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Report Highlights:

Following the catastrophic second COVID-19 wave, India is set to regain its momentum and become the fastest-growing major economy in the world. Throughout the pandemic, Indian consumers have maintained high demand for imported food and agricultural products supported by a growing middle class with greater disposable income. The impact of COVID-19 has further shifted preferences toward immunity boosting, protein-rich, natural, vegan, and organic food products. This consumer behavior, in addition to a sharp increase in e-retail, presents greater opportunities for U.S. exporters. Despite the rapid demand growth for imported food products, India persists as a difficult market for U.S. exporters due to supply chain disruptions, high tariffs, a challenging regulatory environment, and competition from domestic and international suppliers.

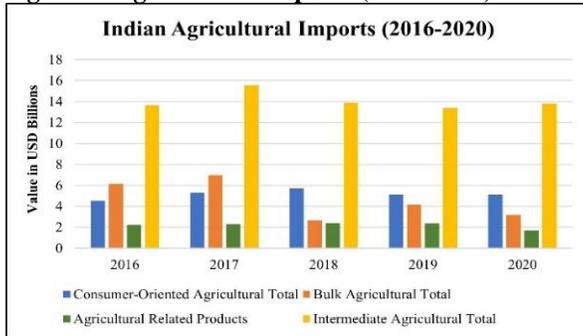
MARKET FACT SHEET

Summary:

India is a middle-income developing market economy and the second most populated country in the world totaling 1.39 billion, equivalent to almost 18 percent of the global population. Over half of the population is below the age of 25 and more than 65 percent is below the age of 35. Despite the economic disruptions caused by COVID-19, the Indian economy is recovering quickly. According to the [International Monetary Fund](#), India's GDP is expected to rebound to 9.5 percent in the current year and 8.5 percent in fiscal year 2022/23.

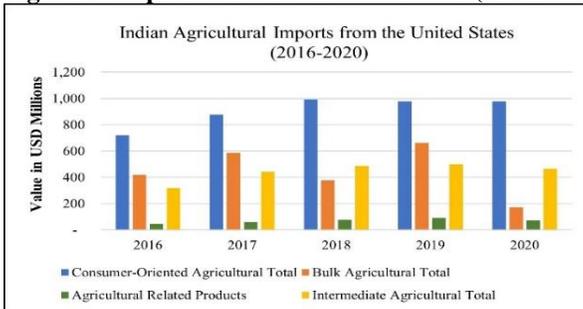
Food processors, importers, wholesalers, retailers, food service operators, hotel, restaurants, and institutions are all part of a developing agribusiness sector. India's bulk, intermediate, consumer-oriented, and agricultural related imports declined from USD \$26.57 billion in 2016 to \$23.80 billion in 2020, while exports grew from \$33.94 billion to \$39.70 billion during the same period.

Figure 1: Agricultural Imports (2016-2020)



Data Source: Trade Data Monitor

Figure 2: Imports from the United States (2016-2020)



Data Source: Trade Data Monitor

Total Agricultural Imports (USD billion)/U.S. market share in 2020	\$23.81/7 percent
Total Consumer Food Imports (billion)/2020 U.S. market share	\$5.14/19 percent
Total Bulk Agricultural Imports (billion)/U.S. market share in 2020	\$3.17/5 percent

Top Agricultural Imports from the United States

- **Bulk Agricultural:** Cotton, Natural Gums/Resins
- **Intermediate Agricultural:** Ethanol, Essential Oils, Other Feeds, Meals & Fodders
- **Consumer-Oriented Agricultural:** Tree Nuts, Fresh Fruits, Prepared Foods, Dairy Products

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"> • Inability of U.S. exporters to meet Indian importers' requirements • Preferential trade agreements with competing countries that supply similar products. • Lack of awareness in the range/value of U.S. products.
Opportunities	Threats
<ul style="list-style-type: none"> • Growth potential for imported ingredients and intermediate products • Aspiration of growing middle class and increased exposure to international products and western lifestyles • Changing buying habits and a preference to purchase for quality over price • Emerging consumer trends favor healthier, natural, and organic food options • Increased tourism • More foreign restaurants and brand franchises 	<ul style="list-style-type: none"> • High tariffs, persistent phytosanitary conditions prohibiting or restrict imports, foreign competition • Fluctuating Indian Rupee to U.S. dollar • Stringent food rules for biotech foods, additives, ingredients • Competition from countries with geographical proximity and a freight advantage. • Product substitutes and competition from local/international suppliers • U.S. exporters not ready for small orders • Often onerous labeling requirements

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SECTION I: MARKET SUMMARY

General Economy and Policy Environment

India's population of 1.39 billion¹ is the second largest, accounting for 17.7 percent of the global population and is expected to overtake China by 2026. This growth is supported by maintaining the largest youth population, where 65 percent of India's inhabitants are aged 35 years and below. The demographic is largely composed of "globally-fluent," aspirational consumers who seek a greater range of premium food products.

According to the International Monetary Fund ([IMF](#)), India's gross domestic product (GDP) is projected to reach 9.5 percent for Indian fiscal year 2021 (IFY) (April 1-March 31), nearly double the world average (4.9 percent). For IFY 2022, India's GDP is estimated at 8.5 percent. India will again likely become the fastest-growing large economy in the world despite inflation and negative growth experienced during the second COVID-19 wave.² Despite an improved business climate, high tariffs, recurrent policy changes, and new import requirements continue to challenge longstanding exporters food and agricultural commodities to India, including the United States.

India's agricultural and related imports dropped from \$25 billion in calendar year 2019, to \$23.81 billion in 2020. In the same period, total agricultural and related imports from the United States fell by approximately 24 percent, from \$2.23 billion to \$1.69 billion. Despite this drop, tree nuts have remained as one of the most consistent high-demand food imports. In 2020, India's tree nut imports from all origins reached \$2.38 billion, a four percent increase from 2019, with the U.S. market share representing 36 percent, or \$850.8 million (For more information, see: USDA GAIN [IN2021-0115](#)).

The demand demographics for consumer-oriented goods has broadened to include the Indian middle-class. Previously, high-value food product imports, like tree nuts, fresh horticultural products, or packaged foods were mostly only available for the affluent. However, in the last decade, this trend has since shifted as a growing middle-class consumer base, especially those within the youth demographic, have developed increased awareness on healthy eating. Indian consumers are routinely purchasing these products throughout the entire year and for personal consumption, as compared to when demand was high only during the festive season, including Diwali (October/November) Christmas, and New Year's.

India has endured two massive COVID-19 waves in the last two years that left a disastrous economic shock and major loss of life. These impacts have also made substantial changes in the behavior of many consumers and their buying patterns. Previously, where consumers would make occasional purchases of certain consumer-oriented products, have now converted these tendencies into regular buying habits. In addition, at the onset of the pandemic in 2020, Indian consumers had engaged in stockpiling and impulse-buying of perceived health foods and immunity-boosting products. While food hoarding subsided following the first COVID wave, impulse buying remained high throughout 2021, largely due to fears of a potential third wave and mandated government lockdowns.

¹ Source: [India's Economy to Rebound as Pandemic Prompts Reforms](#). IMF News, Published November 12, 2021

² Source: [IMF keeps its India economic growth projection for FY22 unchanged at 9.5%](#). Business Standard, Published on October 13, 2021.

Teleworking and the increase of home offices have provided a catalyst for the surge in e-retail spending. The grocery segment (e-grocery) within e-retail grew by 80 percent to \$2.66 billion, as COVID-19 compelled consumers to shop online due to restrictions and safety concerns (See: GAIN [IN2021-0067](#)). In the same year, the e-grocery segment hit \$3.3 billion in gross merchandise value, as compared to \$1.9 billion in 2019.³ Accordingly, by 2025, the e-grocery sales are estimated to reach \$24 billion.⁴ While modern retail outlets and e-retail maintain rapid growth, most urban Indian consumers still shop at longstanding neighborhood shops (known as *kiranas*,) and pushcart vendors. Traditional retail formats prospered in the first COVID wave as *kirana* stores met high consumer demand for staple products. However, during the second COVID wave in May 2021, *kirana* stores saw an estimated 10-15 percent sales loss due to increased spending on medical care, fewer supply chain disruptions in modern retail, and a better-established e-retail industry.⁵

SECTION II: EXPORTER BUSINESS TIPS

India's imports from the United States are growing at a slow pace due to high tariffs, longstanding import restrictions, an aggressively shifting regulatory environment, and strong competition from domestic and international suppliers. Still, India remains a potentially advantageous and diverse export market for U.S. food and agricultural goods. The COVID-19 pandemic has shifted many traditionally price-sensitive Indian consumers to higher-value food consumption habits. Social media, food influencers, and increased consumer awareness on food and health are the biggest contributors to changing consumer demand toward perceived health foods and high-value products.

With the second-largest population globally, India's retail market is also among the world's largest. Retail has quickly expanded throughout India, which has also seen an uptick in convenience store chains, e-retail, and food delivery apps like Zomato and Swiggy. Indian consumers are interested in new foods, and trying traditional cuisines infused with new flavors or ingredients. Indian food importers are competing to access global supply chains to source high-quality food products and ingredients. The food service sector is also seeing a major demand shift. 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. As a result, more consumers are demanding high-quality gourmet food delivered to their homes. With more households with greater disposable incomes (including dual-income families), there are opportunities for imported food products in this sector.

Although most imported foods (tree nuts, fruits, and processed products) are directed toward retail channels, there is high potential in the hotel, restaurant and institutional (HRI) sector, whose menus typically demand the use of high-quality, premium ingredients. The HRI sector is increasing demand for imported tree nuts, meats, cheese, alcoholic beverages, fresh fruits, and other consumer-oriented products, which procures products through a wide array of wholesale markets, distributors, and importers. More recently, Indian chefs and bar mixologists have increasingly been the drivers to seek high quality imported ingredients as they create new recipes and cuisines. With greater international exposure, including global trade shows and foreign clientele, these stakeholders are becoming critical advocates for the industry that will drive future imported food product sales.

³ Source: Financial Express. [E-grocery GMV estimated to touch over \\$3 billion in 2020](#). Published September 26, 2020.

⁴ Source: Outlook India. ["Value-first" opportunity to drive e-grocery to \\$24 bn GMV by 2025: RedSeer](#). Published January 28, 2021.

⁵ Source: Business Today. [Kirana store sales down 10-15% amid 2nd COVID-19 wave](#). Published June 22, 2021.

Entry Strategy: Key factors to consider before entering the market

<ul style="list-style-type: none">❑ Can your product come into India and comply with the local laws?<ul style="list-style-type: none">✓ Determine if your product has market access in Indian commerce✓ Study India's varied laws/regulations, particularly on foods and beverages✓ Review FAS policy/market reports; consider engaging a market research firm to assist❑ Find the Right Partner<ul style="list-style-type: none">✓ Identify a reliable importer/distributor who services in the food retail sector✓ Avoid conflicts of interest✓ Consider if participating in an Indian trade show would be effective in identifying a key importer/distributors/partner (See: USDA-endorsed international 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<ul style="list-style-type: none">✓ 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 2860](#).

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

Data Sources: USDA India historical data series and estimates.

Local Business Customs and Trends

While 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. The working cycle for most of the Indian businesses follows the United States with Saturday and Sunday taken off. Traditionally, business is not conducted on any observed religious and national holidays. (See: U.S. Embassy and Consulates in 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.” 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.

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 with the shows or celebrity television chefs. However, digital and social media are becoming the preferred way for promotions, as online marketing platforms offer cost effective tools to target a growing number of consumers. Among the most effective ways of promoting foods are done through Instagram, Facebook, or Twitter, where social media “influencers” can be employed to build brand awareness, and drive sales for new and existing products.

General Consumer Tastes and Preferences

- The COVID-19 pandemic has changed attitudes toward packaged food items, including instant/ready-to-eat products.
- Consumers are more inclined to purchase top healthy instant/ready-to-eat products, especially food made with high-quality ingredients.
- The pandemic has renewed interest in home cooked meals. Home-cooked foods, including baked items, are drawing significant attention on Indian social media.
- The pandemic has also led many Indian consumers to opt for healthier lifestyles and shift their dietary preferences to natural/organic food options and plant-based and vegan foods.⁶ Immunity boosting products like tree nuts and fresh and dried fruits are also a top buying priority.
- Indian consumers are becoming more conscious of quality foods and food ingredients, which give an edge to U.S. products, which are traditionally viewed as safer and more wholesome.
- The availability of many fresh foods is seasonal, particularly for fruits and vegetables. Traditionally, Indian consumers are accustomed to adjusting their diet to the season.
- Most imported foods (including packaged/processed) are often found in retail stores, such as processed fruits and nuts, fresh fruits, cooking oils, baking mixes, chocolates, condiments and sauces, snacks, soups, pastas, canned vegetables, and breakfast cereals, among others. Exotic items including olive oils and select fruits have prominence in the market.
- Young, urban consumers are bypassing brick-and-mortar retail and increasingly shopping via e-commerce platforms such as Big-Basket, Grofers, and Amazon India, among others.
- An estimated 30-35 percent of the Indian population remains vegetarian while following the tenets of Hinduism. Much of the Indian population does not consume non-vegetarian food (i.e., poultry, 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.
- In general, women make most of the shopping and food purchasing decisions. In households that can afford hired labor, domestic employees often do much of the shopping.
- Most packaged food items are sold in small containers to keep pricing low and accommodate limited storage space.

⁶ See: India: Organic Industry Market Report – 2021. GAIN: [IN2021-0095](#).

SECTION III: IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

The Indian government's Food Safety and Standards Authority of India (FSSAI) published the 2019 edition of the Manual for Food Imports, that details the procedures and requirements to export food products to India. Please refer to [GAIN IN9074](#) for more information on the Food Imports Manual.

General Import and Inspections 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 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 and beverage consignment should carry a label based on the requirements as specified in [Food Safety and Standards \(Packaging and Labeling\) Regulations, 2011](#). (Note: The labeling 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 the [FSSAI's website](#).

High tariffs on many 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 ranging from 30 to 40 percent. India's tariff structure gives considerable flexibility to raise or lower tariffs, and the Indian government routinely uses duty measures to encourage or limit trade, keep domestic food price inflation in-check, and as an 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					
Top Consumer-Oriented Products Imported from the World			Top Consumer-Oriented Products Imported from the United States		
Description	USD (Millions)		Description	USD (Millions)	
	2019	2020		2019	2020
Cashew Nuts, Fresh or Dried, In Shell	1,101	1,081	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, Nesoi	23	17
Others	2,744	2,673	Others	174	99
Total	5,149	5,139	Total	978	980

Data Sources: Trade Data Monitor and FAS India Historical Data and Analysis

Table 3. India: Products Present in Market and have Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2020	U.S. Market Share (percent)	Impacting Factors
Almonds (in-shell and shelled)	926	86.81	<ul style="list-style-type: none"> • United States, with an almost 84 percent market share of imported almonds, has a significant supplier advantage.
Chocolate and Cocoa Products	178	0.77	<ul style="list-style-type: none"> • Strong preference for recognized brands • Competition from domestic and international suppliers
Beverages, Spirits and Vinegar	641	47.69	<ul style="list-style-type: none"> • Increased consumption and lack of domestic production
Fresh Fruits	200	20.17	<ul style="list-style-type: none"> • Counter-season supplier advantage • Brand preference for U.S. fruits (e.g., apples)

Data Sources: Trade Data Monitor and FAS India Historical Data and Analysis

Table 4: Products Not Present in Significant Quantities but have Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2020	U.S. Market Share (percentage)	Limiting and Impacting Factors
Tree nuts (Except Almonds)	1,457	3.20	India imports a large variety of tree nuts from competing regions. Less consumer recognition for tree nuts such as pistachios, high tariff rates for walnuts and almonds, and higher prices for pecans are limiting factors.
Leguminous Vegetables, Dried Shelled/Pulses	1,564	0.84	Back-to-back record domestic harvests in the last two years has resulted in import restrictions. Increased tariffs and quantitative restrictions on pea and pulse imports have limited U.S. exports. India will always maintain a requirement for imported pulses, as demand may not be always met by local production. See: GAIN IN2021-0113
Sugars and sugar confectionery	756	3.06	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.
Processed Fruits	509	1.38	Despite a small market share, Afghanistan figs represent 48 percent of India's 2020 processed fruit imports), significant opportunities exist for U.S. processed fruits, including high, in-demand dried cranberries and blueberries, fruit powders and prunes. Health-conscious Indians are consuming more processed fruits and being used in a variety of traditional Indian cuisines.
Fresh Fruits (Except Apples)	138	2.47	Limiting factors include seasonal availability of domestic fruits and other market competitors
Poultry Meat and Products (ex. eggs) (BICO)	0.3	36.63	India offers opportunities for U.S. poultry. However, pricing, high tariffs, and the regulatory environment limits sales.

Data Sources: 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 certain meat products and pet food). Furthermore, beef imports are banned due to religious concerns. Where permitted, some of these products (e.g., cheeses) may have good sales potential in the food processing, retail, and the hotel restaurant institution sectors.

Effective July 8, 2006, the Government of India’s Foreign Trade Policy (2004-2009) specifies 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. Presently, soybean oil and canola oil derived from select events are the only biotech food products currently approved for import. For more information on India’s biotech import policy, please see: GAIN [IN2021-0121 Agricultural Biotechnology Annual 2021](#).

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Table 5. India: Competition in Major Product Categories in Calendar Year (CY) 2020				
Product Category	Total Imports (\$ Million) CY 2020	Major Suppliers	Strengths of Key International Suppliers	Advantages (A) and Disadvantages (D)
Animal or Vegetable Oils, Fats, and their products	10,598	Indonesia Argentina Ukraine Malaysia	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	1,564	Canada Myanmar Mozambique Tanzania	Price competitiveness, freight advantage and the ability to produce specific varieties of pulses in demand in India.	Record domestic harvests in the last two years have resulted in quantitative restrictions peas and pulse imports, which have slowed since 2018 (D).
Edible Fruits and Nuts	3,189	USA Afganistán UAE Tanzania	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	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	Price competitiveness and proximity to India	Most imports are for re-export (D).
Dairy; bird eggs; natural honey; edible products of animal origin	37	France New Zealand Germany Turkey	Price competitiveness, sanitary requirements	Domestic production is not keeping pace with demand (A). Indian import protocol is stringent and effectively prohibits imports of many U.S. products. (D)

Data Sources: Trade Data Monitor and FAS India Analysis

Please refer to Appendix 1 in the Attachment for:

1. U.S.-Based State Regional Trade Groups (SRTGs)/Cooperators in India
2. Advantageous Indian Agencies of the India Central Government
3. Key Indian Trade Associations

SECTION VI. POST CONTACTS

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For additional information, please visit the various FAS websites, in addition to accessing useful FAS India GAIN reports

- [FAS Homepage](#)
- [FAS India Page](#)
- [FAS India Retail Report](#)
- [FAS India Food Processing Ingredients Report](#)
- [FAS India Food Service - Hotel Restaurant Institution](#)

Attachments: [Appendix 1 - India Trade Associations and Relevant Ministries.pdf](#)