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Retail Food Sector: South India 1999

**Office of Agricultural Affairs
U.S. Embassy, New Delhi**

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Report Highlights:

The retail food sector is modernizing in South India faster than in other parts of the country. While an overwhelming percentage of the food items sold in South Indian “supermarkets” are produced locally, recent amendments to India’s export-import policy have opened the door to more foreign products. For food exporters wanting to test the Indian market, South India may be the place to begin.

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I. Executive Summary

South India's retail food sector is undergoing a slow but steady transformation. Notable improvements have been made in the past three years. However, relative to the population size and increasing purchasing power within the middle and upper classes, growth in India's retail food sector has been slower than in most other Asian countries. This is due in part to strict controls on imported foods, low incomes, and a strong preference for traditional Indian cooking.

In general, South India's retail food outlets are growing in both size and selection, offering more packaged dry foods, some pre-packed fruits and vegetables, frozen foods, and a variety of beauty, health and cleaning products. Stores range from small grocery stalls about 15 square feet in size offering around 300 products, to 4,000 foot supermarkets carrying thousands of products. Over 97 percent of the retail foods available in South Indian supermarkets are domestically manufactured. Regarding imported products, there is an awareness at the dealer level, but little to no consumer awareness at the retail level.

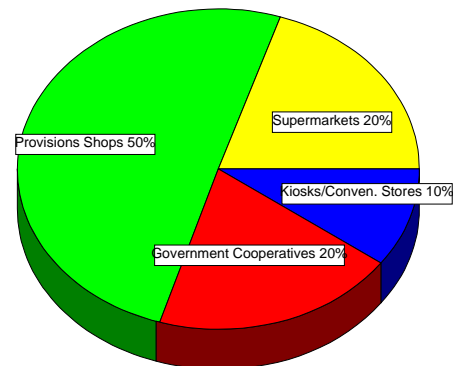
There are no reliable data on total retail food sales in South India. In addition, there are no hypermarkets or club warehouses. Instead, shopping in India is compartmentalized -- consumers visit different shops or open markets for different products. No one outlet supplies all the shopper's needs. Larger supermarkets are visited once or twice a month to stock up on staples, while smaller outlets such as the local provisions shop are visited on average every other day for odds and ends.

Approximately 20 percent of South India's urban population shop in private, western-style supermarkets. These include "Mom & Pop" shops as most South Indian supermarkets are relatively small. Most retailers offer home delivery at no added charge. Nearly 95 percent of consumers purchase fresh fruit and vegetables from a local market or street vendor. Rice, flour, sugar and spices are often purchased at government cooperatives or local provisions shops. Fish and seafood are purchased in wet markets, and meat is purchased from government-run cooperatives or private shops. Most meat outlets typically have limited or no cold storage.

Throughout India there is also a large unorganized (black) market which includes door to door sales and other unconventional means of food distribution -- all of which are virtually impossible to track. By avoiding taxes and customs duties, such merchants offer better prices than those in the organized sector. Transactions are on a cash-only basis.

Consumer oriented foods made up an estimated 28 percent or \$56.8 million of the \$201.4 million of agricultural products exported from the United States to India in 1998. However, it must be noted that exports of tree nuts alone were valued at \$51 million. Exports of US consumer oriented food products to India grew 59 percent from 1994-1998. There are no estimates for transshipped or unaccounted imports from the United States.

Retail Outlet Share of Market



Recent amendments to India's export-import policy have increased the number of imported foods allowed into India. Some (like the local dairy industry) have expressed fears of a retail revolution. Others believe there will be little change in value or volume -- a case of imported products occupying mind share rather than market share. For more information on these new policies, refer to report #IN9015 dated 4/1/99 entitled, "India Opens Door to 390 Additional Ag Products," or #IN8032 dated 5/26/98 entitled, "Agricultural Trade Barriers, 1998."

Advantages	Challenges
New government policy allowing 390 new agricultural imports into India previously subject to licensing requirements (effectively banning their import).	Indian market still closed to many high value and packaged products.
	Non-tariff barriers to trade such as unrealistically high quality standards for imported products are on the rise.
Private supermarkets growing in number & popularity offering many new products.	Private supermarkets viewed as expensive and attract only higher-middle and upper class consumers.
	Importers and retailers lack knowledge and training in purchasing, handling, and merchandising of US products.
	The majority of Indians cannot afford imported foods. The number one purchasing characteristic consumers look for is price, not brand or product origin.
	Less than 20 percent of South Indian women have jobs. There is little perceived need for convenience foods.
Leading multinationals from the US and Europe have already established food processing ventures in India including PepsiCo, Coca Cola, Pillsbury, Conagra, Unilever, Cadbury, Nestle, and Kellogg's.	American foods/brands have little presence in the Indian marketplace. Local consumers have limited exposure to American foods and tastes.
Frozen foods and other ready-to-eat processed foods are appearing in the market.	Less than 25 percent of the urban South Indian population owns a refrigerator. Even fewer own freezers.
	South Indians have a strong preference for freshly prepared foods.
	There is limited infrastructure for distribution and/or sales of chilled and frozen foods.

II. Road Map for Market Entry

A. Consumer Profile

According to the Central Statistical Organization, within the past nine years Indian consumers are spending 20 percent more on durable goods and food items. However, according to a report of the National Council of Applied Economic Research, the average expenditure of an urban household during 1995-96 for durable goods and food was Rs 6,263 (approx. US \$149). In contrast, the average annual expenditure of the rural household was Rs 3,258 (approx. US \$78). The national average was Rs 4,000 (US \$95) per household. Rural Pondicherry had the lowest average household expenditure at Rs 2,176 (US \$52) while Tamil Nadu was almost as low at Rs 2,443 (US \$58).

Many less privileged South Indians -- the majority of the population -- spend under US \$1 per day on food. Meals consist of curried vegetables, rice and/or Indian breads. Meat, though available, is regularly consumed by less than 40 percent of the South Indian population due to its higher cost and a predominance of vegetarianism and Hinduism. Non-vegetarians typically consume meat only once or

twice per week.

Not to be overlooked is the impact of "black money," or income not reported to Indian authorities. Though difficult to quantify, black money contributes to an enormous underground flow of funds and increased purchasing power for the select few. That said, however, less than 15 percent of the South Indian population fall within the potential market for imported foods. For more information on consumer incomes, refer to report # IN8041 dated 7/15/98 entitled, "Annual Marketing Plan -- Consumer Food Products Market."

Of households able to afford Western imports, most have servants who do the time intensive work involved in purchasing, cleaning and preparing foods. Such labor costs are minimal. Together with the low cost of fruits, vegetables and Indian groceries, freshly prepared foods are considered far superior and less expensive than higher priced processed (imported) foods. As a result, when it comes to purchasing habits, food preparation and consumption, changes observed today in other parts of the developing world have largely not been emulated in India due to the prevalence of household servants. Though more women are entering the work force and families are smaller, these factors have not necessarily led to an increased consumption of processed foods in India.

Due to the small selection of processed foods, brands are in their infancy. Packaging is modest, offering only limited product information. Cans and other package features adding extra cost are discouraged as Indian consumers are extremely price sensitive. Labels are sometimes written in any one of the 19 local languages spoken in South India, depending on where the product was manufactured.

Also not to be overlooked, India is regionally diverse when it comes to food tastes and preferences. Some say the different states within India are like different countries when it comes food. For example, Bangalore residents are more willing to try new foods than those in other South Indian cities. Frozen foods were introduced in Madras supermarkets just six months ago with limited success; however in Bangalore, frozen foods have been available for the past three years. Bangalore also has the highest number of upscale restaurants, pubs, and night clubs in comparison to Madras which is an older, more conservative city. Ready to eat foods, breads and dairy products are more developed in Bangalore. As Bangalore is home to a more skilled labor force than Madras, many multinational corporations (MNC's) test market new products in Bangalore due to its progressive nature.

B. Supermarkets

Only in the past five to ten years have South Indians been exposed to self-service supermarket shopping. Small provisional stalls have otherwise been the shopping norm for half a century, offering a limited selection of staples in bulk form. More and more MNC's entering the market have resulted in new products and improved packaging. Local food producers have been forced to raise quality standards and increase product offerings to keep pace with foreign influences.

Today only one supermarket (Food World) qualifies as a true chain store with 29 outlets across South India and one purchasing center for all locations. Food World started with one store in 1996. By June 2000 they intend to have 55 stores. Their five-year plan calls for four-fold growth.

Nilgiris is another popular South Indian supermarket with 18 locations, 11 of which are franchises. Nilgiris' goal is to have over 200 stores throughout India by 2007. They have 1,100 branded products of their own which are both distributed to other South Indian retailers and exported to Sri Lanka, Singapore, Germany, and Australia. Unlike other retailers, Nilgiris is interested in pursuing direct relationships with American food manufacturers. They have worked directly with the American Dry Pea and Lentil Council to import American dried green peas direct from the U.S. in bulk. Nilgiris packages and

redistributes the peas to their own stores and sells to other retailers.

Supermarket Name	Ownership	Location	Number of Outlets	Type of Purchasing Agent
Food World	Indian/Hong Kong	South India, Pune	29	Agents, distributors
Nilgiris	Indian	Bangalore, Madras Vizag, Pondicherry, Karnataka, Tamil Nadu	18	Agents, distributors, direct, importers
Vitan	Indian	Madras	10	
5-Star	Indian	Madras, Mahabalipuram	6	Agents, distributors
Yeses	Indian	Madras	1	Direct, agents, distributors, importers
Amma Nanna	Indian	Madras	1	Agents, distributors
Akshaya Departmental Store	Indian	Madras	1	Agents, distributors
Amudan	Indian -- (state government)	Madras, Coimbatore, Mumbai	30 in Madras	Direct from Indian manufacturer - no imports
Kamadhenu Cooperative	NCCFI	South Madras	12	Direct from Indian manufacturer - no imports
ChinThamani	NCCFI	Madras	6	Direct from Indian manufacturer - no imports

For the larger food retailers such as Nilgiris and Food World, nationwide plans for expansion are hampered by the lack of reliable interstate transportation, complex taxation between states, and limited cold storage facilities. Outside the major metropolitan areas, India is an intricate network of rural villages. Poor roads make many rural districts inaccessible.

Vitan in Madras has 10 locations (6 of which are franchises) and a central administrative office. All new products require head office approval, but purchasing is organized independently by each store. There are a handful of larger upscale Western style supermarkets, each with only one location. Hundreds of small Mom & Pop shops also qualify as supermarkets based on their product offerings. Yeses and Amma Nanna are two private supermarkets offering the most extensive range of imported foods. Both cater more to expatriate and upper class consumers.

A few of the larger supermarkets offer fresh fruits and vegetables either in-store or immediately outside the door. Food World's fruit and vegetable sales have expanded seventeen-fold in the last three years. Only larger supermarkets are automated with bar codes and scanners. Many stores do not even use cash registers. Sales and inventory are tallied manually -- sometimes in a rather haphazard fashion.

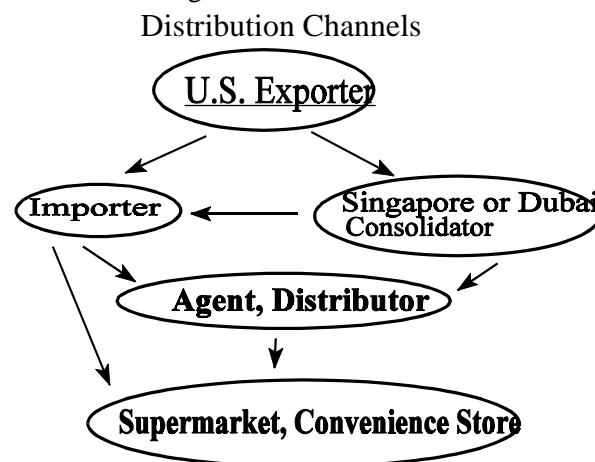
Frozen foods are relatively new to Madras and retailers feature small, top-loading freezers owned and

placed by the frozen food supplier (Sumeru Seafood and Green Gold vegetables). Products include small packs of frozen fish sticks and patties, prawns, processed chicken patties, frozen chicken parts, chicken and lamb samosas, pre-cut vegetables, and french fries. Major retailers (Food World & Nilgiris) have more freezers in Bangalore than in Madras (7 in their main Bangalore locations). Bangalore supermarkets also feature frozen mutton and beef. There are currently no imported frozen foods in South India.

Government-run food stores sell only local products and are not as inviting as the cleaner, more modern air-conditioned supermarkets. These stores cater to upper, lower and middle-income consumers. Products are stacked to the ceiling and cases flood the aisles. What government stores lack in appearance and comfort, they make up for in price savings to the consumer. Products are packaged, both branded and unbranded, and are often the same as those sold in private supermarkets. Government stores offer no fresh produce, no refrigerated or frozen foods. Depending upon the chain, these stores are affiliated with either a state government or the National Cooperative Consumers Federation of India (NCCFI) -- a part of the central government in New Delhi.

Distribution Channels

- # Most American products are transshipped through regional hubs such as Dubai and Singapore due to their liberal trade policies and efficient handling.
- # The major importers are located in Mumbai, Goa, Calcutta, and New Delhi.
- # Established distribution patterns are slowly giving way to more streamlined operations.
- # Best guesstimates indicate 50 percent of imported foods enter the South Indian market via legal channels and 50 percent enter through the black market.



The traditional retail system consisting of many small provisional shops has created a multi-layered distribution system in India. Typically, there are a minimum of three middlemen between the manufacturer and retailer. Unable to personally reach so many small retailers, manufacturers work with agents who sell to distributors, who sell to wholesalers, who sell to retailers.

All packaged food items in India are stamped from the manufacturer with an MRS amount -- maximum rupees that can be charged at the retail level. The MRS often dictates the margin for not only the retailer but also the distributor, wholesaler, and other middlemen. Typical margins for a distributor, wholesaler and retailer are 4-5, 3-4, and 10-25 percent, respectively. Wholesalers remain profitable only by keeping

costs low and turnover high. Many wholesalers operate out of wholesale markets.

With the cost of establishing warehouses becoming extremely high, clearing and forwarding agents (C&F) are fast becoming the norm. Nilgiris is currently in the process of setting up warehouses in Bangalore and Chennai, along with C&F agents for distribution of its branded products.

Food World recently initiated direct relationships with seven large manufacturers to eliminate the middlemen. While government cooperatives have always purchased product directly from the manufacturer, private retailers have previously been too small to warrant direct purchases. Government cooperatives cut prices 5 to 6 percent by buying direct. Time will tell if such savings are also extended to Food World's customers.

Larger supermarkets typically deal with over 400 distributors/suppliers, each handling 3 to 4 products. Some stores contact as many as 15 distributors for imported chocolates and snack foods alone. Some packaged foods such as "Orville Redenbocker's" microwave popcorn and "Betty Crocker" fruit rollups enter illegally. Other products, including Pillsbury cake mixes, Blue Diamond almonds, and Green Giant canned corn enter legally in bulk and are repackaged in country.

Many believe the recent loosening of import restrictions will not affect black market sales due to the cost savings retailers enjoy. These savings are not handed down to the consumer, but are reserved for the retailer. For example, a given product purchased through a black market agent might cost Rs 65, while a legal importer may charge Rs 85. The retailer price is Rs 90 which equates to a 20 percent difference in profit.

One problem with black market goods is expiration. Once black market goods are purchased, there is no future contact with the agent -- no quality control and no stock turnover when the product expires. Losses accrue to the retailer if customers don't purchase these products.

Black market imports are acquired by retailers through local bazaars or agents who work with smugglers who routinely fly products into the country via suitcases. Such products can often be identified on retailers shelves by damaged packaging due to suitcase stuffing. Otherwise, products are smuggled out of local bonded duty-free warehouses.

Licensed importers and their agents offer more reliable product selection and enable retailers to order specific products as well. Also important, they provide a proper bill, making accounting for product purchases easier. In comparison, black market vendors offer limited numbers of product and only on a random, cash-only basis.

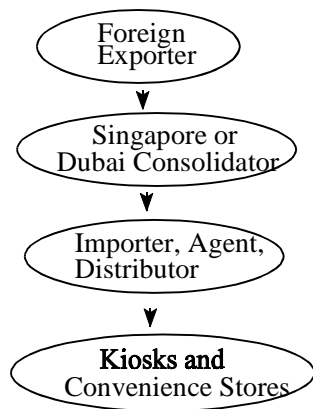
For more information on distribution, refer to report number IN7065 dated 7/9/97 entitled, "Food Retailing and Distribution in India."

C. Juice Bars, Gas Marts, Kiosks

- # Gas station minimarts are relatively new to South India. They depend on agents and distributors that cater to supermarkets for both imported and local products.
- # Because volumes are small, kiosks rely on agents and distributors that also supply for supermarkets.
- # Fresh juice bars and road side stalls are plentiful, but do not sell imported products.

There are thousands of tiny kiosks throughout South India offering biscuits, local Indian snacks ("short eats"), chocolate bars (local and imported), ice cream, and some fruit. Prices are low to appeal to the

lower castes.



A recent addition to the retail food scene is Bharat Petroleum's chain of 18 gas station mini marts ("bazaars") in South India. Indian Oil also has 22 such outlets called ConveniO's. These outlets are open until 2:00 am -- much later than kiosks or small grocers. In addition, they carry an impressive range of products, including imported jams, confectionery products, snack foods, magazines, toiletries, and even frozen seafood. However, these convenience stores cater to an extremely small percentage of the population. Prices are high, and only those able to afford their own car or motor bike would ever stop at a gas station in the first place.

D. Traditional Markets - Provisions Shops; Meat Shops; Fruit, Vegetable and Wet Markets

- # Vegetables are typically supplied to markets by local farmers and smaller wholesalers.
- # No imported food products are available in any of the traditional markets.
- # India's underdeveloped infrastructure severely limits the size of the wholesalers that supply traditional markets.
- # The number of middlemen involved for fruits, vegetables, meats, seafood, and bulk staples is greater than that for processed, packaged foods.

There can be typically up to six middlemen between the fruit/vegetable farmer and the consumer. Marketing of meat and seafood products involves varying numbers of intermediaries depending on the distance products are moved. Because fresh produce, meat and seafood have no added processing or packaging costs, prices are generally low in traditional markets. Though the supplier may be the same, private supermarkets command higher prices than traditional markets for fruits and vegetables though packaging is minimal or non-existent.

It is estimated that only 2 to 4 percent of India's total production of fruits and vegetables are processed and packaged. Other developing countries such as Malaysia process more than 70 percent of their fruits and vegetables. In India, however, most of the raw food products are sold as primary products in and around production centers. The decentralized nature of production equates to small-scale operations with limited quantities from any one farmer.

As with processed foods, the selection of vegetables and fruits in Bangalore is larger and offers greater variety than in Madras. This is likely because Bangalore is closer to Ooty, one of the major production areas in South India.

For staples like rice, sugar, *dahl* and oil, the majority of South Indians visit their local provisions shop. These stores offer exclusively Indian products. With the exception of a few locally packaged snacks, most products are sold in bulk. Purchases are wrapped in newspaper and tied with string.

Provisions shops buy from an average of 10 distributors. Larger customer purchases coincide with pay periods from the 1st through the 10th of each month. Otherwise, purchases are small, ranging from 50 paise to Rs 10 (less than US \$0.25). Daily sales average around Rs 2,000 (less than US \$50). There are thousands of small provisions shops throughout South India, often run by a husband and wife team.

Some also sell small quantities of fruit and vegetables.

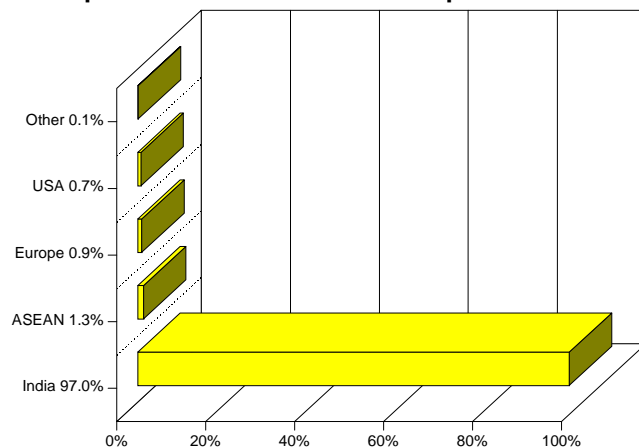
Most consumers prefer the local provisions shop to larger supermarkets because of proximity, personal attention, and lower prices. Traditional shops and markets are also preferred by servants who do much of the shopping for middle class and rich families. Additionally, traditional markets are considered the freshest source for foods. Because South Indians have a strong preference for freshly prepared foods, there is a definite prejudice among the masses against packaged, branded, or processed foods due to possible loss of flavor and nutrients. Many households will not even reheat foods, and make only enough for one meal. This is mainly to avoid waste, but also to ensure absolute freshness as refrigeration is unavailable except in wealthier households.

III. Competition

Imported foods typically consist of only 3 to 4 percent of a western-style supermarket's product offerings.

The biggest competitor in retail foods is India. Until recently, the central government has enforced strict controls to ensure Indian products dominate the market. In addition, most local products, are priced lower than imported products, though quality tends to be inferior. Higher prices on imported foods result from government-imposed tariffs which begin at 40 percent (plus a special 5 percent duty). Import tariffs on beer, wines and other fermented beverages are more than 100 percent. Complicating matters are unclear sanitary and phyto sanitary regulations for imported products.

Competition - Local & Imported Foods



The geographic proximity of New Zealand, Australia, and some European countries reduces transport costs. Retailers say the French and Dutch are working hard to penetrate the Indian market and have made some progress with jams and jellies. Europeans in general, and more specifically the English, have a long history of trade with India. However, with the exception of chocolates, cookies, crackers, some sauces and canned meats, food has not been a major focus for European exports until recently. The Australians are also strengthening their efforts to enter the Indian market.

Malaysia, Korea, Thailand, and the United Arab Emirates provide chocolates, hard candies, cookies, crackers, and cereals on a regular basis. Oman and other Middle Eastern countries offer dried fruits and nuts to the Indian market. American products include Ragu spaghetti sauces; Kraft mayonnaise and salad dressings; Hershey's chocolate syrup; Orville Redenbockers pop corn; Betty Crocker fruit rollups; tortilla chips; Pillsbury cake mixes and wheat flour; Blue Diamond almonds; Del Monte and Sunsweet prunes and raisins; Old El Paso Mexican foods; Dole fruit juices; Campbells soups; Pringles Potato Crisps; Planters cheese balls; peanut butter; canned ham; canned corn and canned salmon. While the US offers the most varied product selection, availability is random and volume minimal for many of these items.

Consumers typically spend Rs 5 to 25 for locally produced chocolates, cookies, or other snacks versus higher priced imports. An imported Lindt chocolate bar (which entered the market in February 1999)

costs Rs 125 and an imported Snickers bar is Rs 35. Such differences in price clearly limit the target market for imported chocolates.

Package sizes and sales volumes are also approached differently in India. Most retailers buy only five to ten units of a given US product at one time. None can afford to purchase an entire container. Additionally, they are unwilling to take the risk of influencing importer purchases for large quantities of unproven products. Americans would do well to find ways of exporting smaller quantities for product introductions and test marketing.

Similarly, retail packaging is typically small in India and there are no discounts for buying larger quantities or larger pack sizes. One retailer stated that Pillsbury cake mixes initially did poorly due to a large package. After scaling down the package and price, sales picked up.

IV. Best Products Perspective

When considering potential best products, one must not underestimate the established tastes and extensive traditions of Indian cooking. One product, Modern Bread, which was actually an Indian effort to conform to what might be considered a Western food, took 20 years to establish itself. After that, many started making money on bread -- but not Modern. That said, there are phenomenal generational changes taking place throughout India. Where available, young adults, teenagers and small children frequent KFC, Pizza Hut, and McDonalds. In the more conservative cities like Madras, however, these chains (with the exception of pizza outlets) have no presence as the authorities want to preserve traditional establishments. In time this will change.

Both KFC and McDonalds have had to alter their menus to cater to local tastes. Spices are strong and hot. Most retailers believe Indian diet patterns will not change to accommodate foreign tastes. Consistent with this theory, the best retail products today include *dahl*, rice, and Indian groceries such as chutneys, pickle, and spices.

Imported products South Indian retailers express an interest in selling include:

canned cherries	fresh juices
raisins	snacks (sweet and savory)
almonds	pulses (red lentils in particular)
chocolates	canned foods (meats, vegetables, cheese, etc.)
cheese	saucers (BBQ, spicy saucers, chocolate saucers)
macaronis & pastas	frozen products (but poor infrastructure remains an obstacle)
health foods (India offers little in this area, but demand is growing)	

Chocolates and snack foods are growth areas for retailers. One retailer even believes local snacks will be phased out in the long run by imports. This is unlikely given the low pricing and variety of popular South Indian snacks. Pringles Potato Crisps recently entered the market via both legal and illegal channels. Though they are restricted for import, one licensed importer managed to reclassify them under a different product type.

Another growth area is bakeries (both independent and within supermarkets). Growing potential exists for foreign food producers to supply ingredients such as cheese powders, extracts, flavorings, bases,

baking ingredients, dried fruit and nuts. In some cases, US food ingredients that add value to local products may be more welcome in the local market than finished products.

When asked if he saw fresh meats as an area for expansion, one retailer expressed concerns regarding the lack of expertise, the need for strict hygiene, and proper retail ambiance. Fresh meat requires infrastructure and training currently unavailable in India. In addition, vegetarians strongly discourage the sale of fresh meats in South Indian supermarkets, while many non-veg consumers have limited knowledge of meat preparation. As a result, imported chilled and frozen meats offer limited potential in South India due to the lack of infrastructure and limited consumer acceptance.

Processed Indian foods are making some headway. Powdered coconut chutney, for example, was recently introduced and simply requires hot water. Canned curry was briefly available in the early 80's, but once it became a profitable export, it was no longer available for local consumption. Perhaps in the coming decade MNC's will market instant foods such as *chapati* with *subje*, or *chapati* with *butter paneer* that can be heated in the microwave or on a gas burner. But the Indian market is not ready for that today -- not in terms of price and certainly not in terms of volume.

On a final note, a large number of foreign companies have overestimated market opportunities in India. They have come with high expectations of selling so many products per hundred population without realizing India has the people but not the money to buy. While a small fraction of the population does wield tremendous wealth, this group is not representative of the majority. Those products that do well in India cater on a large-scale not only to the upper classes, but also lower income consumers -- many of which are illiterate.

American exporters must also recognize the definite constraints to growth in South India, particularly the inadequate infrastructure (ports, roads, cold storage, and distribution network). While many agree the potential for retail foods is enormous in South India, this market is not for the faint-hearted. Market research, careful planning and patience are required.

For additional information on this complex market, Pune-based Chordia Technologies will soon launch a comprehensive data base in CD-ROM format covering the food business in India.

V. Post Contact and Further Information

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