

The Fox Nut Job, overseas

A sourced plan to launch an India-made fox nut brand in your country

A free, sourced plan to launch an India-made fox nut brand in the US, UK, EU, UAE, Australia, Canada, South Africa or Kenya: landed cost, duty, import rules, channels and where to start.

Checked 15 October 2026 · Act 0 takes a minute, the full plan about 60 minutes · every figure sourced



Position as of 15 Oct 2026.

This plan is for you if you live in the US, Canada, the UK, Germany, France, the Netherlands, the UAE, Australia, South Africa or Kenya, and you want your own brand of roasted, flavoured fox nuts (the popped seeds of *Euryale ferox*, known in India as makhana) made by a contract manufacturer in India. A contract manufacturer (CM) is a factory that makes and packs a product under your brand. This plan sets out Poorti's sourced research, position as of 15 Oct 2026. Every figure keeps its source and date. **(EST)** marks an estimate or arithmetic. **(Indicative)** marks a commercial figure that could not be checked against an official source. Brands, retailers and distributors appear only as sources of a price, a fact or a channel the sources found. None is a recommendation.

A few terms come first. **FOB** ("free on board") is the price of goods loaded on the ship at the Indian port; every cost after that is yours. **CIF** ("cost, insurance and freight") is FOB plus ocean freight and insurance to your port. **Landed cost** is what one pouch costs once it sits in your warehouse in your country, with duty paid but before sales tax. A **3PL** (third-party logistics provider) is the outside warehouse that receives, stores and ships your stock. A **SKU** (stock-keeping unit) is one product variant, such as one flavour in one pack size.

Common assumptions used throughout (one set for all ten countries, every figure below rests on it)

Input	Value used	Source / basis
EUR, USD, INR	€1 = USD 1.1195 = ₹106.53, so USD 1 ≈ ₹95.2	ECB reference rates, 14 Oct 2026 ¹
GBP	£1 = ₹128.34 (16 Sep 2026), so £1 ≈ USD 1.35	Most recent dated print in the notes ²
CAD	CAD 1 = USD 0.7019 (2 Oct 2026), so USD 1 = C\$1.425	³
AED	USD 1 = AED 3.6725 (peg)	Standing peg
AUD	1 INR = AUD 0.014803 (22 Jul 2026, stale), so USD 1 ≈ AUD 1.41	⁴
ZAR, KES	USD 1 = R16.58 = KES 129.73 (15 Oct 2026)	⁵
FOB price per 80 g retail pouch (EST)	Base ₹124 = USD 1.30 ; low ₹104 = USD 1.09; high ₹156 = USD 1.64	Built from the India cost sheet (ex-factory ₹87 / ₹105 / ₹134 at lawa ₹700 / ₹950 / ₹1,350 per kg), less ₹4 domestic freight, plus ₹6 export pouch and carton, a 12% exporter margin and ₹4 for haulage, customs agent and port documents. Sits inside the ₹85–180 band (base about ₹120) in the freight notes. An estimate until three CMs quote in writing ⁶
Pouches per container	Central: 31,000 per 40-ft high-cube (40'HC); 15,000 per 20-ft. Conservative sensitivity: 16,000 per 40'HC	About 2 litres of shipped volume per packed pouch (central) against about 4 litres (conservative). The single most important unverified input. Measure a packed carton before ordering
Ocean freight per 40'HC, all-in port to port	US (New York) USD 9,000; Canada (proxy, to Toronto) USD 11,000; UK and EU (Hamburg/Antwerp proxy) USD 6,000; UAE (Jebel Ali) USD 5,800; Australia (proxy) USD 4,500; South Africa (Durban proxy) USD 7,100; Kenya (Mombasa proxy) USD 2,350. "Normalised" sensitivity: USD 2,000 per box	Dated lane rates (see Section 5). A "proxy" is a related lane or a 20-ft rate scaled up ⁷
Other per-pouch costs (EST)	Insurance 0.33% of CIF value; per-container clearance and haulage, and a lab-test allowance, by country; 3PL handling USD 0.10 (US, Canada, UK, EU, Australia) or USD 0.06 (UAE, South Africa, Kenya)	Country notes
"Landed cost"	Delivered into the brand's own warehouse in the destination country, duty paid, before sales tax. Import VAT or GST treated as recoverable	
Channel margins	Each country's retailer and distributor margins as given in its card. A uniform 10% trade and promotion allowance on the brand's invoice everywhere, plus a 5% broker in the US and Canadian natural channel	Partly sourced, partly EST
"Brand margin"	(Brand net revenue – landed cost) ÷ brand net revenue, before marketing, listing fees, salaries and overheads	
Shelf prices	Quoted per 80 g pouch. Per 100 g = price ÷ 0.8. Including VAT/GST where shoppers see it that way (UK, EU, UAE, Australia, South Africa, Kenya); before sales tax in the US and Canada	

0. The job in 60 seconds

The point: Three countries let an Indian-made pouch in at zero duty and already have shoppers who buy fox nuts: the UK, the UAE and Australia.

Duty is the import tax charged at the border. In the table, an **FTA** is a free trade agreement, **GSP** (Generalised Scheme of Preferences) is a reduced tariff some rich countries give developing countries, and **MFN** ("most favoured nation") is the standard rate for countries with no deal. **BICON** is Australia's biosecurity import-conditions database. Sections 1 and 6 explain the rest.

Duty, not freight, separates the markets. Freight adds about USD 0.08–0.36 per pouch everywhere; duty adds USD 0.37 in the US, USD 0.55 in Kenya and nothing in the UK, UAE, Australia and South Africa (EST)⁶. "Direct" means you import and sell straight to retailers. "Via distributor" adds a wholesaler in between.

Market	Duty for India-origin goods	Sales tax	Blockers and gates	Flavoured shelf price per 100 g, observed 15 Oct 2026	Landed per 80 g pouch (USD, EST)	Viable shelf price per 80 g	Brand margin at that price	Verdict
UK	0% under CETA from 15 Jul 2026, with an origin declaration; 12% without ⁸	0% likely (confirm with HMRC), else 20% VAT ⁹	None at the border. HFSS (high fat, sugar or salt) placement limits if in scope. UK address on label	£6.00 mainstream; £4.57–4.74 South Asian grocers ^{10 11}	1.69 (£1.25)	£3.75 (£4.69/100 g)	43% direct (32% at 20% VAT); 29% via distributor (15% at 20% VAT)	Start here
UAE	0% under CEPA with a certificate of origin (CEPA category for the 2008 19 line unconfirmed); 5% GCC tariff without ¹²	5% VAT	Every SKU registered before import (ZAD/FIRS). Arabic label with printed dates. Halal certificate for dairy flavours	AED 14.97–15.00 (30 g packs) ^{13 14}	1.61 (AED 5.93)	AED 13.99 (AED 17.49/100 g)	29% direct as your own importer; 18% via distributor at AED 14.99	Start here
Australia	0% under ECTA, all lines since 1 Jan 2026; 5% MFN otherwise ^{15 16}	10% GST	BICON conditions unconfirmed; a permit may take 20–40 business days. No irradiated product	AUD 11.80 (25 g, sold out); plain AUD 9.75 ¹⁷	1.64 (AUD 2.31)	AUD 7.49 (AUD 9.36/100 g)	42% direct to Indian grocers; 27% via distributor at AUD 7.99	Start once BICON clears
US	27.9%: 17.9% under US tariff line HTSUS 2008.19.9090 (customs ruling NY N285508) plus a 10% Section 301 trade duty. No FTA, no GSP ^{18 19}	State sales tax (not researched)	FDA facility registration with a US agent, an FSVP importer, Prior Notice. Duty-free small parcels suspended ²⁰	Amazon median about \$12 (range \$8.81–29.98) ²¹	2.15	\$9.99 on Amazon (\$12.49/100 g); \$5.99 at Indian grocers	Amazon 24–30% after ads; Indian grocers via distributor 29%	Second wave
Canada	6% MFN; India is not a GPT (General Preferential Tariff) beneficiary in 2026 ²²	5% GST / 13–15% HST ²³	Importer needs an SFC licence. Bilingual labels and the "high in" front-of-pack symbol from 1 Jan 2026 ^{24 25}	C\$5.32 (Food Basics) to about C\$14 (Amazon.ca median) ^{26 27}	1.90 (C\$2.71)	C\$7.49 (C\$9.36/100 g)	28% via distributor to Indian grocers	Second wave

Market	Duty for India-origin goods	Sales tax	Blockers and gates	Flavoured shelf price per 100 g, observed 15 Oct 2026	Landed per 80 g pouch (USD, EST)	Viable shelf price per 80 g	Brand margin at that price	Verdict
Germany	4.4% GSP with a REX statement (12.8% MFN). EU-India FTA expected early 2027 ^{28 29}	7%	EU Novel Food Reg. 2023/652: mandatory name and strict specification ³⁰	€3.99-7.63 ethnic; €6.63 start-up brand ³¹	1.78 (€1.59)	€4.99 (€6.24/100 g)	39% direct; 22% via distributor	Second wave (2027)
France	As Germany	5.5% (20% for chocolate or confectionery coatings) ³²	As Germany, plus a French label	€8.17 (out of stock); about €8.90 ³³	1.78	€4.99	23% via distributor	Later
Netherlands	As Germany	9%	As Germany, plus a Dutch label	€5.32 (out of stock) ³⁴	1.78	€4.99	21% via distributor	Later (EU logistics hub)
South Africa	0% on 2008.19; 25% if classed under 1904.10 ³⁵	15% VAT	R146 bans "healthy" and "nutritious". Plant import permit unconfirmed ^{36 37}	R60-100 (25 g pack, promo and regular) ³⁸	1.68 (R27.8)	R69.99 (R87.49/100 g)	27% direct to Indian grocers; 21% via distributor at R79.99	Later
Kenya	35% EAC tariff + 2.5% IDF (import declaration fee) + 2% RDL (railway development levy) ³⁹	16% VAT	KEBS PVoC certificate before shipment ⁴⁰	No fox nuts on shelf; Pringles KES 279-500 as benchmark ⁴¹	2.10 (KES 272)	None viable (KES 650 needed)	10% at KES 650 via distributor	Avoid for now

The verdict in three lines: 1. **Start** in the UK and the UAE now, and in Australia as soon as your importer confirms the BICON conditions. 2. **Second wave:** the US and Canada (run through one US entity), and Germany once the EU-India trade deal takes effect. 3. **Later:** France, the Netherlands and South Africa. **Avoid Kenya for now.**

Three numbers decide everything, and none is published: how many pouches fit in a container, a written FOB quote, and (in the UK) whether HMRC zero-rates the product for VAT.

Your move: Ask a candidate CM to pack one export carton of 80 g pouches and send you its dimensions and pouch count.

1. The tip: why now



India's new trade deals open three markets at zero duty.

The point: Three trade deals now give Indian fox nuts zero duty, the raw seed is cheap, and the UAE shows real online sales.

A **free trade agreement (FTA)** is a treaty that cuts duty between two countries. Goods qualify only with proof that they were made in the partner country (proof of origin). Without a deal, a country charges its MFN rate.

Deal	What it gives you	Status, 15 Oct 2026
India-UK CETA (Comprehensive Economic and Trade Agreement)	0% on the exact 80 g seasoned fox nut line (2008 19 99 80), against 12% MFN ^{8 42}	In force since 15 Jul 2026
India-UAE CEPA (Comprehensive Economic Partnership Agreement)	0% with a CEPA certificate of origin. CEPA frees 97% of UAE tariff lines. 0% is confirmed for the 1904 lines; the 2008 19 category is not ^{12 43}	In force
India-Australia ECTA (Economic Cooperation and Trade Agreement)	0% on all Australian tariff lines for India, against 5% MFN ^{15 16}	Fully duty-free since 1 Jan 2026
EU-India FTA	Line schedule not found. Until it applies, the EU's GSP gives 4.4% instead of 12.8% ^{28 44}	Concluded 27 Jan 2026; signature expected Dec 2026; in force expected early 2027 ²⁹

The seed is cheap. Lawa (raw popped fox nuts, as traded in India) is the seed harvested from the pond, then popped. It is 59-73% of the cost of a pouch. The Bihar price crashed to about ₹565/kg (1 Oct 2026)⁴⁵. The cost sheet behind the FOB estimate assumes ₹950/kg in the base case and ₹700 in the low case. So a CM should be able to quote nearer the low case: ₹104 (USD 1.09) per pouch. Ask for a price held for a season.

The UAE already buys online. On 15 Oct 2026 a 30 g Haldiram's pack on amazon.ae showed "1K+ bought in past month". The best flavoured fox nut product on amazon.com showed "100+". On amazon.co.uk the best badge (100+) went to a plain pack, and most flavoured listings had 0-25 reviews⁴⁶.

What is still small. India exported only 196.8 t of popped fox nuts in FY2025-26, worth USD 2.37 million. Canada (43 t, 22%), the UAE (38 t, 19%) and the US (31 t, 16%) led, then Nepal (19 t) and Australia (17 t)⁴⁷. One paid report sizes the US market at USD 6.95 million in 2024 (indicative)⁴⁸. On Amazon US, the best fox nut product sells at roughly a twentieth of the speed of established better-for-you puffs⁴⁶. Woolworths Australia's search now returns nothing for

"makhana", after a 2021 launch⁴⁹. Amazon.de showed five plain listings and no flavoured product⁵⁰. You will build a category, not take share in one.

Your move: Send three CMs a written request for an FOB quote per 80 g pouch, held for one season.

2. The target: the product



Popped fox nuts from Bihar: the product, before seasoning and packing.

The point: One 80 g pouch, made and exported by an Indian CM, leaving port at about USD 1.30.

The pouch. The plan is costed on an 80 g retail pouch. In the UAE, the format that moves is a **25–30 g single serve** at AED 4.15–4.50⁴⁶; South Africa and Kenya also point to small packs later. The sources give no FOB for a 25–30 g pack, so get a quote.

The price at the port (EST). No Indian exporter publishes a firm FOB price for retail-packed flavoured fox nuts; listings say "price on request". The figure is built from a cost sheet.

FOB build-up per 80 g pouch (EST)	Low	Base	High
Ex-factory cost from the India cost sheet (lawa ₹700 / ₹950 / ₹1,350 per kg)	₹87	₹105	₹134
Less domestic freight already in that sheet	–₹4	–₹4	–₹4
Export-grade pouch upgrade (foil or metallised high-barrier, oxygen absorber), 5-ply carton	+₹6	+₹6	+₹6
Exporter (CM) margin, 12%	+₹11	+₹13	+₹16
Inland haulage to port, customs agent, origin documents	+₹4	+₹4	+₹4
FOB per pouch	₹104 (USD 1.09)	₹124 (USD 1.30)	₹156 (USD 1.64)

Two checks support it. India's popped fox nut exports realised about USD 12.04/kg in FY2025–26⁴⁷; the base FOB is about USD 16/kg of finished, packed product, which fits above that plain average. Domestic B2B listings price 70–80 g flavoured packs at ₹95–158⁵¹.

Who makes and ships it. The **exporter of record** is the business that legally exports the goods and holds the Indian registrations, normally the CM or a merchant-export house. You do not need Indian registrations yourself. You check that the CM holds them and specify what it files (Section 5).

Minimum orders (indicative supplier claims). Plan on **500–2,000 kg per flavour, about 6,000–25,000 pouches**. One supplier quotes recipe development at ₹100,000–300,000⁵². Gravure-printed pouches pay off at about 10,000 per SKU; digital printing allows 1,000–5,000 (EST).

Lead time (EST, not sourced). A first order takes **6-10 weeks from purchase order to loading**: samples, recipe approval, pouch printing, production, paperwork. Repeat orders take 3-5 weeks.

Built for a long voyage. Fox nuts absorb moisture and go soft. Temperature swings at sea cause "container rain", which insurers can refuse as "inherent vice"⁵³. In the one fox nut packaging study found, 15 µm film held quality about 60 days and 80 µm film or silver laminate about 135 days⁵⁴. Write this specification into the CM contract (EST, synthesised from the sources): - PET/metallised-PET/PE or PET/aluminium/PE laminate of at least 80-100 µm; - nitrogen flush to 2-3% residual oxygen or less; - finished moisture in the low single digits, on each batch's certificate of analysis; - 5-ply export cartons; - calcium-chloride container desiccants with vents sealed (vendors suggest 2-4 kg per 20 ft, indicative)⁵⁵.

Validate a **9-12-month shelf life**. Retailers typically want about two-thirds of the life left on arrival (inference).

Certificates decide your buyers. Mainstream retail wants a plant certificate benchmarked by the GFSI (Global Food Safety Initiative): **BRCGS** for UK multiples, **FSSC 22000 or SQF** for US mainstream retail and Costco, **IFS or BRC** in Germany, where about 89% of chains require one (indicative)^{56 57}. Choose a CM that already holds one; certifying from scratch adds months.

How you buy. Incoterms are the standard trade terms that say where the seller's costs and risks end. The default is to **buy FOB Nhava Sheva or Mundra in a 40-ft high-cube**, with your own freight forwarder booking the ship. CIF suits a small first order, but freight is often marked up. **DDP** (delivered duty paid) is rarely offered by Indian CMs. Ask for **ICC(A) "all risks" cover plus war and strikes**; the Incoterms minimum is only ICC(C). Cover costs about 0.15-0.5% of 110% of the invoice value, about USD 0.002-0.013 per pouch (EST)⁵⁸. Carriers held cargo in 2026 until "emergency" surcharges were paid, so put a cap on surcharge pass-through in the freight agreement⁵⁹.

Your move: Write the packaging specification, the shelf-life test and the required certificate into the CM contract before you approve samples.

3. Casing the joint: demand and shelf prices

The point: Fox nuts already sit on UAE hypermarket shelves and in South Asian grocers everywhere; mainstream shelves elsewhere are mostly empty.

Market	Demand signal	Flavoured shelf prices per 100 g (15 Oct 2026)	Mainstream presence
UK	No size figure. Host category (crisps, snacks, nuts) about £5.3 bn ⁶⁰	£6.00 (25 g at Ocado); £4.57–4.74 at South Asian grocers; plain £3.19 ^{10 11}	One popped-lotus-seed brand in 25 g packs; none at Asda or Waitrose ⁶¹
UAE	About 4.3 million Indian residents, roughly 35% of the population; 38 t of popped fox nuts in FY26 ^{62 47}	AED 14.65–15.00 (Haldiram's 30 g); plain AED 11.50–15.79 ^{13 14}	Carrefour files every fox nut SKU under "Indian food"; Lulu lists seven, including its own label
Australia	971,020 India-born residents, the largest overseas-born group; 17 t in FY26; first sea shipment of 18 t left Bihar in Aug 2026 ^{63 64}	AUD 11.80 (25 g, sold out); plain AUD 9.75; cross-border from India AUD 10.56–25.97 ¹⁷	Woolworths, IGA and Harris Farm show none ⁴⁹
US	31 t in FY26; market USD 6.95 m in 2024 (indicative) ^{47 48}	Amazon \$8.81–29.98, median about \$12; plain \$4.49 at Patel Brothers online ²¹	No grocery price observable (bot checks, no prices rendered)
Canada	Largest buyer of popped fox nuts: 43 t, 22% ⁴⁷	C\$5.32 (Food Basics, 75 g) to C\$24.54 on Amazon.ca ^{26 27}	One foothold: Food Basics, two SKUs
Germany	Highest unit value (about USD 26/kg) but 1–5% of India's exports (different data series) ⁶⁵	€3.99–7.63 at Indian e-grocers; €6.63 start-up brand ³¹	A start-up 30 g pack at REWE; none at dm
France	Only two flavoured listings found	€8.17 (out of stock); about €8.90 ³³	None found
Netherlands	APEDA suggests NL and Belgium as entry points ⁶⁵	€5.32 (out of stock) ³⁴	None at Jumbo or Holland & Barrett NL
South Africa	About 1.7 million Indian/Asian residents, mostly around Durban ⁶⁶	R60–100 (25 g pack, promo and regular); plain R75–84 ³⁸	Clicks and Faithful to Nature return none
Kenya	About 90,527 Asians (2019 census); modern trade about 7% of food retail ⁶⁷	No fox nuts; Pringles KES 279–500 ⁴¹	None

The live Amazon check (15 Oct 2026). Amazon's "bought in past month" badge is the closest public signal of sales speed. Delivery was set to a central address in each country^{46 50}.

Amazon store	Results for "roasted makhana"	Flavoured price per 100 g	Best fox nut sales badge	Same-page comparison
amazon.ae	188	AED 14-17 for 25-30 g packs; AED 11.7-13.3 for 75 g	1K+ (Haldiram's Mast Masala 30 g); 900+ (Haldiram's Salt & Pepper 30 g at AED 4.50; Mr Makhana Lime & Chilli 25 g at AED 4.15)	Seaweed snack 700+
amazon.com	225	USD 8-30, median about USD 15 (20 listings with a stated size)	100+ (flavoured); 200+ (a plain 200 g pack)	LOVE CORN 5K+, Hippeas 2K+, CauliPuffs 700+
amazon.co.uk	93	About GBP 6.6-15.5, median about GBP 8.2 (converted from Amazon's INR display; true GBP may be a few per cent lower)	100+ (a plain 100 g pack); flavoured listings mostly 0-25 reviews	Not captured
amazon.de ("makhana", grocery)	5 fox nut listings on page one	No flavoured product; plain about €11.5-17 (one at €40)	Not recorded	Rest of page was other nuts

Only in the UAE do fox nuts already sell in volume online, at single-serve prices that match the shelf. The US is a premium niche. UK Amazon is a long tail of small Indian sellers, so South Asian grocery and direct pitches come first. Google Trends could not be read on the day (HTTP 429)⁴⁶.

Your move: Put your planned price per 100 g next to the rows for your start market, and check it sits inside the observed range.

4. The money trail



One pouch, followed from the pond to the shelf.

The point: In the UAE you keep about AED 2.50 of a AED 13.99 pouch when you sell direct; in the UK about £0.94 of £3.75, if VAT is 0%.

Follow one coin from the shopper back to you. Each hand takes its share and passes the rest along. Amounts are arithmetic on the source's rates and totals (EST), rounded, so lines may not add exactly.

One pouch in the UAE, direct to a retailer, at AED 13.99

The shopper pays AED 13.99 at the till. The till passes AED 0.67 to the government as 5% VAT. The retailer keeps its 30%, AED 4.00, and passes AED 9.33 to you. You hand AED 0.93 straight back as the 10% trade and promotion allowance. That leaves AED 8.39. But AED 5.93 of it went out before the pouch reached the shelf. AED 4.79 went to the Indian maker at the port, and the biggest part of the maker's cost went back to the pond, as lawa. AED 0.69 went to the shipping line. AED 0.02 went to the insurer. Nothing went to customs. AED 0.08 went to the port, the clearing agent, the Dubai Municipality inspection and the truck. AED 0.02 went to product registration, AED 0.12 to the lab and AED 0.22 to the warehouse. **You keep AED 2.46, a 29% brand margin.**

UAE, AED per 80 g pouch (EST)	Direct to retailer at AED 13.99	Via distributor at AED 14.99
Shopper pays (incl. 5% VAT)	13.99	14.99
→ VAT, 5%	-0.67	-0.71
→ Retailer, 30% of ex-VAT price	-4.00	-4.28
→ Distributor, 20%	none	-2.00
→ Trade and promotion allowance, 10% of your invoice	-0.93	-0.80
= You receive (brand net)	8.39	7.20
Landed cost (next table)	-5.93	-5.93
= You keep	2.46 (29%)	1.27 (18%)

Landed cost, UAE (per pouch, EST)	AED	What sits inside
FOB India	4.79	₹124. Inside it: ex-factory cost ₹105, of which lawa from the pond is 59-73% (the source does not split it further); less ₹4 domestic freight; ₹6 export pouch and carton; ₹13 CM margin; ₹4 haulage, agent and documents
Ocean freight, USD 5,800 ÷ 31,000	0.69	Jebel Ali rate at 2026 crisis level
Insurance	0.02	0.33% of CIF
Duty	0.00	CEPA, with certificate of origin
Port, clearance, Dubai Municipality inspection, trucking (AED 2,500 per box)	0.08	
Product registration	0.02	
Testing	0.12	
3PL warehouse	0.22	
Landed	5.93	AED 5.48 at normalised freight
	(USD 1.61)	

One pouch in the UK, at £3.75

The shopper pays £3.75. If HMRC confirms 0% VAT, the government takes nothing; if not, it takes £0.63. Selling direct, the retailer keeps 35% and you hand back 10% as trade allowance. With a distributor, the distributor takes 20% before you. The UK cost sheet does not show insurance as its own line; it sits inside the £1.25 total.

UK, GBP per 80 g pouch (EST)	Direct, VAT 0%	Direct, VAT 20%	Via distributor, VAT 0%
Shopper pays	3.75	3.75	3.75
→ VAT	0.00	-0.63	0.00
→ Retailer, 35% of ex-VAT price	-1.31	-1.09	-1.31
→ Distributor, 20%	none	none	-0.49
→ Trade allowance, 10%	-0.24	-0.20	-0.20
= You receive	2.19	1.83	1.76
Landed cost	-1.25	-1.25	-1.25
= You keep	0.94 (43%)	0.58 (32%)	0.51 (29%)

Landed cost, UK (per pouch, EST)	GBP
FOB India (₹124; inside it the maker and the pond, as in the UAE table)	0.97
Ocean freight, USD 6,000 proxy ÷ 31,000	0.14
Insurance	Not itemised; inside the total
Duty	0.00 (0.13 without an origin declaration)
Port, broker and haulage (£1,200 per box)	0.04
Testing and compliance	0.02
3PL warehouse	0.07
Landed	1.25 (USD 1.69)

What you keep, country by country

"You keep" is brand net minus landed cost per pouch, before marketing and overheads. Where the source gives only a margin percentage, the money columns say so.

Market	Route and shelf price (80 g)	Brand net	Landed	You keep (EST)	Brand margin
UK	Direct at £3.75 (VAT 0% / 20%)	£2.19 / £1.83	£1.25	£0.94 / £0.58	43% / 32%
UK	Via distributor at £3.75 (VAT 0% / 20%)	£1.76 / £1.46	£1.25	£0.51 / £0.21	29% / 15%
UK	Amazon 4 × 80 g at £12.99, before ads (VAT 0% / 20%)	Contribution per 4-pack		£3.95 / £1.79 per 4-pack	30% / 16% of ex-VAT
UAE	Direct at AED 13.99	AED 8.39	AED 5.93	AED 2.46	29%
UAE	Via distributor at AED 14.99	AED 7.20	AED 5.93	AED 1.27	18%
Australia	Direct to Indian grocers at AUD 7.49	AUD 3.98	AUD 2.31	AUD 1.67	42%
Australia	Via distributor at AUD 7.99	AUD 3.19	AUD 2.31	AUD 0.88	27%
US	Indian grocer via importer-distributor at \$5.99	\$3.02	\$2.15	\$0.87	29%
US	Amazon single pouch at \$9.99, after fees and ads	Contribution		\$2.37-2.96	24-30% of price
US	Natural or mainstream at \$7.49	\$2.96	\$2.15	\$0.81	27%
Canada	Direct to Indian grocers at C\$5.99	C\$3.77	C\$2.71	C\$1.06	28%
Canada	Via distributor to Indian grocers at C\$7.49	C\$3.77	C\$2.71	C\$1.06	28%
Germany	Direct to retailer at €4.99	€2.62	€1.59	€1.03	39%
Germany	Via distributor at €4.99	€2.05	€1.59	€0.46	22%
France	Via distributor at €4.99	Not itemised	€1.59	Not itemised	23%
Netherlands	Via distributor at €4.99	Not itemised	€1.59	Not itemised	21%
South Africa	Direct to Indian grocers at R69.99	R38.34	R27.8	R10.54	27%
South Africa	Via distributor at R79.99	R35.06	R27.8	R7.26	21%
Kenya	Via distributor at KES 650 (KES 560 gives a 4% loss)	Not itemised	KES 272	Not itemised	10%

A distributor plus a retailer, with a 10% trade allowance, leaves you 15-29% almost everywhere. Selling direct, or on Amazon, roughly doubles that. So the first-year model in every start market is: **be your own importer and sell direct**.

The two levers that can break the numbers

Lever 1: pouches per container. Moving from 31,000 to 16,000 pouches per 40'HC adds USD 0.19–0.39 per pouch.

Lever 2: FOB. Moving from base to high FOB adds USD 0.33–0.47. Either shift alone cuts the distributor-route margin to single digits in the UAE, South Africa and Canadian mainstream grocery. Freight, despite the 2026 crisis, is never more than USD 0.36 a pouch at the central fill.

Landed per pouch (EST, local currency)	Base	Low FOB	High FOB	At 16,000 per 40'HC	Other case
US (USD)	2.15	1.88	2.58	2.50	Normalised freight 1.92
Canada (C\$)	2.71	2.39	3.22	3.26	
UK (£)	1.25	1.09	1.50	1.44	
Germany, France, Netherlands (€)	1.59	1.39	1.90	1.84	At MFN duty 1.70
UAE (AED)	5.93	5.15	7.17	6.76	Normalised freight 5.48
Australia (AUD)	2.31	2.01	2.79	2.62	
South Africa (R)	27.8	24.3	33.4	Not given	First 20-ft order of 15,000: 32.7
Kenya (KES)	272	Not given	Not given	Not given	On a 20-ft: 294

Your move: Rebuild these two cascades in a spreadsheet and replace each EST line with a written quote as it arrives.

5. The crew



In India: the maker who packs and exports. At home: the importer who clears and sells.

The point: The Indian CM carries the export paperwork; you, or someone you appoint, carries the import.

In India

Role	What they do	What to ask	Cost (from the sources)
Contract manufacturer and exporter of record	Makes, packs and exports the pouch. Holds IEC (Import Export Code from DGFT), APEDA RCMC (membership with India's agri-export authority) and an FSSAI food licence	Show me your IEC, RCMC and FSSAI licence. Which GFSI certificate do you hold? Will you hold FOB for a season? Do you irradiate? Will every invoice carry the origin declaration? For the US, will you renew FDA registration and name a US agent?	IEC ₹500 (indicative); RCMC ₹5,900, valid 5 years; FSSAI: sources conflict on Central licence vs turnover, so confirm on FoSCoS ^{68 69 70} . HACCP certification about ₹50,000-150,000 over 30-90 days (indicative) ⁶⁸ . Recipe development ₹100,000-300,000 (one supplier, indicative) ⁵²
Freight forwarder	Books the ship from Nhava Sheva or Mundra; handles port paperwork	All-in rate per 40'HC to my port; surcharge cap in writing; an LCL (less than container load, a part load) rate for a small first order	Lane table below. LCL about USD 0.17-0.45 per pouch at pre-spike guide rates (indicative), suited to first orders below about 7,500-12,500 pouches ⁷¹
Inspection body and lab	Tests each batch; issues the certificate of analysis; issues Kenya's PVoC certificate before shipment	Moisture, pesticides (including ethylene oxide), aflatoxins, acrylamide, 3-MCPD, microbes; a germination test for Australia	Lab allowances per box (EST): US USD 1,000; EU €1,500 for novel-food batch tests. Kenya PVoC 0.5-0.6% of FOB (min USD 300, max USD 3,500) plus lab tests ⁴⁰
Cargo insurer	Covers the voyage	ICC(A) plus war and strikes	0.15-0.5% of 110% of invoice value ⁵⁸

Each shipment needs a shipping bill, invoice, packing list, bill of lading, certificate of analysis and certificate of origin, declared under India's tariff code for fox nuts, **2008 19 21**⁴⁷. India's RoDTEP export incentive (to 31 Dec 2026) is worth about one US cent a pouch at the nearest line's 1.3% (indicative), and the CM usually keeps it⁷².

Freight lane from Nhava Sheva (unless stated)	2026 rate	Transit	Per pouch at 31,000 / 16,000 (EST)
New York	40'HC USD 8,713 + USD 210 origin + USD 72 destination (Hapag-Lloyd, valid to 26 Oct 2026); CMA CGM USD 10,208 ⁷³	27-36 days	USD 0.29 / 0.56
Antwerp (North Europe)	About USD 7,550 all-in (MSC, 16-31 Aug 2026); Hamburg USD 4,700-5,080 for late Oct (indicative) ⁷⁴	About 37 days	USD 0.19 / 0.38 at the USD 6,000 used
Jebel Ali (UAE)	USD 5,609 per 40 ft (Drewry, Jun 2026); USD 5,035 forwarder quote (10 Aug 2026, indicative) ⁷⁵	About 22 days (overland bypass)	USD 0.19 / 0.36
Melbourne (proxy: Cochin origin)	USD 3,062-4,246 (28 Aug 2026), plus a USD 600 per 40 ft ANL surcharge ⁷⁶	About 22 days	USD 0.15 / 0.28 at USD 4,500
Durban	20 ft USD 6,298-7,938 ⁷⁷	About 12.5 days	40'HC proxy USD 0.23
Mombasa	20 ft USD 1,920-2,000 ⁷⁷	About 8 days	40'HC proxy USD 0.08
Toronto / Vancouver	No India-origin rate found; proxy USD 11,000 (EST)	Not found	USD 0.35 / 0.69

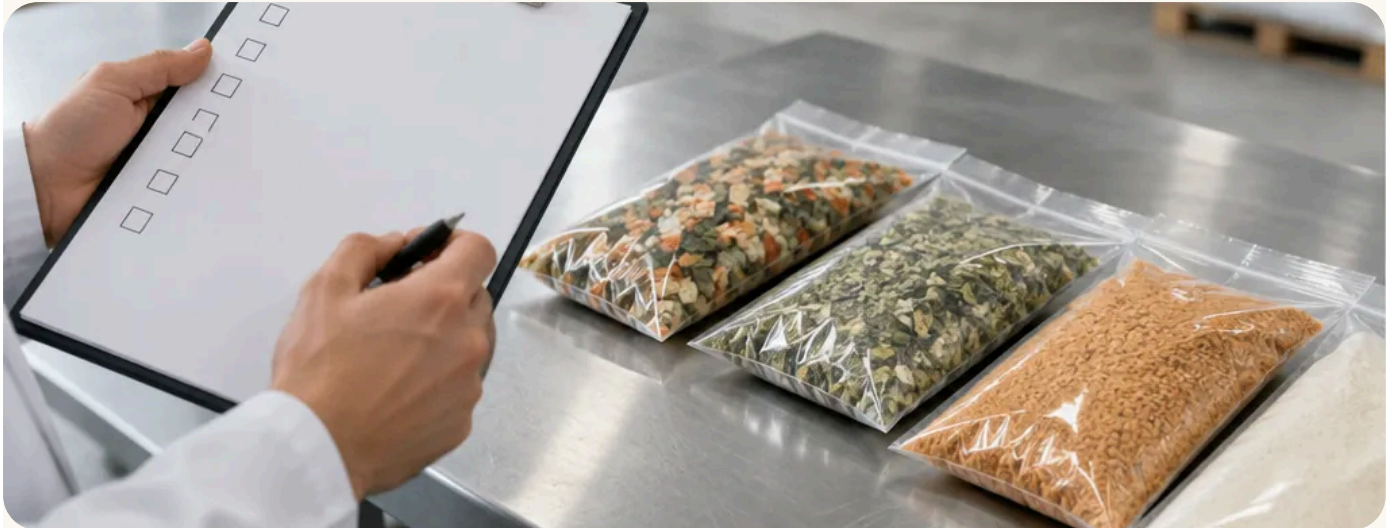
Use a 40-ft high-cube: a 20-ft costs about 90-95% as much but holds half the pouches (EST). Air freight, at about USD 1.35 per pouch airport to airport, is for samples only⁷⁸.

At home

Role	What they do	What to ask	Cost (from the sources)
Importer of record	The legal importer who answers to customs and food authorities: you, your company, or a licensed service. In the US this includes the FSVP importer, who verifies the supplier's food safety; in Canada the SFC licence holder; in the UAE a trade-licence holder with food trading; in Australia the BICON applicant	Are you licensed for food? Will you hold the bond, FSVP or SFC duties? Can you run BICON for me?	Get a quote
Customs broker	Files the import entry, classifies the product, claims the 0% rate	Confirm the tariff line and FTA category (UAE: 2008 19 under CEPA; South Africa: 2008.19, not 1904.10)	Per container, broker plus clearance and haulage (EST): US USD 1,500 (incl. bond, ISF, Prior Notice, drayage); Canada USD 800; UK £1,200; UAE AED 2,500; Australia AUD 900 plus AUD 1,500 terminal and cartage; South Africa USD 1,500; Kenya USD 2,500. Australia also charges AUD 71 plus AUD 152 per consignment ⁷⁹
3PL warehouse	Receives, stores, picks and ships stock	Storage per pallet, pick fees, Amazon prep, food-grade storage	USD 0.10 per pouch (US, Canada, UK, EU, Australia) or USD 0.06 (UAE, South Africa, Kenya) (EST). Germany €8-15 per pallet space per month (indicative) ⁵⁶
Label and regulatory consultant	Checks label, claims and registrations against local law	Are my name, allergen panel, nutrition table and address compliant? EU: does the CM's process match the 2023/652 description?	Get a quote
Distributor	Buys from you, sells to retailers	Margin, payment terms, which retailer codes they hold	UK 10-30% (indicative); GCC about 20% (indicative); US natural channel: distributor, broker and trade costs take 40-50% of bill-through revenue ^{80 81 82}
Retailer buyer	Lists the product on shelf	Front margin, listing fees, promotion calendar	UK front margin 30-45% ⁸⁰ . Listing fees: UAE AED 10,000-15,000 per product per outlet (2018, anecdotal) ⁸¹ ; REWE €20,000-35,000 per SKU; first-year German retail €70,000-150,000 (indicative) ⁵⁶ ; US slotting USD 250-1,000 per item per store ⁸²
Amazon	Marketplace and fulfilment (FBA, "fulfilled by Amazon")	Referral fee and FBA fee at your price point	US: 8% referral at USD 15 or less, 15% above; FBA about USD 2.43-3.06 plus a 3.5% fuel surcharge ⁸³ . UK: 5% up to £10, 8% above ⁸⁴ . Germany: 8% up to €10, 15% above (2019 rule, unverified for 2026); Pan-EU €39 a month ⁸⁵

Your move: Appoint your importer of record first, because most other permits are applied for in its name.

6. The gear



Each country has its own paperwork. Get it right before the box sails.

The point: Each market has its own registration, label and origin paperwork, and one missing item can stop a container.

Market	Registration or licence	Label language and mandatory content	Origin proof for low duty	Special rules
UK	None at the border; fox nuts are not on the GB high-risk food list ⁸⁶	English; 14 allergens emphasised; nutrition per 100 g; a UK, Channel Islands or Isle of Man address ⁸⁷	CETA origin declaration on the invoice (no fee), or a DGFT electronic certificate ⁸⁸	HFSS placement and promotion limits in England may apply (unresolved). The one mainstream recipe checked scores 12, "less healthy" (threshold 4); 10-12% sunflower oil and at most 180 mg sodium per 100 g could score about 2 (EST, needs lab data). Paid ad limits exempt firms under 250 staff ⁸⁹ . A sesame topping could trigger border checks. Ask HMRC for non-statutory VAT clearance ⁹
UAE	Every SKU and flavour registered before first import on ZAD or Dubai's FIRS; fees quoted at AED 110-240 or AED 1,000-2,500 per product (sources conflict) ⁹⁰	Arabic mandatory (GSO 9); production and expiry dates printed, not stickered ; 14-allergen Arabic declaration ⁹¹	CEPA certificate of origin; registration also asks for a health certificate and a free-sale certificate ⁹²	Halal certificate where dairy or flavourings carry animal inputs (indicative) ⁹³
Australia	BICON . No fox nut case exists; the nearest covers puffed seeds made non-viable. A permit, if needed, takes 20-40 business days and only an Australian importer can apply ⁹⁴	English; "Made in India" suffices; PEAL (plain English allergen labelling); Australian address ⁹⁵	ECTA electronic certificate of origin ⁹⁶	Expect to prove the seeds are dead (peanuts need 100% devitalisation proof since 11 Aug 2026) ⁹⁷ . No irradiated product. Khapra-risk spices; no jute or hessian. Fox nuts are "surveillance food" under the Imported Food Inspection Scheme (IFIS) , referred about 5% of the time ⁹⁸
US	CM's plant registered with FDA , naming a US agent (renewal window Oct-Dec 2026); FSVP (Foreign Supplier Verification Program) importer; Prior Notice before every shipment; customs bond and ISF (Importer Security Filing) 24 hours before loading ^{99 100}	English Nutrition Facts built from lab data; nine major allergens; US distributor address	Ordinary certificate of origin (no preference)	De minimis (duty-free entry for parcels of USD 800 or less) is suspended indefinitely, so no duty-free web orders from India ²⁰ . One fox nut exporter is on Import Alert 99-39 for label errors ¹⁰¹
Canada	SFC (Safe Food for Canadians) licence before goods reach the border (up to 15 business days); non-residents need a fixed place of business in the US or Canada; a preventive control plan ²⁴	Bilingual English and French; Canadian Nutrition Facts; "high in" front-of-pack symbol since 1 Jan 2026 ²⁵	Ordinary certificate of origin	A 5% salt recipe is about three times the sodium trigger (EST); cut salt to about 1.7% or design the pack around the symbol

Market	Registration or licence	Label language and mandatory content	Origin proof for low duty	Special rules
Germany, France, Netherlands	EU importer or brand owner on the label with an EU address, registered as a food business; national packaging registration under EPR (extended producer responsibility): LUCID (DE), Citeo (FR), Afvalfonds (NL) ^{102 103}	National language; mandatory name "makhana (Euryale ferox) roasted seeds" or "roasted seeds of Euryale ferox" (you may market the product as fox nuts, but the legal name on the pack must read exactly as the regulation says); "lotus seeds" alone risks being misleading ³⁰	GSP statement on origin from a REX -registered exporter (REX: the EU's registered-exporter system), until the FTA applies ²⁸	Novel Food specification per batch: moisture <5%; pesticides ≤0.01 mg/kg; aflatoxin B1 ≤2 µg/kg; acrylamide ≤40 µg/kg; 3-MCPD ≤20 µg/kg; lead, arsenic, cadmium ≤0.1 mg/kg each; Salmonella and Listeria absent in 25 g ³⁰ . €3 duty per item on parcels of €150 or less since 1 Jul 2026 ¹⁰⁴ . Nutri-Score voluntary ¹⁰⁵
South Africa	Plant import permit unconfirmed ; ask the Plant Health directorate in writing ³⁷	R146 : no "healthy", "wholesome" or "nutritious"; nutrient claims only where thresholds are met ³⁶	Ordinary certificate of origin	Get a SARS tariff determination for 2008.19 (0%) rather than 1904.10 (25%) ³⁵
Kenya	KEBS PVoC (Pre-Export Verification of Conformity) certificate issued before shipment; without one, destination inspection at 0.6% ⁴⁰	KS EAS 38; English and/or Kiswahili; Kenyan importer details ¹⁰⁶	Not applicable	35% duty line; seek a KRA classification view

Your move: Copy your start market's row into a checklist and give it to your importer and label consultant before you approve artwork.

7. The plan



First shipment: about nine to fifteen weeks from order to port.

The point: Three written answers come before the purchase order; everything after it is a fixed sequence.

First-shipment timeline, common to all markets

When	Step	Who	Notes
Before week 0 (gates)	Measure a packed carton; get three written FOB quotes; get lab nutrition data on the finished recipe	You, CMs, lab	No duration in the sources
Before week 0 (gates)	Get your market's regulatory answer: HMRC VAT clearance (UK); CEPA category for 2008 19 from a Dubai broker (UAE); BICON result (Australia)	Importer, broker	A BICON permit, if needed, takes 20-40 business days ⁹⁴ ; Canada's SFC licence up to 15 business days ²⁴
Before week 0	Appoint importer of record and 3PL; register SKUs where required (UAE); finalise label artwork	You, importer, consultant	UAE registration needs printed Arabic artwork
Week 0	Purchase order to the CM	You	Lock the season's FOB price
Weeks 0-10	Samples, recipe approval, pouch printing, production, export paperwork	CM	6-10 weeks to loading (EST, not sourced)
Loading	Origin proof on the invoice or certificate; certificate of analysis; desiccants in the container	CM, forwarder	
At sea	About 22 days to Jebel Ali or Melbourne; about 37 days to Antwerp; 27-36 days to New York	Forwarder	Roughly 9-13 weeks from order to a UAE or Australian port, and 11-15 weeks to North Europe (EST, arithmetic on the rows above)
Arrival	Customs entry, inspection (Dubai Municipality; about 5% referral in Australia), delivery to 3PL	Broker, 3PL	
First sales	Listings live, retailer deliveries	You	Repeat orders take 3-5 weeks to load (EST)

First three steps in each start market

UK. 1. Apply for HMRC VAT clearance and get lab nutrition data, so you know the VAT rate and the HFSS score. Reformulate toward lower sodium and saturates if needed. 2. Make sure the CM puts the CETA origin declaration on every invoice and your label carries a UK address. Ship to a UK 3PL. 3. Launch an Amazon UK multipack, plus Ocado or the Holland & Barrett marketplace, and South Asian online grocers. Then pitch a supermarket challenger-brand scheme with a BRCGS-certified CM.

UAE. 1. Appoint a licensed importer or form a UAE trading entity. Register each flavour on ZAD/FIRS with printed Arabic and English artwork. Get halal certificates for any dairy flavours. 2. Have a Dubai customs broker confirm the UAE line and CEPA category for 2008 19. The CM issues the CEPA certificate of origin and a health certificate. 3. Launch on Amazon.ae and Noon, and approach Lulu directly at AED 13.99. Avoid outlet-by-outlet listing fees until sales data justify them. Book freight as the Hormuz premium unwinds.

Australia. 1. Your Australian importer runs BICON for "puffed lotus seed / *Euryale ferox*", India, human consumption, or calls DAFF on 1800 900 090. Commission a germination test of the finished product in India. 2. Appoint the importer and 3PL, get the ECTA certificate of origin, and build a label with PEAL allergens and an Australian address. Confirm in writing that nothing is irradiated. 3. Sell direct to Indian grocers in Melbourne and Sydney at AUD 7.49, plus online bundles, before any approach to Woolworths or Coles.

Your move: Put the three gate questions for your start market in writing this week, addressed to HMRC, a Dubai broker or your Australian importer.

8. The alarms



Residue and contaminant limits are the border alarms.

The point: Ten known tripwires can stop a container or erase your margin, and each has a defined response.

Alarm	Tripwire	What to do
EU Novel Food specification and name	Any batch above a limit (pesticides ≤ 0.01 mg/kg is effectively "no detectable residue" for a pond crop, by inference); a label saying only "lotus seeds". Italy rejected an Indian roasted fox-nut consignment as an unauthorised novel food in April 2020 ¹⁰⁷	Test every batch against Reg. 2023/652; use the mandatory name; have a consultant confirm the CM's process matches; request an EU binding tariff ruling
Australia BICON unconfirmed	The importer's BICON search shows a permit or treatment is needed (20–40 business days) ⁹⁴	Book no freight until the answer is in writing; commission the germination test early
US 27.9% duty and no de minimis	Duty roughly equals the ocean freight; parcels from India pay duty and need Prior Notice ^{19 20}	Keep the US in the second wave; sell only from imported stock; watch the India-US talks and the "reciprocal rate" dispute (Back pocket)
UK VAT 0% vs 20%	HMRC treats the "fox nut" name as a roasted nut	Direct margin falls from 43% to 32%, distributor route from 29% to 15%; get clearance before setting prices ⁹
UAE CEPA line for 2008 19 unconfirmed	The broker says 2008 19 is not in the 0% category, or the certificate is invalid	The 5% GCC tariff on CIF costs about AED 0.28 per pouch; confirm before shipping ¹²
2026 freight crisis	Emergency surcharges up to USD 4,000 per 40 ft on Indian cargo; Hapag-Lloyd USD 1,000 to the US and Canada from 15 Aug 2026; Jebel Ali rates up about eightfold ^{59 108 109}	Cap surcharge pass-through in writing; use a 40'HC; at central fill, freight stays at or below USD 0.36 a pouch
Pouches per container unmeasured	The notes range from 12,000 to 50,000 per 40'HC; bulk fox nuts fill only about 4 t per 40 ft ¹²	Measure a packed carton; at 16,000 per box, landed cost rises USD 0.19–0.39
Seasoning residues	Indian cumin added to EU increased pesticide checks (June 2026); cinnamon moved up for ethylene oxide ¹¹⁰ ; cumin, coriander and chilli on Australia's khapra high-risk list ⁹⁸	Test the seasoning blend for pesticides and ethylene oxide; keep jute and hessian out of the packing
Shelf life on long sea routes	Thin film lasts about 60 days; a 6-month date cannot survive 5–9 weeks at sea plus warehouse time ⁵⁴	80–100 μ m laminate, nitrogen flush, oxygen absorbers; validate 9–12 months
FBA and marketplace fees	US: 15% referral above USD 15; FBA about USD 3.06; 3.5% fuel surcharge; ads modelled at 15% of price ⁸³	Keep US single pouches at USD 15 or less (8% band); in the UK stay at £10 or less for the 5% fee ⁸⁴ ; note a US 3-pack at \$19.99 leaves only 13%

Your move: Give each alarm an owner and a date, and check the list before you sign every purchase order.

9. Go time

The point: Sell direct first, through South Asian grocers and Amazon, and approach supermarkets only with sales data.

Market	First channel	Then	How to get in, and what it costs
UK	Amazon UK multipack; Ocado or the Holland & Barrett marketplace (opened late Feb 2026) ¹¹¹ ; South Asian online grocers	Supermarket challenger schemes (Sainsbury's "Taste of the Future", Waitrose accelerator) ¹¹²	Retailer front margin 30–45%; gross-to-net 10–30% of invoice ⁸⁰ . Needs a BRCGS-certified CM
UAE	Amazon.ae, Noon; quick commerce (Talabat Mart, InstaShop, Lulu's "Hypermarket Minutes")	Lulu direct, then other hypermarkets	Listing fees AED 10,000-15,000 per product per outlet (2018, anecdotal); distributors about 20% ⁸¹
Australia	Indian grocers in Melbourne and Sydney; online bundles	Health e-tailers, IGA; Woolworths or Coles only via an importer-distributor	Woolworths 38%, Coles 29%, Aldi 9%, Metcash 7% of grocery ¹¹³ . Say "Popped Lotus Seeds / Roasted Makhana (Fox Nuts)" on the pack, because in Indian grocers "makhana" can also mean a sweet or a herb ¹¹⁴
US	Amazon (single pouch at \$9.99, plus a 3-pack); South Asian grocery via importer-distributors (Patel Brothers has about 52 stores in 20 states) ¹¹⁵	Natural channel (UNFI/KeHE) once you can fund slotting; Costco roadshows later, after a food-safety audit ^{82 116}	Natural-channel brands say "water lily pops" or "popped lotus seeds" on the front of the pack ¹¹⁷
Canada	Indian grocers in Greater Toronto, Greater Vancouver and Calgary via a South Asian distributor	Amazon.ca, then a discount banner	Listing fees negotiable; Walmart Canada adds a 1.25% infrastructure fee and a 5% e-commerce fee ¹¹⁸
Germany	Amazon Pan-EU (needs stock in two of DE, FR, IT, ES, PL and an active NL listing from 3 Sep 2026); Indian e-grocers ⁸⁵	dm, or REWE or Edeka start-up programmes, after the FTA	Needs an IFS- or BRC-certified CM and velocity data ⁵⁶
France	Amazon.fr via Pan-EU; Indian grocers	After Germany works	Keep coatings savoury to stay at 5.5% VAT ³²
Netherlands	Rotterdam import and 3PL hub; Amazon.nl; ekirana.nl ships to NL, DE and FR ³⁴		
South Africa	Indian e-tailers and grocers in Durban and Gauteng; Takealot (about 8% success fee, 2024 guide) ¹¹⁹	Clicks and Dis-Chem health aisles; a 25–30 g pack at R15–20	
Kenya	Do not launch. If a partner insists, a 30 g pack at about KES 210–250 via a Nairobi importer with Carrefour and Naivas codes		The Retail Trade Code bans fees for better shelf positions ¹²⁰

First six months, for a UK or UAE start

Month	UK start	UAE start
1	Stock in a UK 3PL. Amazon UK 4 × 80 g multipack live; Ocado or H&B marketplace listing; South Asian online grocers	Stock in a UAE 3PL. Amazon.ae and Noon live; quick-commerce listings
2	Direct pitches to Ocado and independents at £3.75 (43% at 0% VAT)	Direct pitch to Lulu at AED 13.99 (29% as your own importer)
3	Read Amazon's "bought in past month" badge against the 100+ shown by the best UK fox nut listing today	Read the badge against the 900+ to 1K+ of today's 30 g leaders; test a 25–30 g single serve
4	Place the repeat order (3–5 weeks to load, EST), sized on months 1–3	Same; book freight as the Hormuz premium unwinds
5	Decide whether a distributor is worth 14 margin points (43% direct vs 29% via distributor, at 0% VAT)	Decide whether a distributor is worth 11 margin points (29% vs 18%)
6	With a BROGS-certified CM and velocity data, apply to a supermarket challenger scheme	Only with sales data, consider outlet-by-outlet hypermarket listings and their fees

Your move: Write your month-1 listing plan for one channel you can reach without a distributor.

10. The getaway: expanding

The point: Each later market has a named trigger; watch for it instead of guessing.

Market	Wave	What would move it	Watch
Australia	Start, gated	BICON conditions confirmed in writing, with no permit needed or a permit granted	The importer's BICON result; the germination test
US	Second	An India-US deal giving Section 301 relief (unfinished in late July 2026) ¹²¹	Customs and tariff bulletins; a US entity can also hold Canada's SFC licence
Canada	Second	A US entity with a fixed place of business; a recipe below the sodium trigger, or a pack designed around the symbol	Consolidate Canadian stock into the first US container
Germany	Second (2027)	The EU-India FTA entering into force (expected early 2027) with 0% on this line; batch-by-batch proof of the novel-food specification	EU signature (expected Dec 2026); REX registration; IFS or BRC at the CM
France	Later	Germany working through Amazon Pan-EU	Coatings that keep the 5.5% VAT rate
Netherlands	Later	Use as the EU logistics hub first	Amazon.nl listing is compulsory for Pan-EU
South Africa	Later	A SARS tariff determination for 2008.19 (0%); a written Plant Health view on permits	A 25-30 g mainstream format at R15-20
Kenya	Avoid	A change in the EAC tariff or India's trade terms	Revisit only then

If you live in a second-wave country, the answer barely changes: run a small Amazon test at home while your first containers go to the UK, UAE or Australia.

Your move: Set a quarterly check on the EU-India FTA, the India-US talks and your BICON answer, and review this table each time.

Back pocket

Country reference cards

United Kingdom. Duty 0% under CETA from 15 Jul 2026 (12% without an origin declaration). HMRC ruling 600016054 covers roasted, oil-and-seasoning-coated makhana in an 80 g pouch under 2008 19 99 80, valid to 11 Aug 2029⁴². Origin rule: change of tariff heading plus "Standard QVC" (40% of ex-works price), easily met⁸⁸. VAT probably 0%⁹. Landed £1.25; £3.75 gives 43% direct (32% at 20% VAT). Risks: HFSS and VAT. Verdict: start here.

UAE. Duty 0% under CEPA with a certificate (5% without). VAT 5%. About 4.3 million Indian residents; the Consul General put more than half in Dubai⁶². Fox nuts sit in the "Indian food" aisle; the healthy-snack bay is open (a hypothesis, not a finding). Landed AED 5.93. AED 13.99 is about 17% above Haldiram's per gram, defensible only with a visible premium cue such as GI Mithila origin, a better oil or a larger grade (inference); it gives 29% direct. Verdict: start here.

Australia. Duty 0% under ECTA. GST 10%, because roasted or spiced seeds are taxable¹²². Fixed charges AUD 71 plus AUD 152 per consignment⁷⁹. The mainstream shelf is empty since a 2021 Woolworths entrant left, a warning about mainstream sales speed. Landed AUD 2.31 (AUD rate from July 2026); AUD 7.49 gives 42% direct to Indian grocers. Freight among the lowest of the ten. Verdict: start once BICON clears.

United States. Duty 27.9% (17.9% under ruling N285508 plus 10% Section 301), plus about 0.47% fees^{18 19}. Landed USD 2.15. Amazon at \$9.99 gives 24–30% after ads; Indian grocers via a distributor at \$5.99 give 29%. FDA registration, FSVP, Prior Notice; label from lab data. Verdict: second wave.

Canada. Duty 6% MFN. 5% GST or 13–15% HST on savoury snacks. Largest buyer of popped fox nuts (43 t). SFC licence, bilingual label, "high in" symbol. Landed C\$2.71, so the Food Basics anchor of C\$3.99 for 75 g cannot be matched. 28% via distributor at C\$7.49. Verdict: second wave, from a US entity.

Germany. Duty 4.4% GSP with REX (12.8% MFN); VAT 7%³². Novel Food name and specification. Landed €1.59 (€1.70 at MFN); €4.99 gives 39% direct, 22% via distributor. First year in German retail €70,000–150,000 (indicative). Verdict: second wave, 2027.

France. As Germany for duty and Novel Food; VAT 5.5% (20% for chocolate or confectionery coatings). French label with Triman/Info-tri sorting marks (inference). 23% via distributor at €4.99. Verdict: later.

Netherlands. As Germany; VAT 9%, "also for sweets"³². 21% via distributor at €4.99. Verdict: later; use Rotterdam as the EU hub.

South Africa. Duty 0% on 2008.19 (25% on 1904.10, a difference of about R5.40 a pouch). VAT 15%. Wellness drives brand switching for 42% of South Africans, against 33% globally¹²³. R146 claim bans; permit question open. Landed R27.8 (R32.7 on a first 20-ft order); 27% direct at R69.99. Verdict: later.

Kenya. Duty 35% plus IDF 2.5% and RDL 2%, which cannot be recovered; VAT 16%³⁹. Landed KES 272; KES 650 gives 10%, above 40 g Pringles per gram. Verdict: avoid for now.

Where the sources disagree

Topic	Source A	Source B	How this plan handles it
Pouches per 40'HC	Freight note: about 31,000 (ceiling 50,000)	UK note 15,000; EU note 16,000; US note 33,500	31,000 central, 16,000 sensitivity; flagged as the key unverified input
FOB per 80 g pouch	US note USD 1.10; EU note €1.25 (about USD 1.40)	UAE and Australia notes ₹120; SA and Kenya notes USD 1.30	One estimate: ₹124 = USD 1.30 (range USD 1.09-1.64)
INR per USD	Freight note: ₹85-90 (assumed)	ECB-implied ₹95.2; open.er-api ₹95.25	₹95.2
North Europe freight	MSC FAK USD 6,150 + surcharges (Aug 2026)	Globy Hamburg USD 4,700-5,080 (late Oct, indicative); UK note USD 3,150 (MSC, Apr 2026)	USD 6,000 all-in; rates falling 13 weeks running
US duty on India	Tracker: MFN + 10% Section 301 ¹⁹	Business Standard, 13 Oct 2026: 18% "reciprocal" rate ¹²⁴	Tracker and USTR-based 10% used
UK VAT	Earlier note: likely 20%	HMRC Notice 701/14 and VFOOD8120 point to 0%	0% base, 20% shown; get HMRC clearance
Export shares and unit values	APEDA HS-line chart (popped): Canada 22%, UAE 19%, US 16%	Blitz/PIB: US 40%, Canada 20%, UAE 17%; Crisil series 18,000-25,000 t	HS-line data used
APEDA FY26 total	Dashboard text: 7,626 t	Dashboard table: 7,265 t	Table figure used
Canada GPT for India	CBSA 2026 list: MFN yes, GPT no	DutyDecoder and an old report claim GPT	Official 2026 list (6% MFN)
EU GSP rate on 2008 19 99 80	TARIC mirror: 4.4%	Official TARIC email-gated, not seen	4.4%; confirm on Access2Markets
EU-India FTA status	EC and trackers: concluded, not in force; early 2027	A promotional site: "signed and in force"	Not in force
Netherlands VAT on snacks	Belastingdienst: 9% for all food	Blog: chips and nuts at 21%	9% (official)
UAE halal	Meydan FZ: only meat, poultry or gelatin	2026 producer guide: also dairy and flavourings	Certify dairy flavours
UAE registration fee	AED 110-240 per variant	AED 1,000-2,500 per product	Low figure in the model; budget the high one
UAE Indian population	Embassy 4.3 m; Consul General 4.36 m (Dec 2024)	Consular committee: "over 3.5 m" (Nov 2025)	4.3 m
US fox nut market size	BlueWeave: USD 6.95 m (2024)	Marketintelo: global fox nut USD 185 m vs "makhana" USD 0.8 bn (same vendor)	All indicative; volume taken from APEDA
APEDA RCMC validity	APEDA: 5 years	Consultants: one-time, or renew yearly	APEDA
FSSAI licence for exporters	Some guides: Central licence mandatory	Others: turnover decides	Confirm on FoSCoS

Topic	Source A	Source B	How this plan handles it
Kenya levies	FNJ 2026: IDF 2.5%, RDL 2%	Older sources: IDF 3.5% or 2.25%, RDL 1.5%	FNJ 2026
South Africa Indian population	Stats SA 2023 mid-year: 1,697,506	Census 2022 row: 1,554,996	About 1.7 m, approximate

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