



**India's Changing
Consumption Patterns
and Almonds**

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Presentation Roadmap

- About Us
- Knowing/Understanding India
- Indian Economy
- Indian Consumers
- Indian Retail
- Almonds in India
- Australian Almonds in India
- Looking Forward

About Us



Knowing India

India at a Glance

Population	1.4 Billion
Consuming Class	50 – 300 Million
GDP Growth Rate	7.0 % (Projected for 2026-27)
Polity	Democracy
Food Patterns	Diversified
Agriculture	Core
Regulatory	WTO Signatory
Food Market	Developing

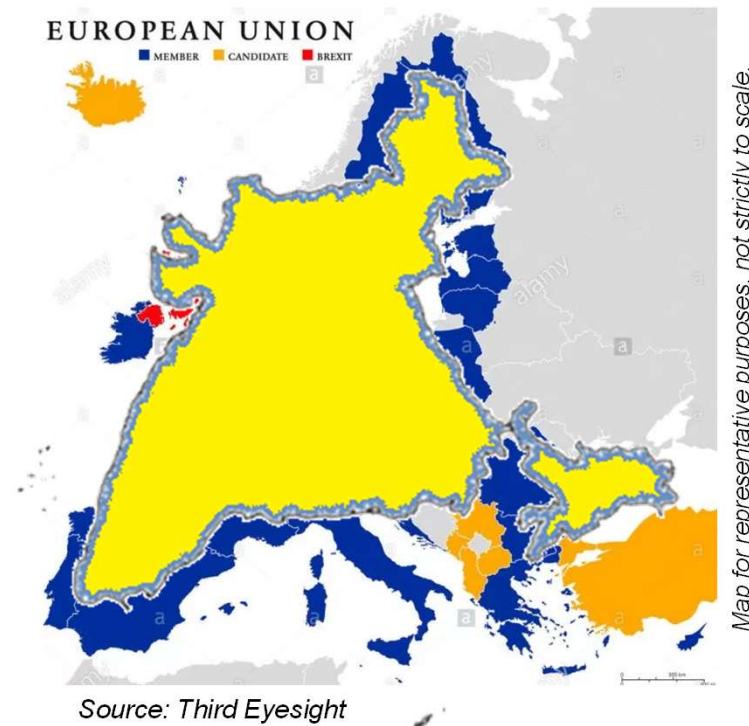


Understanding India

- **Not a country**
 - A Continent
- **Strong Economy**
 - Resilient to many global turmoil
- **300 million consumers!**
 - Unified by aspiration
- **Small Families**
 - Open to change
- **Young population with High Disposable Incomes**
 - Willingness to spend
- **Media Revolution**
 - Highly connected
 - Part of a Global Village
- **Imported Food**
 - Supplementary and Complimentary
 - Niche to Mainstream
 - Anti import voices



India's Consumption Mosaic

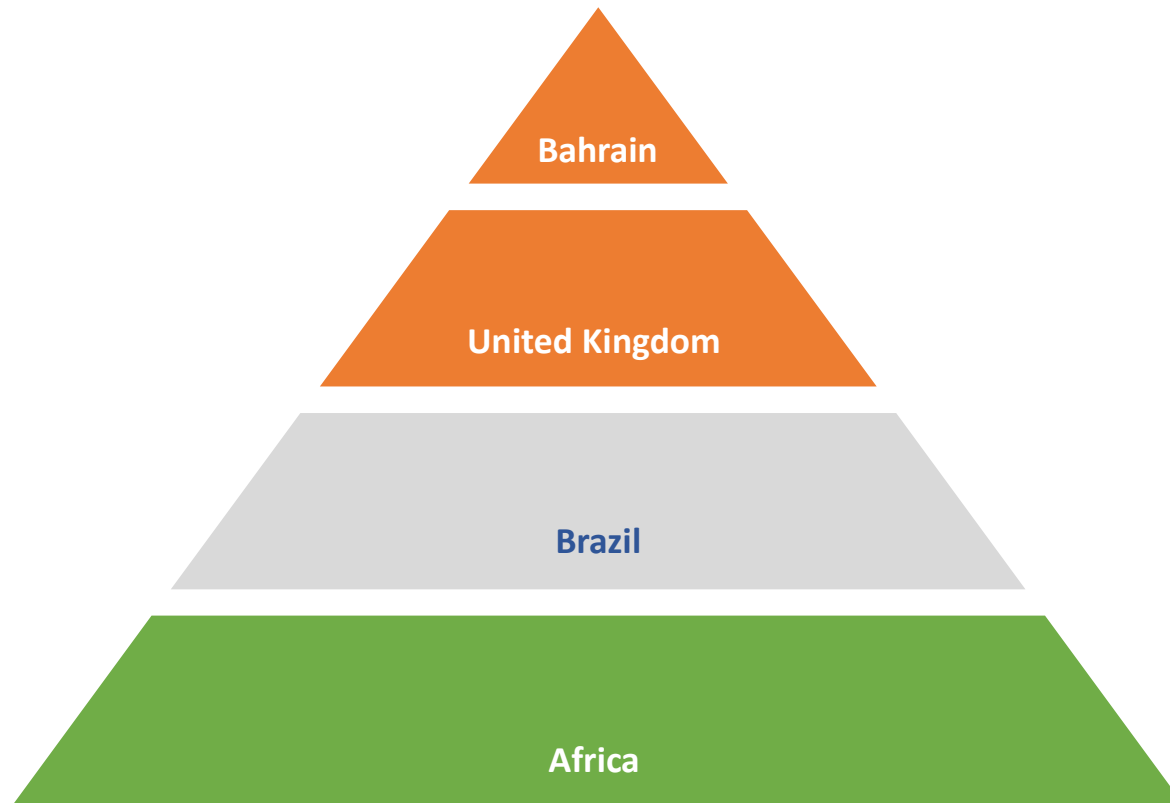


India's Consumption Mosaic

	European Union	India
Comprises of	28 countries	29 States, 7 Union Terr.
Area	4.08 million km ²	3.3 million km ²
Population	511+ million	1.4+ billion
Languages	24 official, 150 minority	22 official, 1600+ other major & minor



Indian Market





Indian Economy

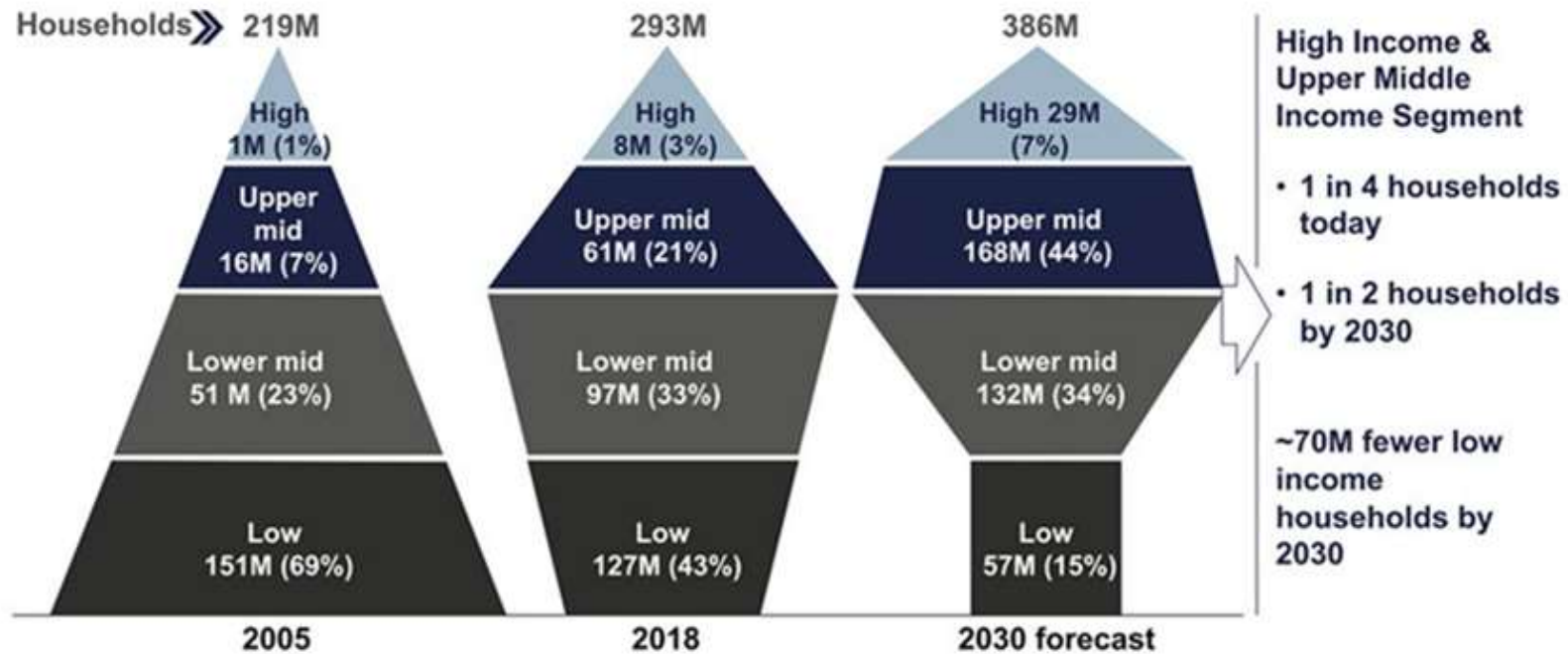
Indian Economy

- India is the world's fastest growing large economy
- Currently the 6th largest economy in the world having overtaken France and Italy
- Set to become world's 3rd largest economy by 2030 surpassing Japan and Germany
- Took 60 years for the first Trillion Dollars and 5 for the second
- Transformation from an agrarian economy to a one now driven by services and manufacturing
- Growth coming from internal consumption
- Food Industry: Average growth rate of 11% (CAGR)



India's Projected Consumption Growth

Evolution of the household-income profile in India



Source: Bain & Company in collaboration with the World Economic Forum



Indian Consumers

New Indian Consumers

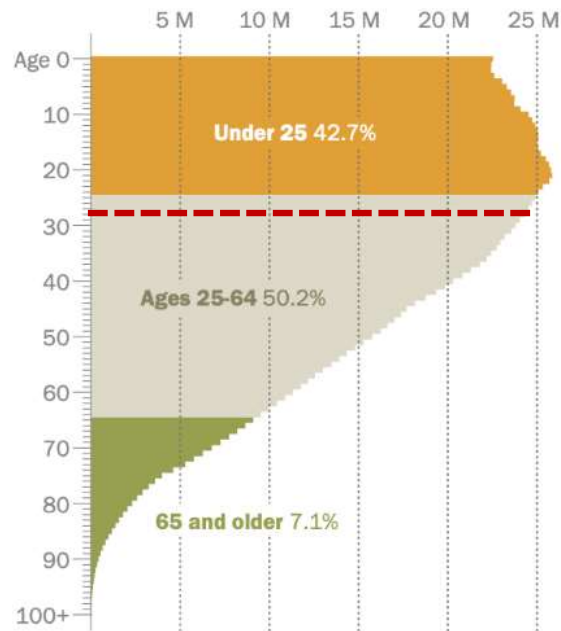
- Young
- Optimistic
- Tech Savvy
- Cashless
- Environmentally Conscious
- Spread across the country
- Spoilt for Choices



India – Youngest Country in the World

More than four-in-ten people in India are under 25 years old

Number and share of people in India, by age



Note: The projection depicted is the UN's "medium variant" scenario for the year 2023.

Source: UN Population Division's World Population Prospects: The 2022 Revision.

Gen Z Paradigm

- Fading of “Mummy ka Magic”
- Body and Not Necessarily Health Conscious
- **Snack-i-fication of Breakfast**
- Mid Meal Snacking
- Looking for “Health” in “Junk”
- Sustainable foods
- Food for camera
- **Vociferous**
- **Willing to spend**
- **Willing to learn**





Indian Retail

Retail Landscape in India

- Myriad of Formats
 - Traditional Roadside and Pushcart
 - Traditional Kirana (Single owner)
 - Home Delivery
 - Modern Organized
 - Specialty
 - Cash and Carry
 - Online (E-commerce; Q-Commerce)
 - D2C
- Leapfrogging
- Fast changing



Traditional Retail



Modern Retail



Not All Inclusive



Indian Market for Almonds



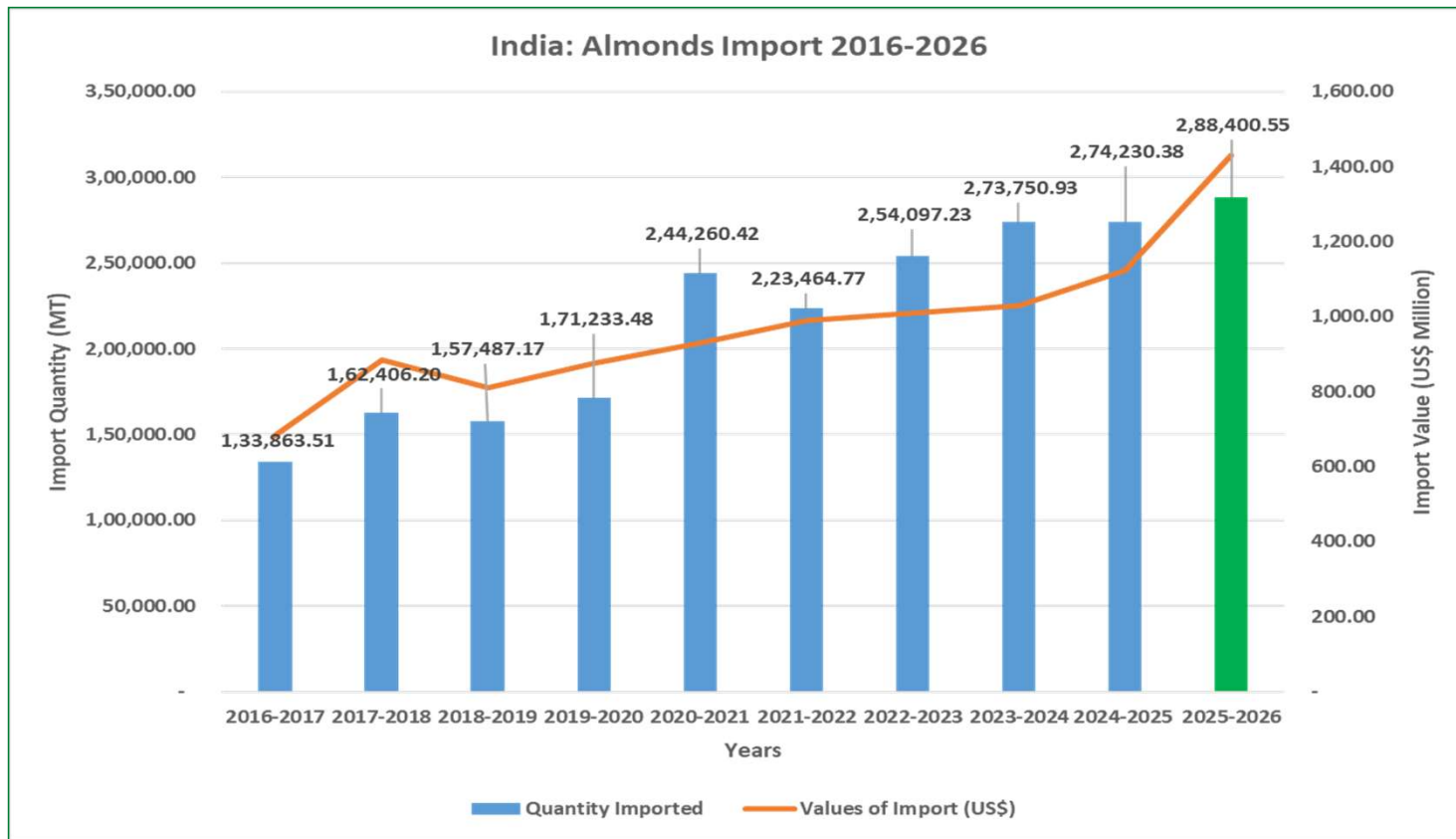
India is at an inflection point

Almond Consumption in India

- India is a growing market for almonds.
- Current almond consumption in India stands at about **180,000 MT** (shelled basis).
- Forecasted consumption of **190,000 MT** in 2026-27 (shelled basis).
- Trade estimates that market for almonds will be a **250,000 MT** (shelled basis) in the next 3-5 years.
- Most of the demand will be met through imports as domestic production of Almonds is small and reducing (Only about 4,000 MT).
- California is by far the major supplier to the market.
- Tremendous opportunities for Australia.

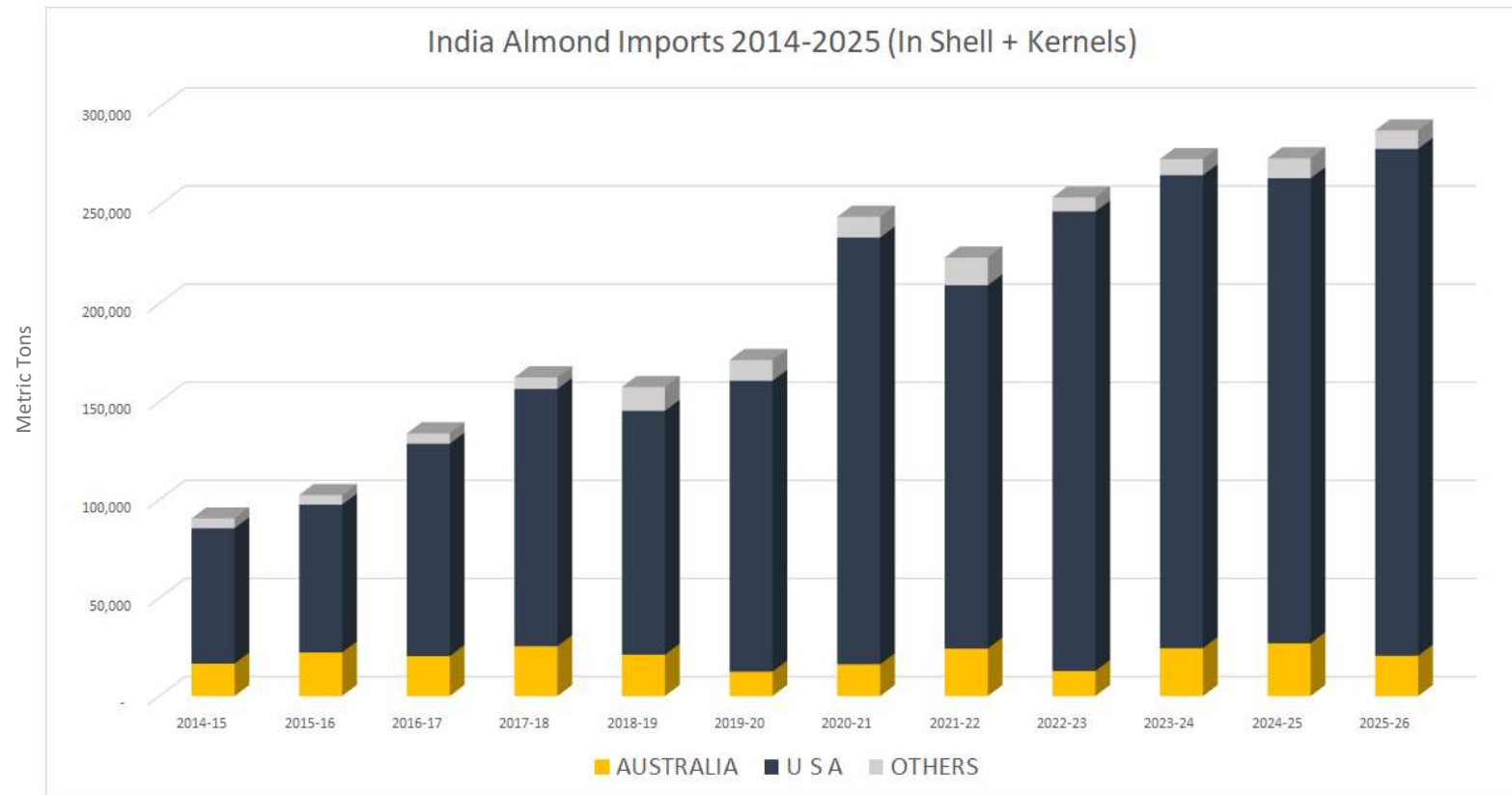


India - Almond Imports



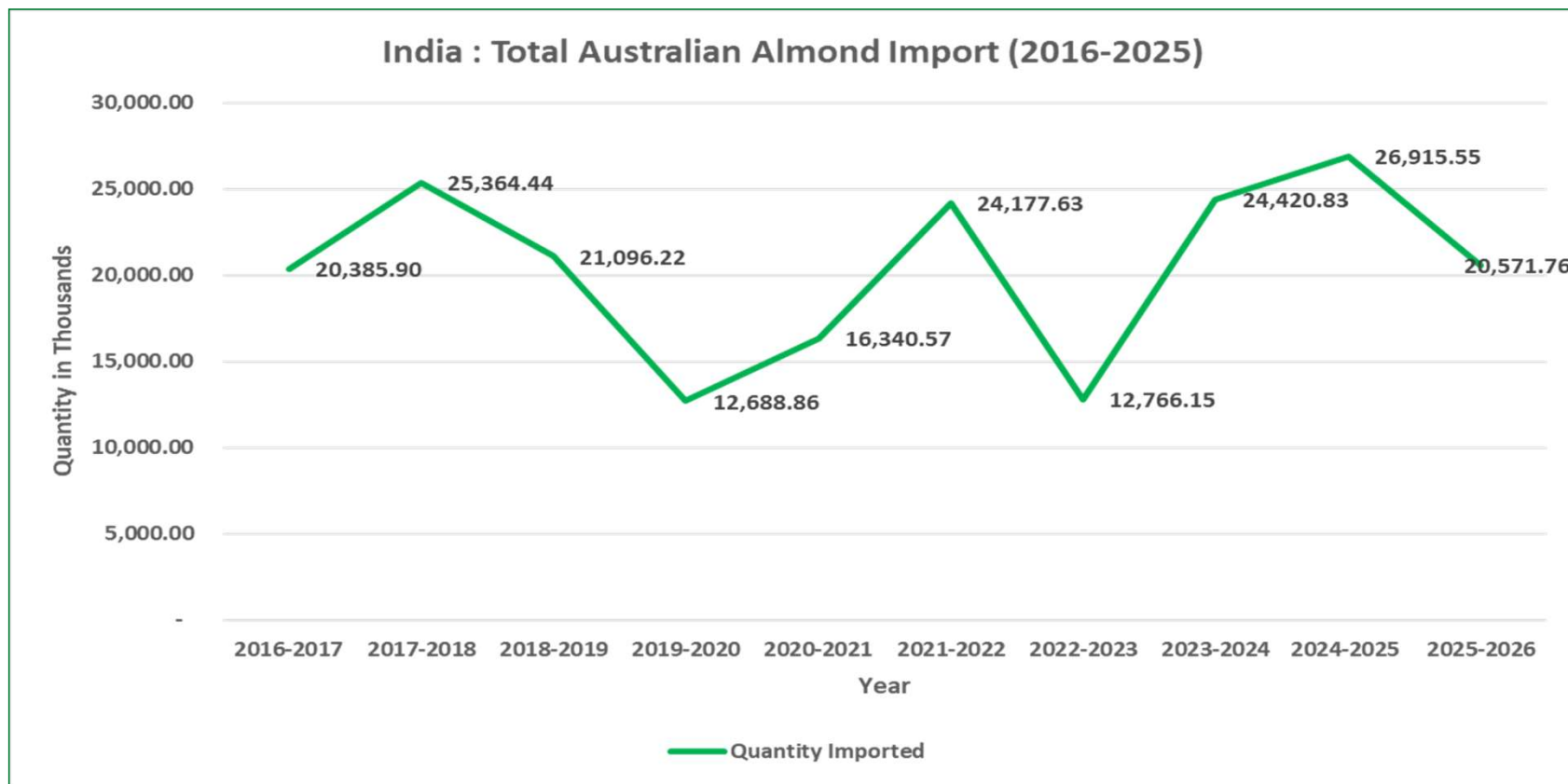
Source: Ministry of Commerce, Government of India

India Almond Imports



Source: Ministry of Commerce, Government of India

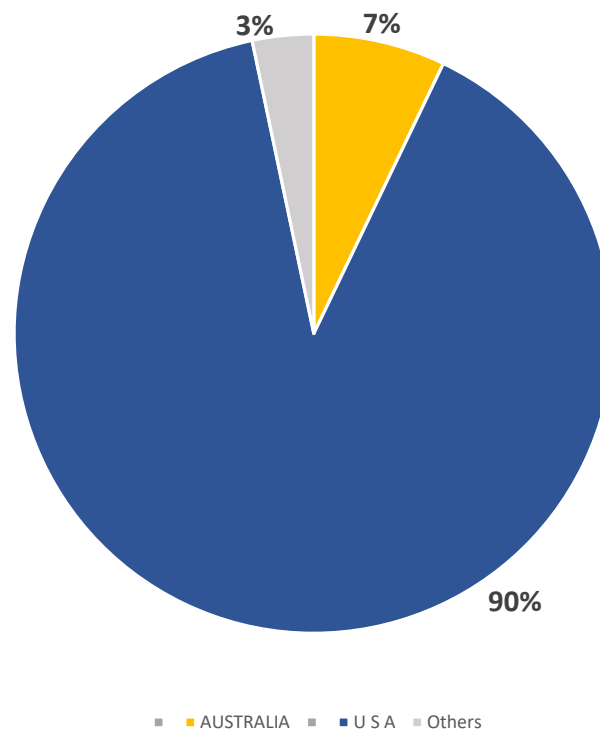
India – Almond Imports from Australia



Source: Ministry of Commerce, Government of India

Almond Import – Market Share 2025-26

INDIA: COUNTRY-WISE ALMOND IMPORT SHARE (2025-2026)



Source: Ministry of Commerce, Government of India

Category Growth Barriers in India



- Caught in legacy consumption and beliefs
- Lack of resonance with the new consumers
- Limited consumption occasions
- Limited geographical expansion



Australian Almonds – What we have been doing

Key Visuals



australian
almonds



Wholesale Market Outreach



Trade Outreach



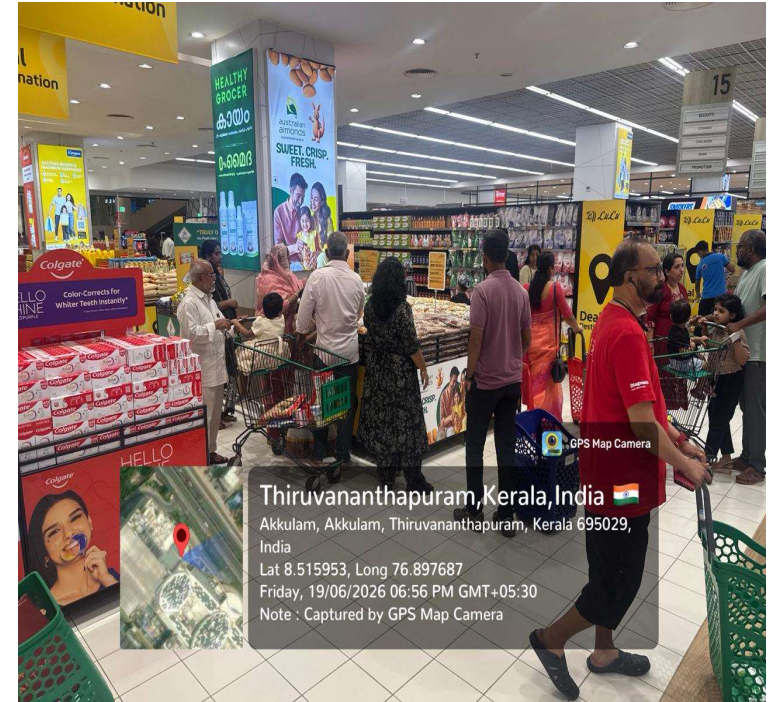
Outreach to Workers



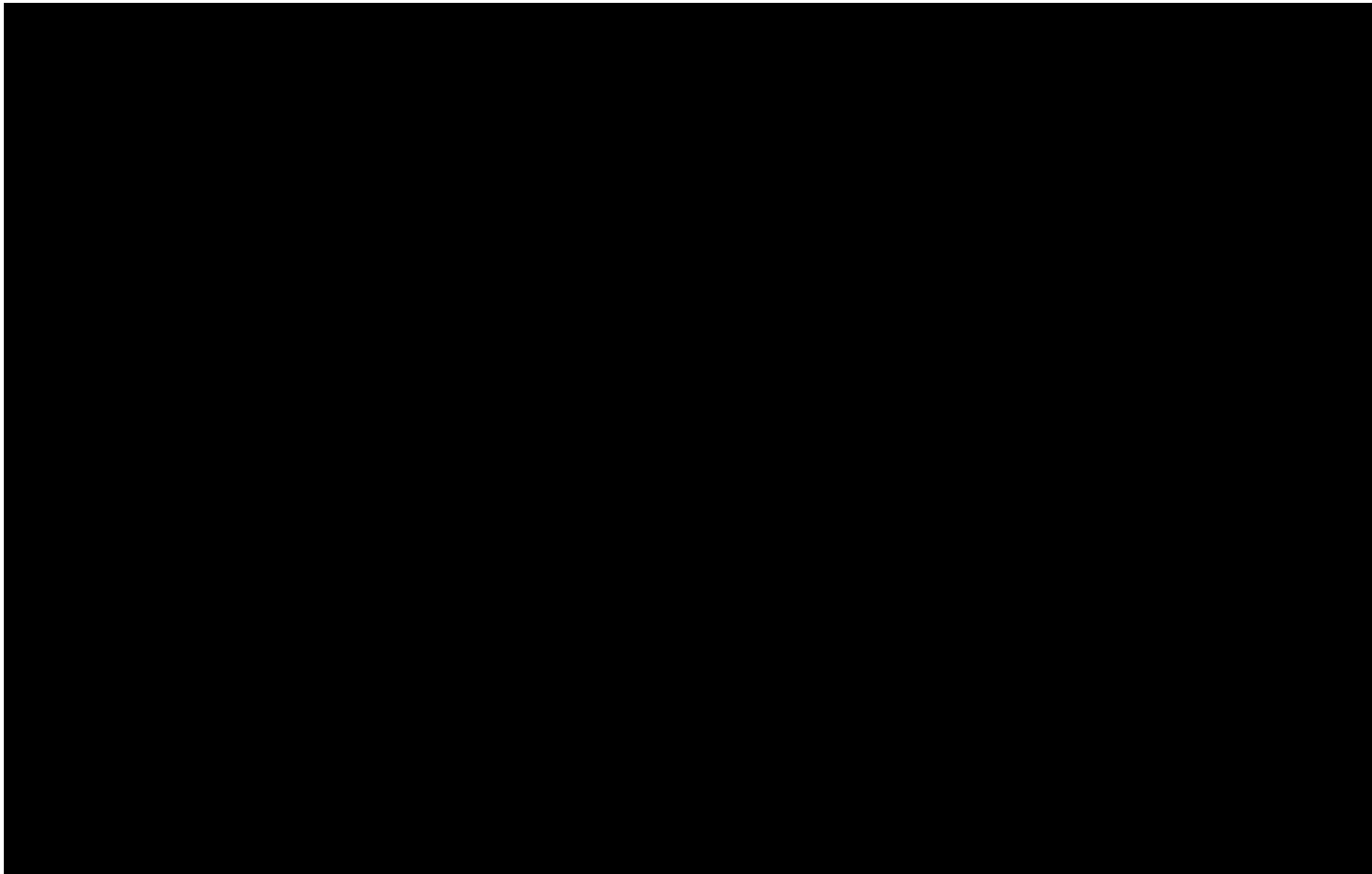
From Commodity to a Brand - Adoption



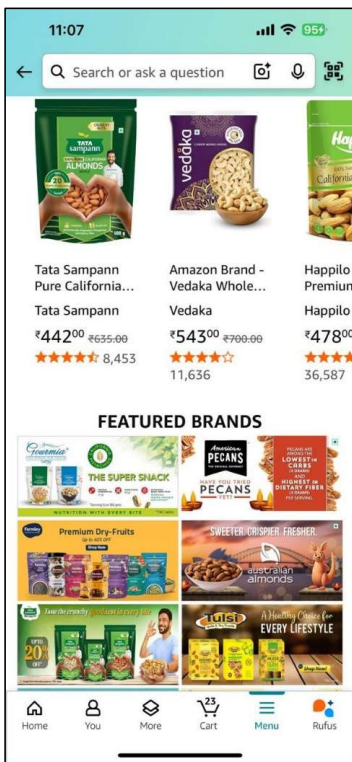
Retail Push



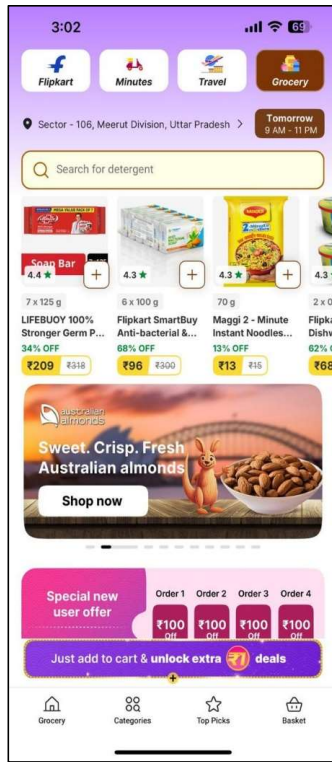
Retail Push



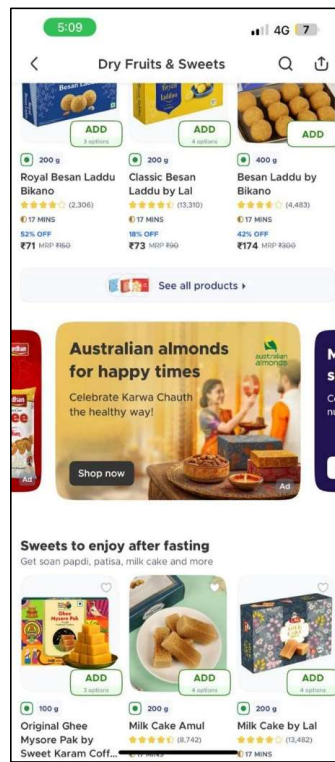
E-Commerce Promotions



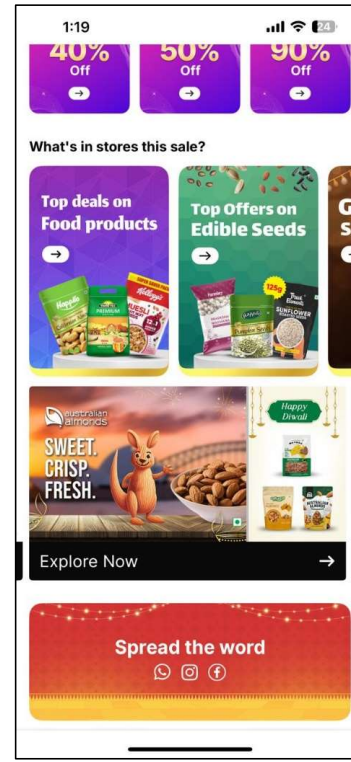
Amazon



Flipkart Grocery



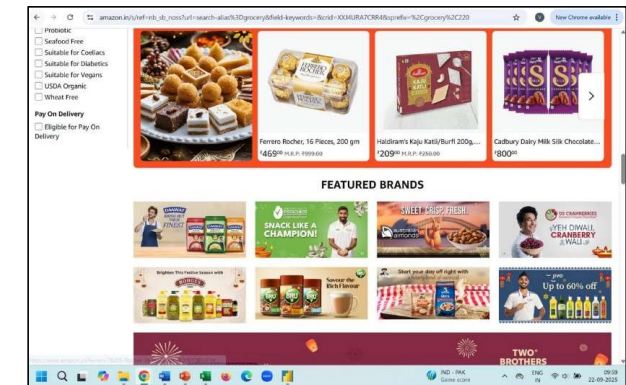
Blinkit



Flipkart BBD



Urban Platter

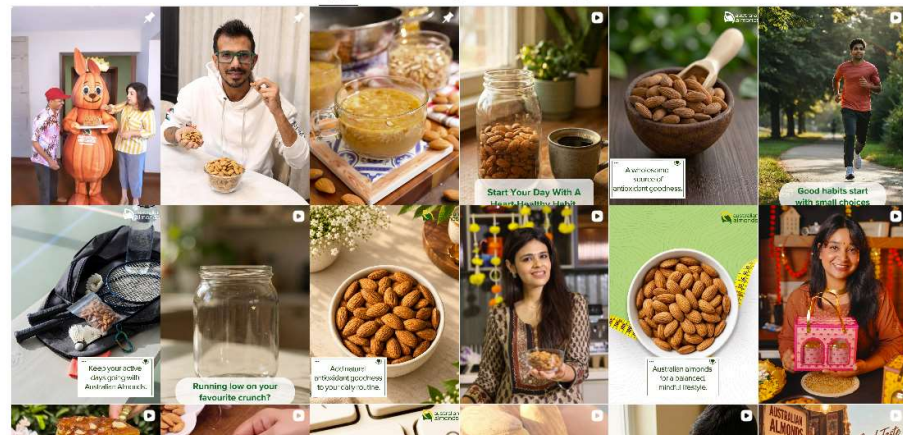
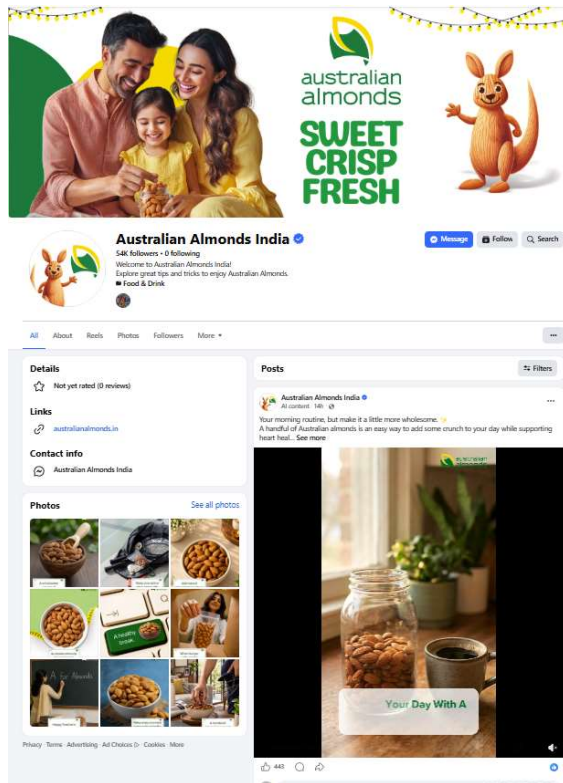


Amazon

PR Activities

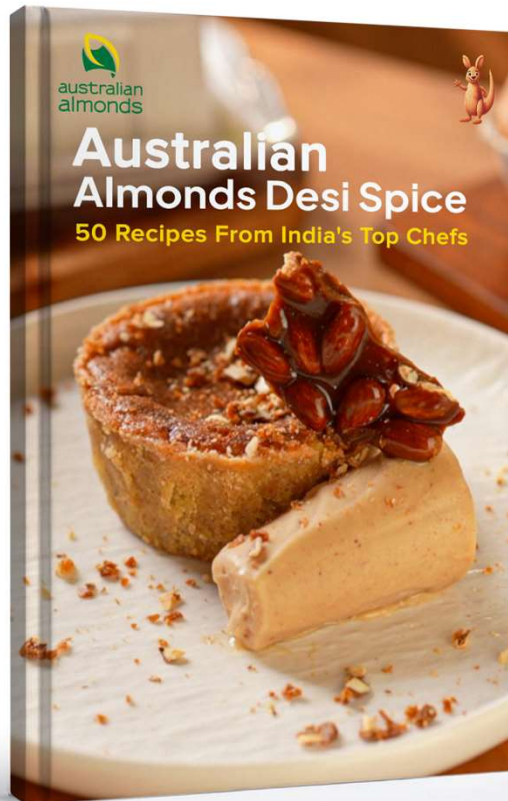


Social Media Presence in India



Instagram: @australianalmonds.india
Facebook: @australianalmonds.india

CookwithAustralianAlmonds.in



Australian Almonds Digital Recipe Book



Scan the
QR code
to get the
digital recipe
book.

Summing Up - Australian Almonds in India

- Australia India Australia-India Economic Cooperation and Trade Agreement (ECTA)
 - Duty Benefit
- Counter seasonal
- Trade awareness is high
 - Strong perceptions
- Consumer awareness is low
 - Tremendous people to people connect
- Size of the pie vs. piece of the pie
 - Both growing
- Sky is the limit
 - Not always geometric progression
- Baby steps taken
 - Initial activities met with great excitement
- Need for year round promotions
 - Consumer brand building is critical



Final Thoughts - Perceptions and Realities

- **Price conscious**
 - Value conscious
 - Premium always in demand
- **Bad payers**
 - Buying from across the world
- **Backward**
 - Data availability and mobile penetration
- **Lack of retail**
 - 1.4 billion people getting serviced
 - New formats are revolutionizing the way people shop
- **Too far**
 - Direct flights
- **Too chaotic**
 - I agree



Thank You



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