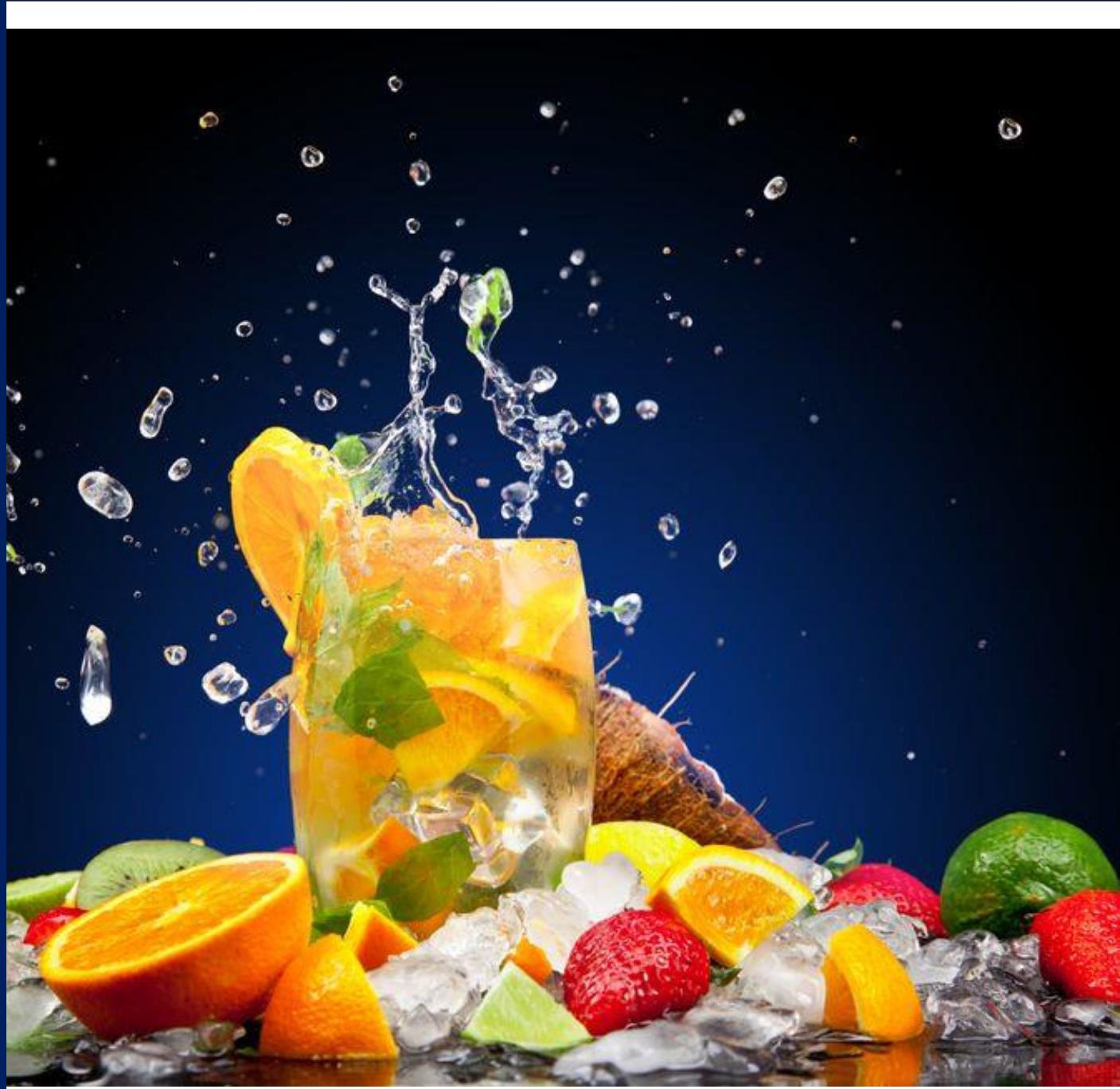


Non-Alcoholic Beverage Sector in India



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Political Map of India



India is a federal union comprising twenty-nine states and seven union territories. The states and union territories are further subdivided into districts and further into smaller administrative divisions.

List of Abbreviations

Acronym	Description
BoE	Bill of Entry
CAGR	Compound Annual Growth Rate
CVD	Countervailing Duty
FICS	Food Import Clearance
FSS	Food Safety and Standards
FSSAI	Food Safety and Standards Authority of India
FY	Financial/ Fiscal Year
HoReCa	Hotel Restaurants Café
HS	Harmonized System
i.e.	that is
IEC	Import Export Code
INR	Indian Rupee
ml	millilitre
NABARD	National Bank for Agriculture and Rural Development
NCR	National Capital Region
NOC	No Objection Certificate
PBT	Polybutylene Terephthalate
PET	Polyethylene Terephthalate
PSL	Priority Sector Lending
PVC	Polyvinyl Chloride
QSR	Quick Service Restaurants
RBI	Reserve Bank of India
TSS	Total Soluble Solids
UAE	United Arab Emirates
UK	United Kingdom
USA	United States of America
USD	United States Dollar

Currency Conversion Rate: 1 USD= 65 INR

Executive Summary

The primary objective of the report is to provide an overview of the Indian Non-Alcoholic Beverage Sector. The research study is geared to highlight opportunities for Brazilian companies looking to enter India as a target market.

The report highlights the following key points:

- *Market size estimation and growth rate*
- *Key sub-segments of the sector*
- *Demand Drivers of the industry*
- *Competitive landscape in the industry*
- *Export import trends in the sector*
- *Brief Regulatory Framework*
- *Opportunity assessment for Brazilian companies in India*

Over the past two years, the Soft (Non-Alcoholic) Beverage Industry has seen a value growth of 11% compound annual growth rate (CAGR) and a volume growth of 5% CAGR. In total, 1.25 billion people in India drink 5.8 billion litres of Non-Alcoholic Beverage (excluding bottled/mineral water) in a year. This makes India's per capita soft drinks consumption large, but just 1/20th of that of the U.S., 1/10th of Kuwait, 1/8th of Thailand and Philippines, and one-third of Malaysia's.

The overall Non-Alcoholic (Soft) Beverage market in India witnessed aggregate sales of 20 billion litres, worth USD 10 billion in the year 2015-16. Carbonated Drinks account for 4.2 billion litres while Fruit based drinks account for 1.5 billion litres in terms of consumption in India¹.

Off-trade sales, i.e. those which take place at retail outlets such as grocery stores, hypermarkets, super markets account almost 70% of the total sales of Non-Alcoholic Beverages in India. On-trade channel, on the other hand, i.e. food service outlets, hotels, restaurants, bars, and clubs account for the remaining portion of the sales.

In terms of geographical weightage, the Indian market is segmented into 4 zones-North, South, East (including North east) and West. West India with a share of 37% is the largest market followed by North India (33%), South India (22.5%) and East (including North East) India with a share of 7.5%.

¹ Source: Euro Monitor (www.euromonitor.com/india)

Consulting

The import segment in Non-Alcoholic beverage is largely dominated with fruit pulp and juice based drinks. The Indian consumer is increasingly becoming health conscious and this has resulted in growth of natural and healthier beverage products. Increasingly, many established players are moving into 100% Juice and nectar categories. Also, cold pressed juices that preserve better nutrition are catching attention of the healthier consumer bracket in India. Over the past 2 years several gourmet players in this category are gaining popularity in the metropolitan cities in India.

Understanding of Brazilian Non-Alcoholic Beverage Market

Brazil's annual Non-Alcoholic beverage consumption is estimated at 14.3 billion litres. The per capita consumption of soft drinks (excluding bottled water) is approximately 75 litres, ahead of several developed countries.

In terms of value, Brazil's Non-Alcoholic Beverage segment is estimated at USD 19.1 billion². The segment wise break up of Non-Alcoholic Beverage in terms of consumption volume is presented in the table below:

Segment	Market Share in terms of Volume
Sports & Energy Drinks	1.4%
Juice	6.3%
RTD Tea/Coffee	0.8%
Bottled Water	31.9%
Carbonated Drinks	59.6%

Source: T&A Research: The data is gathered from multiple data sources including Indian Government data banks, sectoral journals, National daily newspapers, industry association publications and international market research portals. In addition, primary interview responses are also taken into consideration.

Carbonated drinks first appeared in Brazil in 1904, almost 20 years after the foundation of Coca-Cola in the United States. Today, the country has about 200 soda companies, with majority of the market share captured by large corporations. As per Afrebras, — the Brazilian Association of Manufacturers of Soft Drinks — large corporations own a little less than 90% of carbonated drinks market share in terms of volume.

The Non-Alcoholic beverage market in Brazil grew by 2 percent YoY between 2014-15 to 2015-16 despite unfavourable economic situations in the country. Energy drinks grew by 10 percent in the country as consumers chose natural energy drinks with local ingredients. The two key factors that contribute to chilled drinks consumption in Brazil are the local climatic conditions and the young average age of the country's population. Sales figures released by the country's national soft drink association ABIR show that growth in the sector has not been uniform across categories, with volume sales of fruit juice/juice drinks and energy drinks greatly outperforming those of carbonated soft drinks, iced tea, and bottled water.

Juices are viewed as a healthy beverage option and considered a great source of nutrition in Brazil. Although Brazilians prefer freshly squeezed juice, the ready-to-drink juice market is expected to see constant growth in the coming years. More companies are tapping into the pure juice segment, which will help increase market value. Brazil is the world's largest producer and exporter of orange

² Source: BMI Research (www.bmiresearch.com)

juice, accounting for more than half of the global output. The country exports more than 90% of the juice it produces. Brazil accounts for 60 per cent of orange juice concentrate production and Europe is its biggest market with more than 70 per cent of exports heading for EU ports. The major Orange areas in Brazil are Sao Paolo and Minas Gerais. Three Brazilian companies dominate the orange-juice export market i.e. Citrosuco SA Agroindústria, Sucocitrico Cutrale Ltda, and Louis Dreyfus Commodities Brasil SA. Together, these companies account for about 40% of Brazilian orange production.

The mineral water segment has witnessed a significant increase in terms of consumption, almost doubling in sales over a 5-year period between 2010-15. A market that is constantly growing in Brazil is premium bottled water (both still and sparkling) which is a very similar trend to that of India. Brazilian companies have diversified their mix of products including premium lines for a more segmented type of consumer who values health, design, and sophistication. Imported brands are also widely present in this market.

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1.0 Market Overview of Indian Non-Alcoholic Beverage Sector

1.0 Non-Alcoholic (Soft) Beverage Market Overview

In India, the Beverage Market can broadly be categorized into Alcoholic Beverage & Non-Alcoholic Beverage (Soft Beverage) market.

Carbonated drinks, juices, ready-to-drink tea and coffee, bottled water, and energy drinks are some of the key products in the Non-Alcoholic Beverage Category. The Indian Non-Alcoholic (Soft) Beverage market has been driven by increasing preferences of consumers towards product variety and healthier beverages.



As a result, there have been several new product launches by leading players in the industry over the past few years. New Products have been targeted towards catering to popular local tastes, specific price preferences, as well as lifestyle habits of various classes of Indian consumers. Manufacturers have also shown focus on making packs more attractive and convenient for on-the-go consumption.

Some of the New Products that have appealed to Indian Consumers include Sports Drinks, Energy Drinks, Fruit Based Carbonated Beverage, Cold Pressed Juice, and Smoothie.

The main segments constituting the Non-Alcoholic Beverage market in India are:

- Carbonated Beverage
- Fruit Based Drinks
- Bottled Water

These segments together account for over 99% of the total volumes sold in 2015-16. The remaining is divided among products such as ready-to-drink tea, concentrates, sports and energy drinks.

1.1 Market Size

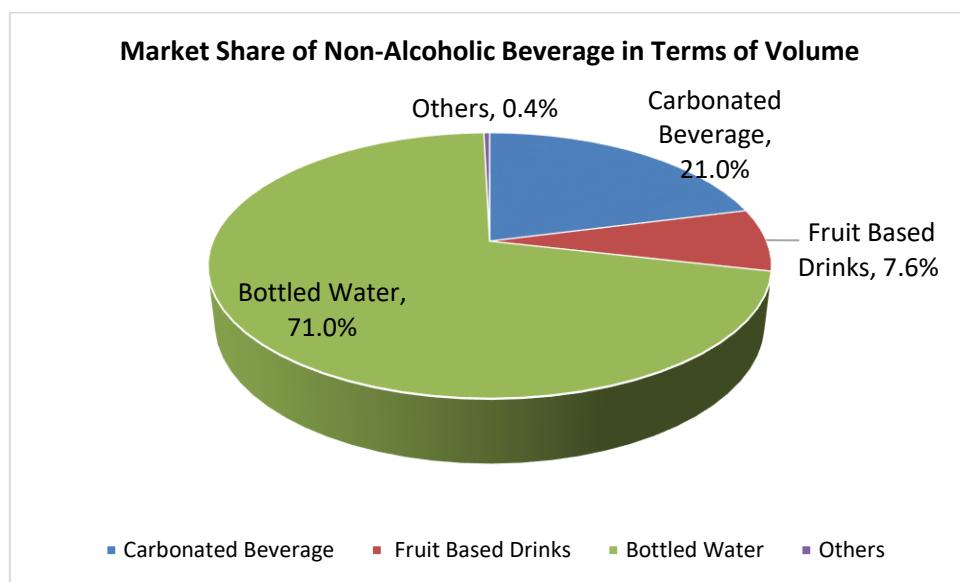
The overall Non-Alcoholic (Soft) Beverage market in India witnessed aggregate sales of 20 billion litres, worth USD 10 billion in the year 2015-16³.

The table below shows detailed Market Break up in terms of Sales Volume in the Year 2015-16 for the Non-Alcoholic Beverage Category.

Category of Non-Alcoholic Beverage	Market Share	Volume in litres
Carbonated Beverage	21.0%	4.2 Billion
Fruit Based Drinks	7.6%	1.5 Billion
Bottled Water (including bulk packaged)	71.0%	14.2 Billion
Others	0.4%	80 Million
Total	100%	20 Billion

**Others include products such as ready-to-drink tea, concentrates and sports and energy drinks*

Source: Euro Monitor (www.euromonitor.com/india)



Source: Euro Monitor (www.euromonitor.com/india)

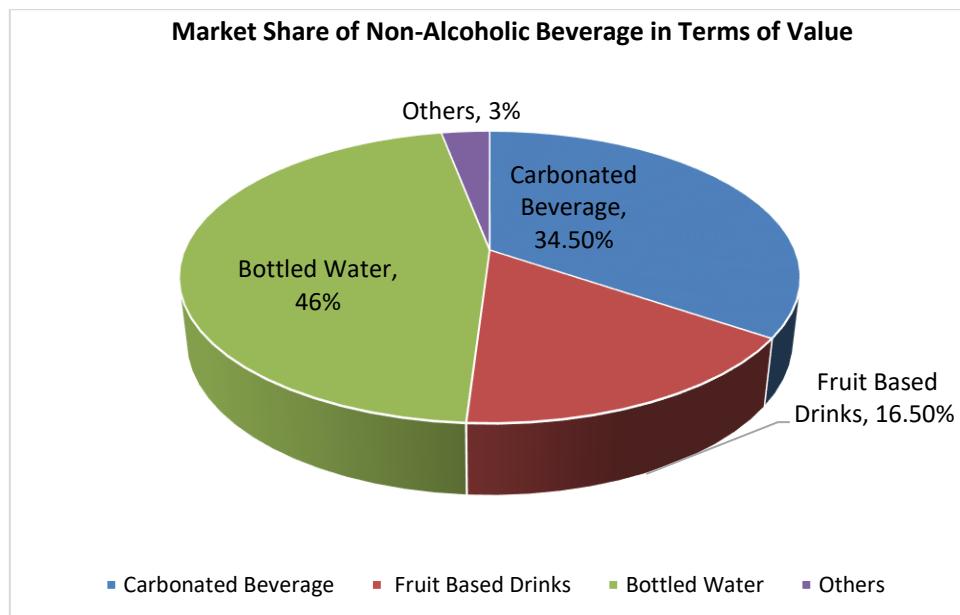
³ Source: Euro Monitor (www.euromonitor.com/india)

The table below shows detailed Market Value Break up in the Year 2015-16 for the Non-Alcoholic Beverage category.

Category of Non-Alcoholic Beverage	Market Share	Market Value USD (Billion)
Carbonated Beverage	34.50%	3.4 billion
Fruit Based Drinks	16.50%	1.6 billion
Bottled Water (including bulk packaged)	46%	4.6 billion
Others	3%	0.3 billion
Total	100.00%	10 billion

*Others include products such as ready-to-drink tea, coffee, concentrates and sports and energy drinks

Source: Euro Monitor(www.euromonitor.com/india)



Source: Euro Monitor(www.euromonitor.com/india)

1.2 Non-Alcoholic Beverage Distribution Channel

In terms of distribution channel, the Non-Alcoholic Beverage market is broadly segregated into the following:

Distribution Channel	Description	Channel Share
Off-trade Channel	Off-trade sales are those which take place at retail outlets such as grocery stores, hypermarkets, super markets	69%
On-trade Channel	On-trade sales, on the other hand, are those taking place at food service outlets, restaurants, bars, clubs	31%

On-trade sales generally take place at higher sales prices. Out of the total volume sales of 20 billion litres of Non-Alcoholic Beverage in India in 2015-16, Off-trade sales is estimated at 13.75 billion litres (about 69%), whereas On-trade sales, is estimated at 6.25 billion litres (about 31%).

1.3 Region Wise Potential of Non-Alcoholic Beverage in India

The size of the Indian Non-Alcoholic Beverage market exhibits a varying trend based on the geographical regions in India. Some of the key regional factors include the following:

- **West India**

Higher disposable income is available with consumers in West India; this makes West India the most affluent region in the country. High degree of urbanization in West India has led to greater availability of branded drinks in the region.

- **North India**

Continued popularity of homemade juice drinks, such as lemonade and sherbet is still prevalent in North India since they are perceived as the most effective refreshers against the hot dry winds prevalent in the area, as well as being more cost effective.

- **East and Northeast India**

East and Northeast India remains the smallest market for non-Alcoholic Beverage with the lowest per capita consumption in India. This may be attributed to the fact

that the region is given less priority by leading players due to difficulty in transportation, combined with lower average disposable incomes vis-à-vis the rest of India.

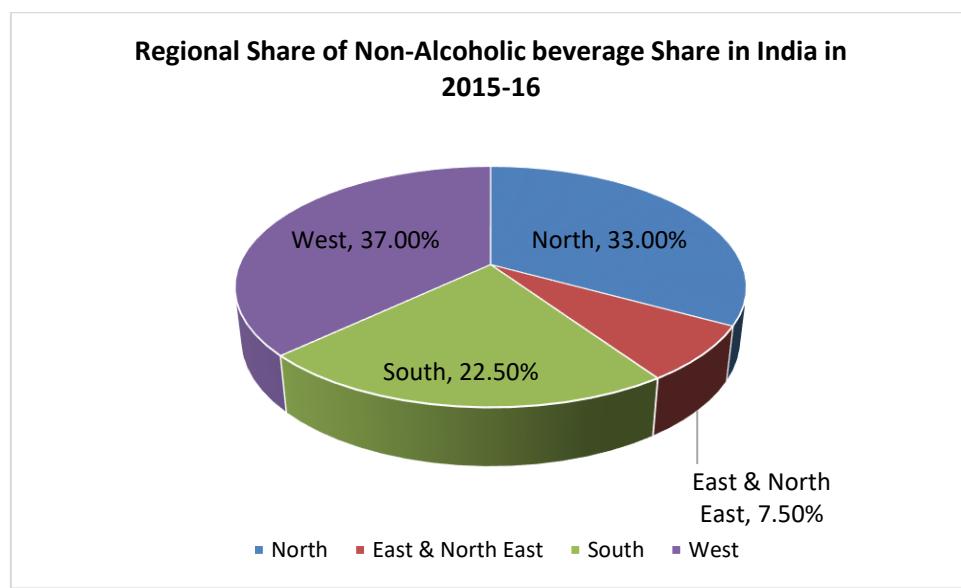
- **South India**

In South India, brand consciousness and higher disposable incomes amongst young IT professionals, presents a huge opportunity for national soft drinks players to test acceptance of new premium products over the forecast period.

The table below shows the region wise break up of Non-Alcoholic beverage sales in India in terms of Volume in 2015-16

Region in India	Volume in Billion Litres (Year 2015-16)	Regional Share
North	6.6	33.00%
East & North East	1.5	7.50%
South	4.5	22.50%
West	7.4	37.00%
Total	20	

Source: T&A Research



Source: T&A Research

Consulting

In the off-trade channel, North India has been the largest market, with total volume sales of 4.9 billion litres in 2015-16, followed closely by West India.

Region in India	Off Trade Volume (Billion Litres)	Channel Volume Break up
North	4.9	36%
East & North East	1.3	9%
South	3.3	24%
West	4.3	31%
Total	13.8	

Source: T&A Research

However, in the on-trade channel, the share of West India has been substantially higher, with recorded volume estimated at 3.1 Billion litres in 2015-16 as compared to 1.7 Billion litres in North India.

Region in India	On Trade Volume (Billion Litres)	Channel Volume Break up
North	1.7	27%
East & North East	0.2	3%
South	1.2	19%
West	3.1	50%
Total	6.2	

Source: T&A Research

1.4 Fruit Based Drinks Market Size

Market Size of Fruit Based Drinks in Terms of Volume	1.5 Billion
Market Size of Fruit Based Drinks in Terms of Value (USD)	1.65 Billion

Source: Euro Monitor(www.euromonitor.com/india)

The Fruit Based Drinks segment of the Non-Alcoholic Beverage market in India is divided into three main categories as listed under.

Category	Fruit Content	Typical target Income Segment
100% Juice	100%	High
Nectars	25-99%	Middle-High
Juice Drinks	Upto 24%	Low-Middle

Source: Euro Monitor(www.euromonitor.com/india)

1.5 Distribution Channel Volume Break Up

In the fruit-based drinks segment, off trade Channel accounts for about 87% of volume sales and about 78% of Sales in terms of Value.

Distribution Channel	By Volume in Year 2015-16	Channel Volume Break up
Off-trade Channel	1.3 Billion Litres	87%
On-trade Channel	0.2 Billion Litres	13%

Source: Euro Monitor(www.euromonitor.com/india)

1.6 Market Size Break up of Fruit Based Drinks through Off-Trade Channel

Off-trade Channel Volume Sales	1.3 Billion Litres
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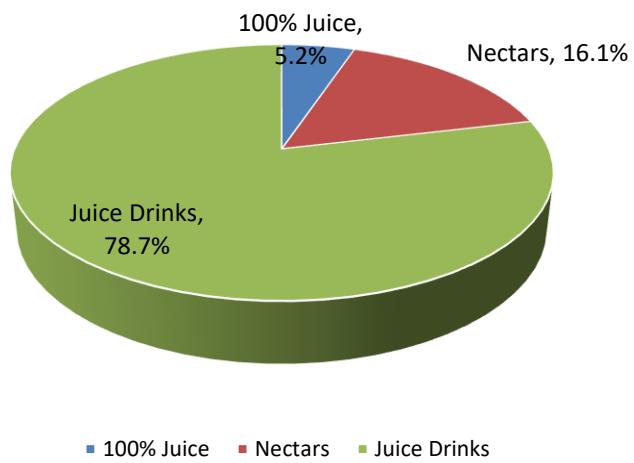
Source: Euro Monitor(www.euromonitor.com/india)

Juice Drinks with fruit content below 24% has the highest market share of about 78% in terms of Volume. The Break-up of Fruit Based Drinks is stated in terms of Volume is stated below:

Category	Market Size by Volume (Million Litres)
100% Juice	69
Nectars (25-99% Juice)	214
Juice Drinks (up to 24% Juice)	1,047
Total	1,330

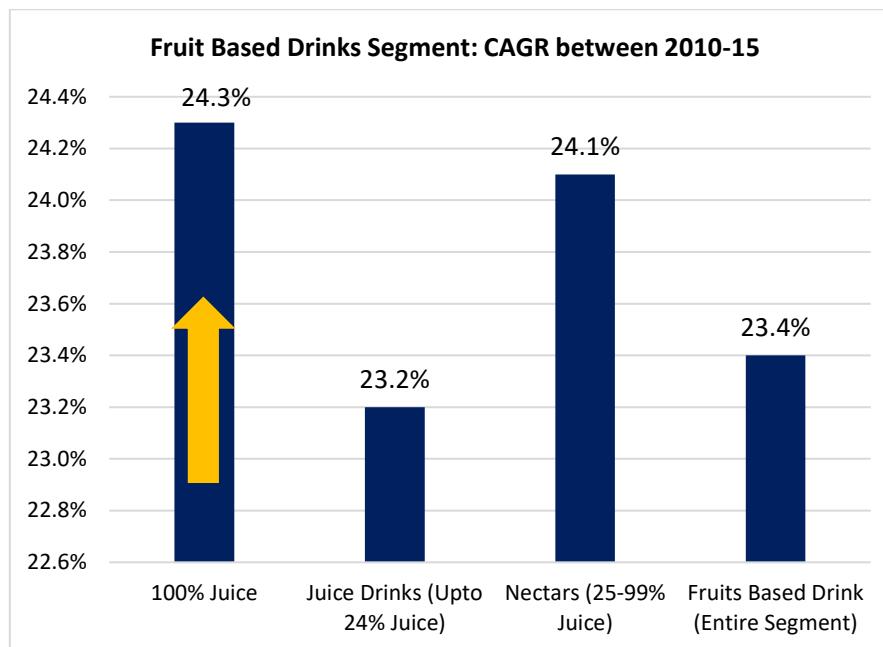
Source: Euro Monitor(www.euromonitor.com/india)

Market Size of Fruit based Drinks in 2015-16 by Volume (Million Litres)



Source: Euro Monitor(www.euromonitor.com/india)

1.7 Growth Rate of the Fruit Based Beverage Segment



Source: T&A Analysis Research

1.8 Demand Drivers

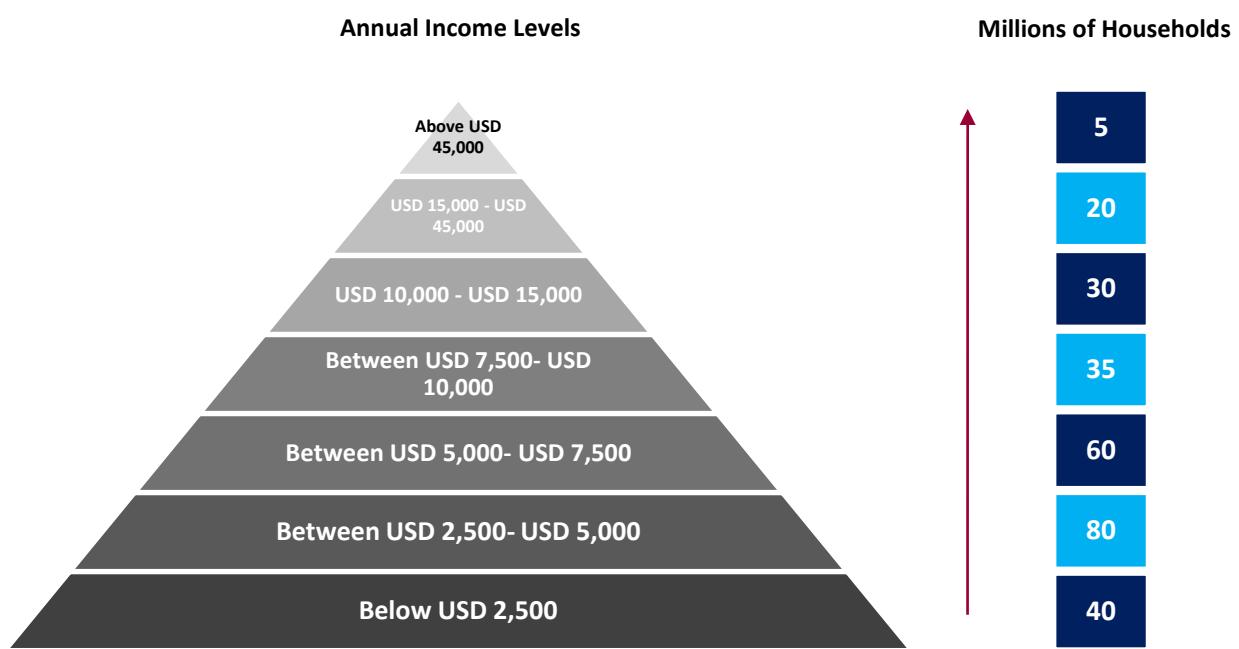
Expansion into New Product Line within Fruit Based Beverage Segment

Innovation is a key factor that is driving the Indian Fruits Based Beverage market, particularly due to increasing preferences of consumers towards product variety, as also towards healthier beverages. Innovative products in the segment, like Cold Pressed Juice & Smoothie has been a new trend and is gaining popularity in Metropolitan areas amongst the health-conscious consumers.

Demographic Dividend-Middle Class Households

Middle Class households are the key target demographic for all Beverage Companies in India. This cohort is driving consumer expenditure in India. During FY⁴2015, there were around 55 million Indian households* in the middle-class category (households with annual incomes of USD 10,000/- and above) with a total population of around 275 million, of which, only 5 million Indian households have annual income levels above USD 45,000/-. This number of households in the middle-class category is expected to reach 100 million by 2020.

An income pyramid representing the shift of income distribution in India (in terms of number of households) is presented below.



⁴ FY- Financial Year or Fiscal year is the period starting from 1st April 20xx to 31st March 20xx+1 (For Instance 1st April 2016 to 31st March 2017)

*Indian Household- An average Indian household is assumed to have 5 people

- Incomes have risen at a brisk pace in India and will continue rising given the country's strong economic growth prospects. The per capita income (at current prices) during 2015-16 was estimated at around USD 1,425/- with a growth rate of 7.4 percent on year-on-year basis

Increasing Health Consciousness

Rising health consciousness and changing food habits of consumers will be a key demand driver of Fruit based beverages and Bottled Water. For instance, Smoothie (a fruit based drink) is healthy and can also be consumed as a meal replacement.

HoReCa (Hotel/Restaurant/Café) Segment

The increasing preference for beverage is reflected in the menu offering by various players in the HoReCa segment. Five star hotels, Fine Dining Restaurants & QSRs (Quick Service Restaurants) offer varieties of beverage as part of their Beverage menu. As the new generation of Indians are open to tasting new Food & Beverage, tastier and healthier beverage is fast gaining popularity across the HoReCa segment in India.

Changing Taste for Food& Beverage amongst the Youth

The youth in India are more experimental in trying out new food and beverage. India has a population of 1.25 billion. Every third person in an Indian city today is a youth. In about 5 years, the median individual in India will be 29 years, very likely a city-dweller, making it the youngest country in the world. People between 15-45 years are considered as a primary demographic who are more experimental in their food habits and more than half of India's population is below 30 years.



2.0 Competitive Analysis

2.0 Competitive Analysis

The competitive analysis covers two broad segments i.e. Bottled/Mineral Water and Packaged Fruit based Beverages. The section is designed based on the potential business synergies between Brazil and India

2.1 Bottled/Mineral Water Segment

- ***The total Bottled Water Market in India market is valued at USD 4.6 billion in 2015-16⁵ (including bulk packaged water)***
- ***The bottled water segment (excluding bulk packaged water) is dominated by five players that account for 70 percent of the market share.***
- ***This market is expected to grow at a CAGR of 22 percent in 2016-17.***

Bottled water market has emerged as one of the rapidly growing and competitive beverage markets in India. On the back of rising health awareness among citizens and lack of access to safe drinking water, bottled water industry has flourished in India during the past decade. The bottled water industry in India witnessed a boom in the late 1990s soon after Bisleri⁶ launched its packaged drinking water in the country.

Key Trends in the Industry

- Mushrooming Bulk Segment
- New Entrants
- Flavoured Water
- Rising Investments & JV's

⁵ Source: Euro Monitor (www.euromonitor.com/india)

⁶ Bisleri is a leading brand of bottle water in India

India's packaged bottled water industry is currently dominated by the top five players, that includes the following companies:

Sl. No.	Company	Brand
1	Bisleri International Pvt. Ltd	Bisleri
2	PepsiCo Inc.	Aquafina
3	The Coca Cola Company	Kinley
4	Dhariwal Industries Ltd	Oxyrich
5	Parle Agro Pvt. Ltd.	Bailley

Value-Added, Functional, Flavoured Waters: Niche Segment within Bottled Water Industry in India



Growing health concerns amongst consumers in India is driving brands to introduce value-added, functional, flavoured waters. **This segment accounts for about 2-3 percent of the overall bottled water market in India.**

In the last five years, several Indian manufactures have launched natural mineral water products, a segment previously occupied by premium imported brands.

Indian Brands	Foreign Brands
Mulshi	Evian
Aava	San Pelligrino
Qua	Perrier
Vedica	Acqua Panna
Himalayan	Veen

Consulting

Majority of the premium brands that cater to this segment in India such as Mulshi, Veen, Qua, Himalayan, and Evian are more active in the HoReCa sector, largely because they target the niche consumer and have higher price points. Currently, the HoReCa segment is the largest consumer of premium brands.

Corporate offices are another growing space where this segment of bottled water is served. Currently, HoReCa and corporate segment jointly account for 80 percent of the total business of Value-Added, Functional, Flavoured Waters in India.

2.2 Packaged Juice Segment in India

The packaged fruit juice market in India can be divided into three sub-categories-Juice Drinks (upto 24% Juice), 100% Juice and Nectars (25-99% Juice). Juice drink is the highest-selling category, with about 75-80 cent share of the market. Mango remains the most popular flavour in the juice drinks category, with more than 80% market share by volume, followed by Lemon (6%) and Orange (5%)⁷. In terms of brands, mango based juice drinks Maaza, Slice, and Frooti dominate the off-trade juice market by volume.

In the 100% juice and nectars categories, however, the spread is more evenly distributed, with orange having the single largest market share of about 38-40%, followed by mixed fruits (21%) and apple (16%) in terms of volume. Some of the dominant brands in this segment include Real, Tropicana and Minute Maid.

Multinational brands Coca-Cola and PepsiCo have been the front runners in the Indian Packaged juice market, having consistently held an aggregate off-trade market share of over 50%, both by volume and value, in the period from 2010 to 2015. PepsiCo held the highest off-trade market share by value, of about 29% in 2015⁸. This was primarily due to the performance of its mango flavoured juice drink brand Slice, which continued to outperform other brands (in growth) in juice drinks, backed by heavy television and in-store advertising throughout FY 2014⁹. Domestic Indian brands Dabur and Parle together hold the next rung in the market with an aggregate off-trade share of 28.2% and 31.4% by volume and value respectively, in 2015-16.

⁷ Source: T&A Research

⁸ Source: FNB (www.fnbnews.com)

⁹ FY- Financial Year or Fiscal year is the period starting from 1st April 20xx to 31st March 20xx+1 (For Instance 1st April 2016 to 31st March 2017)

Consulting

The top five brands in the packaged Juice segment in India that account for about 80% of the market share in terms of volume include Maaza, Slice, Frooti, Real and Tropicana, in order of ranking¹⁰.

Sl. No.	Brand	Parent Company	Website
1	Maaza	The Coca-Cola Company	www.maaza.com
2	Slice	Pepsico India	www.slice.com
3	Frooti	Parle Agro	www.thefrootilife.com
4	Tropicana	Pepsico India	www.pepsicoindia.co.in
5	Real	Dabur India Ltd.	www.dabur.com
6	Paper Boat	Hector Beverages	www.paperboatdrinks.com
7	Ceres	Pioneer Foods	www.ceresjuices.com
8	B Natural	ITC Limited	www.bnatural.in
9	Capri Sun	Rudolf Wild & Co.	www.caprisun.com
10	Minute Maid	The Coca-Cola Company	www.minutemaid.com
11	Del Monte	Del Monte Pacific Limited	www.delmonte.com
12	24 Mantra	Sresta Natural Bio Products Ltd	www.24mantra.com
13	Safal	Mother Dairy Fruit & Vegetable Pvt. Ltd	www.motherdairy.com

¹⁰ Source: Euro Monitor (www.euromonitor.com/india)

2.3 Import Dependence

India is a net importer in the Non-Alcoholic beverage segment. In 2015-16, India's imports in this segment were estimated at USD 154 million compared to exports worth USD 21 million. Fruit Juice and fruit pulp are the dominant segments of foreign trade in the non-alcoholic beverage segment.

The custom duty for fruit drinks and pulps varies between 45% to 50% in India, which acts as a potential deterrent in terms of product costing in India. However, this remains the most attractive segment in the Non-Alcoholic beverage sector in terms of foreign trade.

In terms of fruit juice imports, India's imports are estimated at USD 33.3 million in the fruit juice category. Dominant import partners of India include USA (with 18% share), China, Israel, UAE, and Brazil (with 6% share) in order of ranking. In terms of exports of Fruit juice, India's exports are estimated at USD 8.2 million in 2015-16. Dominant export partners of India in this category include Netherlands (with 15% share), USA, UK, UAE, and Nepal (with 6% share) in order of ranking.

In the Fruit pulp category, India's exports are estimated at USD 1.8 million in 2015-16. Dominant export partners of India include USA (with 43% share), UK, Nepal, Israel, and Canada (with 5% share) in order of ranking. In terms of fruit pulp imports, India's imports are estimated at USD 102 million in 2015-16. Dominant import partners of India include Nepal (with 85% market share), Sri Lanka, Bangladesh, Thailand, and Bhutan (with 0.6% share)

Source: Trade Map (www.trademap.org)



3.0 Regulatory Framework and Import Policy

3.0 Regulatory Framework and Import Policy

3.1 Import policy & Regulations for Non-Alcoholic Beverage Products in India

All imports in India are regulated as per the foreign trade policy formulated by Directorate General of Foreign Trade. However, The Food Safety and Standards Authority (FSSAI) is the regulatory agency under the health ministry that supervises import of food items to ensure quality.



Mandatory FSSAI Requirement for Imports

- An importer or custom house agent (CHA) must take NOC i.e. no objection certificate from FSSAI to import any food items
- All products should have a minimum of 60% shelf life on each product at the time of entry into India.
- All information must be in English.

Specific Regulation for import of Non-Alcoholic Beverages in India

Food additives allowed to be used as an ingredient in beverages are listed below:

- Acidifying Agents like citric acid, fumaric acid, lactic acid among others.
- Antioxidants such as ascorbic acid
- Preservatives such as sorbic acid and its sodium, potassium, and calcium salts as sorbic acid, sulphur dioxide, benzoic acid
- Artificial Sweeteners (Aspertame, Acesulphame K, Saccharin Sodium, Sucralose)
- Colours (Titanium Oxide, Ponceau, Carmoisine, Erythrosine, Tartrazine, Sunset Yellow etc.)
- Flavour Enhancers
- Anticaking Agents in powders such as sodium aluminium silicate
- Thickening Agents/Stabilising/Emulsifying Agents like gums, alginates, pectins among others
- Antifoaming Agents such as dimethyl polysiloxane

In August 2016, FSSAI had finalised the standards for carbonated fruit juices and fruit drinks. These regulations are now known as **the Food Safety and Standards (Food Products Standards and Food Additives) Amendment Regulations, 2016** as per the Official Gazette.

In this regulation FSSAI has defined carbonated fruit beverages or fruit drinks as beverages prepared from fruit juice and water or carbonated water. The beverage could contain sugar, dextrose, invert sugar or liquid glucose as well as peel, oil and fruit essences and other appropriate ingredients.

The regulation defines the requirements for standards which are as follows:-

Total Soluble Solids (m/m) ¹¹	Not less than 10.0 percent
Fruit content (m/m)	
a) Lime or Lemon juice	Not less than 5.0 percent
b) Other fruits	Not less than 10.0 percent

- If the quantity of fruit juice in the beverage is below 10.0 per cent, but not less than 5.0 per cent. (2.5 per cent.in case of lime or lemon), the product shall be called 'carbonated beverage with fruit juice.' In this case, the 10.0 requirement of TSS (Total Soluble Solids) shall not apply
- There is a mandatory requirement to declare the quantity of fruit juice on the labels of carbonated fruit beverages or fruit drinks.

3.2 General Import procedure for Beverage Products

All Non-Alcoholic beverage products may be imported into India under an Open General Licence (OGL), which means no specific licence is required to import such items into India. However, as applicable for any general imports, the import company must get an Import Export Code (IEC) issued by the Director General of Foreign Trade, Ministry of Commerce.

- ❖ **Import Export Code (IEC):** The IEC is required to be obtained from the DGFT to import and export goods
- ❖ **Approval of products from FSSAI**-It's a mandatory requirement for the importer to obtain the FSSAI approval. If any product which is not as per standards of FSSAI is imported the it can be seized by them.
- ❖ **Documents:**

¹¹ m/m- Mixing Ratio

❖ **Bill of Entry**- Every importer is required to file the bill of entry under section 46, The document presents description and value of goods imported in the country and following documents are required to be submitted for obtaining it: -

- a. The original and photocopy of custom
- b. a copy of import permission
- c. A copy of bank details
- d. A copy of making remittances
- e. FSSAI Clearance- For obtaining the NOC an application must be filled with Food Import Clearance (FICS) of FSSAI

- **Certification of Origin**
- **List of transit country**– If the food shipment is trans-shipped through more than one country.
- **Bill of Lading** -as stated in the Bill of Entry (BoE) for sea shipment.
- **Air Way Bill**- as stated in the Bill of Entry (BoE) for air shipment.
- **End-use declaration** – In which the Importer must state the end use of the imported food product
- **Certificate to re-export**- Importers to submit a certificate to Customs that such goods have been re-exported

Specific forms required to be furnished for import of Coffee:

- **Import permit**-This permit is obtained from Ministry of Agriculture, Government of India (in case of primary agricultural produce/ horticulture produce)
- **Phytosanitary certificate**-It is required to be obtained in case of plants, plant products or other regulated articles to meet the phytosanitary import requirements. This certificate is required for importing commodities like plants, bulbs and tubers, or seeds for propagation, fruits, and vegetables, cut flowers and branches, grain, growing medium and certain plant products that have been processed where such products, by their nature or that of their processing have a potential for introducing regulated pests. In India, the certificate is obtained from **Directorate of plant protection, Quarantine & Storage (Ministry of Agriculture, Department of agriculture and cooperation)**.

3.3 Packaging Requirements

A. General Packaging requirements as per FSSAI for packaged food: -

- Pre-packaged food shall not be described or presented on any label or in any manner that is false, misleading, or deceptive or is likely to create an erroneous impression regarding its character in any respect;
- Label in pre-packaged foods shall be applied in such a manner that they will not become separated from the container;
- Contents on the label shall be clear, prominent, indelible, and readily legible by the consumer under normal conditions of purchase and use;
- 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

B. Specific Packaging Requirements: -

- Juices, squashes, crush, cordials among others shall be packed in clean bottles securely sealed. These products when frozen and sold in the form of ice shall be packed in suitable cartons. Juices and Pulps may be packed in wooden barrels.
- Every container or package of flavour emulsion and flavour paste meant for use in carbonated or noncarbonated beverages shall carry the following declaration, in addition to the instructions for dilution

"Flavour emulsion and flavour paste for use in Carbonated or Non-Carbonated beverages only"

- Any fruit syrup, fruit juice, fruit squash, fruit beverages, cordial, crush or any other fruit products standardised under Food Safety and Standards (Food Products standards and Food Additives) Regulations, 2011 which does not contain the prescribed amount of fruit juice or fruit pulp or fruit content shall not be described as a fruit syrup, fruit juice, fruit squash, fruit beverages, cordial, crush or any other fruit product as the case may be.
- In case of any bottle containing liquid milk or liquid beverage having milk as an ingredient, soft drink, carbonated water or ready-to-serve fruit beverages, the declarations with regard to addition of fruit pulp and fruit juice shall invariably appear on the body of the bottle
- Packaging requirements for mineral water: -
 - A. Clean, hygienic, colourless, transparent and tamperproof bottles shall be used.
 - B. Bottles shall be made up of:

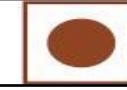
- Polyethylene (IS:10146)¹²
- PVC (Polyvinyl chloride) (IS: 10151)
- PET (Polyethylene Terephthalate) and PBT (Polybutylene terephthalate) (IS:12252)
- Polypropylene (IS: 10910)
- Food grade polycarbonate or sterile glass bottles

C. All packaging materials of plastic origin shall pass the prescribed overall migration and colour migration limits.

3.4 Labelling Requirements

Sl. No	Category	Information Required	Labelling Criteria
1	Name of the food (Product name)	XYZ	Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
2	List of the ingredients (Not required in case of single ingredient)	In Descending order	Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
3	Nutritional information	In Descending order	Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
4	Manufacturers (i.e. producers) name and address	with a prefix of Manufactured by / Produced By/Packaged By Complete Address	Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
5	Net Quantity (i.e. net weight of the product)	Incase of fixed weight product	Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
6	Lot / Batch no	With a prefix of Lot, no/ Batch No	Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
7	Date of manufacture i.e. the production date		Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
8	Best before or use by date or date of expiry		Original Packing only (i.e. Primary Packaging) (may be ink jetted/laser printed on primary packaging)
9	Veg or Non-veg logo	Suitable / Not Suitable for vegetarians	Primary packaging or separate sticker

¹² IS (Indian Standard) is a quality certification given by BIS. The Bureau of Indian Standards (BIS) is the national Standards Body of India working under the aegis of Ministry of Consumer Affairs, Food & Public Distribution, Government of India. One of the major functions of the Bureau is the formulation, recognition, and promotion of the Indian Standards.

		 	
10	Importers name and address	With a prefix imported by Complete Address	Primary packaging or separate sticker
11	Importers FSSAI license number (Will be considered as rectifiable labelling defect from 1st July 2014)		Primary packaging or separate sticker

Specific Labelling Requirements:

- Specific declaration of flavours to be mentioned
- The nutrition information is declared per 100ml or as per serving on the label.
- Labelling requirement of mineral water
 - A. Every package of drinking water shall carry the following declaration in capital letters having the size of each letter as prescribed in Regulation 2.3.3 of FSS¹³ (Packaging & Labelling) Regulations, 2011: **“Packaged Drinking Water”**
 - B. Every package of mineral water shall carry the following declaration in capital letters having the size of each letter as prescribed in regulation 2.3.3 of FSS (Packaging & Labelling) Regulations, 2011: **“Natural Mineral Water”**
 - C. One time usable plastic bottles of packaged drinking water /mineral water shall carry the following declaration: **“Crush the Bottle After Use”**
- It also mentions the labelling requirements for caffeinated beverages specifying the following things: -
 - A. High Caffeine
 - B. Display of caution
 - C. Declaration to use not more than two cans a day.
 - D. Advice to the consumers that “The ingredients of the product consumed through other sources may also be kept in view”
 - E. No health claims or enhanced functional claims.

3.5 FDI Policy of Government of India

With a view to benefit farmers and reduce wastage of fruits and vegetables, the government of India permits 100 per cent foreign direct investment in marketing and processing of foods products.

¹³ FSS- Food Safety and Standards

- 100% FDI is permitted under the automatic route in food processing industries
- 100% FDI is allowed through government approval route for trading, including through e-commerce in respect of food products manufactured or produced in India.

Some of the major foreign investors in the segment include the following

• Danone (France)	• Coca Cola (USA)	• Nestle (Switzerland)
• Del Monte (USA)	• Yakult (Japan)	• Pepsi (USA)
• Unilever (United Kingdom)	• Perfetti (Italy)	• Hershey (USA)

3.6 Government of India Sector Policy to Promote Food Processing

Food processing is recognized as a priority sector in the new manufacturing policy of India¹⁴ in 2011.

- The Indian Government has set up a special fund called "Food Processing Fund" of approximately USD 300 million in National Bank for Agriculture and Rural Development (NABARD) for extending affordable credit to designated food parks and the individual food processing units in the designated food parks. As on 31.05.2016 about a quarter of the fund as term loan has been sanctioned to 12 mega food parks projects.
- Reserve Bank of India has classified loan to food & agro-based processing units and Cold Chain under agriculture activities for Priority Sector Lending (PSL)¹⁵ subject to aggregate sanctioned limit of USD 15.38 million per borrower from the banking system. It will ensure greater flow of credit to entrepreneurs for setting up of food processing units and attract investment in the sector.

¹⁴ The Government of India has announced a national manufacturing policy in 2011 with the objective of enhancing the share of manufacturing in GDP to 25% within a decade and creating 100 million jobs. It also seeks to empower rural youth by imparting necessary skill sets to make them employable. Sustainable development is integral to the spirit of the policy and technological value addition in manufacturing has received special focus.

¹⁵ Priority Sector refers to those sectors of the Indian economy which may not get timely and adequate credit in the absence of this special dispensation. Priority Sector Lending is an important role given by the Reserve Bank of India (RBI) to the banks for providing a specified portion of the bank lending to few specific sectors like agriculture and allied activities, micro and small enterprises, poor people for housing, students for education and other low income groups and weaker sections. This is essentially meant for an all-round development of the economy as opposed to focusing only on the financial sector

3.7 Import and Export Trends

3.7.1 Export Trend

The share of India in export of non-alcoholic beverages segment is limited due to rise in domestic consumption as India stands fourth in terms of sales in beverages market in Asia. In addition, the growth of bottled water and juices is predicted to rise at a CAGR of 20% in 2016-17¹⁶

HS Code	Product Description	Export value (In USD million) in 2015-16
2201	Waters, incl. natural or artificial mineral waters and aerated waters, not containing added sugar, other sweetening matter or flavoured; ice and snow	0.385
2202	Waters, incl. mineral waters and aerated waters, containing added sugar or other sweetening matter or flavoured, and other non-alcoholic beverages (excluding fruit or vegetable juices and milk)	12.849
2009	Fruit juices (incl. grape must) and vegetable juices, unfermented, not containing added spirit, whether containing added sugar or other sweetening matter	8.242
Total Exports		USD 21.4 Million

Source: UN Comtrade (www.comtrade.un.org)

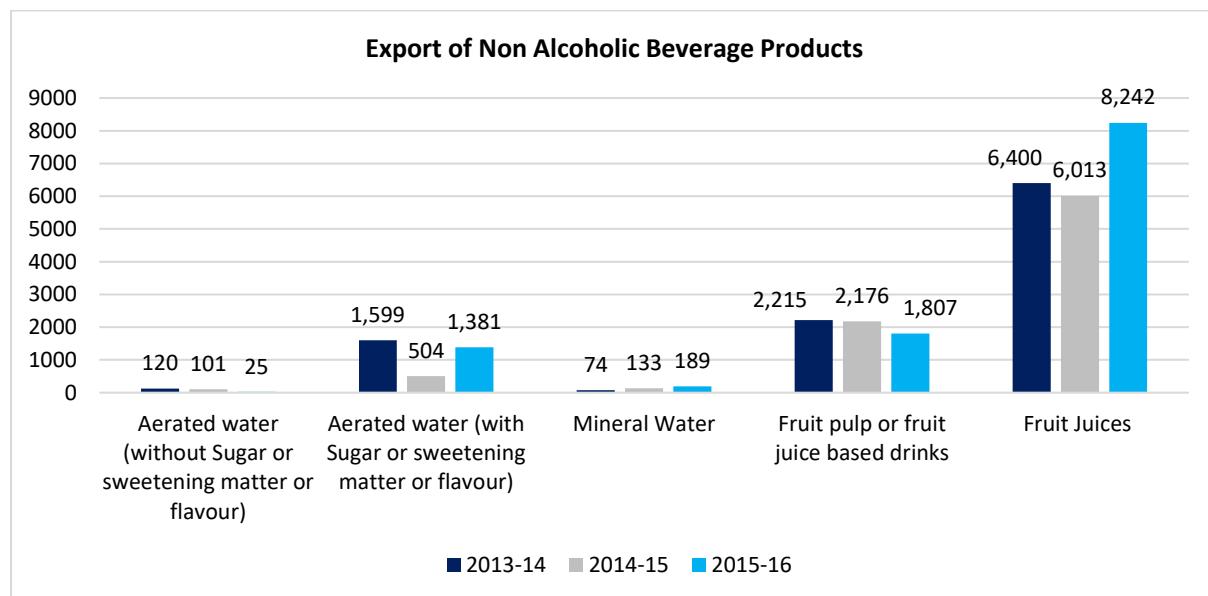
¹⁶ Source: FNB (www.fnbnews.com)

Some key categories of Non-Alcoholic beverages exported by India in 2015-16 are presented in the table below:

Non-Alcoholic Beverages	HS Code	Value of exports (In USD thousand)	Quantity (In litres)	Major Export Partners
Aerated water (without Sugar or sweetening matter or flavour)	22011020	25	32,355	Bhutan, USA, and Australia
Aerated water (with Sugar or sweetening matter or flavour)	22021010	1,381	24,58,389	Nepal, USA, and Bhutan
Mineral water	22011010	189	5,28,107	Nepal, Switzerland, and Singapore
Fruit pulp or fruit juice based drinks	22029020	1,807	1,658,160	USA, UK, and Nepal
Fruit Juices	2009	8,242	5,273,000	Netherlands, USA, and UK

Source: UN Comtrade (www.comtrade.un.org)

The segment-wise export trend over a period of 3-years of certain key non-alcoholic beverages is presented below: -



Source: UN Comtrade (www.comtrade.un.org)

3.7.2 Import Trend

Fruit based drinks dominate the import segment within the Non-Alcoholic beverage category. The considerable increase in the import of fruit pulp or fruit juice based drink in India is attributable to the inclination of consumers towards healthier drinks.

HS Code	Product Description	Import value (In USD million) in 2015-16
2201	Waters, incl. natural or artificial mineral waters and aerated waters, not containing added sugar, other sweetening matter or flavoured; ice and snow	0.590
2202	Waters, incl. mineral waters and aerated waters, containing added sugar or other sweetening matter or flavoured, and other non-alcoholic beverages (excluding fruit or vegetable juices and milk)	121.03
2009	Fruit juices (incl. grape must) and vegetable juices, unfermented, not containing added spirit, whether or not containing added sugar or other sweetening matter	33.333
Total Imports		USD 154.9 Million

Source: UN Comtrade (www.comtrade.un.org)

The value of various categories of Non-Alcoholic beverages imported in India in the year 2015-16 stands at USD 154.9 Million

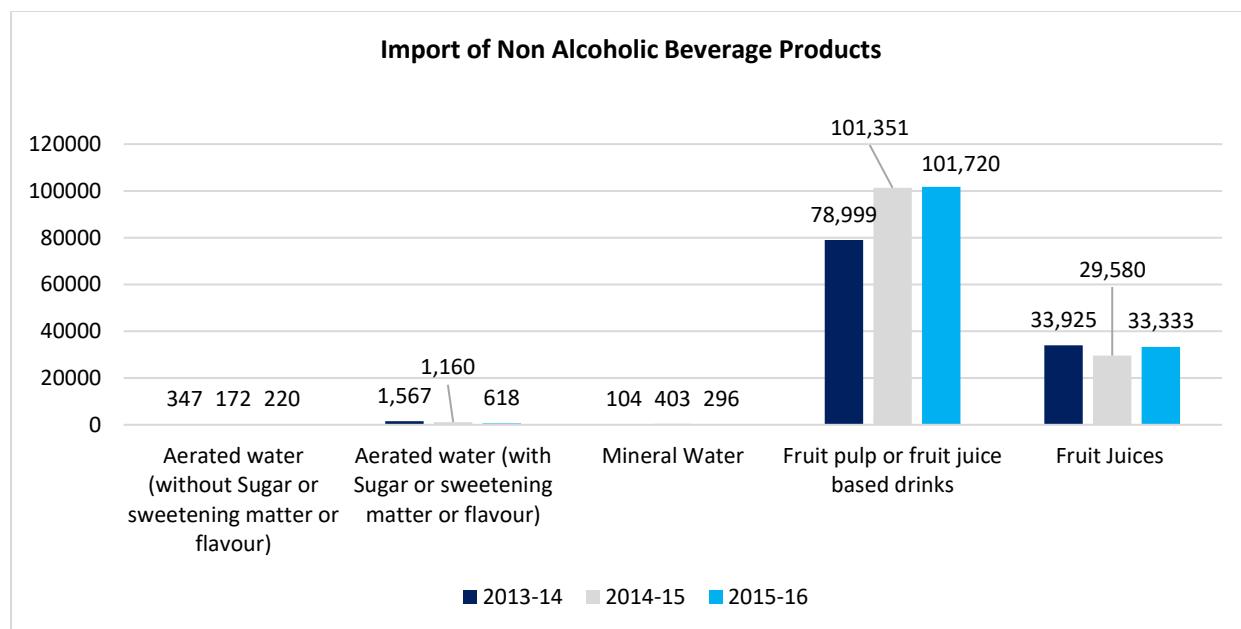
Some of the key categories of Non-Alcoholic beverage imported by India in 2015-16 are presented in the table below.

Non-Alcoholic Beverages	HS Code	Value of imports (In USD thousand)	Quantity (In litres)	Major Import Partners
Aerated water (without Sugar or sweetening matter)	22011020	220	3,29,976	Italy, Australia, and UAE

or flavour)				
Aerated water (with Sugar or sweetening matter or flavour)	22021010	618	9,93,212	Bangladesh, Malaysia, and UAE
Mineral water	22011010	296	5,17,367	Bhutan, Singapore, and Norway
Fruit pulp or fruit juice based drinks	22029020	101,720	8,29,74,789	Nepal, Sri Lanka, and Bangladesh
Fruit Juices	2009	33,333	20,893,000	USA, China, and Israel

Source: UN Comtrade (www.comtrade.un.org)

The segment-wise import trend over a period of 3-years of key categories of Non-Alcoholic beverage is presented below :-



All Fig in USD Thousand

Source: UN Comtrade (www.comtrade.un.org)

3.7.3 Share in India's Total Foreign Trade

The share of import and export of non-alcoholic beverages is negligible as compared to India's total foreign trade. However, the value of import is higher than the value of exports in 2015-16. The data exhibiting regarding the same is as follows: -

Export of Non-Alcoholic Beverages	Total Exports	Share in India's Total Foreign Trade
USD 21.4 million	USD 264,381 million	0.0081%

Source: UN Comtrade (www.comtrade.un.org)

Import of Non-Alcoholic Beverages	Total Imports	Share in India's Total Foreign Trade
USD 154. million	USD 390,744 million	0.039%

Source: UN Comtrade (www.comtrade.un.org)

Orange Juice

Brazil is one of the largest exporter of orange juice in the world and exports to the Indian market as well. To exhibit the same the import details of the year 2015-16 are mentioned below

HS Code	Product Description	Import value from world (USD '000)	Import value from Brazil (USD '000)	Major exporters to India
20091	Orange Juice			
20091100	Frozen	8,010	2,020	Israel, Brazil, and USA
20091200	Not Frozen, of a brix value not exceeding 20	150	-	Israel, France, and Germany
20091900	Other	926	-	South Africa, UAE, and Thailand

Source: UN Comtrade (www.comtrade.un.org)

Indian Import and export trend of Orange juice over a period of 3 years as follows:

	2013-14	2014-15	2015-16
Import	8,612	5,745	9,028
Export	521	387	336

Source: UN Comtrade (www.comtrade.un.org)

*All values in USD Thousand

3.8 Import Tariffs & Duties

Customs Duty is a type of indirect tax levied on goods imported into India. Import duties are generally classified into the following categories in India:

- Basic Duty
- Additional Custom Duty
- CVD – Countervailing Duty
- Education Cess
- Health Cess- Cess applied on certain food products in India

The below mentioned HS codes are considered for non- alcoholic beverages in India:

HS Code	Item Description	Custom Duty (Effective)	
22011010	Mineral Water	Customs Basic Duty:	30
		Education Cess:	2
		Secondary and Higher Edu. Cess:	1
		Countervailing Duty (CVD):	12.5
		Additional CVD	4
		Net Effective Duty	53.543%
<hr/>			
22011020	Aerated Waters- Not Containing Added Sugar or Other Sweetening Matter Nor Flavoured	Customs Basic Duty:	30
		Education Cess:	2
		Secondary and Higher Edu. Cess:	1
		Countervailing Duty (CVD):	12.5
		Additional CVD	4
		Net Effective Duty	53.543%
<hr/>			
22021010	Aerated Waters- Containing Added Sugar or Other Sweetening Matter or Flavoured	Customs Basic Duty:	30
		Education Cess:	2
		Secondary and Higher Edu. Cess:	1
		Countervailing Duty (CVD):	21
		Health Cess	5
		Additional CVD	4
		Net Effective Duty	72.140%

22029020	Fruit pulp or fruit juice based drinks	Customs Basic Duty:	30
		Education Cess:	2
		Secondary and Higher Edu. Cess:	1
		Countervailing Duty (CVD):	6
		Additional CVD	4
		Net Effective Duty	44.491%
20091100	Fruit Juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter : Orange Juice (Frozen)	Customs Basic Duty:	35
		Education Cess:	2
		Secondary and Higher Edu. Cess:	1
		Countervailing Duty (CVD):	6
		Additional CVD	4
		Net Effective Duty	50.169%
20091200	Fruit Juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter : Orange Juice Not frozen, of a Brix value not exceeding 20	Customs Basic Duty:	35
		Education Cess:	2
		Secondary and Higher Edu. Cess:	1
		Countervailing Duty (CVD):	6
		Additional CVD	4
		Net Effective Duty	50.169%
20091900	Fruit Juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing	Customs Basic Duty:	35
		Education Cess:	2
		Secondary and Higher Edu. Cess:	1
		Countervailing Duty (CVD):	6
		Additional CVD	4

	added sugar or other sweetening matter : Orange Juice (Other)		
		Net Effective Duty	50.169%

Source: Ice gate (www.icegate.gov.in)



4.0 Opportunity for Brazilian Products

4.0 Opportunity Assessment for Brazilian Products

This Go-To-Market Strategy is based on T&A Analysis of the Indian Non-Alcoholic Beverage Sector on basis of the potential for Brazilian products.

Export Potential			
	High Potential	Medium Potential	Low Potential
Fruit Juice Based Drinks-Orange	√		
Fruit Pulp-Orange	√		
Bottled Water-Premium Segment		√	
Potential for Investments in India			
Fruit Processing Units	√		
Entry Barriers			
<ul style="list-style-type: none"> In terms of export of Fruit drink based products and pulps to India, the segment attracts reasonably high duties between 45-50%. However, the duties are relatively moderate compared to other beverage products wherein duties range between 75% to 100%. The bottled water segments, attracts duties of about 50%, however this segment caters to a niche clientele and the high duties are offset through premium pricing since imported bottled water are generally positioned as premium products in India. In terms of investment in Fruit processing units, the Government of India now permits upto 100% FDI in automatic route to facilitate food processing in India. This has in turn generated interest from various foreign players to set up processing units in India. 			
Target Segments			
<ul style="list-style-type: none"> Bulk Segment-Processed Fruit Importers and Resellers for Fruit based drinks and pulps Retail Segment- HoReCa, Importers of Beverage products in Tier I Cities in India for Premium Bottled Water and Fruit based drinks. 			
Sl. No.	Tier I Cities		
1	Bangalore		
2	Chennai		
3	NCR ¹⁷ (National Capital Region)- Mainly Delhi & Gurgaon		
4	Hyderabad		
5	Kolkata		
6	Mumbai		

¹⁷ NCR (National Capital Region): NCR is a coordinated planning region centred upon the National Capital Territory of Delhi in India. A total of 22 districts in three neighbouring states of Haryana, Uttar Pradesh, and Rajasthan along with whole of the National Capital Territory of Delhi constitute the National Capital Region (NCR) of India.

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Market Insights

- India is currently a net importer of Fruit pulps, Fruit based drink and mineral/ bottled water. In the year 2015-16, India imported almost 13 times more fruit pulp/juice drinks than its total exports.
- In terms of Fruit based drink segment, mango based products currently dominate the market. However, the Indian consumers are moving towards experimenting with new fruits and healthier version of drinks with natural contents. Orange is the leading flavor in the 100% fruit and nectar content segment of Fruit Beverages.
- The premium bottles water segment is increasingly catching the attention of health-conscious consumers. This segment accounts for about 2-3 percent of the overall bottled water market in India. Due to growing demand in this segment, several Indian manufacturers have recently (over the last 5 years) launched natural mineral water products, a segment previously occupied by premium imported brands.



5.0 Potential Distributor Mapping

5.0 Potential Distributor Mapping

Sl. No	Name of the company	Location	Website
1	L-Comps & Impex Private Limited	Delhi	www.lcomps.com
2	V&V Beverages Pvt. Ltd.	Gurgaon (NCR)	www.vnvbeverages.com
3	Max Foods Corporation	Delhi	www.maxfoods.in
4	Saksham Impex Pvt. Ltd.	Delhi	www.sakshamimpex.com
5	Tan Business Ventures Pvt Ltd	Chennai	www.tbv.in
6	Sserenee International	Delhi	www.sserenee.com
7	Hema Connoisseur Collections (P) Limited	Delhi	www.hema.in
8	Pegasus Imports	Mumbai	www.indiafnb.com
9	Tree of Life Pvt. Ltd.	Mumbai	www.tolindia.com
10	Inducia Food & Beverages International Pvt.Ltd.	Delhi	www.inducia.wordpress.com



6.0 Key Influencers

6.0 Key Influencers

Sl. No.	Key Influencer	Website
1	Indian Beverage Association	www.in-beverage.org
2	The Food Safety and Standards Authority of India (FSSAI)	www.fssai.gov.in
3	All India Food Processors' Association (AIFPA)	www.aifpa.net
4	Agricultural & Processed Food Products Export Development Authority (APEDA)	www.apeda.gov.in
5	Protein Foods & Nutrition Development Association of India (PFNDI)	www.pfndai.com
6	Forum of Indian Food Importers (FIFI)	www.fifi.in



7.0 Major Trade Events

7.0 Major Trade Events

Sl. No.	Trade Events	Dates	Venue	Website	Frequency of the Event
1	Food Hospitality World	22 nd -24 th August, 2017	Bangalore International Exhibition Centre Bangalore (Karnataka)	www.fhwexpo.com	Tri Annual- 3 times a year
2	International Food & Drink Expo India	21 st -23 rd August, 2017	Pragati Maidan (New Delhi)	www.foodtecindia.com	Annual
3	World of food India	14 th -16 th September, 2017	Bombay Exhibition Centre, Goregaon, Mumbai (Maharashtra)	www.worldoffoodindia.com	Annual
4	Food Ingredients & Flavours Expo	27 th -28 th June, 2017	Pragati Maidan (New Delhi)	www.meraevents.com/event/foodingredientsandflavours	(Launch Event, no previous editions)
5	AAHAR – The International Food & Hospitality Fair	7th to 11th March, 2017	Pragati Maidan (New Delhi)	www.indiatradefair.com	Annual