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Report Highlights:

India's growing economy, large population of 1.47 billion, rising incomes, and changing consumer preferences continue to increase demand for imported food and agricultural products. Opportunities for U.S. exporters are expanding in tree nuts, fresh fruits, dairy ingredients, healthy snacks, functional beverages, and other value-added foods, supported by a food retail market valued at $889 billion, a food processing sector projected to reach $585 billion, and a rapidly growing food service industry. Despite challenges such as high tariffs, regulatory requirements, exchange-rate volatility, and strong competition, expanding organized retail, e-commerce, and growing demand in Tier II and Tier III cities are expected to support continued growth in U.S. high-value agricultural exports to India.

Executive Summary:

India is a lower middle-income country on a strong upward trajectory. In 2026, India's nominal GDP is estimated at approximately $4.15 trillion, making it the world's fifth largest economy and on track to become the third largest economy by 2030. With a population exceeding 1.47 billion and a median age of roughly 28 years old, India's consumer market is being formed by urbanization, rising incomes, and a growing middle class that increasingly demands diverse, premium, and health-oriented food products.

Consumer-Oriented Agricultural Imports

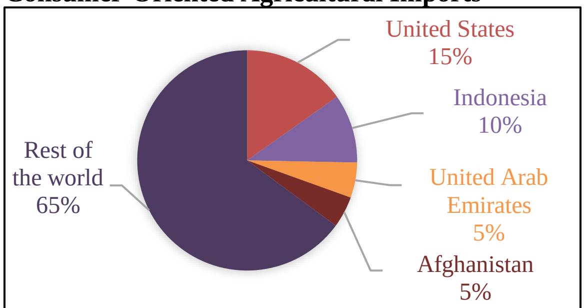

Chart 1: Top Exporting Countries to Country India

Food Retail Industry: India's food retail sector is estimated at $889 billion in 2026[1] and is projected to approach $950 billion by 2030. The sector is undergoing rapid transformation through supermarket expansion, e-commerce, and quick commerce- platforms. Major players including Reliance Retail, DMart and More supermarkets continue to scale both physical and digital operations.Major players including Reliance Retail, DMart and More supermarkets continue to scale both physical and digital operations.

Food Processing Industry: India's food processing sector –one of the country's largest manufacturing industries –is projected to reach $585 billion by 2026.[2] The sector plays a critical role in agricultural value addition, employment, and export generation.

Food Service Industry: The food service industry, valued at approximately $80 billion in 2024, is projected to grow 10–11 percent annually to reach $144–152 billion by 2030[3]. Growth is supported by rising disposable incomes, changing consumption patterns, and expansion of quick service- restaurants, cafés, cloud kitchens, and premium dining formats across metropolitan and smaller urban areas.

Quick Facts CY 2026

Imports of Consumer-Oriented Products *$9.96 billion*

List of Top 10 Growth Products in Host Country

1.Tree nuts	3.Fresh fruits
2.Soyabean oil	4.Processed and dried fruits
5.Pulses	6.Essential oil
7.Sugar and Sweeteners	8.Dairy Products (milk albumin, lactose, whey)
9.Condiment and sauces	10.Chocolate and cocoa products

Food Industry by Channels (U.S. billion)

Retail Food Industry	$889
Food Service-HRI	$80
Food Processing	$585
Food and Agriculture Exports	$57

Top 10 Host Country Retailers

1.Reliance fresh, 2. D-mart
3. Smart bazaar, 4. Star Bazaar
5. More supermarket
Nilgiris, 6. Spencer retail, 7. Natures Basket, 8.
9.Ratandeep.10.Spar India

Other high end gourmet store- FoodStories, Nature Basket, Freshpick, Food Square, Le Marche, Modern Bazaar, Magson. Lulu hypermarket

GDP/Population

Population: 1.47 billion
GDP: $4.15 trillion (nominal) GDP per capita: $2,820 (nominal)
Sources: Trade Data Monitor, IMF

Strengths/Weaknesses/Opportunities/Threats

Strengths	***Weaknesses***
Expanding middle class with rising purchasing power. Strong demand for multifunctional, safe, high-quality food products.	High tariffs and complex regulatory environment.
Established perception of U.S. products as premium and reliable.	Rupee depreciation makes it more expensive to import.

[1] IBEF- https://www.ibef.org/industry/retail-india
[2] IBEF- https://www.ibef.org/industry/food-processing
[3] Economic Times Brand equity article

Section I: Market Overview

India continues to rank among the world's fastest growing major economies and represents a significant and expanding market for imported food ingredients and consumer oriented agricultural products. A population of more than 1.47 billion, a median age of approximately 28 years, accelerating urbanization, higher household incomes, and evolving consumption patterns are collectively driving demand for packaged, convenient, premium, and health focused foods. These dynamics create opportunities for U.S. suppliers of food processing ingredients, tree nuts, fresh fruits, dairy ingredients, beverage components, specialty grains, and other high value products.

India's economic outlook remains positive despite global headwinds. Real GDP grew an estimated 7.7 percent in FY2025/26[4], supported by robust domestic consumption, investment, and services sector expansion. Growth in FY2026/27[5] is forecast to remain strong 6.8 -7.2 percent. Demand for imported ingredients and consumer ready foods is expected to benefit- from continued household spending growth, digitalization, retail modernization, and increasing consumer interest in premium and functional foods.

Key challenges include high import tariffs, regulatory complexity, exchange rate volatility, inflationary pressures, and competition from domestic and third country suppliers. Nonetheless, favorable demographics, income growth, and sector-wide expansion across the retail, food processing, and food service are expected to sustain demand for imported food and agricultural products.

Advantages	**Challenges**
U.S. products carry a strong reputation for quality, safety, and reliability.	High import tariffs on many agricultural and food products.
Growing demand for premium, natural, and functional ingredients.	Complex and evolving regulatory, labeling, and certification requirements.
Expanding food processing industry requires high quality input.	Price sensitivity among consumers and processors.
Opportunities in tree nuts, fresh fruit, beverage ingredients, specialty foods, and food-service products.	Strong competition from domestic suppliers and exporters from Australia, New Zealand, the EU, Southeast Asia, and South America
Growth in organized retail, e-commerce, and food services improves access.	High logistics costs and cold chain gaps in some regions.
Rising middle-class incomes support demand for imported and premium foods.	Exchange fluctuations affect import costs and competitiveness.

[4] The Hindu article
[5] Reuters article

Section II: Exporter Business Tips

India offers strong opportunities for U.S. food and agricultural exporters, but market success requires sustained engagement, reliable local partners, and a clear understanding of regional diversity in consumer behavior and distribution systems. Market conditions differ significantly across states and city tiers, and tailored strategies are generally more effective than uniform approaches. U.S. exporters are encouraged to undertake thorough market research and, when feasible, conduct in-country visits to better understand consumer trends, retail structures, and competitor activity. Establishing relationships with experienced importers or distributors is essential, as these partners assist with regulatory compliance, labeling, pricing, product registration, and logistical challenges.

Face-to-face meetings, regular communication, and long-term engagement are important components of successful partnerships in India. Importers often expect suppliers to support training, product demonstrations, and marketing efforts, particularly when introducing new or specialized items. While demand for premium imported products is growing, price sensitivity remains widespread, requiring exporters to consider adjustments in formulation, packaging, and labeling to meet local market expectations.

Market Research: India's market is highly diverse, with consumer preferences, income levels, and distribution models varying by region, religion, and urbanization level. U.S. exporters should conduct thorough market studies, analyze regional demand patterns, and work closely with local partners to navigate regulatory requirements, pricing structures, and product positioning. Direct in-country engagements remain one of the most effective ways to understand consumer behavior and identify reliable partners.

Local Business Customs and Trends: India's business environment places strong emphasis on personal interaction and long-term relationships. Importers and distributors often prefer negotiations supported by in-person meetings and consistent follow-up. Buyers typically expect suppliers to provide product support, training, samples, and promotional materials, particularly when entering new categories. Price competitiveness is a major factor in procurement decisions. Exporters may need to adapt product characteristics such as flavor profiles, serving sizes, packaging, and labeling to align with local preferences and regulatory standards. Close coordination with partners is important as India's import rules, labeling requirements, and certification procedures continue to evolve.

Participation in Trade Events: Participation in India's major food industry exhibitions such as AAHAR, Fi India, MEWA India, and the Mithai & Namkeen Trade Show provides an effective platform for meeting buyers, identifying distributors, and evaluating market trends.

General Consumer Tastes and Trends: Indian consumers increasingly seek convenience, nutrition, and premium-quality food products. Urbanization, rising incomes, and exposure to global cuisine trends are driving demand for packaged foods, healthy snacks, ready-to-eat meals, international flavors, and premium beverages. Health and wellness remain major purchase drivers, contributing to growing demand for high-protein, low-sugar, fortified, organic, plant-based, and functional products. Direct to consumer channels are also expanding, creating new opportunities for U.S. ingredients incorporated into domestically manufactured food items. These trends support continued opportunities for U.S. suppliers of nuts, fruits, beverages, and value-added products.

Section III: Import Food Standards, Regulations and Procedures

U.S. exporters seeking to access the Indian market must be familiar with India's food import regulatory framework and required documentation. All licenses, certificates, and supporting documents should be finalized before shipment. Refer to the Food Safety and Standards Authority of India (FSSAI's) latest guide, the 2019 Edition of the Manual for Food Imports for details on requirements to export food products to India.

Customs Clearance: India's customs clearance process follows protocols established by the Central Board of Indirect Taxes and Customs (CBIC). Accurate documentation is essential to avoid delays and additional costs. Key steps include:

- Pre-arrival documentation: Preparation of the bill of lading, commercial invoice, packing list, certificate of origin, health certificates, and other required documents.
- Submission to authorities: Filing documents electronically or in person with Indian Customs for verification in accordance with CBIC procedures.
- Inspection and compliance: Customs and FSSAI officials may inspect consignments to confirm compliance with Indian food safety and quality standards.
- Payment of duties and taxes: All applicable duties and taxes must be paid. The CBIC and the India trade portal provide tariff schedules and sanitary/phyto-sanitary (SPS) requirements.

Documents Generally Required by the Country Authority for Imported Food: Commonly required documents include an FSSAI-issued import license, Importer Exporter Code (IEC) from the Directorate General of Foreign Trade (DGFT), bill of entry, commercial invoice, packing list, bill of lading, and certificate of origin. Additional requirements may apply depending on the product. Exporters should consult the Food Safety and Standards (Import) Regulations, 2017 for product specific documentation.

Country Language Labeling Requirements: India requires food labels to comply with FSSAI's Labelling and Display Regulations, 2020. Labels must be provided in English or Hindi and include mandatory declarations such as nutritional information, allergen statements, and vegetarian/non-vegetarian symbols. Exporters should refer to the most recent FAIRS Annual Country Report - New Delhi, India IN2025-0068.

Tariffs and FTA's: India applies varying tariff rates on imported food products depending on the commodity category. Applicable rates can be verified through the CBIC portal or the ICEGATE system, which offers e-filing services and a duty calculator. The Indian Trade Portal also provides tariff and SPS information. India has entered into several free trade agreements (FTAs), including recent agreements with Australia (ECTA), European Union, United Kingdom, Oman and New Zealand. Details of India's trade agreements are available through the Ministry of Commerce and Industry. Awareness of these agreements can help exporters assess competitiveness and market entry strategies.

Trademarks and Patents Market Research: U.S. exporters are encouraged to register trademarks and patents with India's Controller General of Patents, Designs, and Trademarks to safeguard brand identity and reduce infringement rights. Trademark protection is governed by the Trademarks Act (1999) and Trademarks Rules (2002). Foreign firms may file through local agents, and approvals typically require three to five years. Additional information is available through Intellectual Property India.

Section IV: Market Sector Structure and Trends

India's consumer food and beverage sector is undergoing rapid transformation driven by urbanization, rising incomes, and expansion of organized retail and quick commerce- distribution. Growth is increasingly dispersed beyond major metropolitan areas with approximately 93 percent of new urban development occurring in mid-sized and regional cities.[6] These shifts continue to strengthen demand for packaged, premium, and convenience-oriented food products across Tier II and Tier III markets. Key trends influencing food demand include:

- Rising demand for healthy, protein rich, and premium food offerings
- Continued development of organized retail formats in Tier II and Tier III cities
- Increased adoption of private label products across modern retail
- Growing consumer interest in sustainability, plant-based foods, and clean label products.
- Strong demand for convenience foods and ready-to-eat items.

Recommended Market Entry Approach-For most U.S. exporters, the preferred market entry strategy is:

[6] World Economic forum Article-**India's consumer growth is happening where you're not looking**

Best Market Opportunity for New U.S. Sale

Food Retail Opportunity Level- Very High	Rapid expansion of organized retail, e-commerce, premium food demand, imported consumer products. Growth rate is expected at 10–15 percent. Top Brands: Smart Bazaar, Fresh Pick, Natures Basket, FoodStories, More Retail, Spencers, Magsons, Modern Bazaar, Lulu's
E- commerce/ Quick commerce Grocery Opportunity Level- Very High	India's e-grocery sector is exploding, largely driven by the explosive 100 percent year-over-year surge in the quick commerce (quick commerce) market. Top Brands; Amazon fresh, Blinkit, Big Basket, Instamart, Zepto, Country delight, Flipkart Minutes.
Food Processing Opportunity Level- Very High	Growing demand for high quality, versatile ingredients. Export growth rate 11–13 percent. For detailed information, refer to the Food Processing Ingredients Report 2026. Top Brands; ITC Limited, Hindustan Unilever Limited (HUL), Nestlé India, Britannia Industries, Amul (GCMMF)
Food Service(HRI) Opportunity Level- Moderate High	Massive growth in restaurants, hotels, cafés, and internationalchains. Expected to grow at 8–12 percent. Top Brands: Taj, Oberoi, ITC, Marriot, Hyatt, Leela, The Park, and Lemon Tree. Starbucks, Barista, Coffee tea bean leaf, CCD, Blue Tokai, Chaayos. Haldiram. For detailed information, refer to the India: Food Service - Hotel Restaurant Institutional Annual Report 2026.

Best Consumer-Oriented Product Prospects

S. No	Product	Market Attractiveness for U.S. Stakeholders	Key Competitors
1.	Tree nuts (almonds, pistachios, walnuts)	Strong and established demand	Chile, Afghanistan, Iran, Australia
2.	Fresh fruits (apples, pears, cherries, berries)	Growing premium segment	New Zealand, Chile, Italy, Peru, South Africa
3.	Dried fruits	Expanding health-conscious consumer base	Turkey, Afghanistan, Iran
4.	Premium chocolates and confectionery	Rapid growth in urban and travel retail	Belgium, Switzerland, France, Italy
5.	Healthy snacks and protein snacks	Strong demand among younger consumers	UAE, Thailand, Singapore, domestic Indian manufacturers
6.	Functional beverages	Emerging category	Thailand, Vietnam, EU suppliers, domestic brands
7.	Breakfast cereals and granola	Growing urban adoption	UK, Australia, UAE, domestic producers
8.	Frozen foods	Expanding modern retail footprint	Thailand, Malaysia, Vietnam, EU
9.	Specialty dairy ingredients	Food service and processing demand	New Zealand, EU, Australia

10.	Plant-based and alternative protein products	Emerging but fast-growing niche	EU, Canada, China, domestic Indian brands
11.	Craft condiments, sauces, and seasonings	Growing international cuisine segment	Thailand, Vietnam, Malaysia, EU
12.	Distilled spirits	Growing demand amongst affluent buyers	UK (Scotch), E (vodka, gin), Mexico (tequila), Australia

Major food retailers (stores and online)

Retail Group	Format	Ownership
Reliance Retail (smart bazaar, reliance fresh, fresh pick)	Hypermarket, supermarket, online	Reliance Industries
DMart (Avenue Super marts)	Discount supermarket	Avenue Supermarts Limited
Tata Star Bazaar / Big Basket	Grocery retail and e-commerce	Tata Group
Nature's Basket, Spencer's Retail	Premium and supermarket food retail chain	RP-Sanjiv Goenka Group
Amazon Fresh India	Online grocery	Amazon India
Flipkart Minutes	Quick commerce	Flipkart
Blinkit	Quick commerce	Eternal (Zomato)

Other notable retailers include Modern Bazaar, Ratnadeep, Le Marche, Magson, and More Retail. Additionally, international retailers such as Lulu Hypermarket and IKEA continue expanding their food retail presence with planned large-scale investments.

Section V: Agricultural and Food Imports

India's total agricultural and related product imports have grown steadily, increasing from an estimated $42 billion in FY2024 to more than $45 billion in FY2025, with continued expansion expected through FY2026.

India's top ten Imported Consumer-Oriented Agricultural Products from the World

Rank	Subheading	Calendar Year (Value: Million $)				
		2021	**2022**	**2023**	**2024**	**2025**
1.	Tree Nuts	2,535	3,463	2,892	3,353	4,262
2.	Processed Fruit	567	457	575	624	739
3.	Spices	722	743	874	935	909
4.	Chocolate & Cocoa Products	274	377	375	689	905
5.	Fresh Fruit	617	571	664	749	771
6.	Distilled Spirits	295	543	571	573	648
7.	Dairy Products	285	323	390	372	517
8.	Non-Alcoholic Bev. (excl. juices, coffee, tea)	165	244	232	234	271
9.	Bakery Goods, Cereals, & Pasta	118	132	122	154	178
10.	Dog & Cat Food	118	144	122	137	138

Source: Trade Data Monitor, industry estimates, Post analysis.

India's top ten imported Consumer-Oriented Agricultural Products from the United States

Rank	Subheading	Calendar Year (Value: Million $)				
		2021	**2022**	**2023**	**2024**	**2025**
1.	Tree Nuts	837	1,011	1,005	1,076	1,312
2.	Dairy Products	28	40	44	54	87
3.	Fresh Fruit	27	7	9	39	40
4.	Processed Fruit	11	16	12	15	20
5.	Distilled Spirits	6	16	23	14	18
6.	Soup & Other Food Preparations	20	15	13	12	16
7.	Condiments & Sauces	4	5	6	5	5
8.	Processed Vegetables	4	6	6	7	5
9.	Spices	3	1	2	4	3
10.	Chocolate & Cocoa Products	3	2	2	2	2

Source: Trade Data Monitor, industry estimates, Post analysis.

Best High-Value Consumer-Oriented Product Prospects

Fresh cherries represent one of the fastest-growing premium fruit categories, supported by affluent consumers and seasonal demand. Distilled spirits, wine, condiments, and sauces also present strong near-term opportunities.

Top Ten Fastest Growing Consumer-Oriented Import Categories

Rank	Product Category	Growth Drivers
1.	Whey Protein Concentrates and Milk Proteins	Sports nutrition, supplements, food processing
2.	Lactose and Dairy Ingredients	Pharmaceutical and food manufacturing demand
3.	Pistachios	Premium snacking and gifting
4.	Almonds	Health-conscious consumers and bakery use
5.	Cherries and Premium Fruits	Rising affluent urban demand
6.	Chocolate and Cocoa Preparations	Premium confectionery growth
7.	Condiments and Sauces	Growth in international cuisines
8.	Healthy and Protein Snacks	Wellness and convenience trends
9.	Frozen Processed Foods	Expansion of organized retail
10.	Plant-Based Protein Ingredients	Emerging alternative protein segment

Section VI: Key Contacts and Further Information

Government Data Sources
Ministry of Food Processing Industries
Legal Metrology (Weights and Measures)
The Food Safety and Standards Authority of India (Food Regulations)
Ministry of Commerce and Industry (Trade)

U.S. exporters who desire information about consultants conducting market research and handling inquiries into Indian agriculture, agribusiness, food retail, food/agricultural economics, and rural affairs may contact FAS New Delhi.

Foreign Agricultural Service

Embassy of the United States of America	**U.S. Consulate General**
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For additional information please visit:

FAS Homepage
FAS India – Food processing Report
FAS India - Retail Foods
FAS India -Food Service-Hotel Restaurant Institutional

Appendix I; BICO Table –Top U.S. Agricultural Exports to India (Agricultural Products, Consumer Oriented, Total Intermediate, Total Bulk)

Rank	**Subheading**	**Calendar Year (Value: Mil USD)**				
		2021	2022	2023	2024	2025
1.	Tree Nuts	837	1,011	1,005	1,076	1,312
2.	Cotton	222	532	233	204	421
3.	Ethanol, incl. bev.	277	240	153	440	401
4.	Soybean Oil	37	244	0	0	258
5.	Forest Products	55	97	85	96	99
6.	Dairy Products	28	40	44	54	87
7.	Seafood Products	47	45	32	43	80
8.	Other Feeds & Fodders	29	36	38	50	66
9.	Essential Oils	36	46	59	64	62
10.	Pulses	8	0	1	75	43

Attachments:

No Attachments