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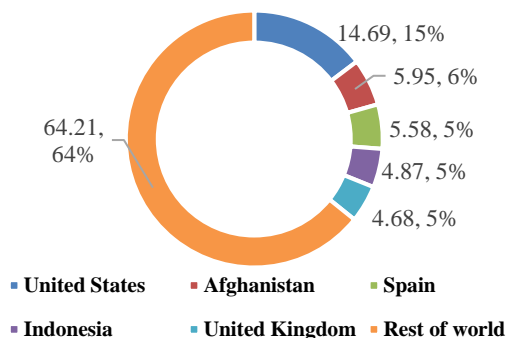
Approved By: Joanna Brown, Agricultural Attaché

Report Highlights:

India continues its rapid economic growth journey in 2024 as the fifth largest economy in the world. It is projected to surpass Japan to become the third largest economy by 2030. With the economic growth, India's purchasing power has increased, which has impacted Indian consumer preferences. There has been a shift towards high quality foods and products perceived as healthy. The food and grocery sector remains the largest segment of the Indian retail market. With over 15 million grocery retail outlets and approximately a million wholesalers, India's modern retail sector and rapidly growing e-commerce sector offers massive opportunities for U.S. processed, fresh and packaged food, and beverage exports. Yet, India persistently remains a difficult market for U.S. exporters due to high tariffs, erratic regulatory requirements for imported food products, and competition from domestic and international suppliers.

Executive Summary: India is a lower middle-income country but maintains its position as the fastest-growing major economy in the world with a 2024 projected real GDP growth rate of 6.8 percent.¹ In 2023, India's GDP reached \$3.5 trillion, making it the fifth largest economy in the world and the most influential economy in South Asia.² India is an agricultural powerhouse and leading producer in several major commodities including milk, pulses, rice, sugarcane, wheat and several fruits and spices.

India's Consumer-Oriented Agricultural Imports 2023



Food Retail Industry: India's food retail reached \$660 billion in 2023.³ India's overall retail sector growth is forecast at 9-10% and expected to reach \$2 trillion over the next decade.⁴ Food and grocery are the largest segment in the Indian retail sector, accounting for 65 percent of the share in 2023. The largest retailers have linked up with the traditional retailers/corner stores (Kirana stores) to leverage e-commerce investments and establish a diversification of traditional and modern retailing across the country.

Food Processing Industry: India's food processing sector is expected to reach \$535 billion by 2026 growing at a compound annual growth rate (CAGR) of 15 percent.⁵ This industry is one of the largest and contributes nearly 13 percent to India's GDP. U.S. tree nuts, processed fruits, baking ingredients, sugars and sugar confectionery can increase their exports volume to India by targeting this enormous sector.

Food Service Industry: India's food service industry was valued at \$57.2 billion in 2023 and expected to reach \$78.8

¹ International Monetary Fund (IMF) India Country Data:

<https://www.imf.org/en/Countries/IND>

² World Bank National Accounts Data:

<https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=IN>

³ Food Retail in India – statistics & facts:

<https://www.statista.com/topics/5615/food-retail-in-india/#topicOverview>

⁴ Boston Consulting Group (BCG) Unlocking the \$2Tn Retail Opportunity in the Next Decade: An Activist Agenda:

<https://www.bcg.com/publications/2024/india-unlocking-the-2tn-retail-opportunity-in-the-next-decade>

⁵ <https://www.investindia.gov.in/sector/food-processing>

billion by 2026⁶. Global brands, especially the quick service restaurants like Domino's, Pizza Hut, KFC, McDonald's, and Subway are dominating the market with their innovative products adaptable to Indian palate.

Quick Facts CY 2023

India's Total Imports of Consumer-Oriented Products US \$7.7 billion (Trade data monitor)

List of Top 10 Growth Products in India (Trade data monitor)

1) Animal or vegetable, oils, & fat products	2) Pulses
3) Tree nuts	4) Forest products
5) Sugar and confectionary	6) Fresh fruits
7) Cotton	8) Processed fruits
9) Distilled spirits	10) Wine and related products

Food Industry by Channels (U.S. billion)
(Financial Express/ India's Ministry of Finance)

Retail Food Industry (2023)	\$660 billion
Food Service-HRI	\$324 billion*
Food Processing	\$ 400 billion
Food and Agriculture Exports	\$56 billion

*This includes India's Food service and hospitality sector

Top 5 India's Retailers

1) Reliance Fresh	2) D-mart
3) More Retail	4) Vishal mega mart
5) Lulu Hypermarket	6) Reliance smart point

Source: Statista

GDP/Population:
Population: 1.44 billion 2023 (IMF)
GDP: \$3.5 trillion 2023 (World Bank)

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
U.S. is seen as consistent supplier with scalability of production. U.S. products perceived as safe and high quality.	Inability of U.S. exporters to meet Indian importers requirements.
Opportunities	Threats
Recently reduced import tariff on various U.S. food products. Growing modern retail and online grocery platforms.	Tariff/non-tariff barriers. Inconsistent regulatory environment.

⁶ Source: [ET Retail](#)

Section I: Market Overview

India is the fifth largest and the fastest growing economy in the world according to the International Monetary Fund (IMF) ⁷. India's imports of consumer-oriented products have remained consistent post pandemic, reaching \$7.7 billion in 2023 with the U.S. market share representing 15 percent, or \$1.2 billion. The United States remains the top consumer-oriented products supplier for India.

Currently, India is the most populous country in the world with over 1.4 billion people, accounting for nearly 18 percent of the world's population. According to S&P report⁸, India has over 678.6 million workers in its labor force population and out of that over 600 million people are between the ages of 18-25. This young demographic consists of an aspirational middle and upper middle-class looking for more quality and premium products. In 2022, more than one third of the population, around 508 million people, lived in urban areas while 908 million lived in rural areas⁹. The major (tier-1) and emerging cities (tier-II) in India have easy access to imported products through growing modern retail, online grocery platforms, and a thriving HRI industry. These tier 1 cities include New Delhi, Mumbai, Kolkata, Chennai, Bangalore and many more¹⁰. There is opportunity for U.S. exporters to expand their product reach across tier 1, tier 2 and even in tier 3 cities¹¹.

There has been a shift in Indian consumers food preference after the pandemic. In last few years, an increasing number of consumers are looking for healthier and high-quality foods. India's growing middle class and young working age population has contributed to an increased consumption of high value imported products like tree nuts, processed and fresh fruits, distilled spirits, wine, and other processed products. U.S. exporters will find the following trends in the Indian market:

- **Functional and Health-Boosting Ingredients:** The demand for healthy and multifunctional foods have increased in past few years. Consumers are not just looking for immunity boosting food, but products that improve mental, gut, and overall health.
- **Value-Conscious Consumers:** Indian consumers are shifting from being price conscious to value conscious. As these consumers become more and more financially stable and tech savvy, they often crave better quality food options with optimum value for the cost.
- **Global cuisine and fusion:** Indian consumers are keen on trying new global cuisine, as more and more Indians travel internationally particularly to the United States for educational, work, and leisure travel. As such, the HRI industry and retail sector are taking note and introducing new imported ingredients in their offerings.
- **Sustainable, plant-based and climate conscious diet:** Indian consumers are willing to pay premium for the products which are sustainably sourced, provide substitute for meats, like plant-based diet and locally sourced ingredients.

⁷ [Reuters](#): "IMF raises India's GDP forecast to 6.8% for 2024-25."

⁸ [S&P Global: India's Demographic Dividend](#)

⁹ [Statista](#)

¹⁰ [99 acres: What are Tier I, II, III, IV cities in India?](#)

Other market trends and factors which are making an impact on Indian consumers buying behavior which U.S. exporters should take note of are mentioned below:

- **Social commerce and its influence:** Social commerce industry in India is estimated at \$7.20 billion in 2024.¹² The rise of this industry is primarily due to rapid digitalization and increased number of internet users (approx. 820 million¹³) in India in last decade. Over 250 million online shoppers use social media apps (Facebook, Instagram, YouTube) and Direct to consumer (D2C) apps and websites to make their purchases.
- **Quick commerce:** India’s quick commerce,¹⁴ which is generally defined as app-based deliveries to consumer doorsteps within 15 minutes, has shown great potential especially in tier-1 and tier 2 cities where consumers prioritize convenience.¹⁵ The major quick commerce apps in India are [Blinkit](#), [Zepto](#) and [Swiggy’s Instamart](#). Indian consumers use these apps to buy their daily grocery needs like milk, fresh fruits, and vegetables as well as special gifts during the festival season like tree nuts, flowers, and processed food products.

Table 1: Advantages and Challenges

ADVANTAGES	CHALLENGES
The United States has the advantage of having a reputation as a consistent supplier of goods with the ability to meet India’s consumer demands with its scale of production. The diverse range of food and agricultural products within the United States is also a benefit.	Inability of U.S. exporters to meet Indian importers’ requirements. Preferential trade agreements with competing countries that supply similar products. Lack of awareness about the range and value of U.S. agricultural products.
Increased tourism and greater arrival of international tourists along with boost of domestic and international business travelers. More foreign restaurants and brand franchises.	Product substitutes and competition from local and international suppliers. U.S. exporters not ready for consolidated and small orders. Onerous labeling requirements.
Recently reduced import tariff on many U.S. food products. Growth potential for imported ingredients and intermediate products. Aspiration of growing middle class and increased exposure to international products and western lifestyles.	High tariffs, persistent Phytosanitary requirements prohibit or restrict imports. Fluctuating Indian Rupee against the U.S. dollar. Stringent food regulations for biotech foods, ingredients, and certain additives.
Changing buying habits and a preference to purchase for quality over price, healthier, natural, sugar-free, vegan, and organic food options.	Competition from countries with geographical proximity and a freight advantage.

¹² [Research and Markets](#) report

¹³ [Economic Times- How India is using the Internet](#)

¹⁴ <https://www.channelsight.com/blog/quick-commerce>

¹⁵ [Tech Crunch- Can quick commerce leapfrog e-commerce in India?](#)

Section II: Exporter Business Tips

India presents a compelling market for U.S. food products, driven by its rapidly expanding middle class, urbanization, and evolving consumer preferences towards healthier and premium food options. However, to seize these opportunities U.S. exporters should understand the following local business customs, trends, and consumer preferences:

- Business culture in India places a strong emphasis on hierarchy and respect for authority. Companies have a clear chain of command, and decisions are usually left to higher-ranking individuals. It is crucial to identify and engage with key decision-makers early in the process.
- When meeting in a group setting, greet the most senior person first to show respect for the hierarchy.
- Personal relationships play a crucial role in Indian business culture, and establishing trust through face-to-face meetings, regular follow-ups, and participation in trade shows can help build strong business relationships.
- Indian partners often prefer doing business with those they know personally and trust. Negotiations can be lengthy and detailed, and extensive discussions and multiple rounds of negotiation can be expected.
- Price is often a critical factor, and negotiation is expected.
- Giving small gifts is a common practice in Indian business culture, especially during the festivals and after successful deals.
- Understanding the cultural context, including major festivals like Diwali, Holi and Eid and holidays,¹⁶ can help U.S. exporters plan marketing and promotional activities effectively.
- India's a diverse country with over 29 states. Each region exhibits distinct food preferences, influenced by cultural, religious, and climatic factors. Understanding these regional differences and incorporating localization to improve relevance of food products is crucial for market success.
- Regionally, Indian consumer preferences vary in these ways:
 - **North India:** Predominantly prefers wheat-based diet with a strong preference for dairy products.
 - **South India:** Rice is a staple, with a preference for coconut-based products, seafood, and spicy curries.
 - **West India:** Diverse tastes with mix of vegetarian and non-vegetarian dishes with a strong presence of street food.
 - **East India:** Predominantly rice-based with a strong emphasis on fish and sweets.

Section III: Import Food Standards, Regulations, and Procedures

U.S. exporters planning to enter the Indian market must understand the regulatory framework and documentations required. The following details outline the stages and stakeholders involved in this process. U.S. exporters should ensure that all licenses and related documents are processed before shipping goods. Please refer to the latest (2019) edition of the Food Safety and

¹⁶ U.S. Embassy & Consulates in India Holiday Calendar: <https://in.usembassy.gov/holiday-calendar/>

Standard's Authority of India's (FSSAI's) Manual for Food Imports for details on requirements to export food products to India.¹⁷

Customs clearance process: navigating the customs clearance process requires adherence to detailed regulations and protocols set by the Central Board of Indirect Taxes and Customs (CBIC). U.S. exporters must ensure all required documents are correctly prepared and submitted to avoid delays and additional costs. Key steps in the customs clearance process include:

1. Pre-arrival documentation: ensure all necessary documents are prepared, including the bill of lading, commercial invoice, packing list, certificate of origin, and health certificates.
2. Submission to authorities: submit documents to the Indian customs authorities for verification. It's crucial to follow all CBIC guidelines precisely.
3. Inspection and compliance: customs officials may inspect the goods to ensure compliance with Indian standards and regulations.
4. Payment of duties and taxes: pay all applicable duties, tariffs, and taxes. Accurate calculation and timely payment can prevent delays.

For detailed customs procedures, refer to the [CBIC website](#)

Labeling requirements: India mandates specific labeling requirements for food products, which can be in English or Hindi. Labels must adhere to the [FSSAI's \(Labelling and Display\) Regulations, 2020](#). For detailed instruction on labeling guidelines, please refer to Section II of the latest [FAIRS Annual Country Report - New Delhi India IN2023-0086](#).

Tariffs and FTAs: India imposes various tariffs on imported food products. These rates can vary significantly based on the product category. U.S. exporters can review [the Central Board of Indirect Taxes and Customs \(CBIC\) portal](#) for applicable tariffs and the [Indian Customs Electronic Gateway \(ICEGATE\)](#) that provides e-filing services to trade, cargo carriers, and other trading partners electronically. It also hosts a customs duty calculator that can be used to identify applicable basic customs duty on imported goods.

Additionally, understanding the impact of Free Trade Agreements (FTAs) that India has with other countries can help in strategizing market entry. India has signed several FTAs, and the details of these agreement can be accessed on the website of [Ministry of Commerce & Industry](#).

Trademarks and Patents Market Research: Protecting intellectual property is crucial when entering the Indian market. Registering trademarks and patents with India's Controller General of Patents, Designs, and Trademarks ensures legal protection and aids in brand establishment. This step is essential to safeguard against potential infringements and to build a strong market presence. The trademarks are protected under the trademarks Act (1999) and the Trademarks Rules (2002). Foreign firms can register trademark through a local agent by applying at the Office of the Registrar of trademarks. The process can take anywhere between three-to-five years to be officially accepted and notified. For more information, visit [Intellectual Property India](#).

¹⁷ FSSAI Manual for Food Imports <https://fssai.gov.in/flipbook.php?bookid=327&doc2=0#book2/>

Section IV: Market Sector Structure and Trends

India's inflation rate was around 4.4 percent in 2023, as compared to 6.6 percent in 2022¹⁸ and average food price inflation was at 7.7 percent¹⁹. The Indian government has taken various steps to subdue rising inflation rates. Consumer spending is expected to reach \$4 trillion by 2030 and spending on food is expected to increase by two folds by the end of the decade. However, the declining employment rate remains a troubling aspect, which was down from 3.6 percent in 2022 to 3.1 percent in 2023.

Retail Sector

The Indian food and grocery retail sector is growing rapidly and offers great opportunity for U.S. exporters to expand and diversify their product offerings. The Indian retail sector is largely unorganized with over 15 million corner (Kirana) stores, representing around 93 percent of the sector. However, there is a shift happening as the share of modern retail stores is expected to increase in the next few years. [Reliance Industries](#) is the biggest food retailer in India with over 2,700 stores. In 2022, the total number of grocery retail outlets reached over 15 million with both traditional and modern grocery retail outlets.²⁰

India's online grocery sector is valued at \$3.2 billion in 2023 and expected to reach \$6.8 billion in 2033²¹. This growth is due to changing consumers preference towards convenience and rapid delivery, coupled with hyper digitalization in India in last few years. With over 230-250 million²² online shoppers, over 800 million internet users, improved supply and cold chain, this sector provides untapped opportunities for U.S exporters.

Food Service – Hotel Restaurant and Institutional (HRI) Sector

The Indian hotel, restaurant, and institutional (HRI) sector is also growing due to increased domestic and international travel by Indians. In 2023, around 9 million international tourists visited India, a 64 percent increase from 2022.²³ The Indian hospitality industry is valued at \$247 billion in 2024 and expected to reach \$475 billion by 2029. In 2023, there were approximately 371 five-star hotels, 355 four-star hotels and 524 three-star hotels registered in India²⁴. The industry is dominated by brands like [Taj](#), Oberoi, [ITC](#), The Park, and Lemon tree hotels.

Food Processing Sector

The Indian food processing sector is a crucial driver to the country's economic growth, supporting employment and attracting foreign direct investment. The sector is also referred to as "sunrise sector" due to the tremendous development in infrastructure and innovation in the last decade with support from government subsidy schemes. This sector's average 7.3 percent annual growth rate over the last 7 years has generated approximately 12 percent in employment, making it an opportune sector for U.S. exporters to further invest and yield mutual economic gains. For more information about this sector, see our [Food Processing Ingredients Report](#).

¹⁸ [Statista](#)

¹⁹ [Statista](#)

²⁰ <https://www.statista.com/statistics/1045639/india-number-of-future-retail-stores-by-select-brand/>

²¹ [Future Market Insights](#)

²² [Bain](#)

²³ [Business Line](#)

²⁴ [Mordor intelligence](#)

Section V: Agricultural and Food Imports

In 2023, India’s agricultural bulk, intermediate, and consumer-oriented imports dropped from \$40.4 billion in 2022 to \$36.9 billion. The United States remains India’s top agricultural supplier outside of domestic production with a 15% share of the market. See Chart 1 and Table 2-5.

Chart 1: India’s Agricultural Imports from the World: 2018-2023

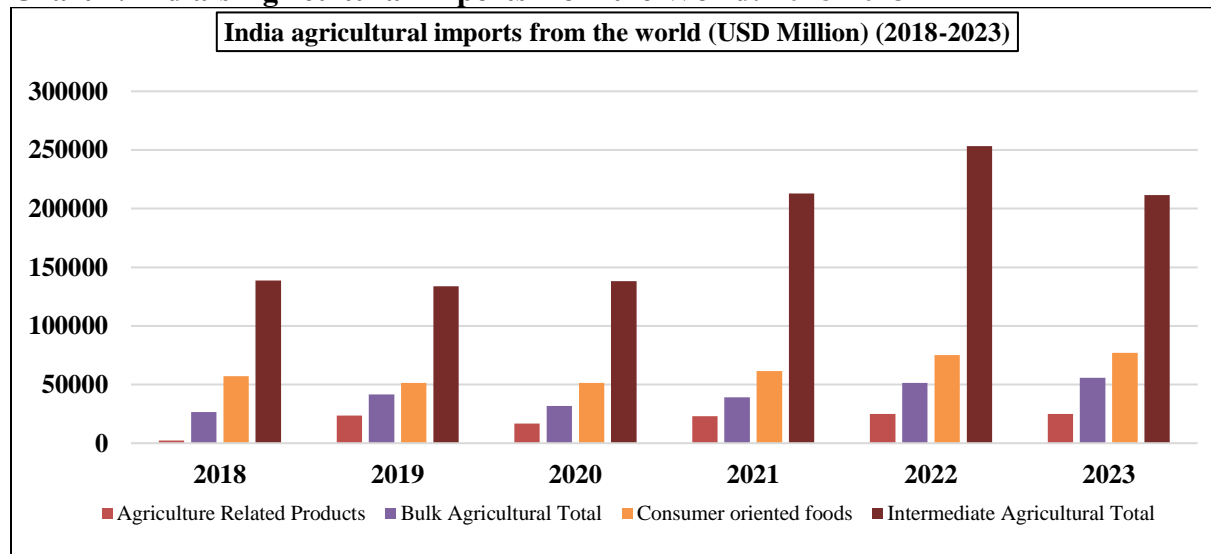


Table 2: India’s Top Consumer-Oriented Product Imports

Table 2A: Top Consumer-Oriented Products Imported from the World			Table 2B: Top Consumer-Oriented Products Imported from the United States		
Description	USD (Millions)		Description	USD (Millions)	
	2023	2024 Jan - March		2023	2024 Jan - March
Cashew Nuts, Fresh or Dried, In Shell	1,337	233	Almonds, Fresh or Dried, In Shell	855	231
Almonds, Fresh or Dried, In Shell	937	232	Milk Albumin, Including Concentrates of Two Or More Whey Proteins	26.85	10
Distilled Spirits-whiskies	391	123	Distilled spirits - Whiskies	16	1
Apples fresh	363	100	Food Preparations Nesoi	13	3
Dates fresh or dried	266	33	Processed Fruit	12	2
Pepper of Genus Piper, Neither Crushed nor Ground	162	62	Fresh fruits (Apples, pears, cherries and others)	8	14
Total	3,456	783	Total	930.8	261

Source: Trade Data Monitor and FAS India Analysis

Table 3: 2024 Best Consumer-Oriented Product Prospects

Product Types	Import Value (\$ Million) CY 2023	U.S. Market Share (percent)	Impacting Factors
Almonds (in shell and shelled)	1075	91	<ul style="list-style-type: none"> • Strong preference for U.S. almonds • Increased consumption, including for snacking
Fresh Fruits	664	1.33	<ul style="list-style-type: none"> • Increased consumption • Strong preference for U.S. origin
Processed fruits	575	2.11	<ul style="list-style-type: none"> • Increased consumption, including for snacking and use in bakery and Indian cuisine. • Less competition from other source
Distilled spirits	571	3.98	<ul style="list-style-type: none"> • Increased consumption and demand for premium products
Wine and related products	433	0.28	<ul style="list-style-type: none"> • Increased consumption • Strong preference for U.S. wines

Source: Trade Data Monitor and FAS India Analysis

Table 4: Products Not Present in Significant Quantities but with Good Sales Potential

Product Types	Import Value (\$ Million) CY 2023	U.S. Market Share (percent)	Limiting and Impacting Factors
Pulses	3082	0.04	Since the removal of retaliatory tariffs on U.S. Pulses last year, there has been a surge in imports of pulses to India. Now that imports of U.S. yellow peas have been allowed to enter India, volumes will increase . Although U.S. exporters need to be wary if erratic import restrictions and competition from other countries who have proximity and cost advantage.
Tree nuts	2892	34	Strong demand for healthy and quality products in India. U.S. origin products share good reputation amongst customers and regular availability sustain the demand. Pistachios, walnuts, Pecans, and almonds has great potential to grow and reach untapped regions in India.
Sugars and sugar confectionery	1545	1.34	India is a large producer, consumer, and exporter of sugar. Indians prefer sweets, and new and innovative products are always in demand by consumers of all ages and class.
Fresh Fruits	664	1.33	Import duty on U.S. apples , seasonal availability of domestic fresh fruits, and imports from other preferred destinations limit U.S. share. Although recently reduced tariff on U.S. apples, blueberries , enhanced access for U.S. cherries , offers strong potential for growth. Avocados, orange, pears, strawberries, and any other fresh fruits have potential to grow as well.
Processed Fruits	575	2.11	Afghanistan's dried and fresh figs, apricots, grapes dried (including raisins) and UAE's dates fresh or dried represented over 60 percent of India's 2023 processed

			fruit imports). Significant opportunities exist for U.S. processed fruits, including dried cranberries, blueberries, fruit powders, and prunes . Health-conscious Indians are consuming more processed fruits and using them in a variety of traditional Indian cuisines.
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Source: Trade Data Monitor and FAS India Analysis

Table 5: Most Competitive Product Categories

Product Category	Total Imports (\$ Million) CY 2023	Major Suppliers	Strengths of Key International Suppliers	Advantages (A) and Disadvantages (D) of Local Suppliers
Animal or Vegetable Oils, Fats, and their products	16,567	Indonesia Malaysia Argentina Brazil Russia	Major production hubs and competitive prices	Local production is inadequate, and significant portion of total edible oil consumption is dependent on imports (A).
Leguminous Vegetables, Dried Shelled/Pulses	1191	Thailand Morocco Bhutan	Price competitiveness, freight advantage and the ability to produce specific varieties of pulses in demand in India	Record domestic harvests in the last two years have resulted in quantitative restrictions peas and pulse imports, which have slowed since 2018 (D).
Edible Fruits and Nuts	4,039	USA Afghanistan Ghana UAE Cote d'Ivoire Togo	Growing market demand, preference for specific quality, popular at certain holidays	Domestic production of some of the major fruits and nuts is insignificant (A).
Sugars and sugar confectionery	1545	Brazil Netherlands Germany USA Sudan	Price competitiveness	India is a large producer, consumer and usually a net exporter of sugar (D).
Coffee, Tea, Mate and Spices	1111	Vietnam Sri Lanka Indonesia Nepal China Madagascar	Price competitiveness and proximity to India	Most imports are for re-export to other regions (A).
Dairy produce: bird eggs; natural honey; edible products of animal origin	60	France Poland Germany Turkey United Kingdom	Price competitiveness, sanitary requirements	Domestic production is not keeping pace with demand (A). Indian import protocol is stringent and effectively prohibits imports of many U.S. products (D).

Section VI: Key Contacts and Further Information

Foreign Agricultural Service

U.S. Embassy New Delhi

Chanakyapuri, New Delhi,

Pin code - 110 021, India.

Phone: +91-11-24198000

Email: AgNewDelhi@usda.gov

Web: [U.S. Embassy, New Delhi](http://U.S.Embassy,NewDelhi)

Twitter: [@USDAIndia](https://twitter.com/USDAIndia); Instagram: [@tasteofamericain](https://www.instagram.com/tasteofamericain)

Office of Agricultural Affairs

U.S. Consulate General Mumbai

C-49, G-Block, Bandra Kurla Complex,

Bandra E, Mumbai - 400 051

Phone: +91-22-26724000

Email: AgMumbai@usda.gov

Web: [American Consulate General Mumbai](http://AmericanConsulateGeneralMumbai)

Twitter: [@USDAIndia](https://twitter.com/USDAIndia); Instagram: [@tasteofamericain](https://www.instagram.com/tasteofamericain)

For additional information please visit the FAS website and FAS India GAIN reports:

- [FAS Homepage](#)
- [FAS India Retail Report](#)
- [India - City Specific Reports](#)
- [FAS India Online Grocery Market](#)
- [FAS India Sweet and Snack Industry Market](#)
- [Food and Agricultural Trade Show Calendar](#)
- [FAS India Food Processing Ingredients Report](#)
- [FAS India Food Service - Hotel Restaurant Institutional](#)
- [FAS India Plant-Based Meat Substitutes Market](#)

Appendix I

In 2023, India imported approximately \$2 billion worth of agricultural products from the United States (Table 7), with consumer-oriented products being the largest category at \$1.2 billion.

Table 7: U.S. Agricultural Exports to India 2019-2023

Product Category	USD				
	2019	2020	2021	2022	2023
Consumer-Oriented	1 billion	1 billion	1 billion	1.1 billion	1.2 billion
Intermediate	439 million	472 million	496 million	588 million	429 million
Bulk	646 million	227 million	230 million	517 million	275 million
Grand Total	2.1 billion	1.7 billion	1.7 billion	2.2 billion	1.9 billion

Source: USDA Global Agricultural Trade Data (GATS)

Attachments:

No Attachments