

MARKET BRIEF & REGULATIONS OF THE INDIAN FOOD & BEVERAGE INDUSTRY



Ministry of Foreign Affairs
and International Cooperation



ITALIAN TRADE AGENCY

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Snapshot of Food and Beverage (F&B) Industry in India

Market Overview

Indian Food & Beverages (F&B) market is the fourth largest F&B market in the world (after the US, China and Japan), with an annual consumption of €345 Bn¹ (US\$403 Bn) in 2019. However, organized F&B market in India is worth only €46 Bn (US\$54 Bn), accounting for merely 13% of the country's total F&B market. The organized F&B market in India is projected to grow by 250% over the next few years, to reach €115 Bn (US\$135 Bn) in 2025. This growth will primarily be driven by rising disposable income and rapid urbanisation, along with a growing consumer preferences for convenient and healthy products for consumption.

Market Composition

Indian F&B market can largely be classified as follows:

1. **'In-the-kitchen'**: This segment mainly comprise of staples, spices & condiments and dairy products, and account for ~70% of Indian F&B market
2. **'On-the-table'**: Mainly include spreads and sauces, and account for 20% of the market
3. **'On-the-go'**: Primarily include snacks and ready-to-eat products, and account for the remaining 10% market

The Government of India's Ministry of Statistics & Programme Implementation (MOSPI), divides Indian F&B sector under the following 12 product categories:

1. Cereals and products
2. Meat and fish
3. Egg
4. Milk and products
5. Oils and fats
6. Fruits

7. Vegetables
8. Pulses and products
9. Sugar and confectionery
10. Spices
11. Non-alcoholic beverages, and
12. Prepared meals, snacks, sweets etc.

According to the Government of India's Ministry of Food Processing Industries (MOFPI), products with high-growth potential in Indian F&B industry are:

- Breakfast cereals
- Snacks
- Ingredients
- Pet food
- Naturally healthy beverages
- Ready meals
- Confectionary
- Organic food
- Dairy food
- Bakery products

The rising demand for products listed above is driven by the following consumer trends:

- Rising demand for low / no-sugar products, due to increased consumer focus on preventive healthcare, and rising prevalence of diabetes and cardiovascular diseases
- Increasing demand for convenient, healthy and on-the-go snacks due busier lifestyles
- Growing consumer awareness about the health benefits of alternative diets such as vegan foods, as well as relatively healthier food ingredient options such as Olive Oils



¹ PwC, Edelweiss Report

Snapshot of Food and Beverage (F&B) Industry in India

Wine – Sector Overview

The Indian market for wine was valued at approximately €738 Mn² (US\$860 Mn) in 2019. The market is expected to grow at a CAGR of 25% to reach €2,807 Mn (US\$3,280 Mn) by 2025.

Nashik, Pune, Bangalore, Hampi Hills, Bijapur and Northern Karnataka are the major wine producing regions in India. Out of 123,000 acres of vineyards in India, only 1-2% area is used to produce wines.

The key market trends are listed below:

- **Rising demand for imported wine:** The Indian wine market have experienced steady volume growth, but volume has recently declined whilst value has increased, due to a shift towards both imported and higher end domestic wine
- **Market reach and quality:** Domestically produced wine has a greater reach in the market, whilst imports are being of a higher quality. Although, this perception is narrowing
- **Brand focus:** Indian wine drinkers are primarily brand focused buyers, due to a lack of experience with the category
- **New retail channels:** On- and off-trade channels developing through the opening of more specialised and wine focused retailers, bars and restaurants
- **Young drinkers:** Millennial wine drinkers in India are embracing wine, showing willingness to experiment with new and different styles

Pasta – Sector Overview

The pasta market in India reached a value of €335 Mn³ (US\$392 Mn) in 2019. The market is expected to grow at a CAGR of 16.2% between 2020 and 2025, to reach a value of €825 Mn (US\$ 965 Mn) by 2025. The key drivers of pasta market in India are as follows:

- **Globalisation:** Rising western influence has popularised Italian and other global cuisines in India, which is a key growth driver of the Indian pasta market
- **Consumer lifestyles and behaviours:** Hectic schedules, shifting food preferences and increasing disposable incomes have led to a rise in demand for easy-to-cook as well as packaged food products, which has positively influenced the Indian pasta market
- **Rising health consciousness:** Increased demand for healthier food options, including whole-wheat pasta, quinoa, and gluten-free recipes among others

Listed below are some of the emerging retail trends influencing the pasta market in India:

- **Food Innovation:** Foodservice companies are providing a combination of Italian and Indian cuisine by cooking pasta with Indian spices, for appealing to a broader customer base
- **e-Commerce:** Expansion of online retail stores is another trend pushing the growth of the sector forward. Appealing discounts, a range of choices, and quick check-out gateways are among the main advantages that are leading customers to online retail

Olive Oil – Sector Overview

The market for Olive oil in India was valued at around €61 Mn⁴ (US\$71 Mn) in 2019. The market is forecasted to grow at a CAGR of 9.9% between 2020 and 2025, to reach a value of approximately €109 Mn (US\$128 Mn). The market has witnessed considerable growth in recent years due to a rise in health-consciousness among consumers. The market has also become more competitive and price sensitive due to its high potential and a steady growth in demand for olive oil.

Production of olive oil in India as of now is only in Rajasthan as it is the only region which fits the production criteria.

Key market segments and related dynamics are listed below:

- **Market by Olive Oil Type:** Olive oil is generally classified as virgin, pomace, and refined olive oil. Indian olive oil market is dominated by pomace olive oil, as it is relatively affordable and readily available olive oil variant in India
- **Market by Application:** Based on application type, the market is segmented into F&B, personal care and pharmaceuticals. The personal care segment is expected to have the largest share in the Indian olive oil market



² Technopak

³ Expert Market Research

⁴ Allied Market Research

Snapshot of Food and Beverage (F&B) Industry in India

Coffee – Sector Overview

The market for coffee in India was valued at approximately €484 Mn⁵ (US\$56 Mn) in 2019. The market is forecasted to grow at a CAGR of 20% to reach €1,445 Mn (US\$1,689 Mn) in 2025. The key market trends are discussed below:

- **Young and working consumers:** Rapid urbanization and hectic lifestyles, especially among the young and working population, have inclined them toward the consumption of stimulating drinks such as coffee
- **Health consciousness:** Presence of antioxidants and essential nutrients in coffee and the numerous health benefits associated with its consumption, such as boosting metabolism and maintaining liver health, have encouraged health-conscious individuals to opt for instant coffee
- **New flavours:** Leading companies are introducing new flavours to expand their product portfolio and attract a wider consumer base across the country
- **Other factors:** Increasing disposable incomes, rising demand from the institutional sector and emerging trends of cafe culture, are propelling the market growth

Chocolate – Sector Overview

The market for chocolate in India was valued at approximately €1.97 Bn⁶ (US\$2.30 Bn) in 2019 and expected to grow at a CAGR of 10% to reach €3.50 Bn (US\$4.10 Bn) by 2025. Some of the key market trends are listed below:

- **Dark chocolate:** Emerging as the most favourite variety of chocolate among Indian consumers, dark chocolate is one of the key drivers for new product development
- **Sugar reduction:** Sugar reduction has become 'the need of the hour' and, albeit at a lower base, chocolate confectionery launches with the no-added sugar claim is gaining traction

- **Smaller packaging sizes:** The market is witnessing an increased share of individually wrapped chocolate products, which is indicative of growing health-consciousness among Indian consumers who are trying to control the portion size
- **Unique flavours:** Chocolate confectionery companies are introducing interesting flavours (e.g. green T, tropical orange, and strawberry delight) to encourage more trials and increase consumer interest

Bakery Products – Sector Overview

The market for bakery products in India was valued at €6.74 Bn⁷ (US\$7.89 Bn) in 2019 and forecasted to grow at a CAGR of 9.3% to reach €11.49 Bn (US\$13.45 Bn) in 2025. Bakery products are rapidly gaining popularity in India, and their consumption levels have witnessed a rise over the past few years, which is attributed to the following factors:

- **Taste and health-benefits:** These products generally have both, a pleasant taste as well as health-benefits, as they are made from a variety of grains such as rye, maize, wheat, and oats among others. It makes these products more appealing to both health cautious as well as casual consumers in India
- **Convenience and affordability:** Bakery products provide both convenience and affordability to the consumers, increasing their demand among busier and urbanised consumer segments in India
- **Changing eating habits:** Daily consumption of breads and biscuits by the consumers has significantly driven up the volume sales of these products in India
- **Rising fast-food culture:** Growth in the fast-food chains further stimulates the demand for breads, as they are used in sandwiches, burgers, soups, snacks, etc.



⁵Economic Times – Retail (India Times)

⁶Mintel, Food Navigator Asia

⁷Globe Newswire

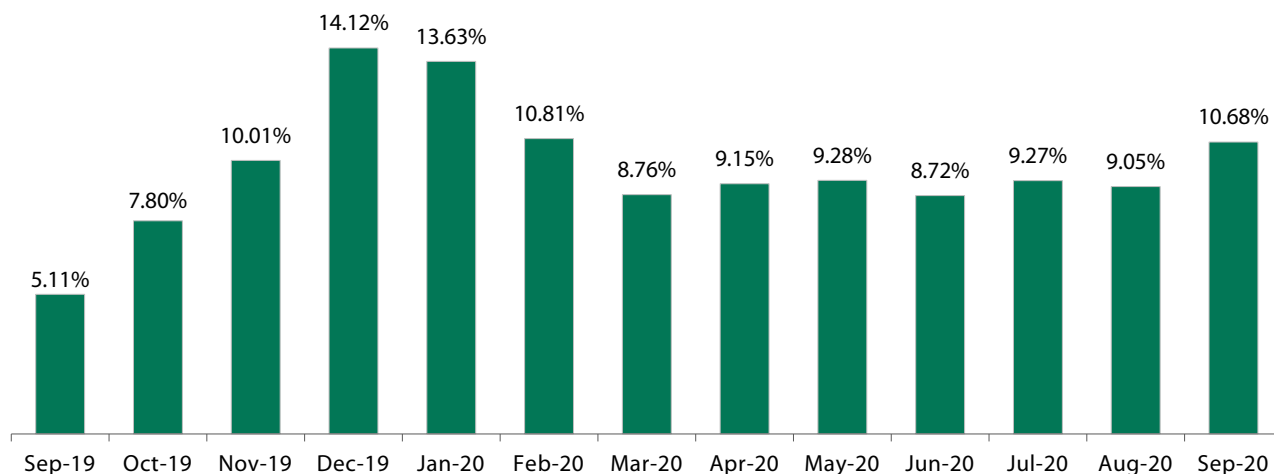
¹⁶Investopedia

Snapshot of Food and Beverage (F&B) Industry in India

Macro-Economic Indicators

Inflation

Food Inflation in India averaged 6.09%¹ between 2012 and 2020, reaching an all-time high of 14.72% in November 2013, and a record low of -2.65% in December 2018. Cost of food in India increased 10.68% in September 2020 over the same month in the previous year. It is the highest food inflation since February 2020, and ahead of the festival season. Prices of vegetables, meat & fish, and pulses jumped by 20.73%, 17.6%, and 14.67% respectively.



Source: TRADINGECONOMICS.COM / MINISTRY OF STATISTICS AND PROGRAMME IMPLEMENTATION (MOSPI)

India's Inflation Rate Sensitivity to Food Prices: In India, the weight for F&B in consumer price index (CPI) basket is 54.18% for rural, 36.29% for urban and 45.86%² for combined rural and urban. The corresponding weight of F&B for the US is only 14-15%. India's inflation is thus relatively more sensitive to food inflation.

GDP Contribution

Overall F&B sector accounted for ~14%³ of India's total GDP of €2.52 Trillion⁴ (US\$2.94 Trillion) in 2019. Processed food accounts for ~32% of the total food market in India, and accordingly contributed ~€111 Bn (US\$130 Bn) to India's GDP in 2019.



¹ Ministry of Statistics and Programme Implementation (MOSPI)

² Consumption Expenditure Survey, 2011

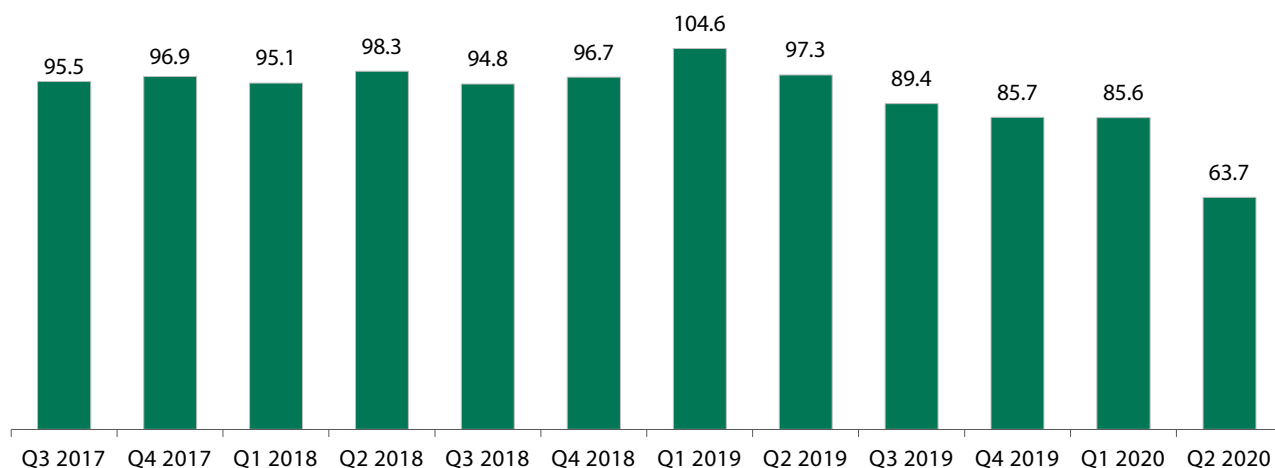
³ PwC, Edelweiss Report

⁴ Investopedia

Snapshot of Food and Beverage (F&B) Industry in India

Consumer Confidence

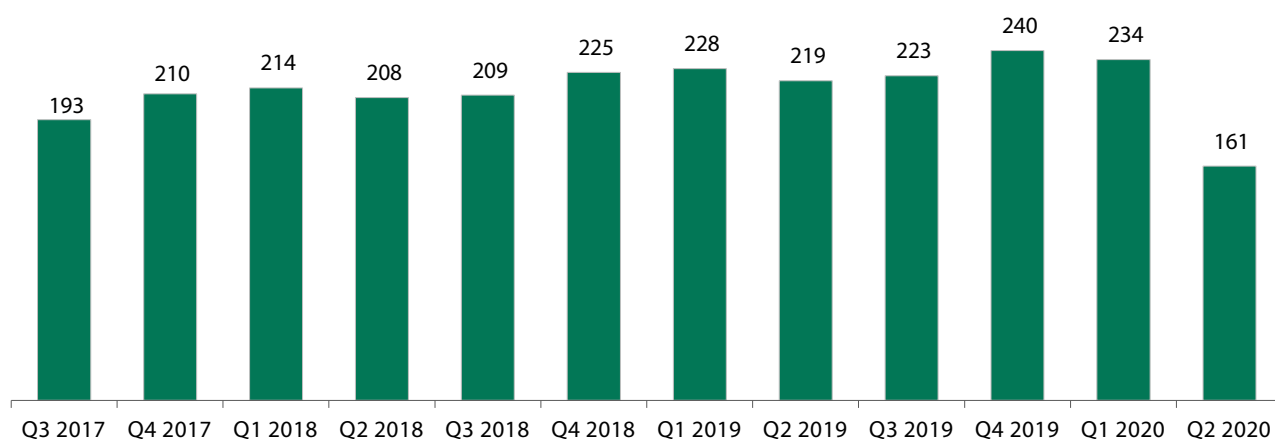
Consumer Confidence in India averaged 101.03 points from 2010 until 2020, reaching an all-time high of 116.70 points in the fourth quarter of 2010 and a record low of 63.70 points in the second quarter of 2020. Consumer Confidence in India decreased to 63.70 points in the second quarter of 2020 from 85.60 points in the first quarter of 2020, due to distress caused by Covid-19 crisis.²⁷



Source: TRADINGECONOMICS.COM / RESERVE BANK OF INDIA

Consumer Spending

Consumer Spending in India decreased to €161 Bn (US\$190 Bn) in the second quarter of 2020 from €234 Bn (US\$276 Bn) in the first quarter of 2020. This decline was mainly attributed to the lockdown restrictions amid Covid-19 crisis.

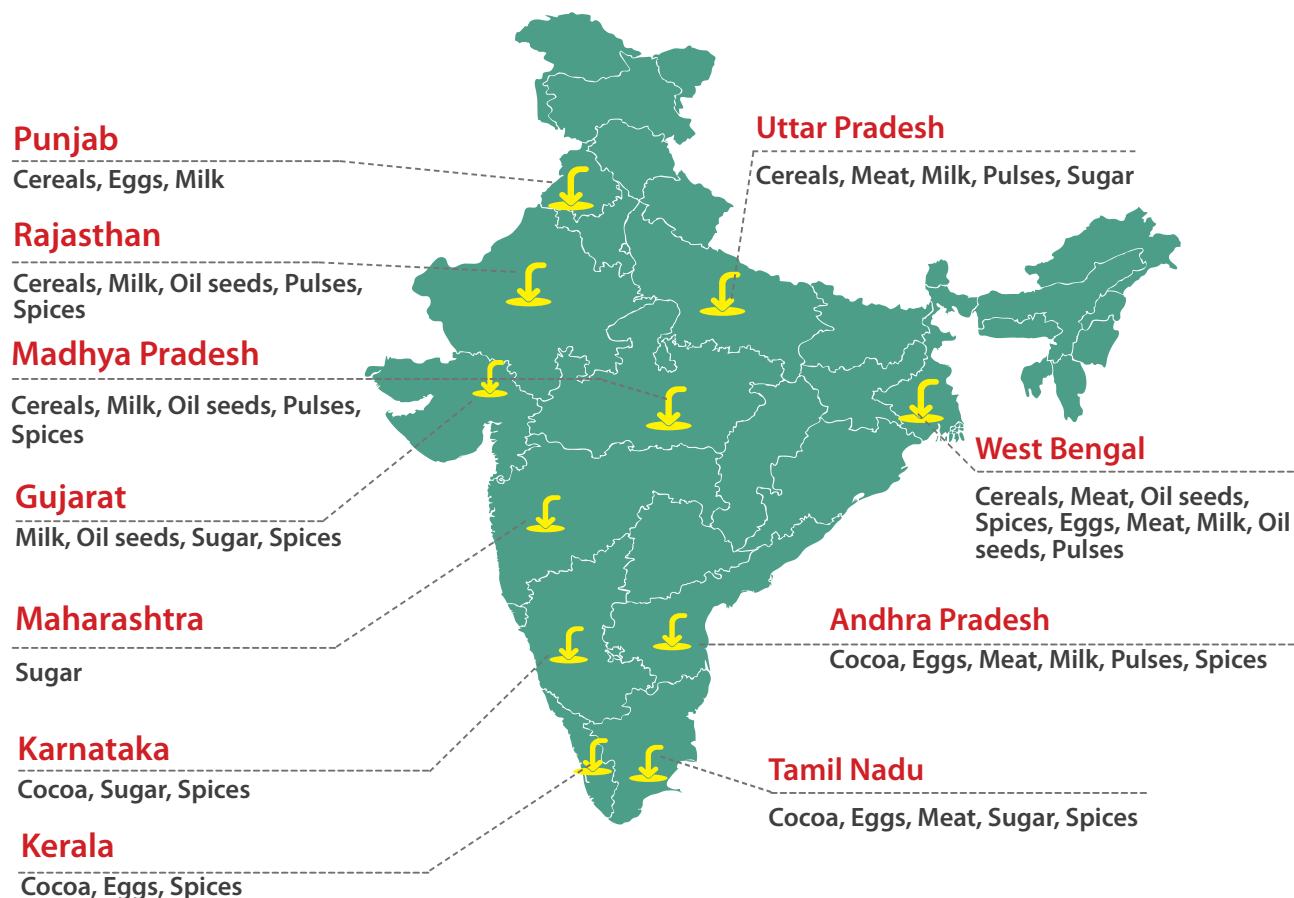


²⁷ Reserve Bank of India

Snapshot of Food and Beverage (F&B) Industry in India

Food & Beverage and Sub-Sectors Clusters in India

Production Clusters:



Production Clusters

The key raw materials used to produce F&B products include cereals, eggs, milk, sugar, pulses, meat, oil seeds, spices and cocoa, among others. Within cereals, major wheat-producing states in India are Uttar Pradesh, Punjab, Haryana, Madhya Pradesh, and Rajasthan, while the largest rice-producing states are West Bengal, Uttar Pradesh and Punjab. Most of the maize is cultivated in the states of Karnataka, Rajasthan and Madhya Pradesh, while oats are largely grown in Punjab, Haryana and Uttar Pradesh. Major barley-growing states are Uttar Pradesh, Rajasthan, and Madhya Pradesh.

Andhra Pradesh, Tamil Nadu and Maharashtra are the top egg producers in the country, while milk is produced largely in Uttar Pradesh and Rajasthan. Uttar Pradesh is also the leading producer of sugarcane and sugar in India. Madhya Pradesh and Rajasthan leads in cultivation of pulses, spices and oil seeds. The south Indian states of Andhra Pradesh and Kerala are the largest cocoa producing states.

Consumption Clusters:

Metro cities such as Delhi NCR, Chennai, Mumbai, Bangalore, and Hyderabad are the major consumption clusters owing to the presence of high population and increasing demand for organized retail chain, coupled with the high disposable income. Moreover, tier 1 and tier 2 cities are also emerging as F&B consumption cluster owing to the growing urbanization.

Snapshot of Food and Beverage (F&B) Industry in India

SWOT Analysis of Indian Food and Beverage Industry

STRENGTHS



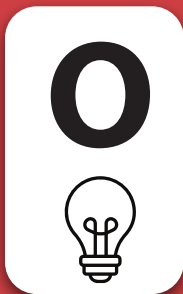
- **Significantly large market:** India is the 3rd largest consumer market in the world (behind the US and China), with a population of over 1.35 Bn
- **Improved economic conditions:** There has been rising disposable income and discretionary spending among Indian consumers, supporting the demand for new and innovative F&B products
- **Government initiatives:** Reduction in import duties and implementation of lower goods and services tax (GST) on several F&B product categories, is supporting F&B market growth in India
- **Supporting consumer trends:** Rising consumer preferences for international brands and cuisines due to an increased exposure to western culture through various media channels and the Internet

WEAKNESSES

- **Lagging rural markets:** Rural markets in India have remained largely untapped by the international brands, due to limited accessibility as well as lack of consumer awareness
- **Infrastructure constraints:** Every year, India witness significant wastage of agricultural produce due to supply chain issues such as insufficient cold storage
- **An unorganized sector:** Over 70% of total F&B market in India is unorganized, highly fragmented and largely unregulated. Therefore, it has remained unserved by the global retail brands



OPPORTUNITIES



- **Rising affordability:** There has been growing demand for imported F&B products among affluent urban Indians, which are rising in numbers
- **Rising health issues:** Healthy food products are increasingly in demand, due to rising prevalence of lifestyle diseases such as diabetes and obesity
- **Busier lifestyles:** Most of the demand for ready-to-eat foods products is coming from cities with working professionals with time constraints
- **Rising e-Commerce:** Indian consumers are increasingly ordering food products and ingredients via online retail channels and mobile devices, as they offer convenience, variety and discounts

THREATS

- **Protectionist tariffs:** To protect the interests of domestic farmers and F&B manufacturers, Indian government impose higher tariffs on imported F&B products
- **Covid-19:** The pandemic has already reduced consumer spending in India, and has also negatively impacted the imports



F&B Import Procedure in India



Introduction

The Food Safety and Standards Authority of India (FSSAI), an autonomous body established under the Ministry of Health and Family Welfare, Government of India regulates the import of F&B products in India. Under the Food Safety and Standards (Import) Regulation, 2017 there are several Chapters providing guidance to parties involved with food import in India.

Along with FSSAI, listed below are other government bodies and departments who work towards food security:

- Ministry of Agriculture, Department for Plant Quarantine Organization
- Ministry of Agriculture, Department of Animal Husbandry and Dairying & Fisheries
- Ministry of Consumer Affairs, Food & Public Distribution, Department of Consumer Affairs

Licenses & Registration to Import Food Products in India

It is necessary to get the following licenses or registrations before importing any food consignment to India:

1. Registering your company (LLP Company/Private Company/ Partnership)
2. VAT Registration
3. Import Export Code
4. Approval of Product from FSSAI
5. Bill of Entry
6. FSSAI Clearance
7. Import Permit
8. Sanitary Import Permit
9. Registration of import contracts
10. Certification of Origin
11. Certificate of Analysis with a composition (Ingredients)
12. End-use declaration
13. Pumping Guarantee Certificate
14. List of the transit country
15. Bill of Entry
16. Airway Bill

Requirements to be a Registered Food Importer

It is necessary to get the following licenses or registrations before importing any food consignment to India:

1. The business needs to be registered as a proprietorship, partnership, private limited company or a public limited company
2. Value Added Tax (VAT) Registration with associated authority for domestic sale
3. Importer Exporter Code (IE Code) circulated by the Director-General of Foreign Trade
4. Product approval if the food product to be imported comes under a non-standardized product category
5. FSSAI has an automated Food Imports Clearance System (FICS). An importer may register the required compliances under FICS. Or for customs clearance on his own or he may hire a Custom Handling Agent (CHA) for the same

F&B Import Procedure and Regulations in India

Documents Required for FSSAI License for an Importer:

- Narcotics Certificate
- Product Approval Certificate
- IE Code License
- FSSAI License
- Ministry of Agriculture Permit
- Ministry of Animal Husbandry Permit

Procedure to Import Food Products into India

For importing food products into India, importers must follow the four steps:

1. Get Custom clearance
2. Apply for FSSAI clearance
3. Consignment inspection and sampling as per FSSAI regulation
4. Food product approval

Details of these steps are provided in the table below:

Steps	Description
Step 1: Customs Clearance	<ul style="list-style-type: none"> • Importing food business operator (FBO) needs to prepare an authority letter in name of a Custom Handling agent (CHA) inscribed to the FSSAI/ Authorised officer before the food consignment reaching in air or seaport in India • When the consignment arrives the custom handling agent according to the authorization letter will apply to the clearance consignment along with the Department of custom based on BOE (Bill of Entry) • The consignment will be verified by a government custom agent and clear the same after clearance of customs formalities and payment of customs duty
Step 2: Applying for FSSAI Clearance	<ul style="list-style-type: none"> • On getting Customs Department clearance, the Customs Handling Agent must apply the Food Import Clearance System (FICS) of FSSAI to get the 'No Objection Certificate.' The documents expected to be uploaded in the FSSAI platform for FSSAI clearance are: <ul style="list-style-type: none"> – Importer Exporter Code (IEC) issued by the DGFT – FSSAI License/ Registration – Bill of Entry (BoE) – Examination Order generated by the EDI system of Customs, therein needing NOC from the FSSAI • Additional Documents in the import of food products: In addition to the above documents, the extra documents may also be needed on a case to case basis: <ul style="list-style-type: none"> – Import Permit: Allotted by the Ministry of Agriculture, Government of India in case of primary agriculture produce/ horticultural product – Sanitary Import Permit: Circulated by Department of Animal Husbandry, Government of India for the livestock products – Registration of import contracts: This is for poppy seeds with the Central Bureau of Narcotics, Gwalior

- **Certificate of Origin:** Allotted by Authorised Person/ Agency at the place of manufacturing/ processing etc of the food consignment. The certificate must include information on the country of origin etc. if the consignor is from a separate country
- **Phyto-Sanitary Certificate:** Allotted by the Plant Quarantine Department of Exporting Country subject to primary agriculture/ horticulture produce with fumigation support
- **Certificate of Analysis with a composition (Ingredients):** This certificate is issued in case of Wine & Whiskey – Test Certificate
- **End-use declaration:** The Food Importer must declare the end use of the imported food product
- **Pumping Guarantee Certificate:** Needed in case of edible oil imported in bulk
- **List of a transit country:** If the food consignment is trans-shipped by more than one country
- **Temperature Chart / Report / Graph:** This is required if the food consignment trans-shipped under the Cold Chain Technologies (CCT) from the port of origin to the point of import
- **Stuffing list and Packing List**
- **Commercial invoice:** It is mentioned in the Bill of Entry (BoE)
- **Bill of Lading:** Mentioned in the Bill of Entry (BoE) for sea consignment
- **Air Way Bill:** Considered in the Bill of Entry (BoE) for air consignment
- **Declaration Undertaking:** In the case of the aseptic package it is required from the manufacturer that is the representative sealed sample from the same batch of the consignment
- **High Sea Sale Agreement**
- **Radio Activity Certificate:** if irradiation is applied
- **In case of re-import:** in addition to the documents mentioned above, submit the documents filed in the customs at the time of export with a copy of the rejection certificate with reasons for such rejection(s) allotted by the Officials of importing country before its re-export thereby leading to re-import into India
- **In the absence of representative sample for the aseptic package:** The importer must furnish an undertaking to the result that they do not have any objection to break open the sealed aseptic container from the consignment and assemble the sample for laboratory analysis and the Food Authority is not liable for any sort of damage to the consignment due to such drawl of sample as it is important for the clearance of the consignment. So, if the sample quantity is insufficient to draw the duplicate sample, the importer must submit a declaration that - no claim shall be done for re-testing if the primary test fails
- **Any other report/document/undertaking/affidavit** as addressed and as defined by the Authorised Officer or by the Food Authority from time to time

F&B Import Procedure and Regulations in India

<p>Step 3: Inspection and sampling of consignment</p>	<ul style="list-style-type: none"> • Once an application is created in the Food Import Clearance System with the preceding documents, and FSSAI Officer will check the documents, request more data (if required only) • If the application is accepted, the Imported will be asked to deposit fees for FSSAI clearance based on the number of samples • Also, the FSSAI Officer will set a date and time for the visual inspection of the consignment. During the visual inspection of the consignment, the following parameters will last be verified: <ul style="list-style-type: none"> – The physical condition of the consignment for noticeable bugs and fungal infestation – The valid outstanding shelf life of the product is more than 60% of its original shelf life at the time of import clearance – Compliance of the FSS (Packaging & Labelling) Regulations, 2011, and the product-specific labelling necessities – Rectification of labelling deficiencies, specifically: <ul style="list-style-type: none"> - Name and address of the importer - FSSAI logo and license number - Veg / Non-Veg Symbol • After the visual examination, the FSSAI Officer will draft two samples from the consignment for testing. One of the sealed and labelled Food samples will be assigned to a randomly selected laboratory made by the Food Import Clearance System. The second food sample would be put in proper conditions for re-testing if the need arises • The samples of imported Food sent by the Authorised Officer will be analysed by the laboratory as per the terms set in the Food Safety and Standards Act and the Regulations. The lab is needed to send its report within 5 days to the Authorised Officer with a certain opinion about the product tested as conforming or non- conforming
<p>Step 4: Approval of Food Product into India</p>	<ul style="list-style-type: none"> • If the authorized lab issues an opinion report validating that the food consignment is in following with the FSSAI regulations, the FSSAI Officer will issue a No Objection Certificate (NOC)/Non-Conformance Certificate (NCC) • The food product will then be cleared for import into India and released from the customs warehouse



Labelling Guidelines - India

In India, the Food Safety and Standard Authority of India (FSSAI) is the government body responsible for regulating the labelling and packaging of food commodities in the country.

General Labelling Requirements

1. Every pre-packaged food shall carry a label containing information:
The particulars of declaration required under these Regulations to be specified on the label shall be in English or Hindi.
2. Pre-packaged food shall not be described or presented on any label or in any labelling manner that is false, misleading or deceptive or is likely to create an erroneous impression regarding its character in any respect;
3. Label in pre-packaged foods shall be applied in such a manner that they will not become separated from the container;
4. Contents on the label shall be clear, prominent, indelible and readily legible by the consumer under normal conditions of purchase and use;
5. Where the container is covered by a wrapper, the wrapper shall carry the necessary information or the label on the container shall be readily legible through the outer wrapper and not obscured by it
6. FSSAI License number shall be displayed on the principal display panel in the following format:



Labelling of Pre-packaged Foods

In addition to the above general requirements, every package of food shall carry the following information on the label, namely:

1. **The Name of Food:** The name of the food shall include trade name or description of food contained in the package.
2. **List of Ingredients:** Except for single ingredient foods, a list of ingredients shall be declared on the label in the following manner:
 - The list of ingredients shall contain an appropriate title, such as the term “Ingredients”;
 - The name of Ingredients used in the product shall be listed in descending order of their composition by weight or volume, as the case may be, at the time of its manufacture;
 - A specific name shall be used for ingredients in the list of Ingredients;

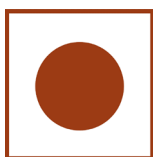
For example in oils, the following class title may be used:

Class	Class title
Edible Vegetable oils	Give name of the specific edible oil such as mustard oil, groundnut oil, etc.
Edible vegetable fat	Give type of vegetable fat (interesterified vegetable fat, hydrogenated oils, partially hydrogenated oils, edible vegetable fats, margarine and fat spreads, such as mixed fat spreads, vegetable fat spreads

- Where an ingredient itself is the product of two or more ingredients, such a compound ingredient shall be declared in the list of ingredients, and shall be accompanied by a list, in brackets, of its ingredients in descending order of weight or volume, as the case may be

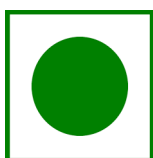
F&B Import Procedure and Regulations in India

- Added water shall be declared in the list of ingredients except in cases where water forms part of an ingredient, such as, brine, syrup or broth
 - Every package of food sold as a mixture or combination shall disclose the percentage of the ingredient used at the time of the manufacture of the food
3. **Nutritional Information:** Nutritional information or nutritional facts per 100 gm or 100ml or per serving of the product shall be given on the label containing the following:
- energy value in kcal;
 - the amounts of protein, carbohydrate (specify quantity of sugar) and fat in gram (g) ;
 - the amount of any other nutrient for which a nutrition or health claim is made
 - Wherever, numerical information on vitamins and minerals is declared, it shall be expressed in metric units;
 - Where the nutrition declaration is made per serving, the amount in gram (g) or milli-litre (ml) shall be included for reference beside the serving measure
4. **Declaration of Veg and Non-Veg:**
- a. Every package of “**Non-Vegetarian**” food shall bear a declaration to this effect made by a symbol and colour code as stipulated below to indicate that the product is Non-Vegetarian Food. The symbol shall consist of a brown colour filled circle having a diameter not less than the minimum size specified in the Table below, inside a square with brown outline having sides double the diameter of the circle as indicated below:



Where any article of food contains egg only as Non-Vegetarian ingredient, the manufacturer, or packer or seller may give declaration to this effect in addition to the said symbol.

- b. Every package of “**Vegetarian**” Food shall bear a declaration to this effect by a symbol and colour code as stipulated below for this purpose to indicate that the product is Vegetarian Food. The symbol shall consist of a green colour filled circle, having a diameter not less than the minimum size specified in the Table below, inside the square with green outline having size double the diameter of the circle, as indicated below:



- c. Size of the logo:

S.No.	Area of principle display panel	Minimum size of diameters in mm
1.	Up to 100 cm square	3
2.	Above 100 cm square upto 500 cm square	4
3.	Above 500 cm square upto 2500 cm square	6
4.	Above 2500 cm square	8

F&B Import Procedure and Regulations in India

The symbol shall be prominently displayed:

- on the package having contrast background on principal display panel;
- just close in proximity to the name or brand name of the product;
- on the labels, containers, pamphlets, leaflets, advertisements in any media;

5. **Declaration regarding Food additives:** No additives are permitted in Virgin Olive oils

6. **Name and complete address of the manufacturer**

7. **Net quantity:**

- Net quantity by weight or volume or number, as the case may be, shall be declared on every package of food; and
- In addition to the declaration of net quantity, a food packed in a liquid medium shall carry a declaration of the drained weight of the food.

8. **Lot/Code/Batch identification:**

A batch number or code number or lot number which is a mark of identification by which the food can be traced in the manufacture and identified in the distribution, shall be given on the label.

9. **Date of manufacture and Best before date**

- The date, month and year in which the commodity is manufactured, packed or prepacked, shall be given on the label:
- the month and year in capital letters up to which the product is best for consumption, shall be given on the label

10. **Country of Origin for Imported Food**

- The country of origin of the food shall be declared on the label of food imported into India.
- When a food undergoes processing in a second country which changes its nature, the country in which the processing is performed shall be considered to be the country of origin for the purposes of labelling.



This image is a labelling example only for reference purposes and is subject to change depending on the changes / modifications in future government regulations.

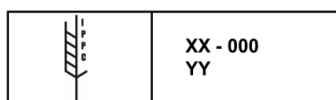
F&B Import Procedure and Regulations in India

Wood Packaging Guideline for Food Products

Commodities such as fresh fruits, vegetables, food-grains, oilseeds, pulses, spices and so on, are highly susceptible to infestation from pests during storage and transit. This infestation can cause extensive damage. International Standards for Phytosanitary Measures (ISPMs) are standards adopted by the Commission on Phytosanitary Measures (CPM), which is the governing body of the International Plant Protection Convention (IPPC) of Food and Agriculture Organization (FAO) to reduce the risk of introduction / or spread of quarantine pest associated with wood packaging material (including dunnage) made of coniferous and non coniferous raw wood, in use in international trade. India is also one of the signatories to this convention since 1952. The food imports in all wood packaging material, raw or solid, are subject to specified treatment and are required to carry the relevant ISPM marking on it.

The treatment of wooden packaging (crates, pallets, etc.) is an area contemplated by the phytosanitary legislation, as regulated by ISPM 15 standard (www.ippc.int/static/media/files/publication/en/2019/02/ISPM_15_2018_En_WoodPackaging_Post-CPM13_Rev_Annex1and2_Fixed_2019-02-01.pdf).

This standard establishes phytosanitary measures to reduce the risk of introduction and spread of harmful organisms associated with the movement in the foreign trade of raw wood packaging material. On the other hand, packaging made with plywood or with particleboard or fiber panels, having undergone processing with glues, heat and pressure, can be considered free from phytosanitary risk and are not regulated by this standard. The phytosanitary measure envisaged for raw wood packaging consists of a treatment to be carried out before shipment, that is, affixing of the international IPPC mark



indicating the code of the country where the treatment was carried out (XX), the code of the company that carried out the treatment (000), the treatment code (YY). The currently authorized treatment techniques are: HT: high temperature treatment; MB: fumigation with methyl bromide; DH: dielectric heating.

F&B Import Procedure and Regulations in India

IMPORT DUTY STRUCTURE

Meat, Seafood, Dairy Products, Fruits, Vegetables , Seeds and Milled Products

Duty Description	Duty Rates (%)	
Assessable Value		100(A)
Basic Duty of Customs (BCD)	30% on (A)	30(B)
Social Welfare Surcharge	10% on (B)	3(C)
IGST Levy (Integrated Goods and Services Tax)	5% on (A+B+ C)	6.65(D)
Total (A+B +C+D)		139.65 (E)
Effective Import Duties (E-A)		39.65%

Source: Ministry of Finance, Department of Revenue

HS Codes: 02,03,04,07,08,11,12

39.65% is the most frequently occurring import duty under HS codes 02,03,04,07,08,11 and 12, however, for various HS codes at the eight-digit level, the effective duties range between 12% to 159.84%.

Coffee, Tea, Mate, Spices , Cereals, Animal/Vegetable Fats and Related Products

Duty Description	Duty Rates (%)	
Assessable Value		100(A)
Basic Duty of Customs (BCD)	100% on (A)	100(B)
Social Welfare Surcharge	10% on (B)	10 (C)
IGST Levy (Integrated Goods and Services Tax)	5% on (A+B+C)	10.5 (D)
Total (A+B +C+D)		220.5 (E)
Effective Import Duties (E-A)		120.5%

Source: Ministry of Finance, Department of Revenue

HS Codes: 09,10,15

120.5% is the most frequently occurring import duty under HS codes 09,10 and 15, however, for various HS codes at the eight-digit level, the effective duties range between 5% to 147.8%.

Sugar, Cocoa, Bakery and Miscellaneous Products

Duty Description	Duty Rates (%)	
Assessable Value		100(A)
Basic Duty of Customs (BCD)	30% on (A)	30 (B)
Social Welfare Surcharge	10% on (B)	3 (C)
IGST Levy (Integrated Goods and Services Tax)	18% on (A+B+C)	23.94 (D)
Total (A+B +C+D)		156.94 (E)
Effective Import Duties (E-A)		56.94%

Source: Ministry of Finance, Department of Revenue

HS Codes: 17,18,19,21

56.94% is the most frequently occurring import duty under HS codes 17,18,19 and 21, however, for various HS codes at the eight-digit level, the effective duties range between 33% to 398.2%.

F&B Import Procedure and Regulations in India

Preparations of vegetables, fruit, nuts or other parts of plants

Duty Description	Duty Rates (%)	
Assessable Value		100(A)
Basic Duty of Customs (BCD)	30% on (A)	30(B)
Social Welfare Surcharge	10% on (B)	3(C)
IGST Levy (Integrated Goods and Services Tax)	12% on (A+B+C)	15.96 (D)
Total (A+B +C+D)		148.96 (E)
Effective Import Duties (E-A)		48.96%

Source: Ministry of Finance, Department of Revenue

HS Codes: 20

48.96% is the most frequently occurring import duty under HS code 20, however, for various HS codes at the eight-digit level, the effective duties range between 48.96% to 73.6%.

Beverages, spirits and vinegar

Duty Description	Duty Rates (%)	
Assessable Value		100(A)
Basic Duty of Customs (BCD)	150% on (A)	150 (B)
Social Welfare Surcharge	10% on (B)	15 (C)
IGST Levy (Integrated Goods and Services Tax)	0% on (A+B+C)	0 (D)
Total (A+B +C+D)		265 (E)
Effective Import Duties (E-A)		165%

Source: Ministry of Finance, Department of Revenue

HS Codes: 22

165% is the most frequently occurring import duty under HS code 22, however, for various HS codes at the eight-digit level, the effective duties range between 24.49% to 212.7%.



India's Trade in Food and Beverages Industry with the Rest of the World

Imports into India

COMPLETE SECTOR OF F&B INDUSTRY

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	21,659.0	15,897.0	16,329.0	100.0%	10,635.0	10,539.0	-0.9%
1	Indonesia	4,830.0	3,406.0	2,671.0	16.4%	1,509.0	2,181.0	44.5%
2	Malaysia	1,401.0	1,203.0	2,107.0	12.9%	1,588.0	530.0	-66.6%
3	Argentina	2,083.0	1,393.0	1,645.0	10.1%	1,075.0	1,274.0	18.5%
4	Ukraine	2,179.0	1,613.0	1,475.0	9.0%	1,059.0	949.0	-10.4%
5	United States	1,151.0	1,136.0	1,220.0	7.5%	818.0	784.0	-4.2%
6	Brazil	1,310.0	992.0	505.0	3.1%	294.0	479.0	62.9%
7	Singapore	49.0	364.0	423.0	2.6%	295.0	161.0	-45.4%
8	Canada	901.0	106.0	411.0	2.5%	280.0	269.0	-3.9%
9	Myanmar	496.0	265.0	338.0	2.1%	173.0	299.0	72.8%
10	Nepal	156.0	137.0	333.0	2.0%	191.0	205.0	7.3%
30	Italy	78	64	109	0.7%	82.0	48.0	-41.5%

Source: Ministry of Commerce & Industry of India

Euro Million

HS Codes: 02, 03, 04, 07, 08, 09, 10, 11, 12, 15, 17, 18, 19, 20, 21, 22

Import Statistics

- India's total F&B imports from the world stood at €16,329 Mn in the calendar year 2019
- Indonesia and Malaysia are the largest exporters of F&B products to India, and together they accounted for ~29.3% share of India's F&B imports in the calendar year 2019
- India exhibited a decrease of ~0.9% in F&B imports in Jan-Aug 2020, as compared with Jan-Aug 2019
- Italy holds 30th rank in terms of F&B imports into India, with a total value of €109 Mn in the calendar year 2019



Trade Exchange

Exports from India

COMPLETE SECTOR OF F&B INDUSTRY

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	28,420.0	26,601.0	27,622.0	100.0%	18,672.0	18,329.0	-1.8%
1	United States	3,267.0	3,051.0	3,313.0	12.0%	2,149.0	1,964.0	-8.6%
2	China	599.0	968.0	2,106.0	7.6%	1,257.0	1,181.0	-6.0%
3	Iran	1,029.0	1,246.0	1,870.0	6.8%	1,463.0	1,123.0	-23.2%
4	Vietnam	4,303.0	3,000.0	1,716.0	6.2%	1,114.0	578.0	-48.1%
5	Saudi Arabia	1,274.0	1,301.0	1,458.0	5.3%	1,078.0	1,048.0	-2.8%
6	United Arab Emirates	1,747.0	1,581.0	1,437.0	5.2%	957.0	1,011.0	5.7%
7	Malaysia	762.0	711.0	744.0	2.7%	520.0	660.0	27.0%
8	Netherlands	675.0	620.0	712.0	2.6%	520.0	451.0	-13.3%
9	Nepal	682.0	695.0	702.0	2.5%	457.0	507.0	11.1%
10	Indonesia	446.0	689.0	630.0	2.3%	375.0	511.0	36.4%
19	Italy	415.0	344.0	355.0	1.3%	254.0	211.0	-17.0%

Source: Ministry of Commerce & Industry of India

Euro Million

HS Codes: 02, 03, 04, 07, 08, 09, 10, 11, 12, 15, 17, 18, 19, 20, 21, 22

Import Statistics

- India's exports to the world stood at €27,622 Mn in the calendar year 2019 and at €18,329 Mn during Jan-Aug 2020
- The US and China were the largest importers of F&B products from India in the calendar year 2019, comprising ~19.6% of India's total export share
- Italy ranked 19th among the importers of F&B products from India in the calendar year 2019, comprising 1.3% share of India's total F&B exports
- Italy holds 19th rank in terms of F&B export from India, with a total value of €355 Mn in the calendar year 2019



Italy's Trade in Food & Beverage Industry with the Rest of the World

Italy's F&B Exports to the World

COMPLETE SECTOR OF F&B INDUSTRY

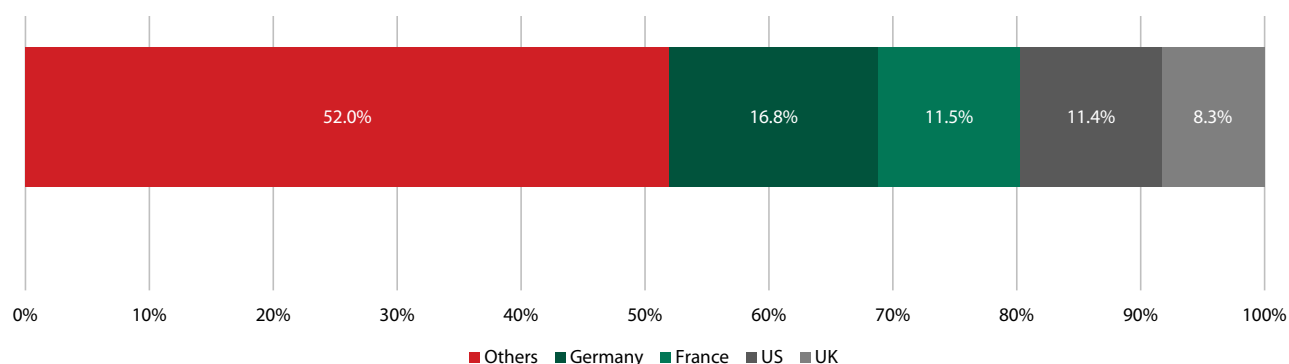
Rank	Partner Country	2017	2018	2019	%share in 2019	7/2019	7/2020	%change
	World	37,172.0	37,784.0	39,571.0	100.0%	22,332.0	22,954.0	2.8%
1	Germany	6,563.0	6,587.0	6,663.0	16.8%	3,820.0	4,093.0	7.2%
2	France	4,168.0	4,354.0	4,563.0	11.5%	2,576.0	2,660.0	3.2%
3	United States	3,948.0	4,086.0	4,529.0	11.4%	2,575.0	2,696.0	4.7%
4	United Kingdom	3,192.0	3,228.0	3,274.0	8.3%	1,780.0	1,873.0	5.2%
5	Spain	1,489.0	1,486.0	1,523.0	3.8%	844.0	799.0	-5.4%
6	Switzerland	1,389.0	1,426.0	1,463.0	3.7%	848.0	895.0	5.5%
7	Netherlands	1,269.0	1,302.0	1,366.0	3.5%	805.0	799.0	-0.8%
8	Austria	1,217.0	1,185.0	1,214.0	3.1%	703.0	719.0	2.3%
9	Belgium	1,070.0	1,100.0	1,126.0	2.8%	634.0	669.0	5.5%
10	Canada	781.0	808.0	839.0	2.1%	440.0	499.0	13.4%
48	India	71.0	59.0	97.0	0.2%	66.0	37.0	-44.5%

Source: Eurostat, Europe

Euro Million

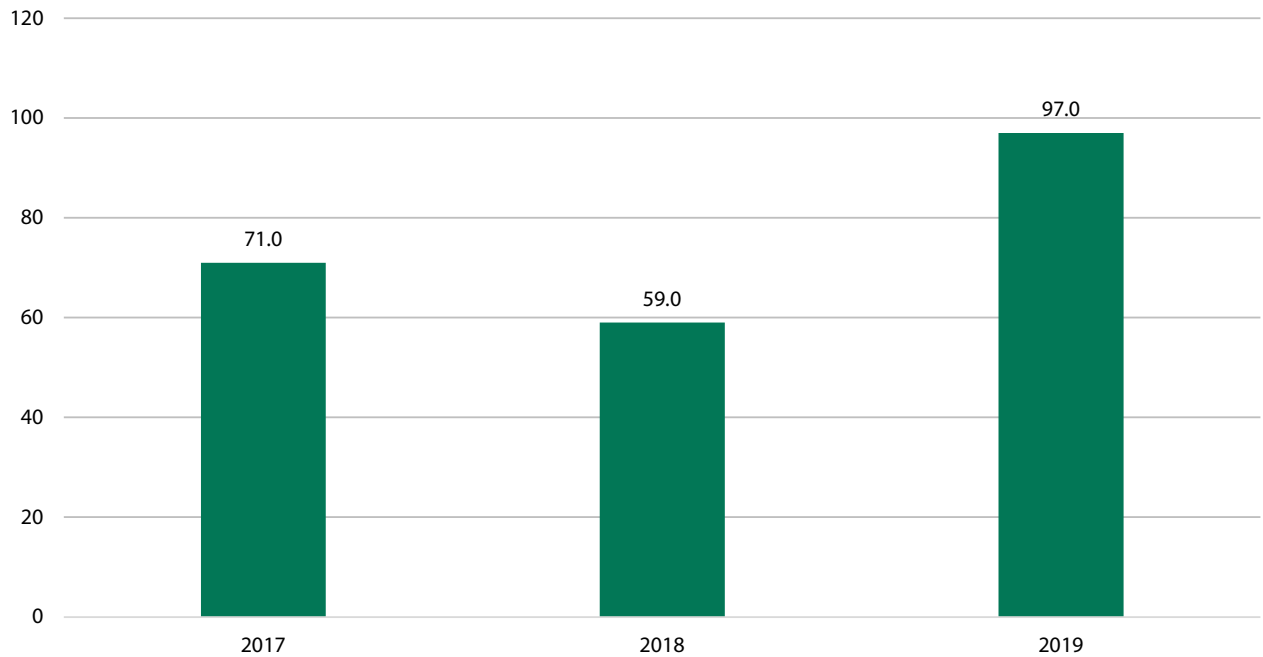
HS Codes: 02, 03, 04, 07, 08, 09, 10, 11, 12, 15, 17, 18, 19, 20, 21, 22

Market Share



Trade Exchange

Italy's Export in the Complete F&B Sector to India (€ Mn)



Italian Trade Statistics

- In the calendar year 2019, Italy had a total export size of €39,571 Mn in the total world exports
- Germany was Italy's largest trade partner for import of F&B products in the calendar year 2019, accounting for 16.8% share; it was followed by France, the US and the UK, together accounting for ~31.2% share of Italy's F&B export in that year
- India holds 48th rank in terms of F&B export from Italy, with a total value of €97 Mn in the calendar year 2019
- India's share in the overall F&B exports from Italy was merely 0.2% in the calendar year 2019, at an overall rank of 48th



Bilateral Trade in Food & Beverage Industry between India-Italy**India's Imports from Italy**

S. No.		2017	2018	2019	8/2019	8/2020
1.	Values in € Mn	78.0	64.0	109.0	82.0	48.0
2.	% Growth (2018/2019)			70.3%		-41.5%
3.	Total Import of Commodity	21,659.0	15,897.0	16,329.0	10,635.0	10,539.0
4.	% Growth (2018/2019)			2.7%		-0.9%
5.	% Share of Country (1 of 3)	0.4%	0.4%	0.7%	0.8%	0.5%
6.	Total Import from Italy	3,921.0	4,519.7	4,204.6	2,920.9	2,101.6
7.	% Growth (2018/2019)			-7.0%		-28.0%
8.	% Share of Commodity (1 of 6)	2.0%	1.4%	2.6%	2.8%	2.3%

Source: Ministry of Commerce & Industry, India

Euro Million

HS Codes: 02,03,04,07,08,09,10,11,12,15,17,18,19,20,21,22

India's Exports to Italy

S. No.		2017	2018	2019	8/2019	8/2020
1.	Values in € Mn	415.0	344.0	355.0	254.0	211.0
2.	% Growth (2018/2019)			3.2%		-16.9%
3.	Total Export of Commodity	28,420.0	28,601.0	27,622.0	18,672.0	18,329.0
4.	% Growth (2018/2019)			3.8%		-1.8%
5.	% Share of Country (1 of 3)	1.5%	1.3%	1.3%	1.4%	1.2%
6.	Total Export to Italy	5,093.5	4,701.4	4,624.2	3,168.3	2,494.9
7.	% Growth (2018/2019)			-1.6%		-21.2%
8.	% Share of Commodity (1 of 6)	8.1%	7.3%	7.7%	8.0%	8.5%

Source: Ministry of Commerce and Industry, India

Euro Million

HS Codes: 02,03,04,07,08,09,10,11,12,15,17,18,19,20,21,22



Trade in Sub-Sectors

COFFEE

Imports into India

COFFEE

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	128.1	114.6	106.4	100.0%	67.3	63.6	-5.6%
1	Vietnam	79.9	82.1	56.1	52.7%	39.2	22.2	-43.4%
2	Kenya	0.8	10.9	15.4	14.4%	11.6	11.1	-4.3%
3	Indonesia	12.5	5.2	14.1	13.2%	5.2	12.8	147.8%
4	Cote d'Ivoire	1.6	0.9	8.2	7.7%	3.0	5.9	96.3%
5	Uganda	20.1	7.4	5.4	5.0%	3.1	4.8	54.4%
6	Tanzania	1.2	1.8	3.3	3.1%	2.1	0.8	-62.3%
7	Germany	0.1	0.4	0.6	0.6%	0.6	0.0	-100.0%
8	Italy	0.42	0.55	0.39	0.4%	0.30	0.31	5.6%
9	Djibouti	-	0.23	0.38	0.4%	0.38	0.13	-66.0%
10	Belgium	-	0.30	0.37	0.3%	0.16	1.44	825.3%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 0901

Import Statistics

- India's coffee imports from the world stood at €106 Mn in the calendar year 2019
- Italy holds 8th rank in terms of coffee import into India, with a total value of €0.39 Mn in the calendar year 2019
- Italy was the 8th largest exporter of coffee products to India in 2019, accounting for ~0.4% of India's import share of coffee products
- India's import of coffee decreased by 5.6% during Jan-Aug 2020, as against Jan-Aug 2019; the country's imports from Italy increased by 5.6% during this period



Exports from India

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	570.4	437.3	449.3	100.0%	356.4	321.0	-10.0%
1	Italy	154.3	128.6	125.5	27.9%	103.7	78.6	-24.2%
2	Germany	87.9	54.1	72.1	16.1%	54.1	47.9	-11.5%
3	Belgium	46.0	40.5	40.2	8.9%	31.0	36.8	18.4%
4	Jordan	22.4	21.4	20.0	4.5%	18.5	21.6	17.0%
5	Kuwait	16.9	13.6	14.1	3.1%	11.1	17.5	58.2%
6	Libya	19.4	12.1	13.0	2.9%	11.6	11.2	-3.1%
7	Australia	17.6	13.3	12.8	2.8%	10.2	8.5	-16.7%
8	Greece	9.0	10.5	10.6	2.3%	7.9	7.0	-11.8%
9	Slovenia	13.8	10.5	10.3	2.3%	7.6	7.3	-5.1%
10	Spain	18.1	11.8	8.6	1.9%	6.9	6.8	-1.4%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 0901

Export Statistics

- India's coffee exports to the world stood at €449 Mn in the calendar year 2019 and at €321 Mn during Jan-Aug 2020
- Italy holds 1st rank in terms of coffee export from India, with a total value of €125.5 Mn in the calendar year 2019
- Italy is the largest importer of coffee from India, comprising of 27.9% share of India's total coffee export in the calendar year 2019; it is followed by Germany, with a share of 16.1% that year



Trade in Sub-Sectors

Exports from Italy

Rank	Partner Country	2017	2018	2019	%share in 2019	7/2019	7/2020	%change
	World	1,443.3	1,446.4	1,533.5	100.0%	890.3	934.9	5.0%
1	Germany	211.5	194.7	214.1	14.0%	129.5	160.4	23.9%
2	France	161.2	147.6	149.6	9.8%	85.6	106.6	24.5%
3	United States	83.7	82.1	97.4	6.4%	52.9	43.0	-18.6%
4	Greece	64.9	77.8	80.5	5.3%	47.0	45.6	-3.0%
5	Austria	86.5	72.8	72.6	4.7%	43.4	35.1	-19.0%
6	Russia	51.2	59.9	68.7	4.5%	40.8	40.8	0.1%
7	United Kingdom	72.8	71.0	67.4	4.4%	38.5	47.6	23.6%
8	Poland	40.6	49.3	58.8	3.8%	33.5	52.1	55.3%
9	Switzerland	42.9	42.4	42.0	2.7%	25.2	24.9	-1.2%
10	Netherlands	34.9	36.3	41.8	2.7%	24.8	27.5	10.6%
88	India	0.63	0.46	0.45	0.03%	0.22	0.41	85.4%

Source: Eurostat, Europe

Euro Million
HS Codes: 0901

Export Statistics

- Italy's coffee export size in the calendar year 2019 stood at ~€1,533 Mn and at €935 Mn during Jan-Jul 2020, among the global exports
- Germany is Italy's largest trade partner for import of coffee, with a share of 14.0%, followed by France and the US, with a combined share of 16.2% of Italy's coffee export in that year
- India holds 88th rank in terms of coffee export from Italy, with a total value of €0.45 Mn in the calendar year 2019
- India's share in the overall coffee exports from Italy was 0.03% in the calendar year 2019



OLIVE OIL**Imports into India****OLIVE OIL**

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	41.6	47.3	22.8	100.0%	15.0	16.0	6.6%
1	Spain	32.4	39.5	17.8	78.2%	11.4	14.4	25.9%
2	Italy	8.1	6.4	4.1	18.0%	2.9	1.3	-56.7%
3	Turkey	0.41	0.50	0.42	1.8%	0.28	0.19	-32.0%
4	Tunisia	0.08	0.14	0.18	0.8%	0.18	0.03	-82.6%
5	United Kingdom	0.03	0.01	0.07	0.3%	0.07	0.001	-98.5%
6	Greece	0.07	0.08	0.07	0.29%	0.05	0.02	-59.6%
7	United States	0.02	0.04	0.06	0.27%	0.03	0.05	94.4%
8	UAE	0.02	0.02	0.02	0.10%	0.00	0.004	-13.7%
9	Israel	0.02	0.01	0.01	0.06%	0.01	0.000	-100.0%
10	Germany	0.01	0.03	0.01	0.06%	0.01	0.003	-73.2%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 1509**Import Statistics**

- India's olive oil imports stood at €22.8 Mn in the calendar year 2019; Spain is by far the leading olive oil importer to India, accounting for 78.2% of total olive oil imported to the country
- Italy holds 2nd rank in terms of olive oil import into India, with a total value of €4.1 Mn in the calendar year 2019
- Italy is the 2nd largest exporter of olive oil to India, accounting for ~18.0% of India's olive oil import share in the calendar year 2019
- India's import of olive oil increased by 0.7% during Jan-Aug 2020, as against Jan-Aug 2019; the country's imports from Italy decreased by 5.7% in this period



Trade in Sub-Sectors

Exports from India

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	0.070	0.122	0.168	100.0%	0.077	0.132	71.7%
1	Bangladesh	0.025	0.010	0.069	41.1%	0.004	0.015	246.4%
2	Bhutan	0.011	0.016	0.034	20.2%	0.029	0.021	-29.3%
3	United States	0.022	0.021	0.024	14.3%	0.015	0.031	107.4%
4	United Arab Emirates	0.000	0.019	0.014	8.3%	0.013	0.015	8.4%
5	Australia	0.001	0.005	0.007	4.2%	0.005	0.007	56.5%
6	Thailand	0.000	0.008	0.004	2.4%	0.001	0.002	101.0%
7	Saudi Arabia	0.002	0.001	0.003	1.8%	0.002	0.006	174.0%
8	New Zealand	0.001	0.003	0.003	1.8%	0.003	0.003	3.2%
9	Kenya	0.002	0.006	0.003	1.8%	0.000	0.002	-
10	South Korea	0.000	0.000	0.002	1.2%	0.000	0.002	-
-	Italy	0.00	0.00	0.00	0.0%	0.00	0.00	-

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 1509

Export Statistics

- India's olive oil exports to the world stood at €168,000 in the calendar year 2019 and at €132,000 during Jan-Aug 2020
- Bangladesh and Bhutan were the largest importers of olive oil from India in the calendar year 2019, accounting for 41.1% and 20.2% of share, respectively
- India do not export olive oil to Italy



Exports from Italy

Rank	Partner Country	2017	2018	2019	%share in 2019	7/2019	7/2020	%change
	World	1,477.5	1,408.9	1,313.1	100.0%	797.7	843.6	5.8%
1	United States	501.5	436.0	420.3	32.0%	260.4	279.2	7.2%
2	Germany	183.7	178.3	168.0	12.8%	100.8	103.7	2.8%
3	Japan	104.4	99.3	104.9	8.0%	66.8	51.2	-23.4%
4	France	98.8	100.8	97.2	7.4%	63.9	74.6	16.7%
5	Canada	84.7	89.6	67.2	5.1%	38.2	44.3	16.0%
6	United Kingdom	56.8	58.8	59.3	4.5%	35.5	41.9	17.8%
7	Switzerland	42.7	42.5	39.9	3.0%	23.4	29.2	24.9%
8	Russia	21.5	21.8	25.0	1.9%	14.2	16.1	13.5%
9	China	36.9	25.1	21.5	1.6%	11.9	8.2	-30.9%
10	Netherlands	16.8	19.1	18.9	1.4%	11.0	12.8	15.6%
37	India	4.8	3.5	2.9	0.2%	1.7	1.1	-37.4%

Source: Eurostat, Europe

Euro Million
HS Codes: 1509

Export Statistics

- Italy's olive oil export size in the calendar year 2019 stood at ~€1,313 Mn and at ~€844 Mn during Jan-Jul 2020
- The US is Italy's largest trade partner for import of olive oil, with a share of 32.0% in the calendar year 2019; it was followed by Germany and Japan, with a combined share of 20.8% of Italy's olive oil exports in that year
- India holds 37th rank in terms of olive oil export from Italy, with a total value of €2.9 Mn in the calendar year 2019
- India's share in the olive oil exports from Italy stood at 0.2% in the calendar year 2019



Trade in Sub-Sectors

CHOCOLATE

Imports into India

COFFEE

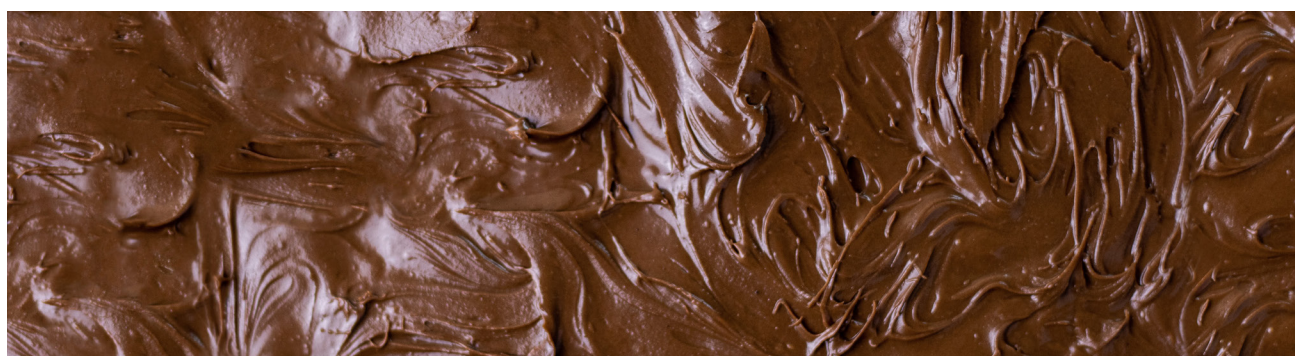
Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	59.8	63.9	68.6	100.0%	45.6	30.7	-32.7%
1	Netherlands	9.1	9.0	10.8	15.7%	7.2	3.9	-45.9%
2	Singapore	5.1	7.6	10.4	15.1%	6.7	5.8	-12.8%
3	Italy	10.1	7.5	9.3	13.5%	7.6	2.7	-64.3%
4	Switzerland	5.0	8.2	8.6	12.5%	5.5	2.0	-63.3%
5	Malaysia	3.4	4.1	5.1	7.5%	3.6	4.1	16.9%
6	Turkey	4.9	5.1	4.7	6.8%	3.2	1.9	-39.5%
7	United Arab Emirates	3.1	4.8	4.4	6.4%	2.7	2.3	-16.5%
8	Belgium	7.2	6.8	4.0	5.9%	2.2	1.6	-25.4%
9	Egypt	1.6	1.8	2.6	3.7%	1.7	1.8	4.6%
10	United States	1.9	2.4	2.1	3.0%	1.5	0.7	-56.1%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes:1806

Import Statistics

- India's chocolate imports from the world stood at €69 Mn in the calendar year 2019, in which the share of Netherlands has been the highest, owning a share of 15.7%; this was followed by Singapore having an approximate share of 15.7% in the same year
- Italy holds 3rd rank in terms of chocolate import into India, with a total value of €9.3 Mn in the calendar year 2019
- In the calendar year 2019, Italy was the 3rd largest exporter of chocolates to India, accounting for ~13.5% of India's total chocolate import share
- India's import of chocolates declined by 32.7% during Jan-Aug 2020, as against Jan-Aug 2019; the country's imports from Italy also declined by 64.3% during this period



Exports from India

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	100.8	119.1	120.7	100.0%	78.1	56.1	-28.2%
1	Indonesia	9.2	15.0	17.5	14.5%	10.8	7.1	-34.9%
2	Turkey	18.0	15.7	16.4	13.6%	11.0	7.9	-28.3%
3	UAE	9.5	9.4	9.3	7.7%	6.9	4.5	-35.8%
4	Nepal	9.3	9.2	9.2	7.6%	6.0	3.9	-35.2%
5	Saudi Arabia	6.5	8.4	7.6	6.3%	5.8	5.3	-9.7%
6	Philippines	2.7	6.7	6.7	5.6%	4.5	3.0	-33.2%
7	Brazil	-	-	6.3	5.2%	2.7	5.2	88.6%
8	Malaysia	3.9	6.0	6.2	5.1%	3.9	1.8	-54.8%
9	United States	2.8	5.9	4.9	4.1%	3.0	0.7	-78.3%
10	Hong Kong	4.8	9.1	4.0	3.3%	2.1	2.1	1.0%
99	Italy	0.041	0.003	0.002	0.002%	0.001	0.001	0.0%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 1806

Export Statistics

- India's chocolate exports to the world stood at €121 Mn in the calendar year 2019 and at €56 Mn during Jan-Aug 2020
- In calendar year 2019, Turkey and UAE were the largest trading partners in terms of chocolate exports from India, accounting for 13.6% and 7.7% of share, respectively
- Italy holds 99th rank in terms of coffee export from India, with a total value of €0.002 Mn in the calendar year 2019



Trade in Sub-Sectors

Exports from Italy

Rank	Partner Country	2017	2018	2019	%share in 2019	7/2019	7/2020	%change
	World	1,749.7	1,758.8	1,876.1	100.0%	853.7	817.2	-4.3%
1	France	336.4	325.9	349.4	18.6%	145.3	150.2	3.4%
2	Germany	145.4	156.0	155.7	8.3%	75.6	74.4	-1.6%
3	United Kingdom	113.7	116.9	133.8	7.1%	52.2	54.6	4.6%
4	Spain	110.9	110.0	108.7	5.8%	41.0	29.5	-28.0%
5	Belgium	80.1	86.2	86.8	4.6%	45.1	43.6	-3.5%
6	Poland	81.1	77.8	72.3	3.9%	34.4	33.0	-4.0%
7	Netherlands	68.0	62.1	60.3	3.2%	32.5	24.0	-26.0%
8	United States	44.2	46.4	53.6	2.9%	25.4	23.0	-9.2%
9	Australia	50.3	49.1	53.2	2.8%	24.8	25.9	4.3%
10	Hong Kong	37.7	47.5	46.7	2.5%	18.3	14.9	-18.5%
43	India	7.1	7.1	8.0	0.4%	6.3	2.6	-58.2%

Source: Eurostat, Europe

Euro Million
HS Codes: 1806

Export Statistics

- Italy's export of chocolates to the world in the calendar year 2019 stood at nearly €1,876 Mn; it stood at around €817 Mn during Jan-Jul 2020
- France is Italy's leading trade partner for import of chocolates, with a share of 18.6% in the calendar year 2019; it was followed by Germany and the UK, with a combined share of 15.4% of Italy's chocolate exports in that year
- India holds 43rd rank in terms of chocolate export from Italy, with a total value of €8.0 Mn in the calendar year 2019
- India's exports from Italy stood at €8 Mn in the calendar year 2019; it declined by 58.2% in Jan-Jul 2020, as compared with Jan-Jul 2019



PASTA**Imports into India****PASTA**

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	11.9	14.1	17.0	100.0%	10.7	10.6	-0.7%
1	Nepal	4.9	5.2	6.8	40.3%	4.6	4.3	-7.1%
2	Italy	4.3	4.9	4.5	26.3%	2.7	2.5	-4.9%
3	South Korea	0.2	0.6	1.2	6.8%	0.6	1.5	143.5%
4	Singapore	0.8	0.8	1.1	6.5%	0.7	0.6	-16.6%
5	Thailand	0.5	0.7	0.9	5.2%	0.5	0.4	-15.8%
6	Bangladesh	0.3	0.3	0.7	4.2%	0.37	0.22	-39.8%
7	Indonesia	0.0	0.2	0.5	3.0%	0.26	0.30	16.4%
8	Turkey	0.4	0.3	0.3	1.7%	0.21	0.15	-31.9%
9	China	0.04	0.1	0.2	0.9%	0.12	0.06	-53.8%
10	Malaysia	0.003	0.17	0.15	0.9%	0.14	0.03	-81.3%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 1902**Import Statistics**

- India's pasta imports from the world stood at €17 Mn in the calendar year 2019, in which the share of Nepal was the highest, having a share of 40.3%
- Italy holds 2nd rank in terms of pasta import into India, with a total value of €4.5 Mn in the calendar year 2019
- India's net import of pasta declined by 0.7% during Jan-Aug 2020, as against Jan-Aug 2019; the country's pasta imports from Italy also decreased by 4.9% during this period



Trade in Sub-Sectors

Exports from India

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	20.0	21.9	24.0	100.0%	15.4	19.4	26.0%
1	United States	6.1	7.4	8.1	33.7%	5.3	7.3	37.5%
2	Bhutan	1.6	3.3	4.2	17.5%	2.8	2.5	-11.7%
3	Canada	1.9	2.6	2.8	11.8%	1.8	3.0	68.5%
4	Australia	1.8	1.5	1.6	6.7%	1.0	1.4	42.9%
5	United Kingdom	1.5	1.3	1.6	6.5%	0.9	1.1	16.3%
6	UAE	1.4	1.3	1.1	4.5%	0.7	1.0	38.7%
7	Nepal	1.5	1.1	1.0	4.2%	0.5	0.4	-28.9%
8	Singapore	0.5	0.5	0.6	2.4%	0.4	0.6	59.1%
9	Malaysia	0.6	0.5	0.5	2.0%	0.3	0.4	26.6%
10	New Zealand	0.4	0.4	0.4	1.6%	0.3	0.3	7.8%
37	Italy	0.01	0.05	0.02	0.1%	-	0.05	-

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 1902

Export Statistics

- India's pasta exports to the world stood at nearly €24 Mn in the calendar year 2019 and at €19.4 Mn during Jan-Aug 2020
- In calendar year 2019, the US was the largest trading partner in terms of pasta exports from India, accounting for 33.7% share in India's pasta exports
- Italy holds 37th rank in terms of pasta export from India, with a total value of €0.02 Mn in the calendar year 2019



Exports from Italy

Rank	Partner Country	2017	2018	2019	%share in 2019	7/2019	7/2020	%change
	World	2,353.4	2,465.0	2,642.5	100.0%	1,507.9	1,861.0	23.4%
1	Germany	370.9	387.6	407.8	15.4%	238.2	290.8	22.1%
2	France	323.0	355.5	376.0	14.2%	210.0	245.4	16.8%
3	United States	273.0	305.2	348.9	13.2%	199.8	281.0	40.6%
4	United Kingdom	317.8	321.0	330.3	12.5%	184.8	239.3	29.5%
5	Spain	96.7	106.3	115.4	4.4%	66.0	70.2	6.4%
6	Belgium	72.7	75.4	78.2	3.0%	44.3	48.0	8.2%
7	Japan	70.5	65.2	75.0	2.8%	44.9	55.2	23.0%
8	Sweden	66.2	68.1	71.2	2.7%	39.9	46.6	16.8%
9	Netherlands	63.6	59.5	61.5	2.3%	33.4	42.1	26.2%
10	Switzerland	54.6	60.6	60.3	2.3%	34.6	42.6	23.1%
53	India	4.3	4.6	4.0	0.2%	2.2	2.3	2.8%

Source: Eurostat, Europe

Euro Million
HS Codes: 1902

Export Statistics

- Italy's export of pasta to the world in the calendar year 2019 stood at €2,642 Mn; it stood at around €1,861 Mn during Jan-Jul 2020
- Germany is Italy's leading trade partner for pasta import, with a share of 15.4% in the calendar year 2019; it was followed by France and the US, with a combined share of 29.6% of Italy's pasta exports in that year
- India holds 53rd rank in terms of pasta export from Italy, with a total value of €4.0 Mn in the calendar year 2019



Trade in Sub-Sectors

BAKERY PRODUCTS

Imports into India

BAKERY PRODUCTS

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	22.6	35.8	43.8	100.0%	24.5	25.1	2.3%
1	Bangladesh	5.2	9.9	12.9	29.4%	6.4	7.4	16.5%
2	Indonesia	2.4	7.1	12.9	29.3%	6.5	8.1	23.9%
3	Malaysia	6.7	8.4	9.3	21.2%	5.9	4.9	-16.4%
4	Italy	0.6	1.7	1.2	2.7%	0.8	0.5	-32.3%
5	UAE	1.2	1.0	1.0	2.4%	0.7	0.7	-0.1%
6	United Kingdom	1.4	1.1	1.0	2.3%	0.7	0.6	-12.7%
7	Thailand	0.4	1.1	0.7	1.5%	0.4	0.4	-3.3%
8	Vietnam	0.4	0.6	0.6	1.3%	0.5	0.5	14.9%
9	Singapore	0.4	0.5	0.5	1.1%	0.4	0.3	-29.5%
10	Netherlands	0.6	0.8	0.4	1.0%	0.3	0.4	52.6%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes:1905

Import Statistics

- India's bakery products imports from the world stood at €43.8 Mn in the calendar year 2019, in which the share of Bangladesh was the highest at 29.4%; this was closely followed by Indonesia having a share of 29.3% in the same year
- India's import of bakery products increased by 2.3% during Jan-Aug 2020, as against Jan-Aug 2019; however, the country's imports from Italy decreased by 32.3% during this period
- Italy holds 4th rank in terms of bakery products import into India, with a total value of €1.2 Mn in the calendar year 2019



Exports from India

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	305.5	290.1	316.7	100.0%	211.2	184.5	-12.7%
1	United States	59.5	51.8	59.3	18.7%	38.5	42.5	10.4%
2	UAE	20.0	22.2	26.5	8.4%	18.4	11.7	-36.7%
3	Nepal	18.4	21.5	21.0	6.6%	14.7	8.6	-41.2%
4	United Kingdom	20.7	20.9	20.3	6.4%	13.8	13.4	-3.3%
5	Angola	11.5	10.2	16.3	5.2%	10.8	5.8	-45.9%
6	Canada	11.9	12.5	14.9	4.7%	9.5	11.5	20.9%
7	Saudi Arabia	7.9	7.0	11.4	3.6%	8.9	5.0	-43.3%
8	Australia	9.8	9.3	10.5	3.3%	7.0	7.2	2.1%
9	South Africa	6.5	6.4	7.5	2.4%	5.1	4.3	-15.5%
10	Malaysia	6.7	5.8	7.0	2.2%	4.5	3.6	-19.2%
53	Italy	0.1	0.4	0.8	0.3%	0.8	0.1	-92.4%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 1905

Export Statistics

- India's bakery product exports to the world stood at nearly €317 Mn in the calendar year 2019 and at €184 Mn during Jan-Aug 2020
- In calendar year 2019, the US was the largest trading partner in terms of bakery product exports from India, accounting for 18.7% share in India's exports
- Italy holds 53rd rank in terms of bakery products export from India, with a total value of €0.8 Mn in the calendar year 2019



Trade in Sub-Sectors

Exports from Italy

Rank	Partner Country	2017	2018	2019	%share in 2019	7/2019	7/2020	%change
	World	1,983.2	2,089.4	2,334.0	100.0%	1,412.1	1,460.2	3.4%
1	France	313.7	332.4	396.1	17.0%	250.0	243.8	-2.5%
2	Germany	271.1	279.8	321.1	13.8%	199.3	219.3	10.1%
3	United States	161.1	177.2	203.5	8.7%	119.5	134.8	12.8%
4	United Kingdom	156.6	153.5	162.6	7.0%	94.8	99.5	5.0%
5	Spain	122.0	133.1	139.8	6.0%	81.6	71.0	-13.1%
6	Saudi Arabia	54.9	64.0	74.6	3.2%	44.5	45.6	2.4%
7	Switzerland	64.1	65.3	71.2	3.0%	39.2	43.2	10.3%
8	Australia	42.3	48.2	65.6	2.8%	39.4	33.8	-14.3%
9	Netherlands	60.0	60.7	64.8	2.8%	42.2	37.3	-11.4%
10	Belgium	45.1	46.6	48.1	2.1%	31.0	26.7	-14.0%
75	India	1.0	1.5	1.1	0.05%	0.6	0.5	-26.7%

Source: Eurostat, Europe

Euro Million
HS Codes: 1905

Export Statistics

- Italy's export of bakery products to the world in the calendar year 2019 stood at nearly €2,334 Mn; it stood at €1,460 Mn during Jan-Aug 2020
- France and Germany are Italy's leading trade partners for import of bakery products, with a share of 17.0% and 13.8%, respectively in the calendar year 2019
- India holds 75th rank in terms of bakery products export from Italy, with a total value of €1.1 Mn in the calendar year 2019



WINE**Imports into India****WINE**

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	21.1	23.3	19.4	100.0%	12.0	7.6	-36.4%
1	Singapore	0.9	4.8	4.7	24.2%	3.2	0.8	-74.1%
2	Australia	3.4	5.6	4.6	23.6%	2.9	2.1	-26.2%
3	France	8.1	4.7	3.7	19.0%	2.3	1.5	-33.4%
4	Italy	2.5	2.6	1.8	9.5%	1.3	1.1	-18.5%
5	Chile	1.2	1.3	1.0	5.1%	0.5	0.6	28.2%
6	United States	0.8	0.9	0.7	3.5%	0.4	0.2	-47.2%
7	Spain	0.6	0.6	0.6	3.2%	0.3	0.2	-35.1%
8	UAE	0.1	0.1	0.5	2.5%	0.2	0.2	12.3%
9	New Zealand	0.3	0.3	0.3	1.8%	0.1	0.1	-14.8%
10	South Africa	0.5	0.6	0.3	1.4%	0.2	0.3	66.2%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 2204**Import Statistics**

- India's wine imports from the world stood at €19.4 Mn in the calendar year 2019, in which the share of Singapore was the highest at 24.2%, followed by Australia and France having 23.6% and 19.0% shares respectively, in the same year
- Italy holds 4th rank in terms of wine import into India, with a total value of €1.8 Mn in the calendar year 2019
- Italy stood at the 4th position in terms of India's wine imports, with a size of €1.8 Mn in calendar year 2019 and a share of 9.5%
- India's import of wine decreased by 36.4% during Jan-Aug 2020, as against Jan-Aug 2019, and the country's wine imports from Italy decreased by 18.5% during this period



Trade in Sub-Sectors

Exports from India

Rank	Partner Country	2017	2018	2019	%share in 2019	8/2019	8/2020	%change
	World	8.2	7.6	7.6	100.0%	5.2	2.6	-49.7%
1	Netherlands	4.3	1.6	3.0	38.8%	1.8	0.7	-58.9%
2	Singapore	0.5	1.0	1.0	12.6%	0.8	0.3	-66.6%
3	Australia	0.2	0.8	0.5	6.8%	0.3	0.04	-83.6%
4	United Arab Emirates	0.5	0.6	0.5	6.8%	0.4	0.3	-34.7%
5	France	0.4	0.3	0.5	6.3%	0.4	0.1	-72.0%
6	Hong Kong	0.2	1.5	0.5	6.3%	0.4	0.7	57.7%
7	Sri Lanka	0.3	0.5	0.3	4.5%	0.2	0.02	-91.2%
8	Japan	0.3	0.3	0.3	4.4%	0.3	0.1	-53.5%
9	United Kingdom	0.3	0.2	0.3	3.3%	0.1	0.1	-54.3%
10	United States	0.2	0.1	0.1	1.9%	0.1	0.1	17.1%
14	Italy	0.0	0.1	0.1	1.0%	0.1	0.03	-36.3%

Source: Ministry of Commerce and Industry, India

Euro Million
HS Codes: 2204

Export Statistics

- India's wine exports to the world stood at nearly €7.6 Mn in the calendar year 2019 and at €2.6 Mn during Jan-Aug 2020
- In calendar year 2019, the Netherlands was the largest trading partner in terms of wine exports from India, accounting for 38.8% share in India's exports, followed by Singapore
- Italy holds 14th rank in terms of wine export from India, with a total value of €0.1 Mn in the calendar year 2019



Exports from Italy

Rank	Partner Country	2017	2018	2019	%share in 2019	7/2019	7/2020	%change
	World	6,005.1	6,236.2	6,434.0	100.0%	3,608.4	3,492.3	-3.2%
1	United States	1,406.6	1,462.1	1,540.7	23.9%	872.3	859.6	-1.5%
2	Germany	997.4	1,038.6	1,064.1	16.5%	612.0	617.2	0.9%
3	United Kingdom	812.2	811.5	771.0	12.0%	412.5	374.3	-9.3%
4	Switzerland	359.4	375.5	381.6	5.9%	216.4	205.0	-5.3%
5	Canada	332.9	333.4	342.0	5.3%	186.5	189.4	1.6%
6	France	170.0	190.5	202.9	3.2%	123.7	105.7	-14.5%
7	Japan	162.6	161.4	182.5	2.8%	110.2	91.0	-17.5%
8	Sweden	164.9	176.6	178.0	2.8%	107.4	110.1	2.5%
9	Netherlands	142.2	153.5	167.1	2.6%	93.5	106.4	13.8%
10	Denmark	148.2	145.3	140.6	2.2%	81.2	83.7	3.1%
68	India	2.4	2.3	1.7	0.03%	0.9	0.6	-32.4%

Source: Eurostat, Europe

Euro Million
HS Codes: 2204

Export Statistics

- Italy's export of wine to the world in the calendar year 2019 stood at nearly €6,434 Mn; it stood at around €3,492 Mn during Jan-Jul 2020
- The US has been Italy's leading trade partner for wine import, with a share of 23.9% in the calendar year 2019; it was followed by Germany and the UK, with a combined share of 28.5% of Italy's wine exports in that year
- India holds 68th rank in terms of wine export from Italy, with a total value of €1.7 Mn in the calendar year 2019



Government Initiatives and Major Investments

Government Initiatives

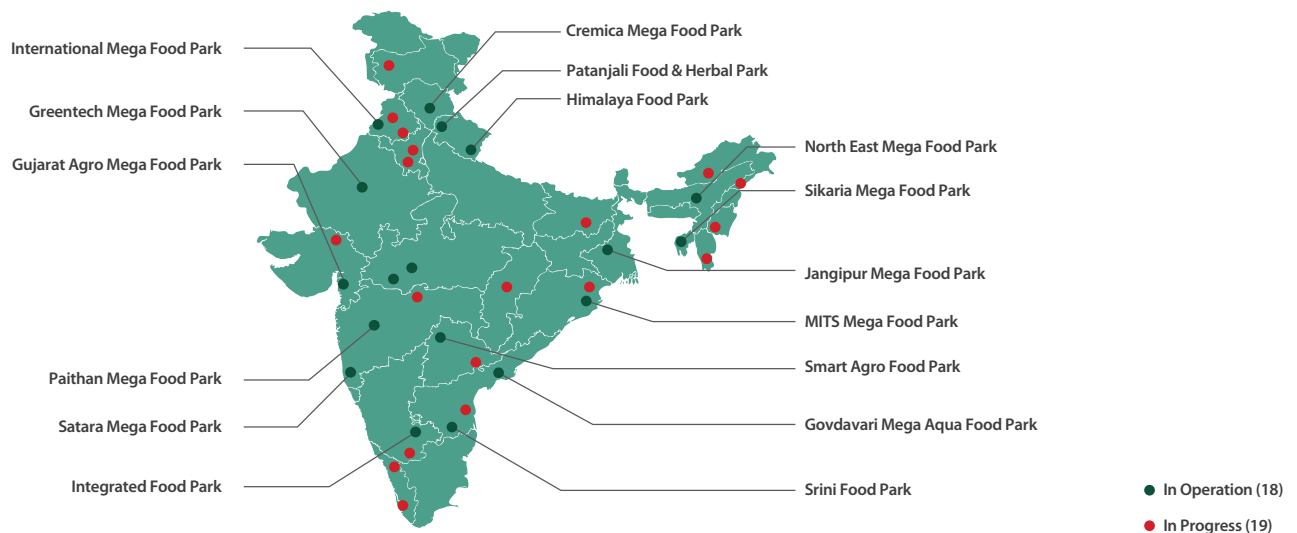
The Government of India is focused on improving competitiveness and reducing wastage in Indian F&B sector, by attracting foreign investments and collaborations through various policy reforms and liberalizations, including introduction of Goods and Services Tax (GST). The foreign direct investment (FDI) liberalization, whereby 100% FDI is now permitted for retail trading (including e-commerce) for food products manufactured and/or produced within the country, is expected to be the turning point in the Indian F&B story going forward.

F&B products are generally categorized under the fast-moving consumer goods (FMCG) sector. The Government of India has taken major initiatives to promote FMCG sector in India. The sector witnessed a healthy FDI inflow of €13.76 Bn (US\$16.28 Bn) during April 2000–March 2020. Some of the prominent government initiatives include the following:

- Approved 100% FDI in the cash and carry segment and in single-brand retail, along with 51% FDI in multi-brand retail
- GST is benefitting the FMCG industry as many of the FMCG products now come under the 18% tax bracket against the previous rate of 23–24%. Specifically, GST on food products is reduced to 0–5%
- GST is expected to transform logistics in the FMCG sector into a modern and efficient model as all major corporations are remodelling their operations into larger logistics and warehousing
- Drafted a new Consumer Protection Bill with special emphasis on setting up an extensive mechanism to ensure simple, speedy, accessible, affordable and timely delivery of justice to consumers
- Allowed 100% FDI in Food Processing industry in India, both under the automatic route as well as through government approval route for retail trading, including through e-commerce, in respect of products manufactured and produced in India

The Government of India through the Ministry of Food Processing Industries (MoFPI) is also taking steps to boost investments in the food processing industry. The government has sanctioned 37 food parks funded under the Mega Food Parks Scheme, 18 are operational and 19 were under implementation as on 27th February 2020¹.

Mega Food Parks

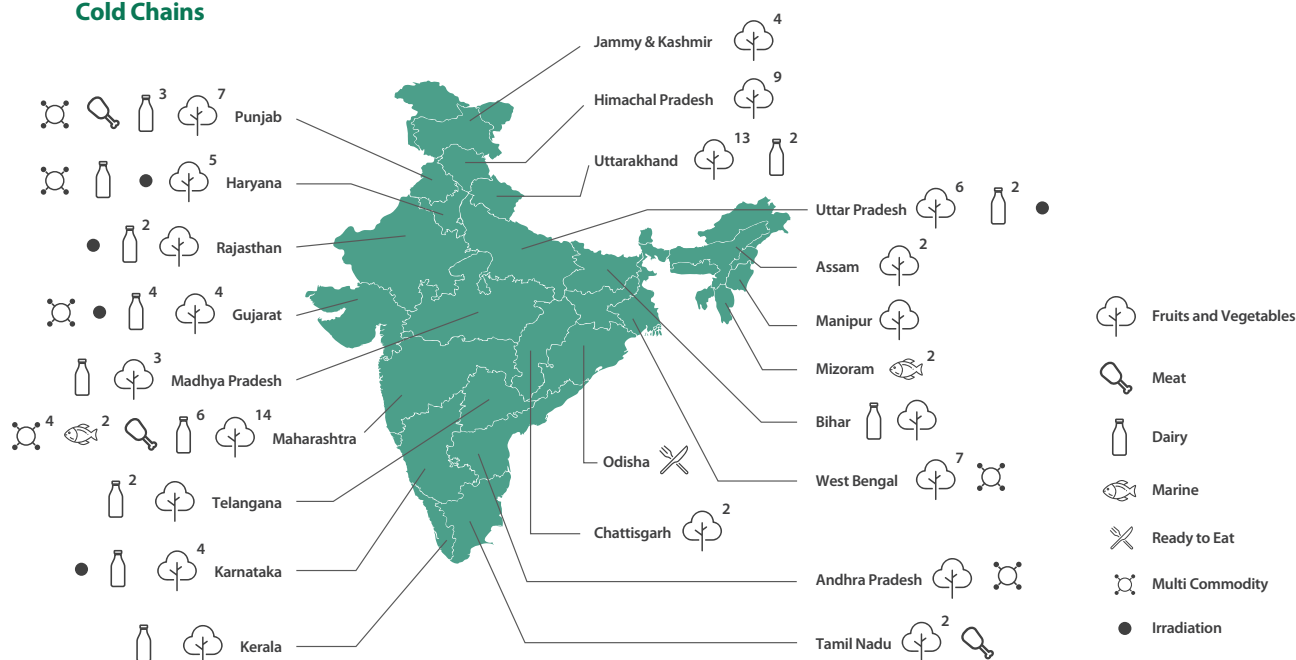


Map not to scale
As on 29 June 2020

¹ Invest in India website

Government Initiatives and Major Investments

Cold Chains



Map not to scale

These initiatives would bolster employment, supply chain and high visibility for FMCG brands across organised retail markets thereby bolstering consumer spending and encouraging more product launches.

Key Foreign Investors (F&B Companies)

Some of the largest F&B companies in the world and retail chains have invested in Indian F&B sector. Listed below are the key investors, based on their regions of origin:

- From North America: Amazon, Cargill, Coca Cola, Del Monte, Hershey, Kellogg's, Kraft, Mars, McCain (Canada), Pepsi, and Walmart
- From Europe: Danone (France), Ferrero (Italy), Metro Cash & Carry (Germany), Nestle (Switzerland), Perfetti (Italy), and Unilever (United Kingdom)
- From Japan: Kagom and Yakult

Recent Investments and Announcements

Listed below are the recent announcements associated with investments in Indian F&B sector.

- **Nestle:** In Oct'20, Nestle announced to infuse €297 Mn (US\$353 Mn) over the next 3-4 years to augment their existing manufacturing capacities, as well as towards their new under construction 'state of the art' factory in Sanand, Gujarat²
- **Pepsi:** In Oct'20, Pepsi announced to increase investment at its new greenfield snacks plant in Uttar Pradesh to €93 Mn (US\$111 Mn) to meet the increasing demand³
- **Orkla:** In Sep'20, Orkla, the Norwegian supplier of branded food products and owner of famous Indian ready-to-eat food brand MTR, acquired 68% stake in Eastern Condiments, one of the oldest producers of curry powders and masala blends in India

²Business Standard

³Economic Times

Government Initiatives and Major Investments

- **GCMMF:** In Sep'20, Gujarat Cooperative Milk Marketing Federation (GCMMF), one of the largest producers of dairy products sold under the brand name 'Amul' in India, will invest around €114 Mn (US\$135 Mn) over the next two years to set up milk processing plants, and another €57 Mn (US\$68 Mn) on facilities for edible oils⁴
- **Dabur:** In Aug'20, domestic FMCG Company Dabur proposed to pump in €57 Mn (US\$68 Mn) for setting up a manufacturing facility in Smart Industrial Park (SIP) at Pithampur, Madhya Pradesh⁵
- **Cargill:** In Aug'20, Cargill announced to invest €13 Mn (US\$15 Mn) to set up a 'high-pressure' hydrogenation plant in Kurkumbh, Maharashtra, to manufacture health and nutrition supplement bypass fats for dairy cattle⁶
- **Pioneering Ventures:** In May'20, Swiss agri-food investor, Pioneering Ventures acquired Lateral Praxis, an Indian agri-tech company⁷. The acquisition will help improve the firm's downstream reach of tech-enabled solutions for food supply chain including information access, apps, data analytics and risk mitigation
- **TCPL:** In May'20, Tata Consumer Products Limited (TCPL) acquired PepsiCo's stake in NourishCo Beverages, a manufacturer of non-carbonated and ready-to-drink beverages⁸



⁴Economic Times

⁵Times of India

⁶Hindu Business Line

⁷Live Mint

⁸India Brand Equity Foundation

Italian Companies in India

**CAMPARI
GROUP**

Davide Campari-Milano S.p.A., together with its subsidiaries, manufactures and trades in alcoholic and non-alcoholic beverages in America, Europe, Middle East, Africa and Asia-Pacific. It has approximately 50 brands marketed and distributed in over 190 countries worldwide

The company operates in India through its subsidiary Campari India Private Limited and the product portfolio includes aperitifs, vodka, whisky, tequila, rum, gin, sparkling and still wines, and ready-to-drink products

FERRERO

Ferrero S.p.A. is an Italian manufacturer of branded chocolate and confectionery products and it is the second biggest chocolate producer and confectionery company in the world

Ferrero India is part of the Ferrero Group and its product range in India comprises Ferrero Rocher praline chocolates, Kinder Joy, Tic Tac and Nutella spread



Rustichella D'Abruzzo and Goyal Group jointly promote an Indo Italian venture Gustora Foods Pvt. Ltd. It has become the monopolist producer of the most premium pasta in India by using the traditional artisan's pasta making process, bronze dies and slow drying process, Gustora pasta carries the Italian taste and aroma of wheat along with a rough non glossy surface for better absorption of sauces



The company is one of the world's largest manufacturers and distributors of confectionery products. Perfetti Van Melle sells to over 150 countries worldwide and has a strong workforce of 17.6K employees in 38 operating companies throughout the world

It operates in India through its subsidiary Perfetti Van Melle India Private Limited (PVMI). It has a diverse portfolio of brands across segments (i.e., sweets and confectionery, fruit jellies, fruit bars, and proprietary ayurvedic medicine) which it sells through various sales channels across the country



ILLVA SARONNO

Illva Saronno is a leading Italian liqueur manufacturer. Its portfolio includes other leading brands such as: Tia Maria, Artic, Isolabella, Zucca, Aurum

The company entered into a joint venture with Umesh Modi Group in India to form Modi Illva India Pvt. Ltd. Together, they brought to the Indian liquor market a premium range of Indian-made Foreign Liquor (IMFL) with the introduction of Artic Vodka as the first offering



Bauli S.p.A. produces bakery products. It offers cakes, doughnuts, chocolates, pastries, and breakfast items. The company offers its products through distribution networks in Italy and worldwide

It operates in India through its subsidiary company Bauli India Bakes & Sweets Private Limited. It has a well-equipped manufacturing unit with a highly technological production line near Pune and is planning to expand its operations in the Indian market



Terre Cevico, with its partners, is present throughout Romagna. It has its own cellars, transfer centres and bottling plants

It operates in India through its subsidiary Gruppo Cevico India, and offers the following wines: E'got Trebbiano Chardonnay Rubicone, E'got Merlot Sangiovese, Golden Sparrow Sangiovese Rubicone IGT and Golden Sparrow Chardonnay Rubicone IGT



Luigi Lavazza S.p.A. owns and operates coffee shops. The company also engages in coffee roasting and production. In addition, it distributes and markets products and coffee machines and also offers franchise opportunities

It has offices and distributors in Italy and internationally and operates in India through its subsidiary Fresh & Honest Cafe Ltd. – Lavazza. It picks up coffee beans from some of the best estates in Karnataka which cater to the Indian taste and preferences

Business Opportunities

Business Opportunities for Italian Companies in India

Listed below are the key market and consumer trends that offer significant growth opportunities for Italian F&B companies in India. These trends are directly or indirectly increasing the demand for Italian food ingredients as well as ready-to-eat products, in both the retail and wholesale channels in India.

1. Rising pasta consumption
2. Rising alcohol consumption
3. Rising dine outs, home deliveries and home cooking
4. Rising chocolate confectionary consumption
5. Rising number of coffee chains

Rising Pasta Consumption

Between mid-April and mid-July 2020, when much of the country was in lockdown due to the Covid-19 pandemic, India saw a sharp spike in pasta consumption. During this 12-week period, consumption volumes jumped three-and-a-half times, from 2,200 tonnes to over 7,600 tonnes¹. Popularity of pasta is rising in India, as consumers are seeking new snacking options beyond instant noodles and domestic snacks. There has also been a rising demand for convenient and healthy foods, providing market opportunities for pasta manufacturers.

While the trend of pasta eating is largely urban centric and restricted primarily to metropolitan cities such as New Delhi and Mumbai, there has been a growing demand among Tier II and Tier III cities, where consumers are increasingly exposed to western cultures and cuisines. This presents significant volume sales opportunity in both retail and wholesale channels.

Rising Alcohol Consumption

Alcohol consumption in India is significantly increasing due to rising disposable income, coupled with increasing mental stress among consumers. India's alcoholic beverages market is expected to grow at a CAGR of 7.4% during 2020-30, to reach €33.5 Bn (US\$ 39.7 Bn)². There is a growing demand for branded and imported liquor, specifically among urban consumers due to rising affluence levels. At the same time, there has been a rising demand for wine, which is perceived to be less harmful compared to whiskey, rum and vodka, and specifically gaining traction among women consumers. This presents significant growth opportunity for importers of wine, who can bring in new and exotic flavoured wines to the Indian market.

Rising Dine Out, Home Deliveries and Home Cooking

Pizza Hut and Domino's Pizza are two of the largest fast food restaurant chains, popular for serving and delivering pizzas to millions of customers across India. These restaurant chains have played a key role in promoting Italian cuisines among Indian households, and especially among young consumers. In addition to these two chains, there now exist thousands of restaurants serving and delivering pizzas and pastas to the Indian consumers. This trend has increased wholesale demand for traditional Italian food ingredients such as mozzarella, chili flakes, oregano, and olives as well as various types of sauces from European origins. The increased retail demand for these food ingredients and products such as dried pasta, is also driven by a rising trend of home cooking of pastas, pizzas and other international cuisines.

The home delivery of food supported by delivery services such as Zomato and Swiggy has also played an important role in making international dishes accessible to average consumers in India. Finally, the opening of online retail channels such as Amazon, Flipkart, Big Basket etc., along with proliferation of modern retail concepts from Walmart, Big Bazar, MORE, Best Buy etc., has also made it easy for the consumers to buy global food ingredients.

Rising Chocolate Confectionary Consumption

Cocoa and chocolate are increasingly being used as ingredients in several confectionary products in India. This is driving up the volume sales of both cocoa powder and chocolate syrups in the local confectionary market. There has

¹ Times of India

² Goldstein Research

also been a trend of chocolate and chocolate-based confectionary products replacing traditional Indian sweets during the festival seasons. The premium positioning of dark chocolate by major confectionary brands such as Hershey's, Perfetti and Cadbury's etc. has also helped chocolate manufactures upsell their products to a wider consumer base.

Rising Number of Coffee Chains

While India remains a predominantly tea consuming country, coffee consumption has also grown up over the past few years. This is largely attributed to the younger consumers increasingly visiting popular coffee chains such as Starbuck and Café Coffee Day, and increasingly willing to pay a premium price to buy and taste the international coffee products.

Opportunities by Product / Project

The table below lists the investable projects in Indian F&B sector by product / project categories and sub-categories³.

S. No.	Product / Project Category	Sub-categories / Details
1	Fruits and vegetables	Preserved, candied, glazed and crystallized fruits and vegetables, juices, jams, jellies, purees, soups, powders, dehydrated vegetables, flakes, shreds and ready-to-eat curries
2	Food manufactured and preserved by fermentation	Wine, beer, vinegar, yeast preparation, alcoholic beverages, fruit-based beverages, and cereal-based beverages
3	Dairy	Liquid milk, curd, flavoured yogurt, processed cheese, cottage cheese, Swiss cheese, blue cheese, ice cream, and milk-based sweets
4	Food additives	Nutraceuticals
5	Confectionery and bakery	Cookies and crackers, biscuits, bread, cakes and frozen dough
6	Meat and poultry	Eggs, egg powder, cut meats, sausages and other value-added products; Fish, seafood and fish processing – processing and freezing units
7	Grain processing	Oil milling sector, rice, pulse milling and flour milling sectors
8	Food preservation and packaging	Metal cans, aseptic packs
9	Food processing equipment	Canning, dairy and food processing, specialty processing, packaging, frozen food/refrigeration and thermo-processing
10	Consumer food	Packaged food, aerated soft drinks, packaged drinking water and spice pastes
11	Supply chain infrastructure	This niche has investment potential in food processing infrastructure, the government's focus is on supply chain related infrastructures such as cold storage, abattoirs and food parks
12	The establishment of food parks	A unique opportunity for entrepreneurs, including foreign investors to enter in the Food Processing industry in India

Rise in e-commerce

- The Indian e-commerce market is expected to grow to €181.4 Bn (\$200 Bn)⁴ by 2026 from €34.9 Bn (\$38.5 Bn) in 2017 and much of the growth of the industry has been triggered by increasing internet and smartphone penetration
- Growing consumerism, disposable incomes, changing lifestyles, convenience and affordability have prompted the increased use of e-commerce
- Almost all major food and beverages companies have made their products available online through e-commerce

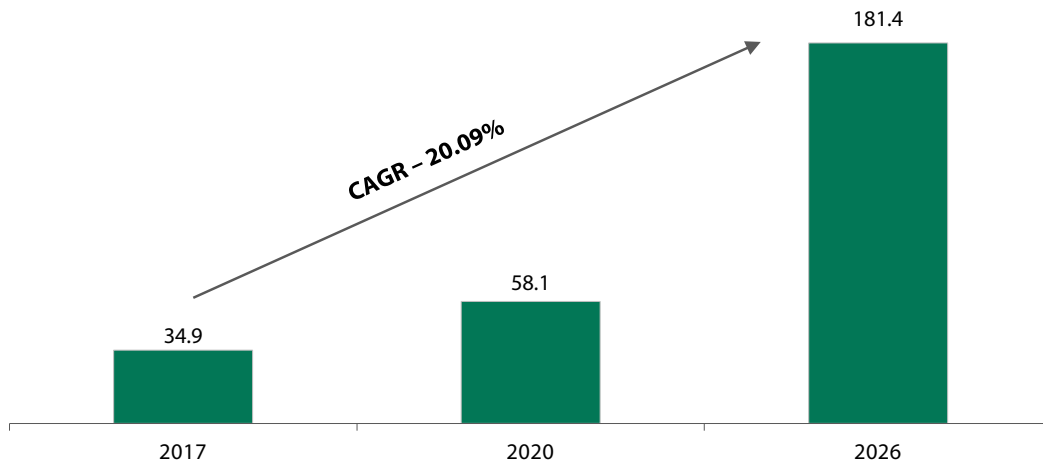
³ Make in India website
⁴ India Brand Equity Foundation

Business Opportunities

websites such as Amazon, Big Basket, Merricart, Snapdeal and Nature's Basket, all of which are recording increase in sales in packaged food and beverages

- For instance, Big Basket processes over 50,000 orders per day and crossed the 5 Mn customer milestone in 2017⁵. Further, Godrej's Nature's Basket, India's premium food destination, is targeting 3x growth and a revenue of €127.27 Mn (INR 1,000 Cr) by 2020

Growth in E-commerce Market (€ Bn)

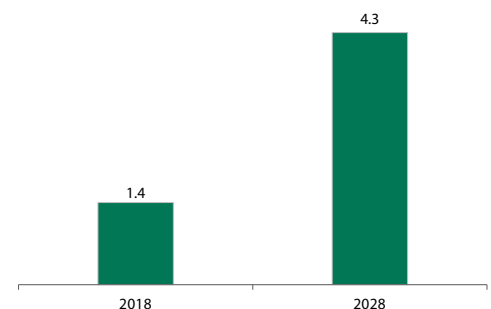


Affluence of working population and increase in disposable income

Over the last decade, the disposable income of Indian households has increased at a 5% CAGR, leading to a staggering rise in the spending power of the country's 48% earning population. The trend has accelerated in the more recent years, thus driving the growth in the affluence of the population.

- India, being the second most populous country in the world, is one of the global leaders in the food and beverage industry⁶
- The domestic consumption in India is expected to touch €4.3 Tn (INR 335 Tn)⁷ by 2028. The consumer market in India, estimated at €1.4 Tn (₹ 110 Tn) in 2018, will grow at a CAGR of 12% over the next 10 years
- Rising affluence is the biggest driver of increasing consumption
- Of India's five household income categories (elite, affluent, aspirers, next billion, and strugglers), the top two income classes are the fastest growing. From 2016 through 2025, the share of elite and affluent households will increase from 8% to 16% of the total while the share of strugglers will drop from 31% to 18%
- As a result of increase in disposable income, the consumers are willing to spend, experience and taste the offerings in the food and beverages market

Domestic Consumption (in € Tn)



⁵ Business Standard

⁶ Ministry of Food Processing Industries, Government of India

⁷ Boston Consulting Group report

Main Indian Bodies & Trade Associations

ASSOCIATION	ADDRESS	TELEPHONE & EMAIL
The Food Safety and Standards Authority of India (FSSAI)	3rd & 4th Floor, FDA Bhawan, near Bal Bhawan, Kotla Road, New Delhi - 110002	T: 1800112100 F: 011-23220994 E: cito@fssai.gov.in

FSSAI has been established under Food Safety and Standards, 2006, which consolidate various acts & orders that have hitherto handled food-related issues in various Ministries and Departments. FSSAI has been created for laying down science-based standards for articles of food and to regulate their manufacture, storage, distribution, sale and import to ensure availability of safe and wholesome food for human consumption.

Website: www.fssai.gov.in

Forum of Food Importers (FIFI)	FIFI House, A- 16/4, First Floor, Poorvi Marg, Vasant Vihar, New Delhi, India-110057	T: +91 11 4019 0638 E: convenor@fifi.in info@fifi.in
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The formation of Forum of Indian Food Importers was initiated by a couple of like-minded importers of food products into India in August 2009. Rounds of initial interactions and deliberations led to the formation of the group by eight key importers as a platform to interact on a regular basis to share and resolve common issues. A few such interactions were all that were required to agree on the need to formalise the platform. The Forum of Indian Food Importers, or FIFI as it is popularly referred to, was in place by the end of 2009. Forum of Indian Food Importers represents Food & Beverage Importers from India.

Website: www.fifi.in

Indian Beverage Association (IBA)	3rd Floor, PHD House, Siri Fort, Road, NEW DELHI – 110016	T: 011 - 4650 8722 F: 011 - 46508733 E: info@in-beverage.org, sg@inbeverage.org
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Leading Indian companies with direct and allied interests in the non-alcoholic beverage industry came together to form the IBA. These companies include Dabur India Ltd., Red Bull India Pvt. Ltd., Tetra Pak India Pvt. Ltd., Pearl Drinks Ltd., Bengal Beverage Ltd., Jain Irrigation Systems Ltd., Coca-Cola India and PepsiCo India Holdings Pvt. Ltd. IBA aims to bring together all stakeholders to a common platform to promote growth of the non-alcoholic industry. The Association is meant to serve as an inter-face between the industry, the government and the public, besides providing a unified and focussed viewpoint in respect of legislative and regulatory matters.

Website: www.in-beverage.org

Main Bodies and Trade Associations

Major Customs Offices in India

ZONES	ADDRESS	TELEPHONE & EMAIL
Ahmedabad	Custom House, Navrangpura, Ahmedabad, Gujarat – 380009 Website: www.ahmedabadcustoms.gov.in	Telephone: +91 (79) 27540258 Email: ccu-cusamd@nic.in
Bengaluru	C R Building, Queens Road, Bengaluru, Karnataka – 560001 Website: www.bangalorecustoms.gov.in	Telephone: +91 (80) 22867990 Email: ccu-cusblr@nic.in
Chennai	60, Krishna Block Rajaji Salai, Opposite District Collectorate, Chennai, Tamil Nadu – 600001 Website: www.chennaicustoms.gov.in	Telephone: +91 (44) 25212033 Email: ccchennaizone.tn@nic.in
Delhi	New Custom House, Indira Gandhi International (IGI) Airport, New Delhi, Delhi – 110037 Website: www.delhicustoms.gov.in	Telephone: +91 (11) 25652970 Email: ccu-cusdel@nic.in
Kolkata	Custom House, 15/1, Strand Road, Kolkata, West Bengal - 700001 Website: www.kolkatacustoms.gov.in	Telephone: +91 (33) 22437665 Email: ccu-cuskoa@nic.in
Mumbai	Commissioner of Customs (Import), Air Cargo Complex Sahar Andheri (East), Mumbai, Maharashtra – 400099 Website: www.accmumbai.gov.in	Telephone: +91 (22) 26816602 E: ccu-cusmum1@nic.in ; import.acc@gov.in

Main Italian Bodies & Trade Associations

ASSOCIATION	ADDRESS	TELEPHONE & EMAIL
Federalimentare	Viale Pasteur, 10 - 00144 Rome	T: +39 06 5903534 F: +39 06 5903342 E: segreteria@federalimentare.it

Federalimentare represents, protects and promotes the Italian Food and Beverage Industry. It is engaged, alongside other Institutions, in promoting a food model based on safety and quality requirements and orienting entrepreneurial skills to seize the best business opportunities in Italy and abroad. It is attentive to the needs of companies and promotes collective economic and social growth.

Website: www.federalimentare.it

Unione Italiana Food	Viale del Poggio Fiorito, 61-0144 Rome	T: +39 06 8091071 E: unionfood@unionfood.it
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Unione Italiana Food was formed from the union of two of the most representative trade associations in the Italian food sector, Association of the Industries of Dolce and of Italian Pasta (AIDEPI) and Italian Association of Food Product Industries (AIIPA). It brings together major international brands as well as small and medium-sized businesses in the food sector.

Website: www.unioneitalianafood.it

Unione Italiana Vini	Via San Vittore al Teatro, 3 20123 Milan	T: +39 02 7222281 F: +39 02 866226 E: info@uiv.it
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Unione Italiana Vini provides advanced services designed to adequately respond to the needs of companies in the wine sector with consultancy and training activities aimed at achieving the best corporate organisation and achieving the most advanced international standards in the sector. It also provides support in the effort to constantly increase quality and traceability levels.

Website: www.unioneitalianavini.it

FEDERVINI	Via Mentana, 2/B - 00185 Roma	T: +39 06 4941630, 06/4469421 F: +39 06 4941566 E: federvini@federvini.it
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The Italian Federation of Industrial Producers, Exporters and Importers of Wines, Sparkling Wines, Aperitifs, Spirits, Syrups, Vinegar (FEDERVINI) was founded in 1917. Its members are entrepreneurs in different sectors of alcoholic beverages. The purpose of the Federation is to protect the interests of the class and provide assistance in all institutional, national, European and international standards.

Website: www.federvini.it

Major Exhibitions/Events

Major Exhibitions in India

FAIR	OCCURRENCE	VENUE	NO. OF EXHIBITORS	VISITORS IN PREVIOUS EDITION	DATES
Fi & Hi India	Quarterly	Pragati Maidan, New Delhi	500+	50,000 - 200,000	08th - 10th Dec 2020

Food Ingredients (Fi) & Health Ingredients (Hi) is unique as it is the only event dedicated solely to food ingredients in India, making it the must-attend business platform for food and beverage professionals in the region. It is expecting to attract 10,000+ trade attendees and 230+ exhibitors. This strong growth in attendance and exhibitor numbers reflect the ongoing growth of the food and beverage market in India and the surrounding region.

Website: www.figlobal.com/india

Drink Technology India (DTI)	Biennial	Mumbai, India	298	12,100	09th - 11th Dec 2020
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Drink Technology India is the international trade fair for the beverage and liquid food industry. It covers the full spectrum of the liquid food and beverage sector in India. The show is divided into different exhibition sectors like soft drinks, beer and brewery equipment up to liquid food and for the first-time oils and fats.

Website: www.drinktechnology-india.com

World Tea & Coffee Expo	Annual	Mumbai, India	90	4,000	09th - 11th Dec 2020
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The World Tea & Coffee Expo offers an organized avenue for all the industry stakeholders to come together under a single roof for networking, business expansion, and ideas exchange. The Expo explores the prospects of the Hot Beverage sector as also showcases technological innovations in this important sector.

Website: www.worldteacoffeexpo.com

Khadhya Khurak	Annual	The Exhibition Centre, Gandhi-nagar	5,000	100,000	17th - 20th Dec 2020
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Khadhya Khurak is one of the premier food machinery sector trade shows in India. The event ranks high on the popularity count with many visitors attending the show at each of its editions. The latest tools, products and market trends are closely deliberated upon during the event. This event showcasing a vast range of Food Processing Equipment, Ayurveda Products, Beverages, Sweets, Ice-Creams, Herbal Products, Edible Flavours, Refrigeration, Hotel, Catering, Dairy, Food Processing, Bakery, Namkeen, Ingredients, Packaging. Fruitful Business partnership deals are struck up during the event, which also offers excellent business networking opportunities to all corporate participants.

Website: www.khadhyakhurak.com

Major Exhibitions/Events

India Food Expo	Annual	Indian Industries Association Bhawan, Lucknow	500	5,000	18th - 20th Dec 2020
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IFX demonstrates as a leading platform in India for the food processing industry. The industry meets at this show aims to exchange new developments and showcase the future of the food processing industry in India. India Food Expo is most prominent exhibition focusing on new technologies and innovations in the Food Processing Sector and demonstrates machines, equipment and processes in the Food Processing & Packaging, especially in processed fruit & vegetables, ready meals, Dairy, Confectionery, Meat and Poultry, Rice / Pulses / Wheat Cleaning, Grading, Sorting, Milling, Health & Fitness, Sugar & Rice Mills, Bakery and much more. It is unarguably a golden opportunity for Indian & Foreign exhibitors in corporate projection and functioning, machinery demonstration, product launching and for sourcing opportunities.

Website: www.indiafoodexpo.in

Food & Hotel India	Annual	Bombay Exhibition Centre (BEC), Mumbai	150	5,000	21th - 23th Dec 2020
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Food & Hotel India will display premium products and services from around the world presented new ideas and solutions for an industry looking to take on a new direction and enhance their business offerings. It has served as an opportunity for industry professionals to forge alliances with leading Indian & international hospitality chains, consultants, suppliers, investors, while networking with premier buyers and decision-makers handpicked in accordance to their purchasing power.

Website: www.foodandhotelindia.com

Indusfood-Tech	Annual	India Exposition Mart, Greater Noida	500	1,000	11th - 13th Jan 2021
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Indusfood-Tech is the most influential and comprehensive F&B, process and packaging technology market event, delivering a three-day business forum where buyers and sellers benefit from innovative ideas, show floor experiences, networking events, and engaging educational seminars, creating a comprehensive business experience. Join the high-energy government supported Indian growth story and catch the pulse of the next big revolution in food processing sector globally.

Website: www.indusfood.co.in

Express Food & Hospitality	Annual	MMRDA Grounds, Mumbai	200	10,000	20th - 22nd Jan 2021
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The Express Food & Hospitality (EF&H) - Mumbai is a focused B2B trade show for the fast-growing food & hospitality industry with the main objective of creating bigger opportunities and successful businesses for companies and trade professionals in India. A wide range of food and delicacies bring together diverse range of buyers and visitors from different parts of the country. The platform offers Indian and International businesses a wide spectrum of opportunity to establish and network their businesses and brands among the top professionals in the country.

Website: www.mumbaiexpo.foodhospitality.in

Major Exhibitions/Events

India Foodex - Bangalore	Annual	BIEC Bengaluru International Exhibition Centre, Bengaluru	110	10,000	29th - 31st Jan 2021
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India Foodex-Bangalore is an International exhibition giving immense space to food and food products, food packaging materials and products, packaging equipment, food ingredients, raw materials, canned foods, processed foods, packaging machinery, and other similar products and accessories in the Packaging Materials, Plant, Machinery & Equipment industries. In order to introduce the latest technological innovations, this event is proved to be an ideal platform to launch your exclusive range of products and services among thousands of Food processors, Machinery suppliers, importers and exporters to throng this expo.

Website: N/A

Annapoorna - ANU-FOOD India	Annual	Bombay Exhibition Centre (BEC), Mumbai	338	10,232	03rd - 05th Feb 2021
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Annapoorna - ANUFOOD India will be held from February 3-5, 2021, Bombay Exhibition Centre, Mumbai, India. The event is the most important B2B platform for food & beverage trade and retail market in the Indian subcontinent. The show is jointly organized by Koelnmesse YA Tradefair Pvt. Ltd. and Federation of Indian Chamber of Commerce and Industry (FICCI). The 15th edition of Annapoorna - ANUFOOD India is concurrent to ANUTECH – International FoodTec India, PackEx India, Food Logistics India & ANUTECH – Ingredients India. Annapoorna - ANUFOOD India, by its increasing quality in the exhibitors and visitors has paved its way as the most sought-after trade fair in India and the neighbouring region.

Website: www.anufoodindia.com

SIAL India	Annual	Pragati Maidan, New Delhi	400	10,000	11th - 13th Feb 2021
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SIAL, the best world partner to support food business development and export! For over 50 years, SIAL has been inspiring food adventures. Today, SIAL is a global brand present in 50 countries all around the world with events in 7 countries. All over the globe our network represents a forum for exchange, meetings and discussions and is truly unique. In terms of visitor ship and impact, SIAL is the premier food innovation event. Introducing new trends, helping to launch products in new territories, solving diversity, quality and safety issues, these are our motives in an ever-growing market.

Website: www.sialindia.com

Foodmech Asia	Annual	River Front Ground, Surat	500	100,000	20th - 23rd Feb 2021
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Foodmech Asia is a leading Exhibition organizing company in India. Foodmech Asia is already known as one of the important Food Processing Machinery & Hospitality Exhibition in India which is growing very rapidly. This event will showcase ultramodern upcoming technologies in Food Processing Machinery, Food Packaging Machinery, Bakery Equipment, Kitchen Equipment, Hotel-wares, Organic Foods, Food Ingredients & Sweets & Essence, Food & Hospitality.

Website: N/A

Major Exhibitions/Events

North East Foodtech	Biennial	Maniram Dewan Trade Centre, Guwahati	500+	20,000 - 50,000	23rd - 25th Apr 2021
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These days High profile trade show is vibrant platform for Hospitality Industry to get innovative ideas, enhancing of business network, introducing new technology and creating enormous awareness in Food & Hospitality Industry.

Website: N/A

Foodtech Asia	Annual	Maniram Dewan Trade Centre, Guwahati	150	10,000	01st - 03rd Jun 2021
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Foodtech Asia will Promote Food Processing Machinery, Bakery & Dairy Machinery, Packaging Machinery & Materials, Catering Display & Equipments, Commercial Kitchen Equipments, Ice Cream Machinery & Plant, Cold Room & Storages Systems, Juice Processing & Filling Machinery, Dairy & Bakery Products, Cleaning Products & Laundry Machinery, Spices & Edible Oil, Food Products, Hospitality, ERP Systems, etc.

Website: www.foodtechasia.in

Bakers Technology Fair	Annual	CODOSSIA Trade Fair Complex, Coimbatore	300	8,000	09th - 11th Jul 2021
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BAKERS TECHNOLOGY FAIR (BTF) is an opportunity to understand, network, as well as to source and trade the widest selection of quality and cost effective Bakery Ingredients, Equipment, Applications and related products & services .Over the years BTF has brought the booming bakery fraternity and their suppliers together. At this BTF, an estimated 8000 + business professional and 300 + brands in more than 200 booths are expected to come together for three days to share their passion for the business. This unique opportunity will allow them to celebrate their industry's new products, equipment, services and best business practices and production techniques all under one roof!

Website:www.bakerstechnologyfair.com

Bakers Technology Fair	Annual	Hitex Exhibition Center, Hyderabad	200	5,000	02nd - 04th Sep 2021
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An annual event in Hyderabad that enables global leading professional buyers and delegates to meet, exchange ideas and share the latest innovations on Manufacturing & Distribution, R&D, Applications and related services of the Bakery & Confectionery industry. BTF this year will showcase two major verticals that are vital for the Industry's growth: Innovative Ingredients and Food Packaging.

Website: www.bakerstechnologyfair.com

Dairy Industry Expo	Annual	Auto Cluster Exhibition Center, Pune	200	7,900	08th - 10th Oct 2021
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Dairy Industry Expo along with Dairy Conference provide an ideal opportunity to meet fellow dairy professionals from around the country displaying complete value chain from animal genetics to farm management and milk and milk-product processing. The event offers a focused platform to network, exchange ideas and do business with leading industry suppliers.

Website: www.dairyindustryexpo.com

Major Exhibitions/Events

Major Exhibitions in Italy

FAIR	OCCURRENCE	VENUE	NO. OF EXHIBITORS	VISITORS IN PREVIOUS EDITION	DATES
Cosmofood	Biennial	Fiera di Vicenza, Vicenza, Italy	80,000sq m	20,000	6th – 10th Nov 2021

Cosmofood is dedicated to the excellence of the food, beverage & technology sector. At Cosmofood, the visitors have direct contact with the producers and suppliers in the food, beverage, contract, food & drink service, retail & technology sectors. They obtain immediate clarity and a perfect synergy between innovation, tradition and the enhancement of typical products accompany the visitors in the discovery of food, wine trends and new technologies.

Website: en.cosmofood.it

Cibus Tec Parma	Triennially	Viale delle Esposizioni 393A 43126 Parma, Italy	120,000 sq m	35,000	25th – 28th Oct 2022
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Cibus Tec is one of the most important Italian food technology exhibitions and presents the latest solutions in the sectors of harvesting, processing and packaging of vegetables, fruit, milk and by-products. The fair represents and presents the best technology to the national and international food industry, offers new business platforms and promotes new ideas and innovations.

Website: www.cibustec.it

Vinitaly Verona	54 th edition	Viale del Lavoro 8 37100 Verona, Italy	Not available	150,000	18th –21st Apr 2021
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Vinitaly is the largest exhibition dedicated to the wine sector. Every year, four thousand exhibitors from all over the world present their top production. There are technical tastings of wine and spirits, overviews of wine-making realities in various regions of Italy, a convention programme embracing conferences, forums and seminars dealing with major topics of current interest that reveal the challenges and prospects for the future.

Website: www.vinitaly.com/EN

Olio Officina Food Festival	9 th edition	Palazzo delle Stelline, Milan, Italy	Not available	5,000	4th – 6th Feb 2021
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Olio Officina Food Festival is a cultural project that aims at the affirmation of a solid culture of olive oil, vinegar and any other condiment, as well as the enhancement of a healthy and correct diet as a presidium of preventive medicine and a source of well-being.

Website: www.olioofficina.com

FOOD & BEVERAGE SECTOR

HS Code	Description
02	Meat and edible meat offal
03	Fish and crustaceans, molluscs and other aquatic invertebrates
04	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included
07	Edible vegetables and certain roots and tubers
08	Edible fruit and nuts; peel of citrus fruit or melons
09	Coffee, tea, maté and spices
10	Cereals
11	Products of the milling industry; malt; starches; inulin; wheat gluten
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder
15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes
17	Sugars and sugar confectionery
18	Cocoa and cocoa preparations
19	Preparations of cereals, flour, starch or milk; pastrycooks' products
20	Preparations of vegetables, fruit, nuts or other parts of plants
21	Miscellaneous edible preparations
22	Beverages, spirits and vinegar

MAJOR SUB-SECTORS

HS Code	Description
2204	Wine
1902	Pasta
1509	Olive Oil
0901	Coffee
1806	Chocolate
1905	Bakery Products

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Italian Trade Commission in India



Alessandro Liberatori
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