Market Profile: India

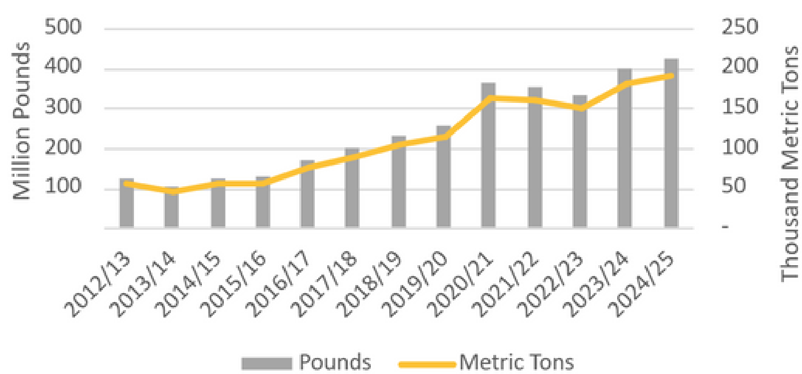
Trade

- India is the California almond industry's #1 export market since crop year 2021/22 (August-July).
- Approximately 95-99% of almonds are shipped inshell due to tariff benefits.
- Shipments have more than doubled in volume over the last six years, from 167 million lbs. in 2016/17 to over 400 million pounds in 2023/24.

Key Facts:

India is the #1 export market for California Almonds for 3 years in a row.

Almond Exports to India (Million Lbs.)
Aug-July ABC Data in Lbs/MTs



- A Phytosanitary Certificate (PC) is required, which includes an additional declaration that the shipment was inspected and found free of Ephestia elutella, Ephestia kuehniella, and Plodia interpunctella. For treatment details, see below.
- Treatments: Methyl Bromide or phosphine. If a phosphine/carbon dioxide mixture is used, such as Eco2Fume, it must meet the same schedule as stated below. When conducting any phosphine treatment, the commodity temperature must always be at or above 5 degrees Celsius (41 degrees Fahrenheit).

Fumigation - Methyl Bromide		
Concentration	**Temperature**	**Duration**
1 pounds / 1000 ft^3	69.8 - above °F	24 Hours
1.5 pounds / 1000 ft^3	60.8 - 69.7 °F	24 Hours
2 pounds / 1000 ft^3	51.8 - 60.7 °F	24 Hours
2.5 pounds / 1000 ft^3	50 - 51.7 °F	24 Hours
Fumigation - Phosphine		
Concentration	**Temperature**	**Duration**
40 g / 1000 ft^3	5 - 9.9 C	10 Days
40 g / 1000 ft^3	10 - 14.9 C	8 Days
40 g / 1000 ft^3	15 - 19.9 C	4 Days
40 g / 1000 ft^3	20 - 24.9 C	3 Days
40 g / 1000 ft^3	25 + C	2 Days

Key Issues

- Current duty on U.S. almonds is 35 RPS/kg for inshell and 100 RSP/kg for kernels. U.S. almonds remain at a disadvantage compared to Australian almonds following the signing of the Australia-India Comprehensive Economic Cooperation Agreement (AI-CECA) in 2023, which resulted in a 50% reduction in MFN tariff rate for Australian almonds to 17.5 RPS/kg and a TRQ of 34,000 MT with effect from 2023.
- Trade disruptions caused by No Objection Certificates (NOC) are still a concern for the almond industry.
- California and Australian exporters continue to engage FSSAI over almond kernel standards that were set to go into effect in 2021 which focus on commercial, quality parameters rather than food safety parameters.
- India reduced GST on almonds from 12% to 5%. While the number of companies involved in almond imports are expanding, the available financing in the market is still limited.
- From time to time there is confusion at the port level on requirements for labelling for almonds (bulk vs retail), application of import parameters (e.g. % defects), as well as insect presence.

california almonds
Almond Board of California