

PROMOTING EXPORTS FROM BIHAR: INSIGHTS AND POLICY PERSPECTIVES



EXPORT-IMPORT BANK OF INDIA

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**PROMOTING EXPORTS FROM BIHAR:
INSIGHTS AND POLICY PERSPECTIVES**

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Project Team:

Ms. Jahanwi, Manager, Research and Analysis Group

Ms. Neha Raman, Deputy Manager, Research and Analysis Group

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EXECUTIVE SUMMARY

Bihar is a land-locked state located in the eastern region of India, sharing an international border with Nepal, and domestic borders with Uttar Pradesh, Jharkhand and West Bengal. Over the recent years, the State's Gross State Domestic Product (GSDP) has registered a Compound Annual Growth Rate (CAGR) of 6.5 percent from 2011-12 to 2017-18, which has led to an increase in the contribution of Bihar to India's GDP. Bihar's economic growth has been fuelled by growing capital expenditure, expansion of industrial capacity, logistic facilities, and public infrastructure. Nevertheless, estimates for 2016-17 indicate that merchandise exports accounted for only about 1.3 percent of Bihar's GSDP. Although this is relatively better than several other states of a comparable economic size, it is much below the national average of 12.1 percent. In order to further propel growth in the State economy, there is a need for multi-faceted intervention in the exports sector.

Against this backdrop, this study examines the economic profile and export performance of Bihar at a granular level, in an attempt to map these factors with demand emanating from the international market. Further, the study analyses the potential for exports, identifying dynamic products and leading markets for exporters to yield greater benefit, and for the government to expedite reform. The study also outlines strategies for development of trade competitiveness at the state-level, and creating an enabling environment for exports in the State.

BIHAR'S ECONOMIC PROFILE

Bihar's GSDP has witnessed robust growth, outpacing the growth in India's overall GDP, from 2016-17 onwards, after witnessing lower levels of growth in the previous years. The GSDP for the State at constant prices increased to Rs. 361,504.3 crores in 2017-18, registering a year-on-year (y-o-y) growth rate of 11.3 percent, indicating positive economic progress in the State. This recent growth has been primarily driven by services sector of the state economy.

The size of the industrial sector in Bihar is small despite the large base of cost effective industrial labour in the State. The agriculture and allied sector accounts for nearly 19.7 percent of the Gross Value Added of the State. But the salience of the agriculture sector on the State economy is much larger from the employment perspective, as it accounts for close to 77 percent of the workforce.

An export strategy needs to take cognizance of the significance of the agriculture sector on the State economy, and attempt to move it to a higher growth trajectory. Alongside, the industrial sector in the State needs to be developed in order to foray into products which would fetch higher values in the export market, while at the same time being more resilient to competitive pressures from other States in India, as well as countries. In the services segment, tourism shall continue to remain an important source of foreign exchange earnings in the State. According to estimates, foreign exchange earnings from the tourism sector is estimated to be more than US\$ 1 billion, making it a significant contributor to the exports sector of the State. However, there is need to fuel growth in the State's tourism sector as it has witnessed only marginal growth in the recent past. Alongside, other services segments such as IT and ITes also need to be encouraged in the State.

EXPORTS PERFORMANCE OF BIHAR

Merchandise exports from Bihar in 2017-18 were valued at US\$ 1.35 billion, a remarkable improvement over the US\$ 0.4 billion of exports recorded during 2012-13. However, there remains substantial room for improvement as exports from the State account for less than 1 percent of the total exports from India.

Petroleum products is an important export item for the State. The non-oil segment of exports from the State has also registered considerable take off since 2016-17, on account of increasing exports in the categories of agro and allied industries, and textile

and garment. But in spite of this growth, the non-oil segment accounts for only one-third of Bihar's overall exports, necessitating a strategy for accelerated growth from the segment.

Nepal is the largest export destination for Bihar, on account of the land border of the State with Nepal. During 2017-18, nearly 78 percent of Bihar's exports were directed towards Nepal, followed by Vietnam (share of 4 percent), Bangladesh (3 percent), Thailand and UAE (2 percent each). Analysis indicates that Nepal is also the largest export destination for non-POL exports from the State, albeit the share is lower at 65 percent. Taiwan, Iraq, Japan and China feature among the top destinations for non-POL exports from the State, but not among the top destinations for overall exports. Diversification of non-POL exports will therefore hinge on further exploring exports to these key markets.

EXPORTS TARGET FOR BIHAR

According to preliminary estimates, presently, Bihar has an untapped export potential of nearly US\$ 900 million in its merchandise exports. Realizing this potential could take the merchandise exports from the State to more than US\$ 2 billion. However, over the medium term, through an appropriate strategy for exports, exports could be further increased.

An ambitious, all-encompassing exports strategy from Bihar should focus on aligning the targets for the State, in line with the growth targets for the country as a whole. The motive of the export policy should be to increase the share of exports in the GSDP of Bihar to at least match with the current national average of 19 percent, and further strive towards reaching a higher level of 25 percent, in line with the national target for 2024-25. Further, the policy should also attempt towards achieving a greater share of merchandise exports in the exports from the State, given the high multiplier effect of manufacturing on employment. Based on these consideration, the target for exports from the State should be set to US\$ 40 billion by 2024-25, with the target for merchandise exports at nearly US\$ 27 billion and for services at US\$ 13 billion.

KEY PRODUCTS AND MARKETS FOR EXPORTS FROM BIHAR

While exports from Bihar have registered a robust growth, it is essential to recognize key products and markets which provide opportunities for firms in the State to grow and achieve economies of scale, as also increase their efficiency levels. The Study undertakes a granular analysis of the products where the State's exports have demonstrated comparative advantage, and matches this with the global import demand for these products.

Based on this analysis, the Study identifies products where domestic capacities can be strengthened and the markets that can be targeted for these products. The items have been classified as 'Product Champions (have maximum potential)'; 'Underachievers (need to recover lost ground from competing suppliers and increase exports)'; 'Achievers in Adversity' (need to diversify and put resources to better use)'; and 'Declining Sectors' (need to diversify)'. Accordingly, 81 products have been identified in the Product Champions segment, 171 products in Achievers in Adversity segment, 570 products in the Underachievers and 1137 products in Declining Sectors.

In the short to medium term, the State can focus on leveraging the opportunities arising in the Product Champions segment, as these are low hanging fruits. In the medium to long term, the State needs to encourage development of capacities in the Underachievers segment.

Pharmaceutical products, animal and animal products, textiles and garments, leather and leather products, and vegetable products are some of the top sectors categorized under the Product Champions segment of Bihar. In the Underachievers sectors, maximum numbers of products are in the sector of textiles and garments. However, in terms of value of exports from the State, chemical and allied products, prepared foodstuffs, pharmaceutical products, and machinery are the top products under the segment. Focus on these products will provide much needed resilience to exports from Bihar in the

face of declining global demand and commodity price fluctuations.

In some of the identified product categories, Nepal is a major importing country, presenting significant opportunities for exporters from Bihar on account of the land border it shares with the country. There is substantial scope for enhancing market penetration in several products imported by Nepal. Apart from Nepal, countries in the Middle East and East Asia are also important destinations for exports from Bihar. These will remain important for exporters from Bihar, especially till the time Inland Container Depots (ICDs) and Container Freight Stations are not developed in the State, and an incentive framework for market diversification is not put in place.

STRATEGIES FOR EXPORT GROWTH

The Study highlights the need for the State to diversify its industrial and exports base and identifies the prospective sectors and markets that can be targeted. The State will need to improve its export competitiveness in order to diversify its exports into these sectors and markets, and an export strategy will be a critical component for achieving this.

In order to take a holistic view, planning of a strategy for promotion of exports from Bihar would entail strategizing across various levels. Broadly, these strategies could be built upon six essential dimensions viz. Focus Products and Markets; Infrastructure Leverage and Strengthening; Capacity Building; Fiscal Incentives; Export Promotion Campaign; and Institutional Streamlining.

Focus Products and Markets

One of the efficient ways to widen exports opportunities is to look at diversification based on value addition. The Study identifies a set of prospective high-value added products which can help diversify the exports basket of Bihar. These include agricultural products, textile and garments, chemicals and allied products, pharmaceuticals, handicrafts products, and tourism and hospitality.

Within the agriculture and allied sector, the State could focus on greater processing of the agricultural products, and increase in organic production. In the textile segment, the State could focus on technical textiles, and cruelty-free silk production, both of which would fetch much higher prices in the international market. In the areas of chemical and petrochemicals, the focus could be on the segments of dyes and pigments, construction chemicals, personal care ingredients, and water treatment chemicals, among others. In pharmaceuticals, there is a need for capacity addition in existing export segments, and diversification into other untapped segments such as immunological products, vaccines for veterinary purpose, opacifying preparations, etc.

Further, the Study indicates that in most of the product categories, exporters from Bihar are not currently exporting to the major importing countries. Thus, it will be essential for the State to diversify the market for its products. There is also a need for the State to focus on newer areas, preferably in the high-technology intensive sectors, such as electrical and electronics, and engineering goods. However, production and exports in these areas will depend on export-oriented foreign direct investment (FDI) in these segments. In lines of the 'Make in India' program of the Government of India, the Government of Bihar needs to adapt, adopt, and implement 'Make in Bihar' program.

Infrastructure Leverage and Strengthening

In order to script a higher export growth story and compete with other states of a comparable economic size, Bihar needs to substantially upgrade its existing export infrastructure. The most critical export infrastructure in the State would be an ICD. Bihar currently has one ICD at Patna, which caters to domestic freight traffic only. Based on preliminary research using secondary sources, the Study recommends setting up of ICDs in Muzaffarpur and Bhagalpur. Further, in order to cater to the export traffic, establishing a custom clearance office in the existing ICD in Patna is also recommended.

Lack of adequate transportation, storage and distribution services is also an issue for exporters across the country. Specifically, in the context of Bihar, this is a major constraint as perishable products account for a significant share of the State's exports. There is need for increasing the warehousing and cold chain infrastructure in the State. Assuming a peak storage capacity requirement of around 70 percent of the production, Bihar would require warehousing capacity of 13 million MT, as against the current capacity of 0.6 million MT. Besides, there is also a need for development of an estimated 2.2 million MT of cold chain infrastructure in the State.

The Study emphasises that Bihar currently does not have any Special Economic Zones (SEZs), nor does the State have in place any policy, act or rules for encouraging establishment of SEZs. Given the significance of SEZs in industrial development and exports, this is a matter of concern for the State. To attract export-oriented FDI and encourage exports from the State, establishment of SEZs will be important. The Study recommends setting up of SEZs in the districts of Patna, Muzaffarpur or Bhagalpur, which have good road and rail connectivity. One of the SEZs could be dedicated to agricultural products, given the substantial potential of exports from the sector.

Capacity Building

The State has several products with Geographical Indication (GI) status. In order to gain from the benefits of GI status, it is important for the GI brand to be recognized as a reliable and preferred brand in the market, with a distinguished positioning. In this regard, a brand equity fund can be set up by the Government of Bihar for building globally competitive brands for products originating from the State. The fund can also assist in marketing of these branded products in the international arena. Initiatives are also needed for identifying more products from the State which can be accorded GI status. This could include agricultural products such as Makhana, and foodstuff such as Litti Chokha and Laktho.

As regards standards, regulations and quality, many export destinations prescribe product specifications which need to be adhered to, and it is the responsibility of stakeholders to ensure that these standards are met. In this regard, a supporting ecosystem comprising phyto-sanitation certification, organic certification, testing for meeting stringent requirements of pesticide free produce, packaging, and labeling will need to be created. Towards this, the Government could consider providing refund of expenses incurred for obtaining statutory certifications like Conformite Europeene CE, China Compulsory Certificate CCC, GMP, etc. In addition, one-day training and awareness drive can be conducted in major production hubs for dissemination of information pertaining to these certifications, including process of application and support provided by the Government of Bihar.

Further, the State government can provide support in submission of applications under the Technology Acquisition Fund Programme schemes of the Central Government, in order to enable exporters to leverage the schemes to boost high-technology exports. As these programs meet only a fixed percentage of the cost of technology acquisition, the State Government can also provide additional financial support on a case-to-case basis.

Fiscal Incentives

As the exports sector in Bihar is at a nascent stage, some fiscal incentives could be provided to exporters in the State. One of the fiscal incentives could be in the form of freight subsidy. This subsidy would help exporters in reducing the cost to exports arising out of infrastructural deficiencies. Keeping in mind the budget considerations, district and product-wise schedule for eligibility of reimbursement and amount for reimbursement under the freight subsidy scheme can be developed.

Export Promotion Campaign

Export Awards can be instituted for recognizing the efforts of exporters across the key sectors such as agricultural and allied products, marine products,

chemical and allied products, pharmaceuticals, textile and garments, engineering goods, and tourism. Separate awards can also be instituted for the MSME units in the State.

From the perspective of export promotion, development and upgrading of clusters in the State will also be an important agenda. As an essential first step, the State needs to develop a mechanism for assessment of existing clusters in the State. Upon assessment of the clusters, the Government can undertake relevant capacity building activities. The key elements of capacity building would include construction of physical infrastructure, building institutions, and development of human resources.

Further, initiatives such as the Marketing Development Assistance Scheme of the Government of India have been proven to assist exporters for export promotion activities, and could be replicated at the State level. Such assistance can help diversify the destinations for exports.

Institutional Streamlining

The overall ecosystem in Bihar would need to be framed in a manner that propels the State to a

higher export trajectory. Institutional structure comprising the associated state machineries would be pivotal in this process. In this context, the Study recommends setting up of Bihar Export Promotion Council (BEPC) under the Department of Industries, Government of Bihar, with the objective of ensuring strong export performance for the State. The BEPC could be set up with the participation of the State government, exporters and industry associations, and would also provide a forum for exchange of views, sharing of information, identifying obstacles faced by exporters and implementing measures to overcome them.

CONCLUSION

The ambitious target of US\$ 40 billion of exports from the State will require enhancing trade competitiveness, promoting innovation, bolstering availability of export finance, widespread branding efforts, and strengthening the institutional capacity for exports, among others. The six-pronged strategy outlined in the current study can help devise the export policy for the State, and formulate a roadmap and action plan for achieving the desired results.

1: INTRODUCTION

Located in the eastern region of India, Bihar is the third most populous state in India with an area of 93.6 lakh hectares. It is a land-locked state sharing an international border with Nepal to the North, and domestic borders with Uttar Pradesh, Jharkhand and West Bengal to the West, South and East, respectively.

Topographically, Bihar can be grouped broadly into two distinct regions – North Bihar and South Bihar – divided by the flow of the Ganges. The northern region is an alluvial plain consisting of rich and fertile soil, but limited in terms of mineral wealth. The southern region is also an alluvial plain primarily utilized for agriculture and endowed with small quantity of mineral wealth. While both regions have accounted for considerable agricultural output, industrial activity has been more extensive across South Bihar.

ECONOMIC BACKDROP

The State's Gross State Domestic Product (GSDP) registered a Compound Annual Growth Rate (CAGR) of 6.5 percent from 2011-12 to 2017-18. This is higher than the CAGR of 5.4 percent registered by the overall GDP of India. This high growth has led to an increase in the contribution of Bihar to India's GDP, and in 2017-18, the State accounted for nearly 2.8 percent of India's total output.

This growth has been fuelled by growing capital expenditure, engendered by improving investment climate in the State. The State performed remarkably well in the Business Reform Action Plan (BRAP) 2017, which was released by the Department for Promotion of Industry and Internal Trade. It includes 405 recommendations for reforms on regulatory processes, policies, practices and procedures spread across 12 reform areas including labour regulation enablers; contract enforcement; registering property; inspection reform enablers; single window system; land availability and allotment; construction permit enablers; environmental registration

enablers; obtaining utility permits; paying taxes; access to information and transparency enablers; and sector specific reforms spanning the lifecycle of a typical business. In Bihar, the implementation of reforms related to the ease of doing business has been prioritised as evidenced by the significant jump of Bihar in the Ease of Doing Business Index. With an implementation score of 81.91 percent, Bihar was put in the 'Fast Movers' Category in the BRAP 2017, along with Himachal Pradesh and Assam.

The recent economic growth has also been on account of expansion of industrial capacity, logistic facilities and public infrastructure. Currently, the State has 1 Inland Container Depot (ICD); 2 Integrated Check Posts (ICP); 20,068 km of road network including National Highways, State Highways, and Multi-District Roads; 6,870 km of rail network; and considerable prospect for the development of Inland Waterways along NW-1 (Bhagirathi-Hoogly-Ganga), NW-37 (River Gandak) and River Kosi.

NEED FOR EXPORT STRATEGY

Estimates for 2016-17 indicate that merchandise exports accounted for approximately 1.3 percent of Bihar's GSDP. Although this is a substantial improvement over the share of 0.2 percent in 2011-12, it remains below the shares of other states of comparable economic size such as Haryana (share of 13.1 percent), Odisha (10.8 percent) and Punjab (8.3 percent). It is also below the national average of 12.1 percent. Clearly, exports growth can substantially improve GSDP growth of the State. Export growth will also have a positive impact on the employment scenario in the State (Box 1).

The share of the State in India's exports is also not commensurate to its share in the GDP, area and population of the country. While the State accounted for nearly 2.9 percent of India's total land area, 8.6 percent of population, and 2.8 percent of India's GDP, it accounted for less than one percent of India's merchandise exports (Exhibit 1).

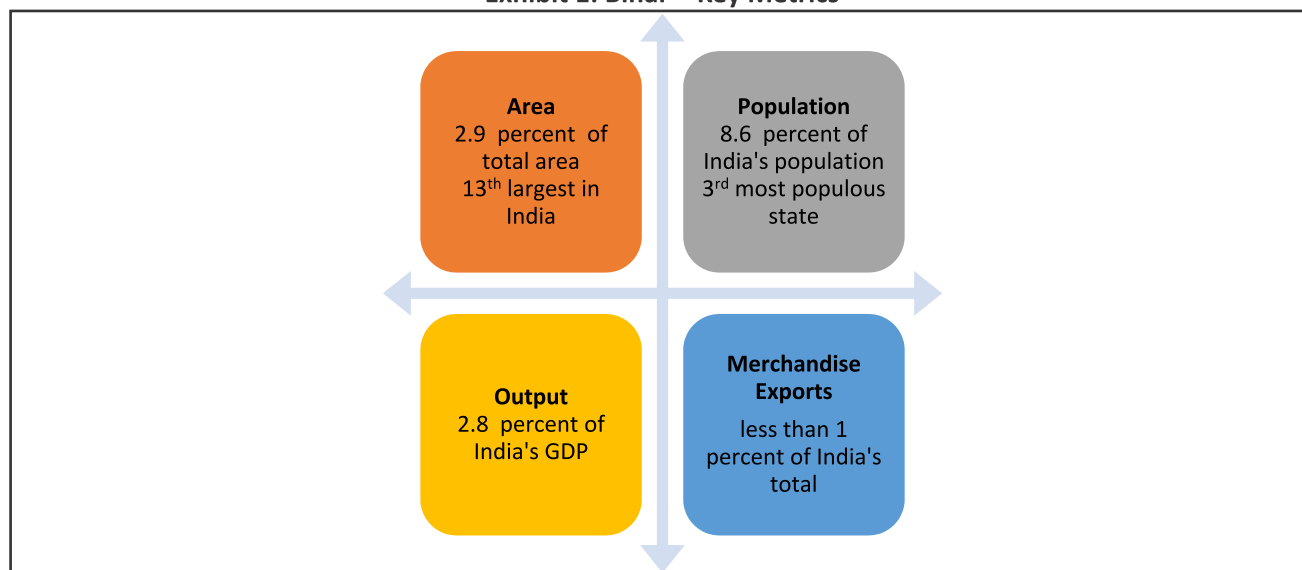
Box 1: Impact of Exports on Employment and Wages

Exports are engines of economic growth, not only by its virtue of expanding the market for producers in a country, but through its effects on efficiency improvements, technology transfers, and improvement in the skills of workers. Contemporary analytical enquiries have focused on how exports foster inclusive growth, especially on its linkages with employment in an economy. According to Exim Bank research, export supported employment accounted for nearly 14.5 percent of the total employment in India during 2012-13. A recent study by the World Bank-ILO further corroborates the positive impact of exports on employment, in terms of increasing wages and reduction in informality. According to the Study, an increase of US\$ 1,500 in India's exports per worker increases wages per worker by Rs. 8,000, and reduces informality by 12.4 million workers.

Clearly, a robust export-led growth strategy can lead to substantial gains for the labour market. However, in recent times, the impact of exports on labour market outcomes in Bihar has been marginal. Analysis indicates that during 1999-2011, only about 1.4 percent of the wage increase in Bihar can be attributed to greater exports, and about 0.4 percent of the reduction in informality is attributable to trade. This is significantly lower than several other states of India.

A well-formulated export growth strategy has the potential to bring down the labour market gap and persistent informality in the State; but the strategy needs to be complemented by policies that make the gains from trade more inclusive. This includes policies which (1) boost and connect exports to people (for example, by investing in infrastructure and better connectivity and freer trade); (2) eliminate distortions in production (for example, by eliminating distortions in capital/ labour inputs, increasing participation of women in merchandise exports, and increasing worker mobility); and (3) protect workers (for example, by investing in education and skills).

Exhibit 1: Bihar – Key Metrics



Source: Exim Bank Research

Set against a backdrop of consistent economic growth, improving investment climate and expanding export profile, this study examines the economic profile and export performance of Bihar at a granular level, making an attempt to map these factors with demand emanating from the international market. The study analyses the

potential for exports, identifying dynamic products and leading markets for exporters to yield greater benefit, and for the government to expedite reform. The study also outlines strategies for development of trade competitiveness at the state-level, and creating an enabling environment for exports in the State.

2: MACROECONOMIC PROFILE

GSDP is an important indicator to measure the growth and economic development in a state, and gauge the structural changes in a state economy. It is equal to the income generated by the production of goods and services within the geographical boundaries of a state. The estimates for value added without any adjustments for the capital depreciation / consumption is termed as Gross Value Added (GVA)¹.

During 2012-13 to 2015-16, the GSDP of Bihar at constant (2011-12) prices witnessed lower levels of growth as compared to the all-India GDP growth. However, from 2016-17 onwards, the GSDP has witnessed robust growth, outpacing the growth in India's overall GDP. The GSDP for the State at constant prices increased to Rs. 361,504.3 crore in 2017-18, registering a year-on-year (y-o-y) growth rate of 11.3 percent. These trends are indicative of positive

economic progress in the State (Table 1).

The growth in recent times has been driven by services sector of the state economy. During 2011-12 to 2017-18, GVA in the services sector of the State registered a CAGR of 8.2 percent (Table 2). Accordingly, the share of services in Bihar's GVA increased from 55.5 percent in 2011-12 to 62.3 percent in 2017-18, while the share of agriculture and allied activities declined from 25.7 percent in 2011-12 to 19.7 percent in 2017-18, and the share of industry marginally declined from 18.8 percent to 18 percent during the same period (Table 3).

While the State has witnessed robust growth in the recent period, sustained growth and development in the economy would entail price stability. There are several inflation indicators which measure the rise in the general price level. Consumer Price Index (CPI)

Table 1: Comparison of Gross State Domestic Product of Bihar with Gross Domestic Product of India (Rs. Cr.)

Year	Bihar		India	
	GSDP-Constant (2011-12)	Growth Percent	GDP-Constant (2011-12)	Growth Percent
2011-12	247144		8736329	
2012-13	256851	3.9	9213017	5.5
2013-14	269650	5.0	9801370	6.4
2014-15	279482	3.6	10527674	7.4
2015-16	295622	5.8	11386145	8.2
2016-17	324778	9.9	12196006	7.1
2017-18	361504	11.3	13010843	6.7

Source: MOSPI, Exim Bank Research

Table 2: Sector-wise Gross Value Added (GVA) for Bihar (Rs. Crore)

Sectors	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	CAGR
Agriculture, forestry and fishing	62067	68040	59516	59349	60754	66864	67779	1.5%
Industry	45540	39555	51668	56824	58104	60483	62021	5.3%
Services	134092	144015	149478	153245	166366	187613	214947	8.2%
Total GVA	241698	251609	260662	269418	285223	314959	344747	6.1%

Source: MOSPI, Exim Bank Research

¹Central Statistical Office

Table 3: Sector-wise GVA share for Bihar (Percent)

Sectors	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Agriculture, forestry and fishing	25.7	27.0	22.8	22.0	21.3	21.2	19.7
Industry	18.8	15.7	19.8	21.1	20.4	19.2	18.0
Services	55.5	57.2	57.3	56.9	58.3	59.6	62.3

Source: MOSPI, Exim Bank Research

measures the changes over time in the level of prices of goods and services that a reference population acquires, uses or pays for consumption.

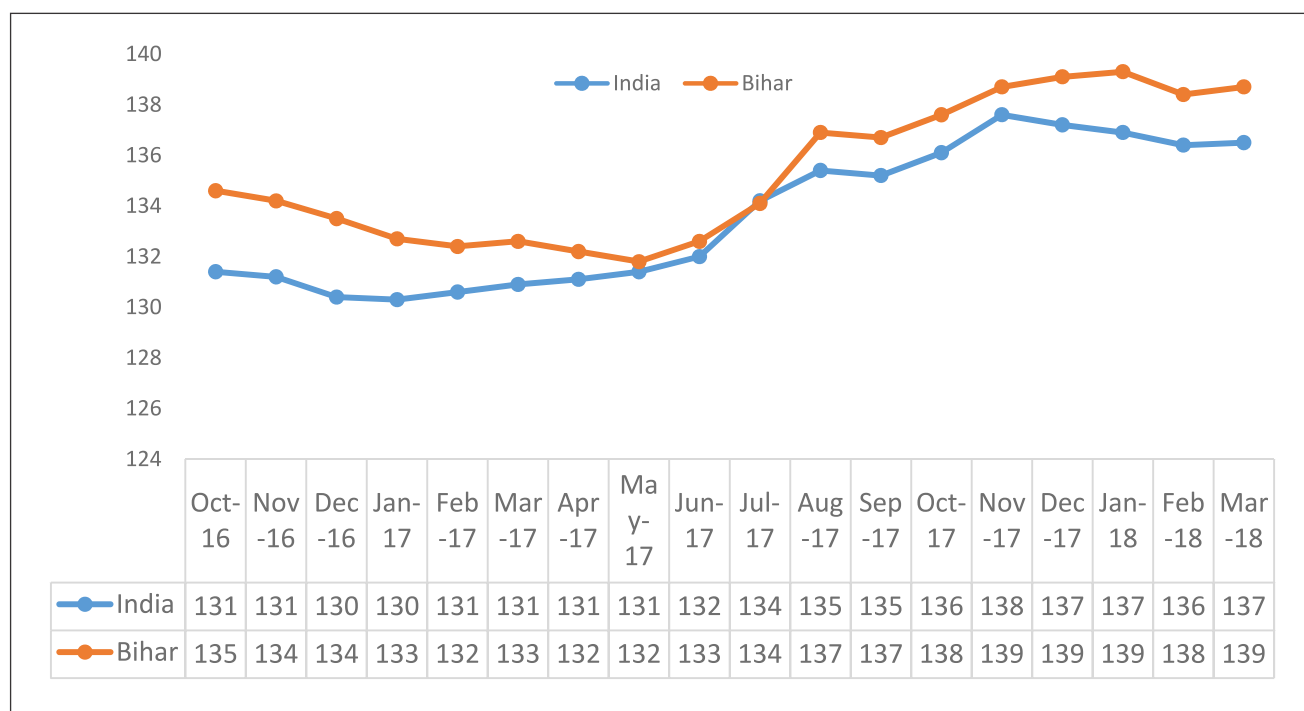
A comparison of CPI (Base: 2012=100) at the state and India level indicates higher level of average prices in Bihar. In March 2018, the CPI for Bihar registered a y-o-y increase of 4.6 percent, compared to an increase of 4.3 percent in the all-India level (Exhibit 2). CPI in Bihar and India have registered similar levels of volatility during the period October 2016 to March 2018, with both the series displaying a standard deviation of 2.7 points each. Lower and stable inflation will be crucial for competitive production processes in Bihar.

KEY ECONOMIC ACTIVITIES

Agriculture and Allied Activities

The GVA of agriculture, forestry and fishing sector in Bihar registered a CAGR of 1.5 percent during 2011-12 to 2017-18. Fishing and aquaculture, and livestock, witnessed the maximum growth during this period, with CAGRs of 9.3 percent and 8.2 percent, respectively (Table 4). Within the sector, the crops segment accounted for the largest share in GVA of 11.1 percent during 2017-18. Livestock, with a share of 5.6 percent, is the second largest category within the sector, indicative of the large animal husbandry sector in the State (Exhibit 3).

Exhibit 2: Monthly Movements in Consumer Price Index (Base: 2012 = 100)



Source: RBI-DBIE, Exim Bank Research

Table 4: GVA in the Agriculture, Forestry and Fishing Sector of Bihar (Rs. Crore)

Sectors	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	CAGR (FY12- FY18)
Crops	42608	47493	37107	35254	35348	40021	38294	-1.8%
Livestock	12028	12525	14008	15359	16281	17556	19312	8.2%
Forestry and logging	4187	4253	4330	4218	4353	4492	4637	1.7%
Fishing and aquaculture	3244	3768	4071	4518	4772	4793	5535	9.3%
Agriculture, forestry and fishing	62067	68040	59516	59349	60754	66864	67779	1.5%

Source: MOSPI, Exim Bank Research

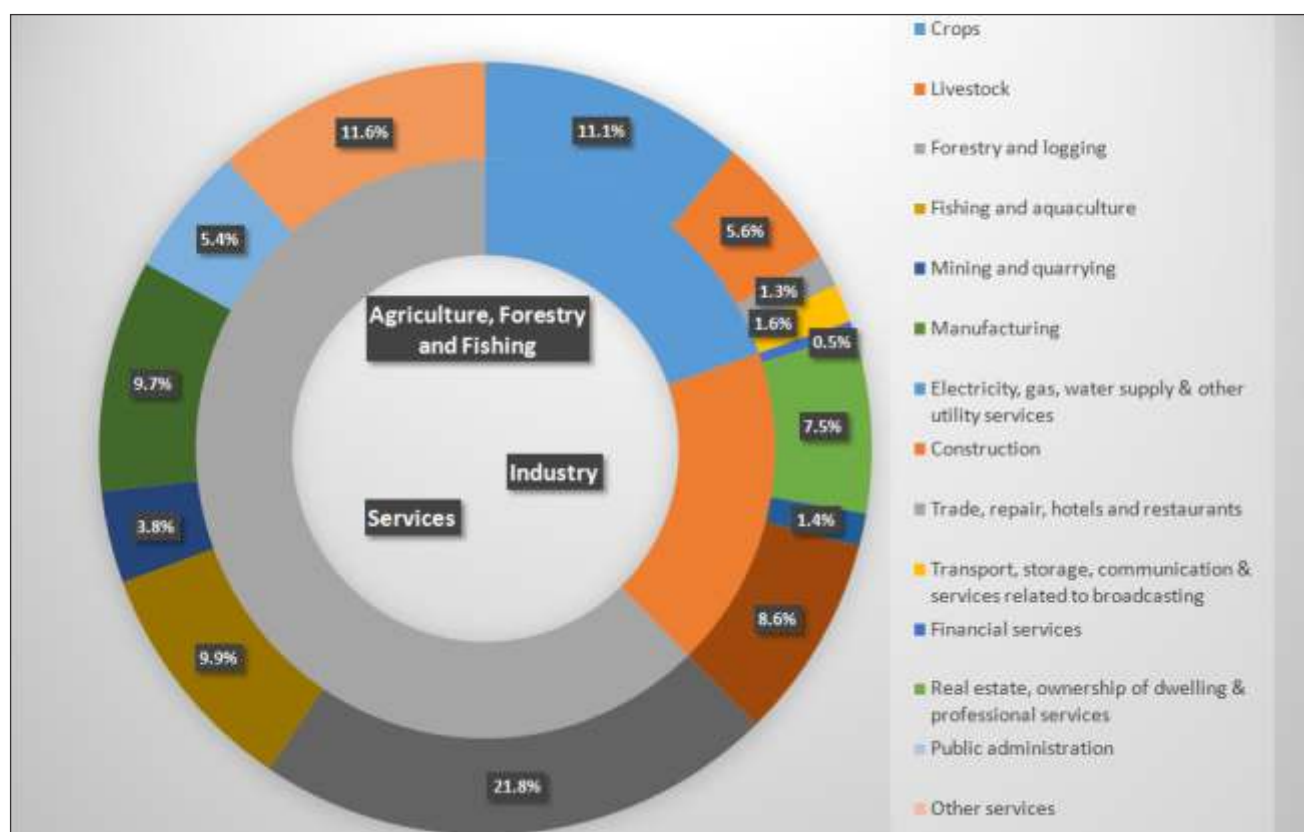
Industrial Sector

The size of the industrial sector in Bihar is small. This is in spite of the large base of cost effective industrial labour in the State. Construction and manufacturing are the top economic activities under the industrial sector, with their shares in GVA being 8.6 percent and 7.5 percent, respectively. While construction sector has witnessed a marginal CAGR of 1.5 percent during the period 2011-12 to 2017-18, the manufacturing

sector has registered a robust CAGR of 9.9 percent. Within the industrial sector, maximum CAGR of 45.0 percent was witnessed in the mining and quarrying segment (Table 5).

Going forward, the State has the potential to become a major industrial hub, especially for agro-based industries. The manufacturing segment is already on a growth path, and is expected to maintain the growth momentum.

Exhibit 3: Gross Value Added by Major Economic Activity (2017-18)



Source: MOSPI, Exim Bank Research

Table 5: GVA in the Industry Sector of Bihar (Rs. Crore)

Sectors	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	CAGR (FY12 – FY18)
Mining and quarrying	199	216	1386	577	1789	1787	1849	45.0%
Manufacturing	14666	9714	18893	25958	23371	25151	25835	9.9%
Electricity, gas, water supply & other utility services	3659	4017	4128	4270	4275	4587	4753	4.5%
Construction	27017	25608	27261	26019	28668	28957	29584	1.5%
Industry	45540	39555	51668	56824	58104	60483	62021	5.3%

Source: MOSPI, Exim Bank Research

Services Sector

The services sector has registered an impressive growth performance during the period under consideration. Leading contributors in terms of value added in the services sector include the trade & repair services segment (share of 20.9 percent in state's

GVA), transport, storage and communication (9.9 percent), and real estate and professional services (9.7 percent). During 2011-12 to 2017-18, growth in the services sector has been driven by the segments of air transport (CAGR of 35.6 percent); road transport (13.3 percent); and trade & repair services (9.8 percent) (Table 6).

Table 6: GVA in the Services Sector of Bihar (Rs. Crore)

Sectors	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	CAGR (FY12-FY18)
Trade, repair, hotels and restaurants	43904	46729	45683	42626	50421	61638	75185	9.4%
Trade & repair services	41109	43945	42775	39877	47496	58547	71947	9.8%
Hotels & restaurants	2796	2784	2908	2749	2925	3091	3238	2.5%
Transport, storage, communication, services related to broadcasting	17545	20372	23473	26054	28375	29996	34212	11.8%
Railways	2751	3346	3965	4092	4070	3926	4359	8.0%
Road transport	8405	9962	11373	12678	14010	15678	17788	13.3%
Water transport	49	24	15	17	18	20	22	-12.4%
Air transport	31	54	38	64	126	139	192	35.6%
Services incidental to transport	893	1043	1202	1344	1499	1688	1896	13.4%
Storage	74	79	71	75	80	83	85	2.3%
Communication & services related to broadcasting	5342	5863	6808	7785	8572	8463	9871	10.8%
Financial services	8839	9580	10273	11653	12393	11845	13259	7.0%
Real estate, ownership of dwelling & professional services	28023	28686	29819	30739	30032	31365	33454	3.0%
Public administration	13587	13350	12752	13171	13132	17522	18729	5.5%
Other services	22193	25297	27478	29002	32012	35248	40108	10.4%
Services	134092	144015	149478	153245	166366	187613	214947	8.2%

Source: MOSPI, Exim Bank Research

RESOURCE PROFILING

An analysis of the resource profile of the State can shed light on the areas in which it has competitive advantage. This can help in identification of the latent export potential in the State and devising strategies for achievement of sustainable development.

Agriculture

For a holistic understanding of agricultural potential, identification of the various agro-climatic zones within the State would be an essential first step. In 1987, 15 agro-climatic regions were identified in India on the basis of soil, temperature, rainfall and captive water resources. These regions have been further classified into 126 agro-climatic zones under the National Agricultural Research Project (NARP) launched by the Indian Council of Agricultural Research.

Bihar is geographically placed within one agro-climatic region – Middle Gangetic Plains Region. It has three main agro-climatic zones which can support diverse crops: Zone-1 – North Alluvial Plain, Zone-2 – North East Alluvial Plain, and Zone-3 – South Alluvial Plain (further segregated into Zone-3 A and Zone-3 B) (Table 7).

Mineral

Mineral resources are of paramount importance in industrial activities. They enter the production cycle of several industries in the form of raw materials and help build up prosperity in an economy. Bihar

currently has vast tracts of under-tapped and untapped mineral resources.

The important mineral occurrences in Bihar are limestone in Bhabhua, Munger and Rohtas districts; mica in Nawada district; quartz/silica sand in Bhagalpur, Jamui, Munger and Nalanda districts; pyrites in Rohtas district; quartzite in Lakhisarai, Munger and Nalanda districts; talc/soapstone /steatite in Munger. Other occurrences include Bauxite in Munger and Rohtas districts; china clay in Bhagalpur and Munger districts; feldspar in Gaya, Jamui and Purnea districts; granite in Bhagalpur, Gaya, Jahanabad and Jamui districts.

The most prominent occurrence of metal and metal alloys in Bihar is gold in Jamui district, which is estimated to hold 44 percent of India's gold ore reserves. However, economic feasibility of mining and processing has limited the development of this natural resource. Bihar is also the principal holder of India's sulphur and pyrite resources with a 95 percent share in national reserves.

The major mineral produced in the state is limestone, of which there was only one reporting mine in the state. The value of minor minerals' production in the State was estimated at Rs. 4,272 crore during 2016-17.

Human Capital

Accounting for 8.8 percent of India's population, Bihar has a strong human capital base to leverage the

Table 7: Agro-Climatic Zones in Bihar

NARP Zone	Districts	Major Crops
North Alluvial Plain	West Champaran, East Champaran, Gopalganj, Siwan, Saran, Sitamarhi, Muzaffarpur, Vaishali, Madhubani, Darbhanga and Samastipur	Rice, Wheat, Maize, Potato, Sugarcane, Mango, Litchi
North East Alluvial Plain	Madhepura, Purnia, Katihar, Khagria, Begusarai and Saharsha	Maize, Jute, Pineapple
South Alluvial Plain	Bhojpur, Rohtas, Patna, Aurangabad, Jehanabad, Nalanda, Gaya, Nawada, Munger and Bhagalpur	Rice, Wheat, Potato, Gram, Mango, Guava

Source: Government of Bihar

growth potential of the state. The State has a large base of cost effective industrial labour, making it an ideal destination for investments in labour-intensive segments. The State is also focusing on improving the quality of its human capital base, through focus on education and skill development.

Over a 10 year period from 2001 to 2011, the literacy rate has improved significantly from 47.0 percent to 61.8 percent. Although the literacy rate is still behind the national average of 72.9 percent, Bihar has registered a significant increase in its female literacy rate, with a reduction in the gender gap in education as well.

OUTLOOK

The State is gradually emerging as a key contributor to India's economic output, engendered by a coalescence of proactive policy, locational advantages, and large resource base. In order to ensure that the long term growth story of the State remains resolutely positive, Bihar needs to increasingly diversify the key contributors to its GSDP. The manufacturing sector needs to be supported through an accelerated across-the-board engagement. Alongside, exports from the sector also need to be encouraged through appropriate institutional streamlining, capacity building, market assistance, and appropriate incentive framework.

3: ECONOMIC SCENARIO

AGRICULTURE AND ALLIED SECTOR

With three agro-climatic zones and a range of different soil groups, there is potential to grow variety of agriculture and horticulture products in the State. Unsurprisingly, agriculture and allied sector is the bedrock of Bihar's economy, accounting for nearly 19.7 percent of the GVA of the State. Its contribution in terms of employment is even more significant with close to 77 percent of the total workforce engaged in agriculture. The salience of the sector is further evident from the fact that nearly 56.55 percent of Bihar's land is under cultivation, with districts such as Buxar, Nalanda, Madhepura, Bhojpur and Siwan having a much higher net sown area. Apart from agriculture, animal husbandry and fisheries are also important source of gainful employment and economic output in the State.

Analysis indicates that Tirhut division is the key agriculture production area in Bihar. The district centre Muzaffarpur and its neighbouring districts of East Champaran, Vaishali, Samastipur and Darbhanga are amongst the leading agrarian districts of Bihar.

Production Scenario

The prowess of Bihar in the agriculture sector is visible in its contribution to the agricultural output of India. Bihar accounts for 2.9 percent of the total land area of the country, but nearly 5.2 percent of the total area under production of foodgrains, and 6.7 percent of the total foodgrain production. It ranks 8th in the country in terms of production of foodgrain, and 6th in terms of production of oilseeds. Bihar is, in fact, among the top producing states in several of the cereal categories. During 2016-17, the State accounted for approximately 14.6 percent of the country's maize production, 7.5 percent of rice production, 6.1 percent of wheat production, and 4.3 percent of sugarcane production. The State is also the second largest producer of Jute and Mesta, with a share of 14.8 percent in India's total production (Table 8).

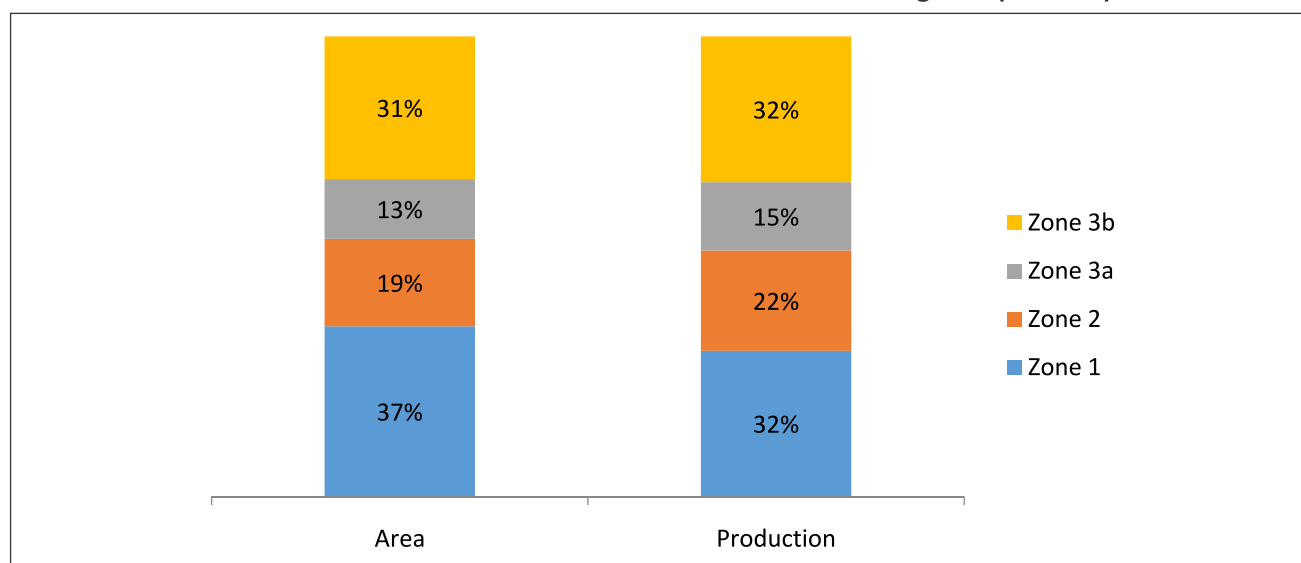
Cropping pattern in the State is dominated by cereals production, with cereals accounting for more than 85 percent of the gross cropped area. However, the productivity of most of the cereals is below national

Table 8: Comparison of Agricultural Output in Bihar and India (2016-17)
(Area in Thousand Hectares; Production in Thousand Tonnes; Yield in Kg/Hectare)

Crop	Bihar			Share of Bihar		All India Yield
	Area	Production	Yield	Area	Production	
Rice	3339.8	8238.8	2467	7.7%	7.5%	2551
Wheat	2105.8	5985.8	2843	6.9%	6.1%	3216
Maize	720.9	3845.7	5335	7.3%	14.6%	2657
Pulses	493.1	461.7	936	1.7%	2.0%	780
Millets + Course Cereals	50.1	57.6	1150	0.3%	0.3%	1203
Total Foodgrain	6709.7	18589.6	2771	5.2%	6.7%	2154
Oilseeds	108.9	125.8	1156	0.4%	0.4%	1225
Sugarcane	237.0	13040.0	55021	5.4%	4.3%	69705
Jute/Mesta Bales	0.1	1.6	2626	14.2%	14.8%	2529

Note: Yield figures in bold are those which are higher than all-India level

Source: Department of Agriculture (Govt. of Bihar), MOSPI, Exim Bank Research

Exhibit 4: Zone-wise Share in Area and Production of Foodgrains (2016-17)

Source: Department of Agriculture (Govt. of Bihar), Exim Bank Research

average. But on account of higher productivity in maize and pulses segments, the overall foodgrain productivity in the State is higher than the national average.

Zone 1 and Zone 3b account for the largest area under cultivation of foodgrains, with shares of 37 percent and 31 percent, respectively. Tirhut is the leading division for agriculture in Zone 1, while Patna and Gaya are the key divisions in Zone 3b. The productivity in Zone 1 is a challenge, and it accounts for a lower share of 32 percent in the production of foodgrains in the State (Exhibit 4). Zone 2 and Zone 3a

have higher rates of productivity, with considerably larger yields as compared to Zone 1 and Zone 3b.

Horticulture

The varied agro-climatic zones have also encouraged horticulture development in the State, positioning it as the eighth largest state in terms of fruit production and fourth largest in terms of vegetable production. The State accounted for 8.6 percent of India's vegetable production, 5.3 percent of fruit production, and 9.5 percent of its honey production (Table 9). Further, the State is also a leading producer of

Table 9: Comparison of Horticultural Output in Bihar and India (2017-18)
(Area in '000 hectares/ Production in '000 Tonnes)

Category	Value of Production		Share in India	
	Area	Production	Area	Production
Fruits	296.7	5117.1	4.6%	5.3%
Vegetables	824.6	15863.2	8.0%	8.6%
Plantation	11.4	52.9	0.3%	0.3%
Aromatics and Medicinal	4.1	1.2	0.6%	0.1%
Flowers	0.6	5.5	0.2%	0.3%
Spices	0.1	8.3	0.0%	0.2%
Honey	10.5	10.0	0.1%	9.5%
Total	1145.5	21060.5	4.5%	6.8%

Source: National Horticulture Board, Exim Bank Research

Makhana in the country. As in the case of foodgrain production, Zone 1 accounts for the largest share in cultivation of fruits and vegetables, followed by Zone 3b.

In the segment of vegetables, Bihar is the largest producer of bottlegourd in India, 2nd largest producer of cauliflower, 3rd largest producer of cabbage and potato, and the 4th largest producer of brinjal, okhra and raddish. It is also India's largest litchi producer (share of 24.1 percent), 3rd largest producer of Guava (10.2 percent) and 5th largest producer of Mango (7.5 percent)².

Makhana is another important agricultural product in the State, which has a substantial import demand in the international markets. It is cultivated in the districts of Darbhanga, Madhubani, Purnia, Katihar, Sitamarhi, Saharsa, Supaul, Araris and Kishanganj. It is estimated that around 50,000 MTs of Makhana is produced annually in the country, of which only around 2 percent is consumed domestically, leaving a large marketable surplus. According to APEDA, the global import demand for this product is estimated at nearly US\$ 4 billion. Going forward, Bihar can focus on value added products of Makhana, such as gluten-free protein supplement, and potential nutraceutical and pharmaceutical products.

Animal Husbandry

According to the livestock census of 2012, the total livestock population in the State was 329.39 lakh, with

milch animals constituting 60 percent of the population. Bihar ranked 5th in terms of total livestock resources, 3rd in terms of population of goats, 4th in terms of number of pigs, and 6th in terms of numbers of cattle and buffaloes.

On account of the abundant livestock wealth, Bihar has emerged as a major producer of meat, for domestic consumption, processing and exports. The State accounted for 4.5 percent of the country's meat production and 5.2 percent of the total milk production in the State during 2017-18. The production of milk has registered a robust CAGR of 6.45 percent during the period 2013-14 to 2017-18, on the back of a progressive three-tiered cooperative structure for milk in the State. Meat production in the State has also registered a CAGR of 4.11 percent during the period 2013-14 to 2017-18 (Table 10).

In addition to its abundant livestock wealth, the State is also endowed with a number of rivers, providing potential for inland fishing. As a result, fishing and aquaculture contributes significantly to the economy of Bihar. During 2013-14 to 2017-18, fish production in the State registered a strong CAGR of 7.97 percent. On the back of this strong growth, the State emerged as the fourth largest producer of inland fish during 2017-18, with a share of 7.4 percent in the all-India production.

INDUSTRIAL SECTOR

Industrial sector in Bihar is currently at a nascent stage. In 2015-16, the State accounted for nearly 0.7

Table 10: Livestock and Fish Production in Bihar

Year	Milk (Lakh Tonnes)	Egg (Crores)	Wool (Lakh Kgs)	Meat (Lakh Tonnes)	Fish (Lakh Tonnes)
2013-14	71.97	93.08	2.71	2.92	4.32
2014-15	77.75	98.35	2.78	2.94	4.79
2015-16	82.88	100.21	2.4	3.02	5.07
2016-17	87.1	111.17	2.81	3.26	5.09
2017-18	92.41	121.85	2.98	3.43	5.87
CAGR	6.45	6.97	2.40	4.11	7.97

Source: Economic Survey of Bihar, 2018-19

²Data as on 2016-17

Table 11: Scenario of Industrial Production in Bihar (2015-16)

Manufacturing Activity	Gross Value of Output (Rs. Million)	Share in Gross Value of Output of India (%)	Gross Value Added (Rs. Million)	Share in Gross Value Added of India (%)
Total	477343.8	0.7	60834.1	0.5
Coke and Refined Petroleum Products	218817.9	2.6	13634.3	0.8
Food Products	119516.8	1.4	14363.3	1.7
Basic Metals	40680.7	0.5	607.1	0.1
Other Non-Metallic Mineral Products	17806.6	0.8	3665.4	0.7
Publishing Activities	14355.7	21.0	8360.7	28.5
Tobacco Products	13763.1	2.9	10963.7	5.7
Beverages	7173.2	1.0	1887.8	1.1
Paper and Paper Products	4911.1	0.5	1281.8	0.8
Rubber and Plastics Products	4825.0	0.2	592.7	0.1

Source: Annual Survey of Industries, Exim Bank Research

percent of the gross value of output in India, and 0.5 percent of the gross value added in the country. Manufacturing of coke and refined petroleum products, food products and basic metals are the key industrial segments in the State. Production of coke and refined petroleum products in Bihar accounted for nearly 2.6 percent of the gross value of output in the country. Significantly, Bihar had a share of 21 percent in the gross value of output of publishing activities in India (Table 11).

Coke and Refined Petroleum Products

Coke and refined petroleum products is the largest category of industrial production in Bihar. This is largely on account of the Barauni refinery in Begusarai, one of 23 oil refineries in India, and one of the 9 refineries of the Indian Oil Corporation. Built in collaboration with Russia and Romania, Barauni Refinery was commissioned in 1964, initially designed to process low sulphur crude oil (sweet crude) from Assam. Over time, the refinery has gone through considerable upgradation, and can now process high-sulphur crude oil as well. The refinery has a capacity of 6 million metric tonnes per annum, with a capacity utilisation of 97 percent in 2017-18.

This refinery has become the centre for one of Bihar's major industrial complex, encouraging the establishment of ancillary industries. This includes the development of petrochemical and chemical industry. For example, the coke division of the Graphite India Ltd. at Barauni manufactures calcined petroleum coke, and has an installed capacity of nearly 30,000 tonnes per annum.

The State also has companies in the agrochemicals and fertilizer segment. Companies such as Krishi Rasayan Exports Pvt. Ltd. and Hindustan Fertilizer Corporation Ltd. have established industrial units in the State.

Agro and Food Processing Industries

Agro and food processing as a segment of economic activity, is uniquely positioned at the intersection of agriculture, manufacturing and services sectors of Bihar's economy, with the potential to develop into a sizeable growth engine for the State.

Bihar, a primarily agrarian state, has a large agricultural and animal production base for a flourishing agro and food processing industry. Realizing the potential, the Government of Bihar has

accorded priority status to the development of agro and food processing industry in Bihar, with the expectation that this segment will play a leading role in the industrialisation drive of the state. Entrepreneurs in the sector receive an extensive package of incentives including capital subsidies, infrastructure development, subsidy on power, tax incentives, interest subvention, duty exemptions, land concessions, and R&D and technology related incentives. Udyog Mitra, Department of Industries, Govt. of Bihar, has further identified maize processing, fruits and vegetable processing, and poultry and fish processing, as high priority segments within the sector.

Currently, sugarcane is a key agro-based industry in the State. There are eleven sugar mills in the State, of which nine are private sector owned. The Mukhya Mantri Ganna Vikas Yojana in the State has contributed significantly towards increasing productivity and recovery percentage of sugar in the production process.

The dairy industry in the State has also registered substantial growth. The milk production in the State is nearly 238.66 lakh litre per day, and the milk processing centres have a capacity of 2,565 thousand litre per day. These processing units are currently operating at 61.52 percent of their capacity, according to the Department of Animal Husbandry and Dairying, Government of India³.

The role of Bihar State Milk Co-operative Federation Ltd.(COMFED) has been crucial in development of the dairy industry in Bihar. COMFED was established in 1983 as the implementing agency for dairy development programme in the State, on the lines of the “Anand” model. COMFED is an organized milk processing cooperative which collects milk through district level cooperative unions, and processes and markets the same.

COMFED initiated a three-tier cooperative structure in Bihar — milk producers' cooperative society at the village level, milk union at the district level and milk federation at the state level. Under COMFED, 21,002 milk cooperative societies were organized till 2017-18. COMFED performs diversified activities, ranging from collection of milk, marketing of dairy products, and provision of services to ensure the welfare of the animals. It also supports members with interventions across technology, supply chain, training, etc. It has also established a strong brand value for its range of products under the name “Sudha”. The “Sudha” brand name needs to be further promoted in international market for COMFED to tap the international markets.

Textile

The textile industry contributed marginally to the total industrial output in Bihar in 2015-16. However, there is scope for development of the textile sector due to the resource base and availability of large scale labour pool in the State.

Bihar has a large pool of approximately 1 lakh weavers, for whom manufacturing and processing of textile and wearing apparel is a traditional source of livelihood. In terms of resource base for the textile sector, Bihar is a major producer of jute and silk in the country. It is the second-largest producer of Jute in the country. It also has an established sericulture industry. Production of raw silk stood at 77 tonnes in 2016-17, with three types of silk – Mulberry, Tassar and Eri –produced in the State. Tassar Silk of Bhagalpur is in fact an exclusive commodity of Bihar, which demands premium pricing in its product range.

Given the significance of the sector in terms of employment and livelihood in the State, several segments in 'Textile, Apparel and Leather' sector have been identified as 'High Priority' sector for investment.

³“State Dairy Profiles- Dairy Development Schemes”, January 2019, Department of Animal Husbandry and Dairying, Ministry of Agriculture and Farmers' Welfare, Government of India

Exhibit 5: High Priority Sectors for Investment in Textile, Apparel and Leather

Weaving/ Knitting/ Stitching	Production of Apparel and Home Textile	Banana Fibre/ Jute Fibre	Leather, Artificial Leather and Leather Substitute Material
<ul style="list-style-type: none"> • Powerloom and knitting • Production of Ready-made garments 	<ul style="list-style-type: none"> • Woven and knitted apparel manufacturing • Hosiery products manufacturing • Carpets and other home textiles 	<ul style="list-style-type: none"> • Integrated units for processing banana fibres and manufacture of products using banana fibres • Integrated units for processing jute fibres and manufacture of products using jute fibres 	<ul style="list-style-type: none"> • Manufacturing of garments/ Shoes/Slippers/footwear • Manufacture of furniture upholstery, upholstery for automobile • Manufacturing of leather goods

Source: Udyog Mitra, Department of Industries, Government of Bihar

Handloom is an important segment within the textile and garments sector of Bihar. There are 1089 primary cooperative societies managing approximately 15,000 handlooms in the State. Table 12 provides a list of the key handloom products in various districts of the State.

Further, several districts are also being developed

into more organized clusters with upgraded facilities, and training programmes. Bhagalpur, for example, is being developed as a mega handloom cluster. Two block-level clusters at Nawada and Dehri are also being developed. Another Jute Park is being established at Maranga. These are set to give a boost to the handloom segment in the State.

Table 12: District-wise Key Handloom Products

Districts	Handloom Products
Bhagalpur	Silk, Cotton, Furnishing cloth, Staple chadar, Exportable silk, Cotton cloth
Banka	Tasar silk, Exportable silk cloth
Gaya	Cotton and Silk cloth
Nalanda	Ornamental curtain, Bed cover, Interior decoration material, ornamented cloth
Nawada	Tasar silk, ladies dress material
Darbhanga, Madhubani, Sitamarhi	Fine cotton long cloth, dhoti, shirting
Aurangabad, Rohtas	Woollen blanket, Woollen carpet, and Sari
Kaimur	Woollen Carpet, Banarasi Sari
Patna, Siwan	Cotton cloth, Furnishing cloth
Purnea, Katihar	Jute bags, Jute-blended material, Interior decorative material

Source: Economic Survey of Bihar, 2019

TOURISM

In view of its rich cultural and historical heritage, Bihar has the potential to earn substantial foreign exchange through its tourism sector. Bihar's competitive strengths in the sector come from its rich cultural endowment, which is derived from its history as a centre for religious development in India. Significantly, the Buddhist and Jain religious traditions developed within the ancient Indian kingdom of Magadha which was located in modern-day Bihar.

Recognizing the potential for the sector, the Department of Tourism has identified the following 8 tourism circuits in Bihar – Buddhist Circuit, Jain Circuit, Ramayana Circuit, Shiv Shakti Circuit, Sufi Circuit, Sikh Circuit, Gandhi Circuit, and Nature / Wildlife circuit.

Bihar is an important tourist destination for foreign tourists. While it had a share of only 1.96 percent in domestic tourist arrivals, it had a share of 4.02 percent in the total foreign tourist arrivals in India in 2017 (Table 13). In fact, the State ranked 9th in terms of foreign tourist arrivals in India during 2017. Assuming equal propensity of expenditure of foreign tourists across all states, foreign exchange earnings for Bihar is estimated to be more than US\$ 1 billion. This is significant, given that the merchandise exports from the State stood at nearly US\$ 1.35 billion during the same period. However, growth in the sector has stagnated—CAGR for foreign tourist arrivals in Bihar

during 2011-2017 was 1.8 percent, as compared to 5.5 percent CAGR for foreign tourist arrivals in India as a whole.

The Government of Bihar has been increasing its expenditure in the tourism sector, consistent with the inclusion of tourism under the priority sectors of the Department of Industries. Due to the immense potential of the sector to attract foreign exchange, some high priority segments have been identified for investments in the tourism sector (Exhibit 6). Investments in these sectors will be important for reversing the slowing growth trend in the sector.

WAY AHEAD

The salience of the agriculture sector on the economy of Bihar is expected to continue. An export strategy needs to take cognizance of the significance of the sector, and attempt to move it to a higher growth trajectory. Alongside, the industrial sector in the State needs to be developed in order to foray into products which would fetch higher values in the export market, while at the same time being more resilient to competitive pressures from other States in India, as well as countries. In the services segment, while tourism shall continue to remain an important source of foreign exchange earnings in the State, there is need to fuel growth in this sector which has witnessed only marginal growth in the recent past. Other services segments such as IT and ITeS also need to be encouraged in the State.

Table 13: Tourist Arrivals in Bihar (In Millions)

Year	Number of Tourists		
	Domestic	Foreign	Total
2011	18.40	0.97	19.37
2012	21.45	1.10	22.54
2013	21.59	0.77	22.35
2014	22.54	0.83	23.37
2015	28.09	0.92	28.95
2016	28.52	1.01	29.53
2017	32.41	1.08	33.50
CAGR (%)	9.90%	1.80%	9.60%
Share in India (2017)	1.96%	4.02%	2.00%

Source: Ministry of Tourism, Exim Bank Research

Exhibit 6: High Priority Sectors for Investment in Tourism

Transportation	<ul style="list-style-type: none"> • Taxi operators at tourist places • Cab aggregators/ radio taxis at tourist places • Luxury coaches & cars plying on tourist circuits • Air taxis and helicopter services for the tourist circuits • Special tourist trains, boats, steamers, etc.
Accommodation	<ul style="list-style-type: none"> • Hotels, motels, resorts, guest houses, home stays, etc. within 10 km radius of the identified tourist circuits. • Caravans, camping facilities/tent accommodations, heritage homes, etc.
Tours & Travels	<ul style="list-style-type: none"> • Travel agencies, tour operators, tourist taxis, etc. at tourist places
MICE facilities	<ul style="list-style-type: none"> • Meeting hubs, convention centres, exhibition centres, event organizers, etc. at the tourist places.
HRD Institutions	<ul style="list-style-type: none"> • Hotel management institutes, food craft institutes, travel & trade institutes, manpower training centres, tourist guide training centres, management institutes providing tourism sector related education and trainings, etc.
Souvenir shops	<ul style="list-style-type: none"> • Handicraft shops, souvenir shops, ethnic boutiques, traditional jewellery shops etc. at tourist places
Wayside amenity (On the National Highways and State Highways)	<ul style="list-style-type: none"> • Wayside amenity centres, wayside restaurants, snack bars, dhabas, pay-and-use toilets, utility shops, parking areas and shops of handloom and handicraft items produced in the state at tourist places.
Wellness centres	<ul style="list-style-type: none"> • Ayurveda centres, wellness spas, treatment centres, yoga university, etc. at tourist places
River Attraction	<ul style="list-style-type: none"> • Cruise, floating restaurant, floating cottages, water sports (like river rafting, para sailing), recreational facilities (like fishing, dolphin watching) etc.
Entertainment	<ul style="list-style-type: none"> • Amusement parks, water parks, theme parks, craft village, ropeway, science center, museum, planetarium, etc. at tourist places.
Cinematic	<ul style="list-style-type: none"> • Film city

Source: Udyog Mitra

4: EXPORTS FROM BIHAR: CURRENT SCENARIO AND PROSPECTS

Bihar is at the cusp of a substantive upgrade in its exports sector, fostered by strong growth in economic output, improving infrastructure facilities, and positive policy environment. Merchandise exports in 2017-18 were valued at US\$ 1.35 billion, a remarkable improvement over the US\$ 0.4 billion of exports recorded during 2012-13. However, there remains substantial room for improvement as merchandise exports from the State account for less than 1 percent of these exports from India.

TRENDS IN EXPORTS FROM BIHAR

Merchandise exports from Bihar have witnessed consistent growth during 2016-17 and 2017-18, following a substantial dip in exports during 2015-16 (Table 14). The dip in export value in 2015-16 can be explained by a 2 month long closedown of major border crossings in Nepal from September 24, 2015, and a devastating earthquake in April 2015 which damaged existing transportation networks and infrastructure. Decrease in total exports from Bihar was further compounded by the decline in commodity prices during 2015-16.

The non-oil segment of exports from the State has registered considerable take off since 2016-17, on account of increasing exports in the categories of agro and allied industries, and textile and garment. In spite of this growth, the non-oil segment accounts for only

one-third of Bihar's overall exports, necessitating a strategy for accelerated growth from the segment.

KEY EXPORTED PRODUCTS

Barauni refinery is a significant industrial unit for Bihar from the point of exports. Petroleum products from the refinery accounts for nearly two-third of merchandise exports from the State. Other major export items for Bihar are buffalo meat (share of 6.1 percent in merchandise exports), other cereals (5.1 percent), rice (other than basmati) (5.0 percent), and drug formulations, biological (3.7 percent) (Table 15).

In several agro-based products, Bihar has a high share in India's overall exports. Bihar accounted for nearly 34.9 percent of India's exports of raw jute. The predominance of cereals in the agricultural production of Bihar is also evident in its exports basket. The State accounts for 18.4 percent of India's wheat exports, 1.8 percent of rice (other than basmati) exports, and 27.7 percent of the exports of other cereals. Petroleum products, the largest export item from the State, had a share of 2.4 percent in India's total exports of these products (Table 16).

KEY DESTINATIONS

Nepal is the largest export destination for Bihar, on account of the land border of the State with Nepal.

Table 14: Trends in Exports from Bihar

Year	Exports-US\$ million			Y-o-Y Growth (%)			Share in Total Exports-%	
	Total	Oil	Non-Oil	Total	Oil	Non-Oil	Oil	Non-Oil
2013-14	949.9	656.7	293.1				69.1%	30.9%
2014-15	1034.7	743.1	291.5	8.9	13.2	-0.5	71.8%	28.2%
2015-16	546.3	335.7	210.6	-47.2	-54.8	-27.8	61.5%	38.5%
2016-17	823.5	552.9	270.6	50.7	64.7	28.5	67.1%	32.9%
2017-18	1353.2	898.5	454.7	64.3	62.5	68.0	66.4%	33.6%

Source: DGCI&S, Exim Bank Research

Table 15: Product-wise Exports from Bihar (2017-18)

Exports Category	Value of Exports (US\$ Mn)	Share %
Petroleum Products	898.5	66.4
Buffalo Meat	82.5	6.1
Other Cereals	68.8	5.1
Rice (Other than Basmati)	67.2	5.0
Drug Formulations, Biologicals	50.3	3.7
Wheat	17.8	1.3
Fresh Vegetables	12.3	0.9
Marine Products	12.1	0.9
Auto Tyres and Tubes	11.8	0.9
Leather Goods	8.8	0.7
Total Exports	1353.2	100.0

Source: DGCI&S, Exim Bank Research

Table 16: Products with Highest Share in India's Exports (2017-18)

Exports Category	Value of Exports (US\$ Mn)	Share in India's Exports
Jute, Raw	5.2	34.9%
Other Cereals	68.8	27.7%
Wheat	17.8	18.4%
Coal, Coke and Briquettes, Etc	8.6	5.1%
Other Oil Seeds	6.4	3.6%
Mica	2.0	2.5%
Fertilizers Crude	0.3	2.4%
Petroleum Products	898.5	2.4%
Other Jute Manufactures	2.7	2.2%
Buffalo Meat	82.5	2.0%
Jute Yarn	0.4	2.0%
Rice (Other Than Basmati)	67.2	1.8%
Fresh Vegetables	12.3	1.5%
Dairy Products	3.9	1.3%
Jute Hessian	1.8	1.3%
Natural Silk Yarn, Fabrics, Madeup	0.4	0.8%
Human Hair, Products Thereof	2.0	0.8%
Molasses	0.1	0.7%
Auto Tyres And Tubes	11.8	0.7%
Cement, Clinker and Asbestos Cement	2.9	0.6%
Leather Goods	8.8	0.6%
Other Crude Minerals	0.9	0.6%
Oil Meals	6.4	0.6%
Processed Fruits and Juices	3.4	0.5%
Fresh Fruits	3.8	0.5%
Total Exports	1353.2	0.4%

Source: DGCI&S, Exim Bank Research

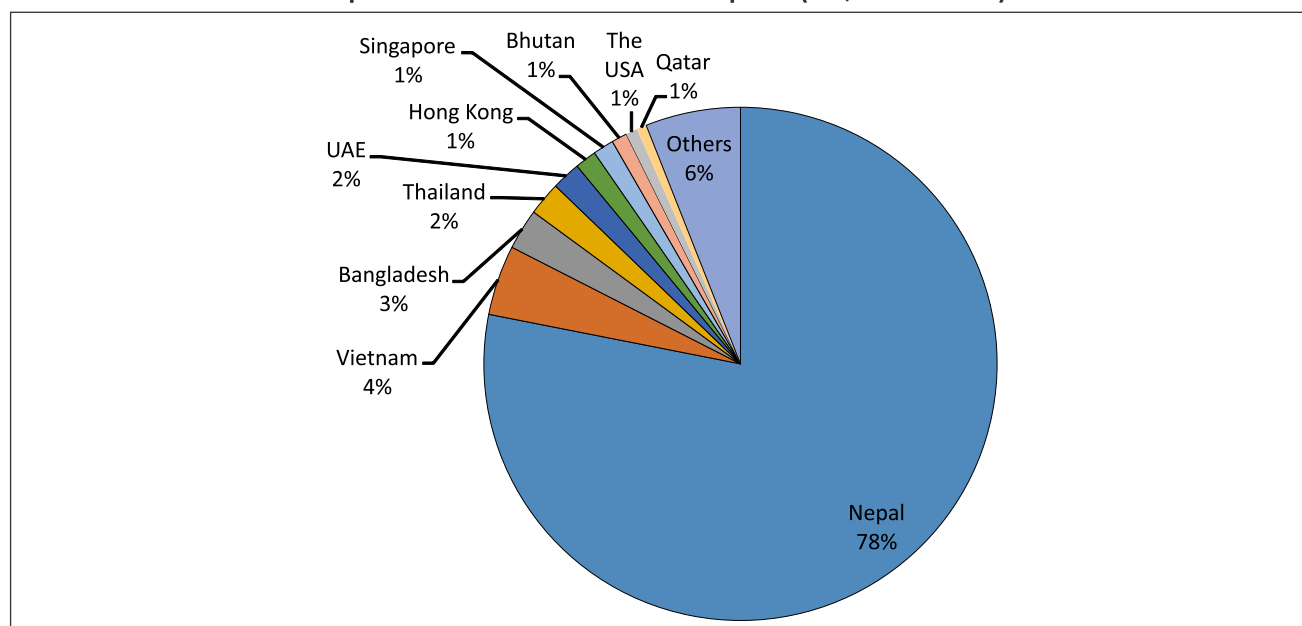
During 2017-18, nearly 78 percent of Bihar's merchandise exports were directed towards Nepal, followed by Vietnam (share of 4 percent), Bangladesh (3 percent), Thailand and UAE (2 percent each) (Exhibit 7).

Analysis indicates that Nepal is also the largest export destination for non-POL exports from the State, albeit

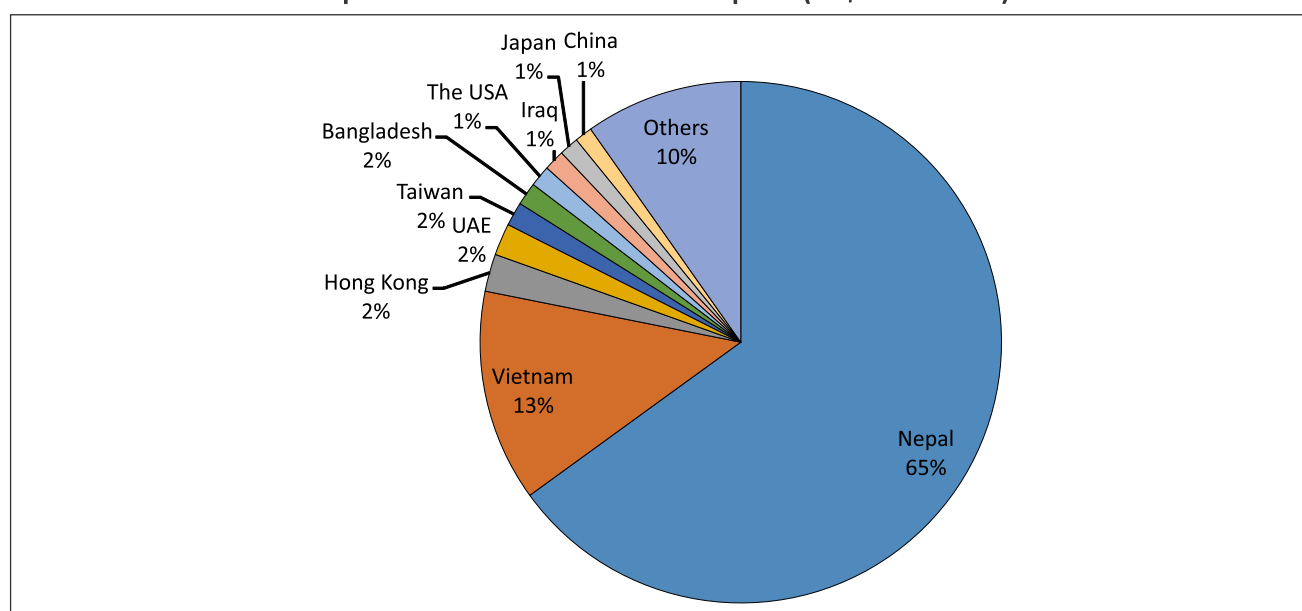
the share is lower at 65 percent. Vietnam is the second largest export destination for non-POL exports as well, with a higher share of 13 percent. Taiwan, Iraq, Japan and China feature among the top destinations for non-POL exports from the State, but not among the top destinations for overall exports (Exhibit 7). Diversification of non-POL exports will therefore hinge on further exploring exports to these key markets.

Exhibit 7: Top Export Destinations for Bihar's Overall and Non-POL Exports (2017-18)

Export Destinations for Overall Exports (US\$ 1.35 billion)

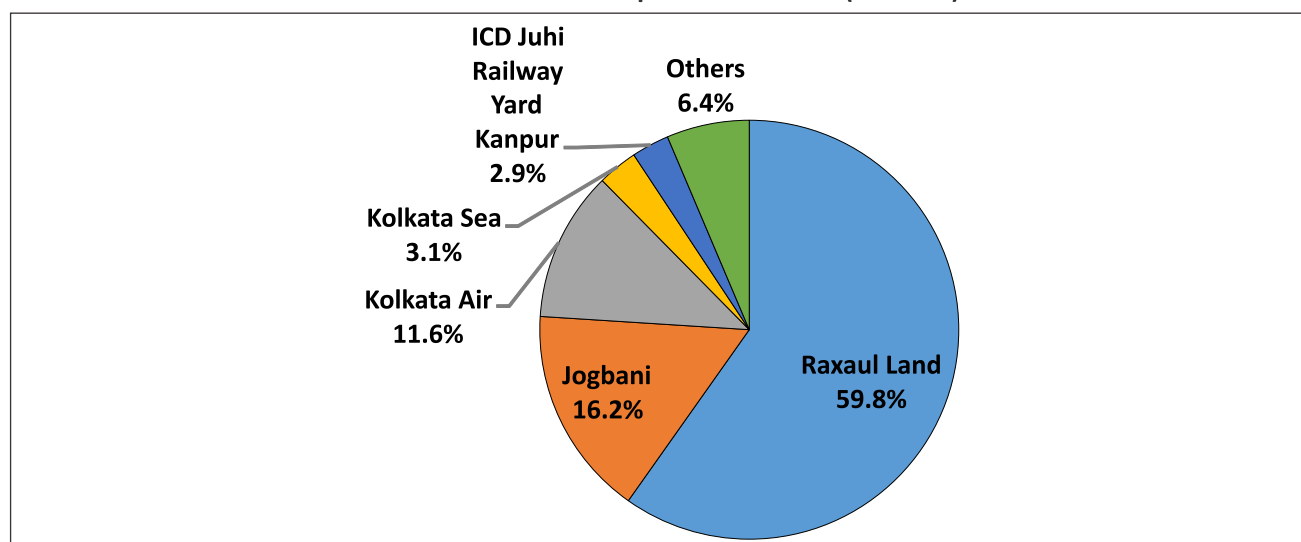


Export Destination for Non-POL Exports (US\$ 0.45 billion)



Source: DGCI&S, Exim Bank Research

Exhibit 8: Port-wise Exports from Bihar (2017-18)



Source: DGCI&S, Exim Bank Research

There is currently one ICD in Bihar at Patna, but it caters to domestic freight traffic only. Majority of the exports is from two Integrated Check Posts (ICPs) at Raxaul and Jogbani. Both these ICPs are utilized for exports to Nepal. Other than these, Kolkata Seaport and Kolkata Airport are the major ports for exports from Bihar. Together, these ports at Kolkata account for nearly 14.7 percent of the exports from Bihar (Exhibit 8). The major destinations for Bihar's merchandise exports from the ports in Kolkata are countries in the Middle East, and those to the East of India, such as Bangladesh, Thailand, UAE, Singapore, Hong Kong, Qatar, and Bhutan.

EXPORTS TARGET

According to preliminary estimates, presently, Bihar has an untapped export potential of nearly US\$ 900 million in its merchandise exports. Realizing this potential could take the merchandise exports from the State to more than US\$ 2 billion. However, over the medium term, through an appropriate strategy, exports could be further increased.

The Indian economy is on a high growth trajectory, with a distinct possibility of reaching US\$ 5 trillion in GDP by 2024-25. It is further expected that exports will reach US\$ 1 trillion level by 2024-25. An ambitious, all-encompassing exports strategy from

Bihar should focus on aligning the targets for the State, in line with the growth targets for the country as a whole.

The motive of the export policy should be to increase the share of exports in the GSDP of Bihar to at least match with the current national average of 19 percent, and further strive towards reaching a higher level of 25 percent, in line with the national target for 2024-25. Further, the policy should also attempt towards achieving a greater share of merchandise exports in the exports from the State. At present, while merchandise exports are valued at around US\$ 1.35 billion, tourism receipts alone are estimated to be in the range of US\$ 1 billion, keeping the share of merchandise and services in the State's exports at nearly half each. Given the higher multiplier effect of manufacturing on employment, the State could attempt achieving a higher share of merchandise in its overall exports basket.

Optimistic Scenario

Exim Bank's research indicates that the GDP for India could reach Rs. 325.8 trillion by 2024-25 under an optimistic scenario, in line with the estimates of the Government of India. Growth under this optimistic scenario would be driven by both exports, as well as domestic demand in the country. As exports will be a critical factor for this high rate of growth, our

estimates project exports to accordingly have a higher share in India's GDP, of nearly 25 percent, from the current levels of nearly 19 percent.

Under this optimistic scenario, Bihar should aim to achieve GSDP growth that exceeds the current levels, which would increase the share of the State in India's overall GDP. The GSDP of Bihar in such an optimistic scenario could be around Rs. 10.4 trillion during 2024-25. Assuming that Bihar achieves exports to GSDP ratio at par with the projected level for India (which is 25.0 percent), with improvement in trade scenario and a favourable policy environment in the State, the exports from the State could reach nearly US\$ 40.1 billion by 2024-25, with merchandise exports alone amounting to US\$ 26.7 billion. If Bihar achieves this level of exports, the share of Bihar in India's exports would see significant improvement (would reach nearly 3.2 percent).

Baseline Scenario

In a baseline scenario, as per Exim Bank's estimates, India's GDP is expected to reach a level of Rs. 280.5 trillion by 2024-25, with the share of exports in GDP remaining constant at 19 percent. Growth in this baseline scenario will largely be driven by the domestic demand. In the recent past, GSDP growth of Bihar has outpaced the GDP growth for India. In this baseline scenario, it is assumed that the trend is expected to continue, and Bihar is expected to account for a higher share of 3 percent in India's GDP,

taking the value of GSDP of Bihar to Rs. 8.4 trillion. With a thrust on exports, through well-crafted export strategy, the share of exports to GSDP in Bihar could be pushed to 19 percent of the GSDP (matching with the prevailing 19 percent share of exports in national GDP). In such a baseline scenario, Bihar's exports are expected to be around US\$ 24.6 billion by 2024-25, with merchandise exports amounting to US\$ 16.4 billion. In the baseline scenario, Bihar's exports are expected to have a share of nearly 3.0 percent in India's exports.

Pessimistic Scenario

If the recovery in global trade falters or the protectionism intensifies, share of exports in GDP is expected to decline. Under this pessimistic scenario, as per Exim Bank's estimates, India's GDP would reach Rs. 235.2 trillion, and the share of exports in GDP is expected to witness a marginal fall (from the present level) to 18 percent.

In such a pessimistic scenario, Bihar's GSDP is expected to maintain its current share in national GDP of nearly 2.8 percent, reaching a level of Rs. 6.6 trillion, by 2024-25. Exports are expected to grow at a faster than current pace at the back of well-crafted export strategy and the exports share in Bihar's GSDP is expected to increase to 18 percent by 2024-25. In such a scenario, exports would reach US\$ 18.2 billion by 2024-25, with merchandise exports amounting to nearly US\$ 12.2 billion.

Table 17: Export Targets for Bihar under Alternative Scenarios (2024-25)

	Pessimistic Scenario	Baseline Scenario	Optimistic Scenario
GDP India (Rs. Trillion)	235.2	280.5	325.8
Share of Exports in GDP (India)	18.0%	19.0%	25.0%
Share of Bihar in India's GSDP	2.8%	3.0%	3.2%
GSDP Bihar (Rs. Trillion)	6.6	8.4	10.4
Exports from Bihar (US\$ Bn)	18.2	24.6	40.1
Merchandise Exports (US\$ Bn)	12.2	16.4	26.7
Services Exports (US\$ Bn)	6.1	8.2	13.4
Share of Bihar in India's Exports	2.8%	3.0%	3.2%

Source: Estimated by Exim bank, using secondary data from CMIE, MOSPI and using R Core Team (2013). R: A language and environment for statistical computing. R Foundation for Statistical Computing, Vienna, Austria. URL <http://www.R-project.org>, for analysis

Therefore, based on Exim Bank estimates, the target for exports from the State should be set to US\$ 40 billion by 2024-25, with the target for merchandise exports at nearly US\$ 27 billion and for services at US\$ 13 billion.

KEY PRODUCTS FOR MERCHANDISE EXPORTS

While exports from Bihar have registered a robust growth, it is essential to identify key products and markets which provide opportunities for firms in the State to grow and achieve economies of scale, as also increase their efficiency levels. The present section undertakes a granular analysis of the products where the State's exports have demonstrated comparative advantage, and matches this with the global import demand for these products. Quantification of comparative advantage will help in identification of products where exports from the State have been performing well, as also those where success has been limited, although opportunities are significant.

The first set of products, where the State has competitive advantage and global import demand is increasing, could be targeted for achieving export growth in short to medium term. In products where the State does not have a competitive advantage, but the import demand have been robust, the State could provide incentives for enabling growth in the medium to long term.

Methodology

For analysing the export competitiveness, the concept of Revealed Comparative Advantage (RCA) is used. RCA Indices are used to identify categories of exports in which an economy has a comparative advantage by way of comparison of the country's trade scenario with the world scenario. The basic assumption underlying the concept of revealed comparative advantage is that trade profile reflects the inter-country differences in terms of relative costs as well as non-price aspects. As per Balassa's (1965) measure, index for country i , commodity j is-

$$RCA_{ij} = \frac{(X_{ji}/X_i)}{(X_{wj}/X_w)}$$

Where,

X_{ji} : exports of commodity j from country i

X_i : total exports from country i

X_{wj} : total exports of commodity j from world

X_w : total exports from world

The RCA index ranges from 0 to infinity, with 1 as the break-even point. That is, an RCA value of less than 1 means that the product has no export comparative advantage, while a value above 1 indicates that the product has a comparative advantage.

The normalized revealed comparative advantage (NRCA) index has been demonstrated capable of revealing the extent of comparative advantage more precisely and consistently than other alternative RCA indices in the literature. NRCA can be defined in the following manner-

$$NRCA_{ij} = \frac{RCA_{ij} - 1}{RCA_{ij} + 1}$$

The export competitiveness of Bihar, as reflected in the NRCA, has been mapped with global demand for the products. Based on this mapping, four categories of products have been identified:

- **Product Champions – Competitive Exports** (NRCA > 0); Growing Import Demand (Product Import AAGR > 0): These products have the maximum potential, as the world demand for these products during 2013-2017 has shown robust growth, and Bihar's exports of these products are competitive.
- **Underachievers – Exports not competitive** (NRCA < 0); Growing Import Demand (Product Import AAGR > 0): Bihar does not have comparative advantage in these products, while the import demand for these products has shown positive growth over the period under consideration. The State can strive towards increasing competitiveness in these products.
- **Declining Sectors – Exports not competitive** (NRCA < 0); Weak Import Demand (Product Import AAGR < 0): Bihar does not have comparative advantage in these products, and these sectors have also

registered negative global import growth during the period under consideration.

- **Achievers in Adversity**—Competitive Exports (NRCA > 0); Weak Import Demand (Product Import AAGR < 0): Bihar has competitiveness in these products, but the world import demand for these products has been negative.

In the short to medium term, the State can focus on leveraging the opportunities arising in the Product Champions segment, as these are low hanging fruits. In the medium to long term, the State needs to encourage development of capacities in the Underachievers segment.

Identified Products

During 2017-18, Bihar exported 1959 products at HS-6 digit level. Based on the methodology outlined above, 81 products exported from Bihar can be classified as Product Champions. The combined exports of these products from the State were US\$ 89.9 million, accounting for 6.6 percent of the State's exports (Exhibite 9). These products present the maximum potential for export growth from the State in the short to medium term.

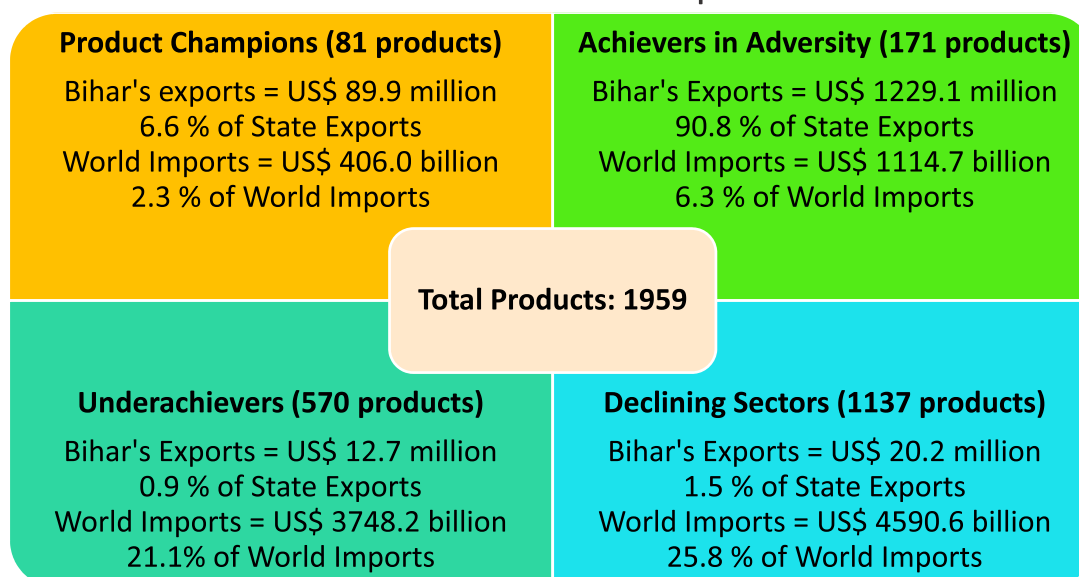
Bihar also needs to focus on the Underachiever product categories, which accounted for more than

one-fifth of the world imports in 2017, but only 0.9 percent of the State's exports during 2017-18 (Exhibite 9). There is need for capacity creation in these product categories, through an appropriate incentive framework for attracting investments in the State. Focus on these products will provide much needed resilience to exports from Bihar in the face of declining global demand and commodity price fluctuations.

Maximum numbers of products were categorized under the 'Declining Sector' category. These products account for more than one-fourth of the global imports, but the global slowdown and commodity prices have adversely impacted these sectors, and the import demand during 2013-17 was negative.

The maximum value of exports from Bihar was in the category of 'Achievers in Adversity'. These are the products where the State has competitive advantage but the global demand in these products has declined in the recent period, adding vulnerabilities to the exports basket of Bihar. Petroleum products, which account for bulk of the exports from the State, are categorized under this category. The State needs to diversify its exports away from this segment, and more towards the Product Champions and Underachievers segment, in order to provide a boost to the exports sector.

Exhibit 9: Product Identification for Exports from Bihar



Source: DGCI&S, ITC TradeMap, Exim Bank Research

Key Focus Sectors

Pharmaceutical products, animal and animal products, textiles and garments, leather and leather products, and vegetable products are some of the top sectors categorized under the Product Champions segment of Bihar. Nearly 24 of the 81 products in the product champion category are in the sector of textiles and garments. However, the maximum value of exports is in the category of pharmaceutical products, followed by animal and animal products (Table 18).

In the Underachievers sectors, maximum number of products are once again in the sector of textiles and garments. However, in terms of value of exports from the State, chemical and allied products, prepared foodstuffs, pharmaceutical products, and machinery are the top products under the segment (Table 19).

Annexure outlines the major import markets for the Product Champions identified in this section, and the major suppliers to these markets. Exporters from Bihar could target these markets, and the schemes recommended in the latter sections could focus on these markets.

In some of the identified product categories, Nepal is a major importing country, presenting significant

opportunities for exporters from Bihar on account of the land border it shares with the country. There is substantial scope for enhancing market penetration in several products imported by Nepal. For example, in the category of raw cane sugar, in solid form, not containing added flavouring, or colouring matter (HS 170113), Nepal was the third largest importer in the world, with a share of 4.5 percent in global imports. In fact, India is the largest import source for Nepal in this product category. However, Bihar accounts for only 1.2 percent of India's exports in this category, amounting to US\$ 0.2 million in 2017-18, as compared to the import demand of US\$ 30.5 million by Nepal in 2017. Clearly, there remains substantial scope for exports in this product category. Similar opportunities exist in the categories of "Agarbatti" and other odoriferous preparations which operate by burning (HS: 330741), jute and other textile bast fibres, raw or retted (HS: 530310), sewing thread of artificial staple fibres, whether or not put up for retail sale (HS: 550820), woven fabrics containing predominantly, but < 85% synthetic staple fibres by weight (HS: 551449), woven fabrics containing predominantly, but < 85% artificial staple fibres by weight (HS 551694), knitted or crocheted fabrics of a width of <= 30 cm (HS 600390), and table, kitchen or other household articles and parts thereof, and pot scourers and scouring (HS: 741810).

Table 18: Sector-wise Product Champions for Bihar

Product Category	Number of Products at HS-6 Digit level	Value of Exports in 2017-18 (US\$ Mn)
Pharmaceutical Products	3	43.1
Animal and Animal Products	11	20.5
Textiles and Garments	24	8.1
Leather and Leather Products	3	6.3
Vegetable Products	18	4.6
Chemical and Allied Products	4	3.1
Mineral Products	2	1.0
Prepared Foodstuffs	4	0.8
Machinery and Mechanical Appliance; Electrical and Electronics	3	0.8
Miscellaneous	4	0.7
Metals and Metal Products	4	0.6
Animal or Vegetable Fats & Oils & their Cleavage Products	1	0.1
Total Product Champions	81	89.9

Source: DGCI&S, ITC TradeMap, Exim Bank Research

Table 19: Sector-wise Underachiever Sectors for Bihar

Product Category	Number of Products at HS-6 Digit level	Value of Exports in 2017-18 (US\$ Mn)
Chemical and Allied Products	58	2.5
Prepared Foodstuffs	23	1.4
Pharmaceutical Products	6	1.4
Machinery and Mechanical Appliance; Electrical and Electronics	95	1.1
Textiles and Garments	101	1.1
Miscellaneous	62	0.9
Metals and Metal Products	58	0.8
Vehicles, Aircraft, Vessels and Associated Transport Equipment	14	0.8
Vegetable Products	38	0.7
Optical, Measuring, Medical & Similar Instruments & Parts	34	0.5
Plastics and Articles Thereof	16	0.4
Mineral Products	12	0.3
Animal and Animal Products	4	0.3
Leather and Leather Products	5	0.1
Construction Material	12	0.1
Rubber and Articles Thereof	9	0.1
Paper and Paper Products	8	0.1
Glass and Glassware	11	0.0
Animal or Vegetable Fats & Oils & their Cleavage Products	4	0.0
Total Underachievers	570	12.7

Source: DGCI&S, ITC TradeMap, Exim Bank Research

Apart from Nepal, countries in the Middle East and East Asia are important destination for exports from Bihar. These will remain important till the time ICDs and Container Freight Stations (CFS) are not developed

in the State, and an incentive framework for market diversification is not put in place. These markets have been highlighted in Annexure as the focus markets for exporters in the short to medium term.

5: STRATEGIES FOR EXPORT GROWTH

Analysis in the preceding chapters highlight the need for the State to diversify its industrial and exports base for imparting a renewed energy and momentum to its economic growth, and identifies the prospective sectors and markets that can be targeted. For diversification of its exports, the State will need to improve its export competitiveness, and an export strategy will be one of the critical components for achieving this.

While trade and commerce is a subject of the Union List, which empowers the Parliament of India to make legislations, the building blocks of such activities which include agriculture and industries are prerogatives of the State Government. It is therefore essential for Bihar to create and integrate an export strategy as part of its economic agenda. In order to take a holistic view, planning of a strategy for promotion of exports from Bihar would entail strategizing across various levels. Broadly, these strategies could be built upon six essential dimensions—institutional streamlining, focus products and markets, infrastructure leverage and strengthening, capacity building, fiscal incentives, and export promotion campaign (Exhibit 10).

FOCUS ON PRODUCTS AND MARKETS

Expanding the export basket of Bihar can provide the much needed resilience to the exports sector of the

State. One of the efficient ways to widen exports opportunities is to look at diversification based on value addition. There are two key methods for export diversification—horizontal diversification, which takes place within the same sector by adding new products in the existing exports basket within the same sector; and vertical diversification, which entails a shift from the primary to secondary or tertiary sector. Vertical diversification would entail contriving further uses for existing products by means of increased value added activities such as processing, marketing or other services. Table 20 provides a list of prospective high-value added products which can help diversify the exports basket of Bihar.

Agriculture and allied products is a major non-oil sector of exports for the State. Going forward, the State could focus on greater processing of the agricultural products. Currently, cereals are an important export item for the State, but exports of cereal preparations are low. Focus on this segment can garner greater export revenues for Bihar. Higher level of processing of dairy and meat products for exports can also be undertaken.

Further, the focus on organic production can be increased. The global organic market was estimated at nearly US\$ 89.7 billion in 2016, and presents considerable opportunities for exporters from the

Exhibit 10: Key Elements of Export Strategy



State. Recognizing the potential for organic products, the Government of Bihar has already taken several steps to promote organic production in the State. There are plans for developing organic corridors in the State, and farmers are being provided agriculture input subsidy for organic vegetable farming in the State. From exports perspective, the organic production needs to be certified, packaged, and labelled as per the requirements of importing markets.

In the textile segment, Bihar is a major exporter in products manufactured from a wide range of materials—cotton, jute and silk. In fact, exports of jute and jute products are an important export item for Bihar. While jute fibres are not used for garments, they can be processed into technical textiles, which would fetch much higher prices in the international market. Jute fibres can be used in manufacturing of agrotech, buildtech, clothtech,

geotech, mobiltech, packtech, protech, and oekotech.

Silk is also an important textile item for the State. Given the increasing consciousness about the cruelty in silk production process, the concept of 'Ahimsa silk' is gaining popularity (Box 2). Under the new production process, silk is produced without killing of the silk worms, which is gaining more acceptance in the international market. Products made from these newer processes can be marketed properly, which would fetch them premium prices.

Bihar also has presence in exports of chemical and petrochemicals. A wide array of chemicals, including organic, inorganic and speciality chemicals are exported from Bihar. However, the value of exports is currently low and can be further beefed up. Focus can be on the segments of dyes and pigments, construction chemicals, personal care ingredients, and water treatment chemicals, among others.

Table 20: Opportunities for Diversification of Bihar's Exports

Sector	Existing Products	Prospective High-Value Added Exports	Comments
Agriculture and Allied Sector	Cereals-Maize, Rice, Wheat	Processing of cereals to high value products like snacks, ready to cook/ ready to eat products, bakery products	Bihar has limited presence in the segment of cereal preparation.
	Dairy—Milk, Cream, Butter, Processed Cheese	Whey products (HS 0404)	Dairy products are an important export item, but currently whey products are not exported from Bihar. Global whey imports amounted to US\$ 4.6 billion in 2017 ⁽¹⁾ . Markets in China and Indonesia could be explored.
	Marine Products-Live fishes; frozen shrimps, prawns, inland fishes	Marine-based products, Fish Oils (HS 1504), Canned marine products	Fish oil is used as a medicine, as also in food products and industrial purposes. Global demand in 2017 stood at US\$ 1.8 billion. ⁽¹⁾

	Horticulture- Fruits, Vegetables, Flowers	Shift towards organic production and exports; focus on other variety of flowers	Global organic food market reached US\$ 89.7 billion in 2016. ⁽²⁾ Need to engage with NPOP for certified organic production and exports from Bihar. Bihar has higher productivity in flower production than the national average. Flower production and exports could be increased.
Textile and Garments	Jute-Exports comprise largely of raw jute	Shift towards technical textiles segment: Agrotech-Canvas cloth and tarpaulins Buildtech- Jute Laminates Clothtech-Jute and Jute Blended Fabrics Geotech- Soil savers Furniture, Interior Textiles and floor covering-Curtains made out of jute blends, jute wall coverings, dividers, etc. Mobiltech-Non-wovens made out of jute/ jute blends for sound and heat insulation Packtech-soft luggage fabrics, laminated jute hessian cloth and sackings Protech-Flame proof and mildew proof fabrics made using jute yarn as core and other conventional/ high performance fibres as sheath Oekotech-Canvas cloth and tarpaulins made out of jute/ jute blends	The technical textile market was valued at US\$ 157.68 Billion in 2016 and is projected to reach US\$ 220.37 Billion by 2022.

	Natural Silk-Raw, Fabrics, Madeups	'Ahimsa' silk' products, refers to any type of silk that is produced without harming or killing the silk worms, Pure silk carpets	Growing sensitivity about cruelty-free, eco-friendly, sustainable garment can adversely impact silk production. Diversification into cruelty-free silk production can fetch greater value.
Chemical and Allied Sector	Wide range of agrochemicals, inorganic chemicals, organic chemicals	Personal care ingredients, Water treatment chemicals, Construction chemicals, Dyes and Pigments	Bihar already exports some of these products, but in low volumes.
Pharmaceutical	Wide range of drug formulations, and some bulk drugs	Immunological products; Vaccines for veterinary purpose; opacifying preparations; medicaments containing ephedrine; containing pseudoephedrine; containing alkaloids or derivatives; containing insulin; etc.	Pharmaceutical is a product champion category. There is need for capacity addition in existing exports segment, and diversification into other untapped categories.
Handicrafts	Madhubani painting, grass craft, lac bangles, stone carving, wooden toys, terracotta figures and pots	Modern accessories and gifts, furniture, wall décor, lamps, etc.	Improvement in designs and marketing techniques will be crucial. Products should be customized to international demand trends.
Tourism and Hospitality	Religious tourism, Heritage tourism	Festival tourism (around Chath puja), Culinary tourism, Adventure tourism	Bihar can leverage its unique food and festival culture for enhancing the palette of tourist experiences.

Note: ⁽¹⁾ITCTradeMap, ⁽²⁾FIBL & IFOAM
Source: Exim Bank Research

BOX 2: AHIMSA SILK

Ahimsa silk was commercialized in early 2000s. The Hindi word "*ahimsa*" means "non-violence." This new way of the production of silk yarn is also known as "peace silk." *Ahimsa* Silk does away with brutal practices in the production of silk without compromising on the quality of the silk and the productivity of operations. Unlike the conventional method where the pupae are killed before reeling yarn from the cocoons, in the process of *ahimsa* silk production, the adult moths are allowed to emerge alive from the cocoons, and then the silk yarn is spun from the open-ended or pierced cocoons found in the wild or from those used in breeding cycles.

The silk moths best suited for the production of *ahimsa* silk are the Eri Silk Moth (*Philosamia ricini*). These feed on the castor plant, in contrast to the conventional mulberry feeding silk moth. Other species that are being used for *ahimsa* silk include the Tassar moths (both tropical and temperate- *Antheraea mylitta* and *Antiharaeaproylei*) and the Muga Silk Moth (*Antheraea assamensis*). While *ahimsa* silk may lack the shine of regular silk, it is comfortable to wear. It is also wrinkle free and has a better fall.

There is a growing demand for *ahimsa* silk from the environmentally conscious and non-violent clientele all over the world, and weavers and designers have been recognizing this demand. As a result, a wide range of *ahimsa* silk products such as shawls, stoles, scarves, ties, furnishing fabrics, knitwear, apparel fabrics, rugs and other diversified products are being developed.

It will also be essential to diversify the market for products exported from Bihar. A comparison of the top export destination for the major products exported from Bihar, vis-à-vis the top importers of these products indicates that in most of the product categories, exporters from Bihar are not currently exporting to the major importing countries (Table 21). Exporters need to understand the regulations for exporting to these markets, and develop an action for entering these major importing countries.

Bihar also needs to focus on newer areas, preferably in the high-technology intensive sectors. This includes the categories of electrical and electronics, and engineering goods. These are the products which account for the largest share in global import basket, after mineral fuels. These are also products in which competition from low cost suppliers is less likely. However, production and exports in these areas will depend on export-oriented foreign direct investment (FDI) in these segments. In lines of the 'Make in India' program of the Government of India, the Government of Bihar needs to adapt, adopt, and implement 'Make in Bihar' program.

Biodiesel is another new area which can be explored by exporters. Given the fluctuations in oil prices, and concerns over greenhouse gas emissions, biodiesel is emerging as a sunrise sector globally. Exporters from Bihar can tap this opportunity as the State has large

cultivation of crops such as soybean, sunflower, palm, rape seed, cotton seed, peanut, *Jatropha* seed, Mahua, Castor seed, Jajoba, Neem, etc. which can be utilized for generating biodiesel. Wastelands in Bihar can be utilized for planting some of these plants, which can then be utilized by companies to extract bio-diesel.

INFRASTRUCTURE LEVERAGE & STRENGTHENING

Comparison of export infrastructure in Bihar with other land-locked States such as Haryana, Uttar Pradesh, Rajasthan, Madhya Pradesh, Telangana, Chattisgarh, and Uttarakhand indicate that all these States have far more intensive logistic network than Bihar. These States, some of which are geographically smaller in size, have greater number of operational ICDs and CFSs than Bihar. The robust export infrastructure in some of these States has engendered impressive export performance of these States. For Bihar to compete with these landlocked States and script a higher export growth story, there is a need for substantive upgrade in its existing export infrastructure.

Inland Container Depots / Container Freight Stations

The most critical export infrastructure in the State would be an ICD. Bihar currently has one ICD at Patna, which caters to domestic freight traffic only. The

Table 21: Export Destinations vis-à-vis Top Import Sources for Major Products Exported from Bihar

HS	HS Description	Top Export Destinations for Bihar	Top Importers
27	Mineral Fuels, Mineral Oils & Products; Bituminous Substance	Nepal (84.9), Bangladesh (3.1), Thailand (3.1), UAE (1.7), Singapore (1.7)	China (12.3), The USA (10.0), Japan (6.9), India (6.0), South Korea (5.4)
10	Cereals	Nepal (94.6), Bhutan (1.3), Sri Lanka (1.2), Bangladesh (1.2), Benin (0.6)	China (5.8), Japan (4.9), Mexico (4.0), Egypt (4.0), Indonesia (3.6)
02	Meat and Edible Meat Offal	Vietnam (64.3), Hong Kong (11.4) , Taiwan (7.9), Iraq (7.1), UAE (2.9)	Japan (8.6), China (8.1), The USA (7.0), Germany (6.5), Hong Kong (5.6)
30	Pharmaceutical Products	Nepal (99.1), Hong Kong (0.3), Moldova (0.2), Myanmar (0.1), Ukraine (0.1)	The USA (17.2), Germany (9.6), Belgium (6.2), The UK (5.9), Switzerland (5.1)
07	Edible Vegetables and Certain Roots and Tubers	Nepal (94.1), Bangladesh (4.9), UAE (0.6), The UK (0.2) , Qatar (0.1)	The USA (14.0), Germany (9.4), The UK (5.7), India (5.4), France (4.8)
40	Rubber and Articles Thereof	Nepal (98.5), Bhutan (0.4), Sri Lanka (0.3), Bangladesh (0.2), Saudi Arabia (0.2)	The USA (14.5), China (9.7), Germany (8.3), France (3.7), Mexico (3.6)
03	Fish and Crustaceans, Molluscs and other Aquatic Invertebrate	Vietnam (44.9), Japan (33.1) , Nepal (11.1), China (4.2) , Hong Kong (3.3)	The USA (15.6), Japan (10.2), China (7.0), Spain (6.0), France (4.7)
23	Residues and Waste from the Food Industries	Nepal (83.7), Bangladesh (10.8), Vietnam (5.1) , Cambodia (0.5)	Germany (5.4), China (4.6), The Netherlands (4.6), Vietnam (4.3), The USA (4.0)
42	Articles of Leather, Saddlery Harness and Animal Guts	The USA (29.6) , Germany (20.7) , The UK (13.2), Spain (4.6), The Netherlands (4.4)	The USA (18.2), Japan (7.7), Hong Kong (6.5), France (6.3), Germany (6.2)
12	Oil Seeds Oleaginous Fruits; Misc. Grains, Seeds & Fruits;	Nepal (95.3), Vietnam (3.4), Thailand (0.6), Taiwan (0.6)	China (42.8), Germany (5.7), Japan (4.3), The Netherlands (3.9), Mexico (3.1)

Note: Markets in bold are the ones which are a major destination for exports from the State, as also the top importing country in the product category. Data on export destinations is for 2017-18, and data on world imports is for 2017.

Source: DGCI&S, ITC TradeMap, Exim Bank Research

Department of Commerce, Government of India defines an ICD as a common user facility with public authority status, equipped with fixed installations, and offering services for handling and temporary storage of import/export laden and empty containers carried under customs control, and with Customs and other agencies competent to clear goods for home use, warehousing, temporary admissions, re-export, temporary storage for onward transit and outright export. Transshipment of cargo can also take place from such stations.

ICDs can facilitate the economic development of land locked states, such as Bihar, through the provision of enhanced connectivity; prospects for future expansion of ICDs into Special Economic Zones

through its linkage with production clusters; shifting of distribution functions from seaport terminals; and shift towards more multi-modal forms of transportation.

A broad assessment of seven major production centres – Patna in Patna Division, Begusarai in Munger Division; Bhagalpur in Bhagalpur Division; Munger in Munger Division; Muzaffarpur in Tirhut Division; Rohtas in Patna Division; and Purnea in Purnea Division – has been undertaken for the identification of a prospective location for an ICD in the State. These districts have been considered on the basis of their existing production capacity, potential for enhancing production, logistic network and locational advantage. A comparative

assessment of these areas has been undertaken based on key demand and supply considerations for the establishment of a new ICD (Table 22). This includes proximity to production centres;

accessibility to transport infrastructure; range of support services; proximity to other logistics platforms; and investment and operational climate.

Table 22: Comparison of Districts for Establishment of an ICD

Indicator	Muzaffarpur	Bhagalpur	Purnea	Patna	Rohtas	Begusarai	Munger	Bihar State
GDDP per Capita (District) – Rs.	15402	17324	10099	63063	13909	17587	22051	14574
Population - % of State Total	4.6	2.9	3.1	5.6	2.8	2.9	1.3	100
Production Statistics-% of State Total								
Agri Production- Rank	2	6	4	3	1	5	7	-
Total Agri Production	4.24%	2.49%	3.04%	3.15%	4.68%	2.96%	1.15%	100
Rice	2.1%	0.9%	3.4%	2.2%	7.8%	1.0%	1.1%	100
Wheat	4.3%	2.7%	1.4%	3.4%	7.7%	3.8%	0.6%	100
Maize	1.5%	3.6%	7.4%	0.4%	0.0%	5.5%	0.1%	100
Pulses	2.7%	2.2%	1.5%	12.5%	3.0%	1.1%	0.8%	100
Mango	6.6%	5.0%	1.7%	2.6%	4.0%	2.9%	0.9%	100
Guava	3.2%	1.6%	0.9%	2.4%	7.3%	1.2%	0.6%	100
Litchi	20.4%	2.2%	4.2%	-	-	1.7%	1.1%	100
Banana	17.8%	3.6%	2.9%	1.8%	1.0%	3.0%	1.1%	100
Potato	4.0%	2.6%	2.1%	5.6%	3.2%	2.9%	2.2%	100
Onion	5.6%	3.2%	3.4%	5.2%	2.2%	3.4%	2.2%	100
Cauliflower	6.6%	2.9%	3.5%	0.1%	2.2%	3.5%	1.3%	100
Brinjal	3.2%	3.2%	1.8%	4.3%	1.7%	5.2%	1.4%	100
Livestock Wealth- Rank	1	3	2	5	4	6	7	
Total Livestock Wealth	4.5%	3.6%	3.8%	2.7%	2.8%	2.1%	1.2%	100
Cow	2.8%	4.2%	4.1%	2.5%	3.2%	3.0%	1.4%	100
Buffalo	3.7%	2.5%	1.8%	3.9%	3.9%	1.3%	0.7%	100
Pig	0.8%	1.4%	2.9%	5.9%	1.7%	0.6%	1.2%	100
Sheep	1.0%	0.2%	0.0%	5.7%	6.0%	0.0%	0.1%	100
Goat	4.6%	4.8%	4.2%	1.5%	3.0%	1.9%	1.4%	100
Poultry	6.7%	2.8%	4.4%	3.1%	1.5%	2.0%	1.1%	100
Dairy Production– Rank	2	3	6	1	5	4	7	-
District	3.8%	3.8%	2.40%	5.5%	3.1%	3.7%	1.6%	100
Division	15.0%	6.4%	10.2%	20.1%	20.1%	12.0%	12.0%	100

Presence of Robust Transport Infrastructure								
Indicator	Muzaffarpur	Bhagalpur	Purnea	Patna	Rohtas	Begusarai	Munger	Bihar State
Road Density - km/km ² (Rank)	2	3	7	1	6	5	4	-
NH Road Density	0.08	0.06	0.04	0.12	0.05	0.05	0.06	0.05
SH Road Density	0.02	0.03	0.04	0.07	0.05	0.02	0.02	0.04
MDR Road Density	0.15	0.11	0.07	0.18	0.10	0.11	0.03	0.12
RR Road Density	2.15	1.09	1.65	1.19	0.86	1.15	0.59	1.38
Railway Infrastructure – Rank	2	3	5	1	6	4	7	-
Proximity to Ports								
Distance from Patna Airport - km	79	242	374	0	146	132	185	-
Distance from Kolkata – km	594	415	503	579	576	497	470	-
Range of Support Services – Proximity to Other Logistics Platforms								
Number of Commercial Banks	383	267	206	954	211	205	129	7267
Warehousing, Storage (District) - Rank	2	1	5	3	6	4	7	-
SWC Capacity – MT	28757	61583	*	11742	0	9037	0	504221
CWC Capacity – MT	-	-	-	23487	6200	2500	8000	119520
Cold Storage Capacity (Functional) - MT	85621	15956	73548	56432	1529	120355	0	1285593
Investment and Operation Climate								
Power Consumption per capita - kwh	916	714	382	4197	785	452	310	258
VAT Collection [^] - Rs. Lakh	25706	14497	13344	897516	6664	6232	3920	1072609
No. of Industrial Establishments	69163	55272	52904	147972	52819	56329	26287	1707398
VAT Collection per Establishment - Rs.	37167	26228	25223	606544	12617	11064	14912	62821

* - Storage Capacity of SWC in Purnea not provided in official sources

[^] - VAT has been considered in absence of availability of district level data in public domain on GST

Source: Government of Bihar, Central Warehousing Corporation, State Warehousing Corporation, RBI, Exim Bank Research

An essential consideration for setting up of an ICD would be the demand for its services. This would be directly related to the level of economic activity in the districts and divisions. Exim Bank research indicates that agriculture is the major economic activity in all the seven districts taken into consideration. Among the districts, Muzaffarpur and Rohtas emerge as the most significant agri production centres in terms of annual production of fruits, flowers and vegetables, as also in terms of cropping intensity. Moreover, Muzaffarpur's neighbouring districts of East Champaran, Vaishali, Samastipur and Darbhanga are also among the top agricultural producing districts. The establishment of agri export zones in and around

the district further positions Muzaffarpur as the focal point of a large production cluster in North Bihar. Other significant agri production districts in the State are Patna (flowers, pulses and vegetables), Rohtas (cereals and fruits) and Purnea (cereals, spices and foxnut).

Animal husbandry is also an important economic activity, and features prominently in the State's export basket. Muzaffarpur, Bhagalpur, and Purnea are the State leaders in terms of livestock wealth. Patna and Tirhut divisions are the largest producers of milk accounting for 20 percent and 15 percent of the overall State production, respectively. Based on the

agriculture and animal husbandry activities in the State, Muzaffarpur again emerges as the key demand centre for an ICD in the State, followed by Bhagalpur and Purnea.

Presence of an efficient transport infrastructure is another important pre-requisite for establishing an ICD. An ICD is usually located at a distance from existing ports, and strong transport infrastructure can potentially reduce transportation cost and time.

In terms of road infrastructure, Patna is the most developed district in Bihar, leading in terms of road density of National Highways, State Highways, and Multi-District Roads. After Patna, Muzaffarpur has the highest road density of National Highways, while Rohtas has the highest density of State Highways. Muzaffarpur and Purnea are also located along the East-West Corridor, the largest national highway project in India. In terms of railway infrastructure, analysis indicates that Patna and Muzaffarpur are the largest railway junctions in the East Central Railway Division, which encompasses most of Bihar; while Bhagalpur is the third largest railway junction in the Eastern Railway Division. Understandably, Patna is a clear leader in terms of existing surface transport infrastructure, followed by Muzaffarpur.

Proximity to the airport in Patna and the Kolkata port would also be other important consideration for the setting up an ICD. Our analysis indicates that in terms of access to airport, Muzaffarpur is the closest amongst the districts taken into consideration, located at a distance of just 79 km from Patna. Begusarai, Rohtas and Munger are also in closer proximity to the airport at a distance of 132 km, 146 km and 185 km, respectively. In terms of access to the Kolkata port, Bhagalpur is the closest amongst the assessed districts, located at a distance of 415 km. Based on our analysis, Muzaffarpur and Bhagalpur emerge as the key areas in terms of proximity to the Patna airport and Kolkata port, respectively.

The range of support services and proximity to other logistics platforms are also extremely relevant for the full-fledged functioning of an ICD. ICDs should provide a range of support services, including customs office,

banking services, warehousing and cold storage facilities. In the context of Bihar, cold-storage facilities are a key support infrastructure on account of the prominence of export items which have low shelf-life such as fruits, vegetables, dairy and meat products.

Of the districts under consideration, only Muzaffarpur has a Customs Office. In terms of access to banking services, Patna, followed by Muzaffarpur has the largest number of functioning offices of commercial banks. As far as storage capacities are concerned, Bhagalpur, Muzaffarpur and Patna are the leading districts in terms of capacity of warehouses under the Bihar State Warehousing Corporation and Central Warehousing Corporation. Bhagalpur, which is a significant industrial centre in the State, has considerable warehousing capacity, but the cold storage capacity is relatively small. The leading districts in terms of functioning cold storage capacity are Samastipur and Vaishali, both of which are not part of the current analysis but are close to Muzaffarpur. Amongst the assessed districts, Begusarai, followed by Muzaffarpur and Purnea have the most extensive cold storage facilities. This development of cold storage facilities complements the relatively high-level of agricultural output in these regions. Based on these considerations, Bhagalpur, Muzaffarpur and Begusarai emerge as the areas with the most extensive support services.

Looking further at the supply side aspect, investment and operation climate is a relevant consideration for ICD service providers. Per capita power consumption, total VAT collection and number of industrial establishments in each district have been compared for an evaluation of the operational climate. Districts with higher per capita power consumption are expected to have more extensive power infrastructure. Patna, Muzaffarpur, Rohtas and Bhagalpur have the highest power consumption per capita, which is indicative of better power availability. Further, districts with higher VAT collection per industrial establishment would also reflect a positive investment and operation climate. The VAT collection per establishment is estimated to be the highest in case of Patna, followed by Muzaffarpur, Bhagalpur and Purnea. Based on supply side assessment,

Muzaffarpur and Bhagalpur are the key districts in Bihar.

An evaluation based on the aforementioned parameters suggests Muzaffarpur as a preferred location for the establishment of an ICD. Several factors support Muzaffarpur's candidacy as a preferred destination including its proximity to a large agricultural production cluster, relatively high level of economic output, extensive access to transport infrastructure, considerable warehousing and cold-storage capacity (in and around Muzaffarpur district), and positive investment and operational climate. Geographically located north of the Ganga, along the East-West Corridor, the enhancement of export infrastructure in the district could reap substantial benefits.

In terms of prospective utility for service users, an ICD in Muzaffarpur would allow for more efficient intermodal transportation of goods due to the relatively better road, rail and air infrastructure. The road and rail linkage between Muzaffarpur and Kolkata, and the proximity to Patna Domestic Airport further strengthens the case for an ICD in the district. Considerable industrial development has also resulted in the district being home to a range of financial and other support services, which could amplify the benefits accruing from the establishment of an ICD. In terms of utility for ICD service providers also, Muzaffarpur stands out as a prospective location for establishment of an ICD.

Establishment of an ICD in Bhagalpur could also be considered. The district has considerable agricultural and industrial capacity, in addition to relatively well developed road and rail infrastructure. Its proximity to production centres in the North East of Bihar, its geographic location south of the Ganga and its proximity to Kolkata port accord it substantial locational advantage. Further, Bhagalpur has a relatively more conducive investment and operational climate as compared to other districts in Bihar.

Based on preliminary research using secondary sources of data and information, setting up of ICDs in

Muzaffarpur and Bhagalpur is recommended. However, a detailed techno-economic feasibility study would be warranted to further ascertain the costs and benefits associated with the establishment of a new ICD at these two locations in the State along with their commercial viability. Further, in order to cater to the export traffic, establishing a custom clearance office in the existing ICD in Patna is also recommended. Additionally, there is need for establishment of office of Export Inspection Council near the ICDs in order to provide country of origin certificates. These certificates are important for targeting regulated markets. Apart from this, air cargo complex needs to be set up in key centres such as Patna and Gaya, and container freight terminals at Fatuha and Bitha need to be upgraded, as already outlined in the Bihar Industrial Investment Promotion Policy 2016.

Warehousing and Cold Storage

Lack of adequate transportation, storage and distribution services is an issue for exporters across the country. Specifically, in the context of Bihar, this is a major constraint as perishable products account for a significant share of the State's exports. Agro and allied products are key exports from the State. Further, pharmaceuticals have also been identified as a Product Champion sector for the State. Encouraging exports from these segments would require adequate warehousing and cold storage infrastructure.

Bihar has a total warehousing capacity of 623,741 Metric Tonnes (MT), of which 504,221 MT has been installed by the State Warehousing Corporation (SWC), and 119,520 has been installed by the Central Warehousing Corporation (CWC). In terms of capacity, Patna division had nearly 38.8 percent of the capacity, followed by Purnea (14.3 percent) and Tirhut (12.8 percent). Bihar accounted for a total of 1.4 percent of India's total warehousing capacity as of August 2018 (Table 23), which is abysmally low considering that the State accounts for nearly 6.7 percent of the total foodgrain production in the country.

Table 23: Warehousing Capacity in Bihar (MT)

Division	SWC	CWC	Total	Share in Bihar's Total %
Tirhut	75197	4400	79597	12.8%
Saran	26591	13216	39807	6.4%
Darbhanga	13258	23870	37128	6.0%
Kosi	5660	9211	14871	2.4%
Purnea	68956	20000	88956	14.3%
Patna	203816	38323	242139	38.8%
Magadh	30123	-	30123	4.8%
Munger	19037	10500	29537	4.7%
Bhagalpur	61583	-	61583	9.9%
Bihar total	504221	119520	623741	100.0%
India Total	35776000	9969000	45745000	-
Share of Bihar in India	1.4%	1.2%	1.4%	-

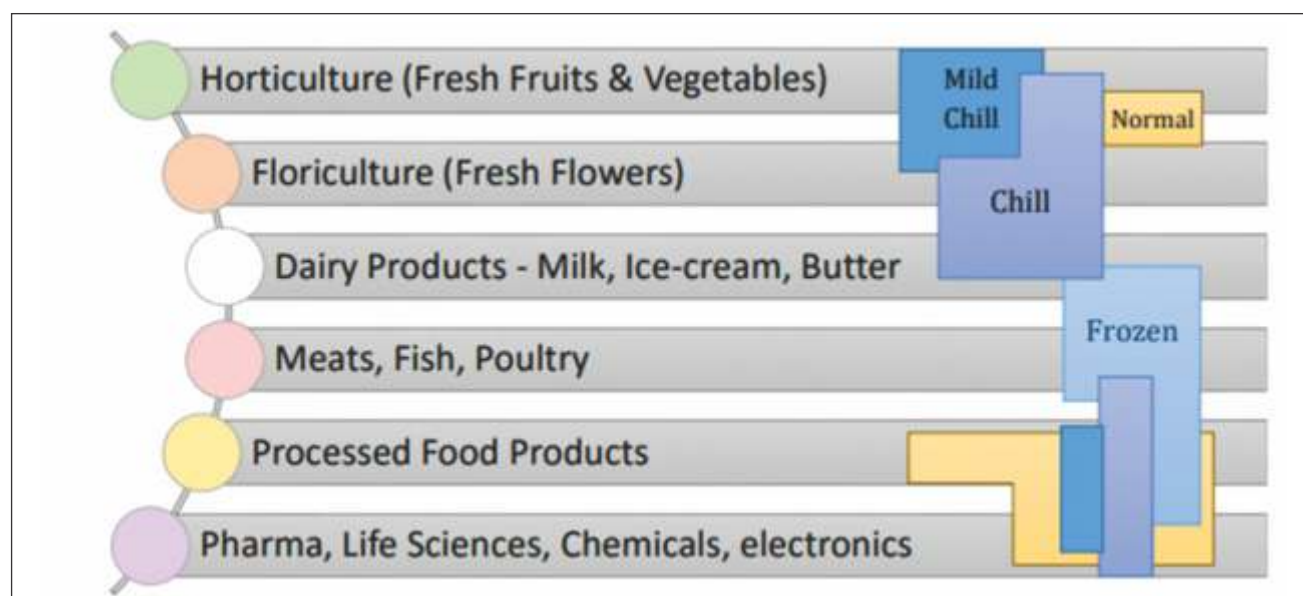
Note: Data as on August 2018

Source: CWC, Department of Industries, Govt. of Bihar, Exim Bank Research

Further, cold chain infrastructure will also be crucial for several products exported from the State. For fresh horticulture and floriculture produce, cold-chain enhances the life cycle of the produce, thereby extending its saleable life and time span to reach the end-consumers across geographies. For processed food as well, the cold-chain protects the food

products till its consumption. Pharmaceutical, life sciences, chemicals and electronics products also require varying degree of temperature controlled storage. Data from the State Horticulture Board of Bihar indicates that Bihar had a cold chain infrastructure of 1.9 million MT as of August 2017, of which nearly 1.3 million MT was active.

Exhibit 11: Segments requiring Cold Chain Storage



Source: National Center for Cold Chain Development

Table 24: Cold Chain Infrastructure in Bihar (As of August 2017; Value in MT)

	Division	Active		Potential		Total	
		Value	Share	Construction	Inactive	Value	Share
Zone 1	Tirhut	366833.5	28.5%	35349.0	75922.4	478104.9	25.8%
	Saran	182788.2	14.2%	44494.2	58178.3	285460.6	15.4%
	Darbhanga	219893.8	17.1%	0.0	33023.5	252917.3	13.7%
Zone 2	Kosi	30296.0	2.4%	0.0	12300.0	42596.0	2.3%
	Purnea	138339.2	10.8%	31247.5	9733.0	179319.7	9.7%
Zone 3b	Patna	167629.2	13.0%	25638.8	109720.6	302988.6	16.4%
	Magadh	41550.0	3.2%		55252.0	96802.0	5.2%
Zone 3a	Munger	122306.9	9.5%	6103.7	42198.1	170608.7	9.2%
	Bhagalpur	15956.4	1.2%	0.0	25964.0	41920.4	2.3%
Total Bihar		1285593.0	100.0%	142833.2	422291.8	1850718.0	100.0%

Source: State Horticulture Board Bihar, Exim Bank Research

There is need for increasing the warehousing and cold chain infrastructure in the State. Warehousing will be crucial for supply chains of foodgrains in the State. Assuming a peak storage capacity requirement of around 70 percent of the production, Bihar would require warehousing capacity of 13 million MT, as against the current capacity of 0.6 million MT. Alongside, cold chain infrastructure also needs to be enhanced. In 2015, the National Center for Cold Chain Development had estimated a need for development of nearly 2.2 million MT of cold chain infrastructure in the State. While nearly 0.5 million MT have been added to the cold chain infrastructure since then, it remains far below the requirement in the State. For efficient agri-value chain, establishment of cold chains need to be encouraged at all stages of the business cycle, starting from harvesting till the final destination.

Special Economic Zones

According to SEZ Act 2005, a Special Economic Zone (SEZ) can be established either jointly or severally by the Central Government, State Government, or any other person involved in the manufacturing of goods.

Even a foreign company can also set up SEZs in India. The private sector has been actively associated with the development of SEZs in many States of India.

SEZs provide efficient infrastructure, quality services, and favorable business environment, with minimal regulatory restrictions. On account of these factors, SEZs provide the requisite environment for export-oriented FDI. Consequently, the contribution of these zones to output, employment and exports is substantial. Growth in exports from SEZs has in fact outpaced the growth in exports from India during the recent years. For example, during 2017-18, while India's overall merchandise exports in rupee terms registered a growth of 5.8 percent, exports from SEZs increased by 11 percent.

Given the significance of SEZs in industrial development and exports, it is a matter of concern that Bihar currently does not have any SEZs. The State also does not have any policy, act or rules for encouraging establishment of SEZs. To attract export-oriented FDI and encourage exports from the State, establishment of SEZs will be important. These could possibly be set up in the districts of Patna, Muzaffarpur or Bhagalpur which have good road and

rail connectivity. One of the SEZs can be dedicated to agricultural products, given the substantial potential of exports from the sector.

CAPACITY BUILDING

Branding of Geographical Indications

Geographical Indications (GI) status for handicrafts, handloom and agricultural products of Bihar can function as product differentiators, and serve as important tools for marketing strategies. The reference to geographical origin, along with the use of traditional practices and processing methods, provides substantial marketing potential. Bihar already has a wide range of products with GI status, ranging from handicrafts to agricultural products to foodstuffs (Table 25).

To reap the benefits of GI status, it is important for the GI brand to be recognized as a reliable and preferred brand in the market, with a distinguished positioning. Products such as Darjeeling Tea, for example, have been able to gain substantial market share on account of this brand building. In order to attain similar levels of success, key value proposition needs to be defined for the products having GI status. The logo and name of the GI brand needs to be developed and marketed,

and mechanism needs to be devised for ensuring that all the products marketed under the GI brand meet the minimum specified standards.

In this regard, a brand equity fund can be set up by the Government of Bihar. This will be aimed at building globally competitive brands for products originating from the State. The fund can also assist in marketing of these branded products in the international arena. Export related brochures, interactive CDs, etc. can be created for popularizing the products from the State in international market.

Initiatives are also needed for identifying more products from the State which can be accorded GI status. This could include agricultural products such as Makhana, and foodstuff such as Litti Chokha and Laktho.

Standards, Regulations and Quality

Various quality requirements and standards need to be maintained by the exporters in the State. Many export destinations prescribe product specifications which need to be adhered to, and it is the responsibility of stakeholders to ensure that these standards are met.

Table 25: Geographical Indication Products of Bihar

Products	Sector
Madhubani Paintings	Handicraft
Applique (Khatwa) Work of Bihar	Handicraft
Sujini Embroidery Work of Bihar	Handicraft
Sikki Grass Products of Bihar	Handicraft
Bhagalpur Silk	Handicraft
Bhagalpuri Zardalu	Agricultural
Katarni Rice	Agricultural
Magahi Paan	Agricultural
Shahi Litchi of Bihar	Agricultural
Silao Khaja	Foodstuff

Source: Intellectual Property India

The supporting eco-system comprising phyto-sanitation certification, organic certification, testing for meeting stringent requirements of pesticide free produce, packaging, and labeling will need to be created. Refund of expenses incurred for obtaining statutory certifications like ConformiteEuropeene (CE), China Compulsory Certificate (CCC), GMP, etc., could be considered, to the extent of 50 percent of expenses incurred by exporters, subject to a ceiling per exporting unit. One day training and awareness drive can also be conducted in major production hubs for dissemination of information pertaining to these certifications, including process of application and support provided by the Government of Bihar.

Technology Acquisition

The Government of India has launched several schemes for assisting Indian manufacturers to acquire and evolve cutting-edge technologies to catalyze growth and compete in global market. One such initiative is the Technology Acquisition Fund Programme (TAFP) which is an industry driven initiative, aimed towards assimilation of technology in a short span of time. The TAFP provides financial assistance to Indian capital goods sector to facilitate the acquisition of strategic and relevant technologies, and also development of technologies through contract route, in-house route, or through joint route of contract and in-house.

Similarly, the Technology Acquisition and Development Fund (TADF) aims at facilitating acquisition of clean and green technologies by MSMEs across sectors, and bridge the technological gap at an affordable cost. These can be leveraged by exporters from Bihar to boost high-technology exports.

In this context, the State government can provide support in submission of applications under the schemes. For example, under TAFP, applicants need to carry out a mandatory detailed assessment study by a third party specialized and accredited agency on the proposed technology. This is done to evaluate the following aspects in the context of improving the existing business proposition —

- Technical uniqueness of the proposed technology in the context of area of application vis-à-vis other competitive technologies;
- Commercial viability and appropriate justification for financial valuation of the “Proposed Technology”;
- Requisite level of details on Intellectual Property Rights in relation to the context of improving the existing business proposition.

Prior to the opening of the Request for Proposal (RFP) cycle of the schemes, the State Government can invite and review applications from export-oriented units / clusters / consortium in the State, and provide necessary advisory and financial support in preparation of the application. As these programs meet only a fixed percentage of the cost of technology acquisition (25 percent in case of TAFP subject to ceiling of Rs. 10 Crore), the State Government can provide additional financial support on a case-to-case basis.

FISCAL INCENTIVES

Fiscal incentives are sometimes necessary to make or keep domestic products competitive in the global market. As the exports sector in Bihar is at a nascent stage, some fiscal incentives could be provided to exporters in the State.

Being a landlocked state, Bihar needs to reduce the logistics cost incurred by its exporters. To subsidize freight component on floriculture, fresh fruits, fresh vegetables, fresh culinary herbs, dried flowers, processed fruits, vegetables, poultry, dairy products and medicinal plants, assistance is provided to exporters by APEDA. Freight subsidy was also provided for select states by the Ministry of Commerce and Industry, but this was discontinued in 2016. This kind of support helps exporters in reducing the cost to exports arising out of infrastructural deficiencies.

Such support can be provided at the state level by the Government of Bihar, for subsidizing the freight component for key products exported from the State.

Keeping in mind the budget considerations, district and product-wise schedule for eligibility of reimbursement and amount for reimbursement can be developed. Several other state governments provide such freight assistance for export promotion. For instance, the Government of Uttar Pradesh incentivises export oriented units by providing subsidy on export cargo sent by air and subsidy on freight charges on gateway port⁴. On similar lines, the Government of Punjab provides freight assistance to MSMEs set-up anywhere in the State for export of goods, manufactured by the exporting MSME, to the extent of 1 percent of Free on Board (FOB) value or actual freight (excluding government fee and taxes on transportation of goods from place of manufacture to the sea port & airport from where they are shipped), whichever is less, and maximum up to Rs. 20 lakh per annum⁵.

EXPORT PROMOTION CAMPAIGN

Export Awards

To encourage exports from the State, Export Awards can be introduced for recognizing the efforts of exporters across the key sectors— agricultural and allied products, marine products, chemical and allied products, pharmaceuticals, textile and garments, engineering goods, and tourism. Separate awards can also be instituted for the MSME units in the State. A selection committee comprising officials from key government agencies and eminent industrialists can evaluate the applications, taking into consideration the value of exports, ratio of exports to sales, level of value addition, adoption of best practices, product and process innovation, R&D activity, etc.

Capacity Building of Industrial Clusters

Industrial clusters have been proven to have several advantages in promoting the growth of a particular sector or industry. It is recognized that enterprises can achieve high levels of competitiveness if they work in a cluster environment ensuring complementarities,

common facilities, collective activities, including collective sourcing and marketing.

The State of Bihar has several industrial clusters spread across an array of sectors. The development and upgrading of these clusters will be an important agenda for the State Government. As an essential first step, the State needs to develop a mechanism for assessment of existing clusters in the State. The assessment can cover aspects pertaining to infrastructure bottlenecks, technological upgradation, access to skilled human resource, environmental sustainability, etc. Upon assessment of the clusters, relevant capacity building activities can be undertaken by the Government. The key elements of capacity building would include construction of physical infrastructure, building institutions, and development of human resources.

Market Development Assistance

Marketing Development Assistance (MDA) Scheme of the Government of India assist exporters in undertaking their export promotion activities abroad. Entrepreneurs get funding for participating in trade delegations/ buyer seller meets/ fairs/ exhibitions. These initiatives have been proven to assist exporters for export promotion activities. A State-level MDA scheme can also be put in place for further encouraging participation of exporters from the State. Exports from the States are highly concentrated in a few geographies, and such assistance can help diversify the destinations for exports. The implementation of the scheme needs to be made segment specific, with focus on exporters in the high value added and technology intensive sectors.

INSTITUTIONAL STREAMLINING

The overall ecosystem in Bihar would need to be framed in a manner that propels the State to a higher export trajectory. Institutional structure comprising the associated state machineries would be pivotal in

⁴"Industrial Investment and Employment Promotion Policy of Uttar Pradesh 2017", Government of Uttar Pradesh

⁵"Detailed Schemes and Operational Guidelines, 2018 for availing Fiscal Incentives under Industrial and Business Development Policy 2017", Department of Industries and Commerce, Government of Punjab

this process. In this context, a Bihar Export Promotion Council (BEPC) could be set up under the Department of Industries, Government of Bihar, with the objective of ensuring strong export performance for the State. The BEPC could be set up with the participation of the State government, exporters and industry associations, and would also provide a forum for exchange of views, sharing of information, identifying obstacles faced by exporters and implementing measures to overcome them.

The proposed structure of the BEPC has four key operational areas –merchandise exports division; services exports division; export connect division; and information technology (IT) division (Exhibit 12). Apart from this, a Programme Management Unit (PMU) could also be set up for integrating the various functions of the BEPC. The functions of the various divisions would be:

1. Merchandise and Services Divisions: The merchandise wing of BEPC could focus on merchandise export segments by coordinating with State bodies, exporters, etc., while the services wing could focus on services segment such as IT and tourism. These wings would largely be composed of Government officials, who would outline strategies for ensuring that targets are met in their respective areas. These shall also provide advisory services to exporters.

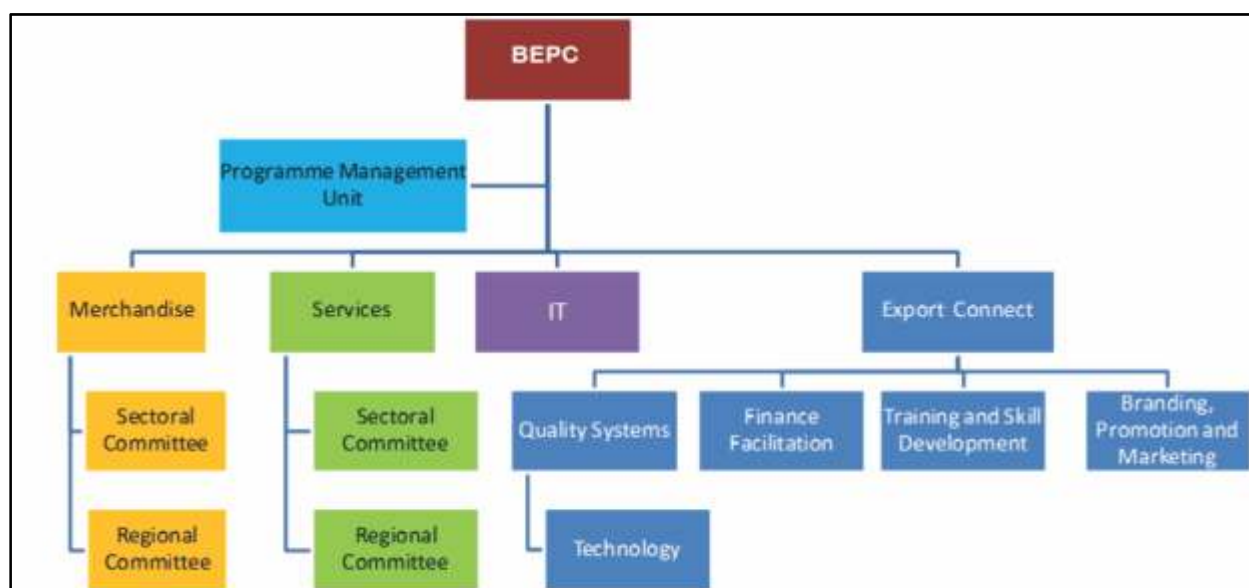
The Merchandise and Services wings could in turn be composed of sectoral committee and regional committee. The sectoral committee could manage the delivery of export promotion products and services to the exporting sectors, while the regional committee could work with the trade and commerce related offices located in India and abroad through the Embassies/ High Commissions, Export Promotion Councils, Exim Bank and other chambers of commerce and industry. The sectoral committee could inter alia, focus on application of GIs, providing benefits under the proposed freight subsidy scheme, assessing applications under the proposed brand equity fund, and providing support to exporters for availing benefits under the Government of India's

technology acquisition programmes. The regional committee could inter alia, focus on the proposed market development assistance program, and reimbursement of costs for certifications required for exports to various markets.

2. Export Connect Division: This could offer critical export-related support services and could comprise separate divisions for each of the support services – quality systems, finance facilitation, training and skill development, and branding, promotion and marketing. The Division would comprise subject experts. The functions of the various segments within the Export Connect Division could be:

- Quality Division:
 - o Enhancing focus on quality control and inspection protocols
 - o Disseminate the key inputs to export stakeholders
 - o Provide input to the regional committee on standards and certification
- Technology Division:
 - o This shall have linkages with the quality division, and will include subject matter experts who will work with export stakeholders for boosting the technology and innovation quotient
 - o Disseminate information on value addition, and use of technology for enhancing competitiveness of local products/services
 - o Provide inputs to the sectoral committee for its support to companies applying for technology acquisition funding
- Capacity Building Division:
 - o Work with the National Skill Development Council, Sector Skill Council, and State level institutes to build export relevant skills in the State

Exhibit 12: Structure of the Bihar Export Promotion Council



- Finance Wing:
 - o Disseminate information on procedures to avail export finance and guarantee
- Branding, Promotion and Marketing:
 - o Work towards improving the branding and marketing of local products
 - o Provide inputs to the sectoral committee for financing under the proposed brand equity fund
 - o Advise the sectoral committee on application of GIS
 - o Advise the regional committee on financing under the MDA scheme

3. IT Division: The IT division could manage systems for providing information to stakeholders including websites, skills and training modules.

4. Program Management Unit: The PMU could be set up to integrate all the functions of the various divisions of BEPC. The PMU could undertake continuous monitoring of the export targets, their

achievements and key constraints for the same on a periodical basis, so that prompt corrective actions can be taken should there be a deviation from the projected targets. The PMU could also liaison with national export bodies on issues of importance.

To supplement the institutional strengthening, a one stop information portal for exports could be established. This portal could enable exporters to improve their know-how and access information pertaining to markets, finance, export promotion programs, event details, etc. Advisory services can also be provided through the portal. This portal can be directly administered and managed by the IT Division of BEPC.

CONCLUSION

The ambitious target of US\$ 40 billion of exports from the State will require enhancing trade competitiveness, promoting innovation, bolstering availability of export finance, widespread branding efforts, and strengthening the institutional capacity for exports, among others. The six-pronged strategy outlined in the current study can help devise the export policy for the State, and formulate a roadmap and action plan for achieving the desired results.

Annexure: Key Markets and Competitors for Bihar in the Product Champion Categories

HS Code	Description	Exports from Bihar (US\$ '000)	Global Imports (US\$ Mn)	Share of Bihar in India's Exports	Top Importers	Imports (US\$ Mn)	Share in World Imports	Top Suppliers in the Markets
20622	Frozen edible bovine livers	126.0	501.4	1.2%	Belgium	7.9	12.0%	Germany (59.1), The Netherlands (23.9), Italy (5.4), Poland (4.4), Denmark (4.1)
					Indonesia	6.4	9.7%	Australia (71.8), New Zealand (15.7), The USA (12.4), Spain (0.1)
					Brazil	5.1	7.8%	Australia (41.6), Argentina (40.1), Uruguay (8.4), The USA (7), Paraguay (2.9)
					Cote d'Ivoire	4.8	7.2%	France (37.8), Ireland (14.3), The Netherlands (7.4), Belgium (6.9), The UK (6.2)
					Mozambique	3.6	5.4%	The USA (35.3), Canada (24.3), Italy (9.6), Austria (6.5), South Africa (4.4)
20629	Frozen edible bovine offal (excluding tongues and livers)	7449.9	2153.0	4.0%	Hong Kong	979.8	56.3%	Brazil (50.6), The USA (14.5), Argentina (8.5), Australia (7.6), Uruguay (2.9)
					Mexico	163.2	9.4%	The USA (89.6), Canada (7.6), Australia (1.9), Nicaragua (0.6), New Zealand (0.2)
					South Korea	156.9	9.0%	Australia (52.1), The USA (33.1), New Zealand (12.3), Canada (2), Chile (0.3)
					China	69.5	4.0%	Uruguay (59.4), Australia (21.6), New Zealand (16.5), Costa Rica (2.5), The USA (0.1)
					Indonesia	64.6	3.7%	Australia (50.8), The USA (31.3), New Zealand (15.1), Canada (2.1), Spain (0.5)
30119	Live ornamental fish (excluding freshwater)	36.0	75.5	4.8%	The Netherlands	20.6	35.2%	France (20.1), Czechia (19), Belgium (18.5), Germany (17.6), Indonesia (7.1)
					Italy	4.5	7.6%	Greece (19.5), Indonesia (18.7), France (15.3), Portugal (13.5), Spain (9.7)
					Hong Kong	4.4	7.4%	Indonesia (23.4), The USA (22.7), Philippines (19.6), Djibouti (5.4), Sri Lanka (5.1)
					Germany	3.4	5.8%	Indonesia (27.4), The Netherlands (19.1), The USA (15.8), Philippines (11.6), Sri Lanka (7.4)
					China	2.9	4.9%	Indonesia (34.1), The USA (22.6), Philippines (18), Sri Lanka (8.3), Other Asia, nes (7.3)
30219	Fresh or chilled salmonidae	658.4	237.2	6.3%	Benin	40.6	36.1%	Mauritania (44.6), Morocco (26.1), The Netherlands (7.3), South Africa (4.5), Namibia (3.5)
					Italy	15.4	13.7%	Spain (43.9), France (19.8), Sweden (19.2), The Netherlands (5.1), Denmark (5)
					France	10.4	9.2%	The UK (47.7), Norway (30.9), Ireland (9.5), The Netherlands (5), Germany (2)
					Greece	7.1	6.3%	Czechia (42.5), Spain (26.9), Denmark (14.2), Italy (8.1), France (2)
					Kuwait	6.9	6.1%	Norway (95.1), Denmark (1.7), UAE (0.6), The UK (0.6), Turkey (0.5)
30272	Fresh or chilled catfish "Pangasius spp., Silurus spp., Clarias spp., Ictalurus spp."	171.6	12.2	33.6%	Denmark	1.5	35.7%	Sweden (85.7), Estonia (10.7), Germany (1.6), Austria (0.8), Portugal (0.4)
					Ireland	0.4	10.6%	Germany (97.5), The UK (2.5)
					The Netherlands	0.4	8.7%	Denmark (47.9), Belgium (33.5), Germany (7.2), Other Europe, nes (2.3), France (2)
					France	0.4	8.5%	Iceland (72.5), The Netherlands (11.3), Viet Nam (4.4), Denmark (3.3), Belgium (3.3)
					Austria	0.2	5.4%	Germany (62.7), Sweden (17.4), The Netherlands (11.8), Czechia (1.8), France (1.5)
30289	Fresh or chilled fish, n.e.s.	180.6	1914.2	0.6%	Italy	193.5	18.4%	Spain (27.1), France (11.7), Sweden (11), Greece (9.9), The Netherlands (8.9)
					Hong Kong	184.0	17.5%	China (60.8), Japan (18.6), Other Asia, nes (7.4), Indonesia (3.3), Philippines (2.2)
					Malaysia	95.3	9.0%	Indonesia (59.7), Thailand (38.4), Viet Nam (0.6), Japan (0.6), Myanmar (0.4)
					France	93.6	8.9%	The UK (23.7), Iceland (12.1), The Netherlands (10.4), Spain (9), Senegal (8.4)
					The Netherlands	71.5	6.8%	Belgium (25), Germany (20.9), Denmark (11.7), France (8.4), The UK (8.4)

30569	Fish, salted or in brine only	322.0	201.8	4.4%	Brazil	89.7	70.8%	Norway (54), China (43.5), Portugal (2.5)
					Canada	8.9	7.0%	Norway (37.9), Faeroe Isds (27.7), China (16.8), Iceland (7.1), Chile (4.1)
					Germany	4.7	3.7%	Iceland (52.1), Norway (31), Latvia (7.4), Spain (2.9), The Netherlands (2.9)
					France	2.6	2.1%	Namibia (39.1), The Netherlands (20.8), Norway (8.6), Faeroe Isds (8.2), Spain (7)
					Italy	2.5	1.9%	Spain (28.2), The Netherlands (22.4), Croatia (11.8), Sweden (9.8), Morocco (9.7)
30614	Frozen crabs, even smoked, whether in shell or not, incl. crabs in shell, cooked by steaming	319.8	2673.9	1.7%	Japan	500.9	38.3%	Russian Federation (52), Canada (28.9), The USA (10), Norway (3.8), China (1.1)
					China	277.4	21.2%	Canada (50.8), Chile (15), The USA (12.6), Russian Federation (6.3), North Korea (6.1)
					South Korea	132.1	10.1%	China (42.6), Russian Federation (28), Bahrain (9.3), Pakistan (4.8), Namibia (3.5)
					Hong Kong	96.9	7.4%	China (64.7), Canada (8.2), South Korea (5.2), Japan (4.8), Myanmar (3.3)
					Indonesia	54.4	4.2%	Canada (52.7), The USA (16.7), Russian Federation (6.5), Norway (6.3), China (5.1)
30617	Frozen shrimps and prawns, even smoked, whether in shell or not.	9937.4	15498.7	0.2%	Japan	1679.2	23.4%	Viet Nam (25.7), India (20.3), Indonesia (16.8), Argentina (10.8), Thailand (7.6)
					France	812.1	11.3%	Ecuador (28.3), India (11.9), Madagascar (11.6), Viet Nam (6.8), Venezuela (6.4)
					The Netherlands	697.0	9.7%	India (25.3), Bangladesh (21.3), Viet Nam (15.8), Belgium (12.3), Nigeria (5.1)
					Italy	491.7	6.8%	Ecuador (35.4), Argentina (24.9), Spain (14.7), India (7.1), Viet Nam (3.4)
					China	473.2	6.6%	Argentina (29.2), Ecuador (22.7), India (14.6), Thailand (14.6), Indonesia (3)
40510	Butter (excluding dehydrated butter and ghee)	724.3	7188.8	1.9%	The Netherlands	1324.5	22.6%	Ireland (27.5), Germany (24.7), Belgium (17.4), Poland (9.2), France (4)
					France	961.5	16.4%	The Netherlands (27.2), Belgium (22.3), Germany (13.8), Ireland (12.4), Finland (7.6)
					Germany	683.7	11.7%	The Netherlands (47.3), Ireland (25), Belgium (10.2), Poland (4.4), Denmark (3)
					Belgium	526.0	9.0%	The Netherlands (43.5), Germany (13.2), Ireland (12.1), France (11.8), The UK (8.1)
					China	344.1	5.9%	New Zealand (80.3), France (11.1), Australia (3.1), Belgium (2.8), The Netherlands (0.9)
40590	Fats and oils derived from milk, and dehydrated butter and ghee	602.2	2318.4	1.0%	Belgium	240.5	15.3%	Ireland (37.1), The UK (28.8), The Netherlands (11.8), Germany (9.6), France (5)
					Mexico	200.0	12.8%	New Zealand (82.4), The Netherlands (6.5), The USA (4.3), Chile (2.5), Australia (2.4)
					Italy	194.9	12.4%	France (31.7), Belgium (17), The UK (13.8), Spain (13.6), The Netherlands (13.2)
					France	177.6	11.3%	The Netherlands (43.3), Belgium (25.2), New Zealand (11.8), Germany (9), Spain (5.9)
					China	155.2	9.9%	New Zealand (90.3), Belgium (4.1), The Netherlands (3.1), Germany (1.5), France (0.4)
60390	Dried, dyed, bleached, impregnated or otherwise prepared cut flowers and buds	137.9	467.9	1.2%	The Netherlands	244.3	55.0%	Germany (25.2), Spain (21.5), Italy (14.3), Belgium (13.3), France (8.2)
					France	57.2	12.9%	The Netherlands (85.6), Italy (2.9), Colombia (2.8), Spain (2.5), Belgium (2.4)
					Denmark	23.7	5.3%	The Netherlands (88.3), Germany (6.3), Belgium (1.9), Italy (1.4), Poland (0.6)
					Belgium	19.3	4.3%	The Netherlands (92.6), Italy (2.4), Germany (1.8), France (1.1), India (0.9)
					Japan	15.2	3.4%	Colombia (32.4), Ecuador (26.8), China (21.8), Thailand (6.7), The USA (5.6)
70999	Fresh or chilled vegetables n.e.s.	864.7	2715.5	0.7%	The Netherlands	318.6	20.2%	Belgium (25.4), Spain (24.9), Italy (15.5), Germany (12), France (5.1)
					Germany	293.7	18.6%	The Netherlands (31.9), Italy (31.8), Spain (15.5), France (10.8), Belgium (1.7)
					France	203.6	12.9%	Spain (35.8), Italy (23), The Netherlands (7.6), Belgium (7), Honduras (3.2)
					Canada	151.2	9.6%	The USA (72.9), Mexico (13.5), Honduras (3.1), Nicaragua (3), India (1.9)

					Belgium	95.2	6.0%	The Netherlands (35.1), France (26.4), Spain (10.3), Germany (9.8), Italy (6.1)
71220	Dried onions, whole, cut, sliced, broken or in powder, but not further prepared	112.4	385.8	0.1%	Germany	55.3	20.0%	India (27.9), China (16.7), France (11.5), Egypt (10.5), The USA (10.2)
					The Netherlands	34.9	12.6%	Belgium (32), Egypt (25.6), India (12.8), Spain (7.2), France (6.9)
					Japan	28.0	10.1%	The USA (53), China (22.7), Egypt (15.8), France (3.1), Bulgaria (2)
					Canada	16.4	5.9%	The USA (76.3), China (10), India (7.9), Germany (2.2), Egypt (2)
					Belgium	16.1	5.8%	India (34.1), France (26), The Netherlands (12.6), The USA (8.9), Spain (6.5)
80112	Fresh coconuts in the inner shell "endocarp"	325.1	197.6	8.4%	China	165.8	86.8%	Indonesia (48.4), Thailand (37.3), Viet Nam (9.2), Philippines (3.5), India (1.6)
					The Netherlands	6.0	3.1%	Thailand (47.9), Cote d'Ivoire (34.1), Belgium (3.4), Viet Nam (3.1), Ghana (2.7)
					Australia	3.0	1.6%	Thailand (67.3), Samoa (10.9), Viet Nam (10.9), India (4.1), Tonga (3.2)
					Italy	2.8	1.5%	The Netherlands (37), Cote d'Ivoire (24.2), Nicaragua (17), France (7.9), Dominican Rep. (4.8)
					Hong Kong	2.7	1.4%	Thailand (88.9), Chile (11), China (0.2)
80450	Fresh or dried guavas, mangoes and mangosteens	388.6	2862.0	0.2%	The Netherlands	459.9	29.9%	Brazil (33.6), Peru (31.5), Cote d'Ivoire (5.6), France (3.3), Dominican Rep. (3.1)
					Germany	202.5	13.2%	Brazil (35.1), Peru (26), Spain (6.8), Cote d'Ivoire (4.9), Israel (4.1)
					China	166.8	10.9%	Thailand (90), Other Asia, nes (3.9), Australia (2.9), Peru (2.2), Philippines (0.5)
					France	132.9	8.7%	Peru (23.1), Spain (15.4), Israel (12.5), Brazil (11.2), Cote d'Ivoire (8.8)
					Canada	106.3	6.9%	Mexico (50.9), Philippines (12), Brazil (7.7), Thailand (7.2), Peru (7)
80711	Fresh watermelons	171.7	1671.3	1.9%	The Netherlands	459.9	29.9%	Brazil (33.6), Peru (31.5), Cote d'Ivoire (5.6), France (3.3), Dominican Rep. (3.1)
					Germany	202.5	13.2%	Brazil (35.1), Peru (26), Spain (6.8), Cote d'Ivoire (4.9), Israel (4.1)
					China	166.8	10.9%	Thailand (90), Other Asia, nes (3.9), Australia (2.9), Peru (2.2), Philippines (0.5)
					France	132.9	8.7%	Peru (23.1), Spain (15.4), Israel (12.5), Brazil (11.2), Cote d'Ivoire (8.8)
					Canada	106.3	6.9%	Mexico (50.9), Philippines (12), Brazil (7.7), Thailand (7.2), Peru (7)
81090	Fresh tamarinds, cashew apples, jackfruit, lychees, sapodillo plums, passion fruit, carambola	680.5	3184.5	0.6%	China	887.6	37.0%	Viet Nam (99), Myanmar (1)
					The Netherlands	460.9	19.2%	Viet Nam (65.8), Thailand (29.8), Other Asia, nes (4.3), Indonesia (0.1)
					Hong Kong	170.2	7.1%	Spain (23.4), Colombia (20.2), Peru (9.7), Belgium (5.6), South Africa (5.5)
					Indonesia	163.1	6.8%	Thailand (65), China (7.9), Viet Nam (7), Other Asia, nes (5.1), Ecuador (4.2)
					Germany	120.5	5.0%	Thailand (95.4), Viet Nam (2.1), Egypt (0.7), China (0.6), Australia (0.3)
91030	Turmeric "curcuma"	211.1	264.2	0.1%	Iran	21.7	14.9%	The Netherlands (16.8), Spain (12.5), Turkey (11.9), Colombia (11.9), South Africa (9)
					The Netherlands	17.0	11.7%	India (86.9), UAE (10.1), Myanmar (1.8), Pakistan (0.6), Ethiopia (0.5)
					Morocco	12.6	8.7%	India (65.3), Peru (15.5), Viet Nam (6.2), Thailand (3.6), China (2.7)
					Germany	11.5	7.9%	India (96.2), Ethiopia (2.7), Myanmar (0.7), France (0.2), Spain (0.1)
					Malaysia	10.7	7.4%	India (58.4), The Netherlands (8.3), Madagascar (7), Peru (6.3), Thailand (3.7)
91099	Spices (excluding pepper of the genus Piper, fruit of the genus	101.9	759.5	0.1%	Germany	54.9	14.4%	India (91.7), Bangladesh (3.8), Myanmar (1.8), China (1.2), Indonesia (0.6)
					The Netherlands	46.4	12.1%	Poland (24.2), Austria (11.8), The Netherlands (11), Turkey (9.4), Italy (6.5)
					Belgium	27.6	7.2%	Belgium (16.9), Spain (16.8), Turkey (10.5), Germany (9.4), Thailand (7.3)
								The Netherlands (45.3), France (15.2), India (6.7), Germany (6.3), Turkey (4.8)

	Capsicum or of the genus Pimenta				France	23.8	6.2%	Germany (34.9), Italy (9.6), Spain (8.4), Turkey (5.1), India (4.4)
					Denmark	23.3	6.1%	Germany (28.7), Sweden (20.7), The UK (20), Ireland (13.4), Italy (5.8)
100640	Broken rice	438.7	3346.2	0.1%	Benin	604.5	29.1%	India (48.9), Thailand (43.1), Pakistan (4.8), UAE (1.9), Singapore (0.4)
					China	326.1	15.7%	Thailand (49.9), Viet Nam (38.6), Pakistan (11.3), Cambodia (0.2)
					Ghana	297.3	14.3%	Viet Nam (62.8), Thailand (23.6), India (9.8), The USA (2.5), Pakistan (0.7)
					Indonesia	132.8	6.4%	Thailand (45.4), Pakistan (26.2), Myanmar (14.7), India (8.6), Viet Nam (5.1)
					Cote d'Ivoire	116.1	5.6%	Thailand (90.7), Viet Nam (5.3), India (2.8), Pakistan (0.5), Myanmar (0.3)
100810	Buckwheat	128.3	109.9	19.2%	Japan	35.2	38.8%	The USA (43.8), China (40.2), Russian Federation (11.3), Brazil (3.1), Canada (1.3)
					The Netherlands	10.2	11.3%	Lithuania (41.1), Poland (22.8), Germany (15.1), Belgium (8.8), Finland (2.7)
					Italy	7.9	8.7%	Poland (55), Lithuania (23.9), France (5.1), The Netherlands (5), Germany (4.2)
					France	6.4	7.0%	Lithuania (31.2), China (19.3), Poland (10.5), Latvia (8.2), Czechia (7.6)
					Lithuania	5.8	6.4%	Russian Federation (79.5), Latvia (18.3), Estonia (1.6), Poland (0.6)
100829	Millet (excluding grain sorghum, and seed for sowing)	173.2	146.0	1.2%	Indonesia	13.5	13.5%	The USA (91.1), Ukraine (3.9), China (3.6), Canada (1.1), Russian Federation (0.2)
					Germany	12.0	12.0%	Ukraine (22.8), Austria (16.5), China (13.3), France (12.8), Poland (10.7)
					Iran	10.6	10.7%	Azerbaijan (61.8), Russian Federation (26.7), UAE (10), Ukraine (0.8), Turkey (0.7)
					The Netherlands	8.5	8.6%	Ukraine (18.4), China (16.7), France (15.6), India (11.7), Belgium (9.8)
					Belgium	8.2	8.2%	France (26.9), Ukraine (18.5), The Netherlands (14.9), India (11.6), Germany (9.5)
110290	Cereal flours (excluding wheat, meslin and maize)	45.3	494.3	0.3%	The Netherlands	60.2	17.9%	Belgium (55.4), Germany (21.2), Italy (10.6), Thailand (2.7), Spain (2.6)
					China	31.6	9.4%	Thailand (99.7), The USA (0.1), Japan (0.1)
					France	28.4	8.4%	Germany (25.1), Italy (17.2), Belgium (17.1), The Netherlands (12.1), Thailand (7.3)
					Belgium	26.1	7.8%	The Netherlands (43), France (14.7), Italy (14.7), Germany (11.4), The UK (4.5)
					Germany	23.3	6.9%	The Netherlands (32.1), Belgium (30.4), Italy (21.5), Denmark (2.8), Austria (2.2)
110319	Groats and meal of cereals (excluding wheat and maize)	75.1	170.4	6.4%	Canada	8.0	13.5%	The USA (89.4), Russian Federation (2.2), China (1.7), Poland (1.3), India (1.1)
					Germany	7.8	13.1%	Croatia (64.9), Belgium (24.5), The Netherlands (6.7), Austria (1.7), Poland (0.9)
					The Netherlands	7.1	11.9%	The UK (52.7), Germany (20.3), Belgium (11.1), France (7.3), Italy (3.4)
					Other Asia, nes	5.3	9.0%	Lao (70.7), China (19.5), Thailand (9.3), Italy (0.3), Ukraine (0.1)
					Belarus	4.3	7.2%	Russian Federation (100)
120110	Soya bean seed, for sowing	197.9	1091.3	6.5%	Malaysia	174.4	70.9%	The USA (71.1), Canada (21.5), Brazil (4.2), Uruguay (2.7), China (0.3)
					Canada	28.6	11.6%	The USA (97.2), Chile (1.8), India (0.6), Argentina (0.2), China (0.2)
					Italy	17.9	7.3%	The USA (64.9), Croatia (13.1), Austria (4.4), France (4.2), Serbia (3.9)
					Bolivia	5.6	2.3%	Argentina (99.9), Brazil (0.1)
					Germany	3.0	1.2%	Austria (79.3), France (9.3), The USA (4.4), The Netherlands (2.1), Japan (1.7)
120770	Melon seeds	41.3	271.8	1.5%	The Netherlands	73.5	43.8%	Peru (33.2), The USA (13.5), Chile (12.7), Japan (8.5), China (7.1)
					Morocco	18.2	10.8%	Peru (38), France (27.8), China (12.1), Spain (7.2), Jordan (4.2)
					Brazil	13.9	8.3%	Peru (50.4), Spain (39), France (4.3), China (2.4), Thailand (1.7)

					France	10.3	6.1%	The Netherlands (43.4), Spain (27.2), Thailand (7), The USA (6.3), Chile (6.1)
					China	7.5	4.4%	Myanmar (32.9), Thailand (27.6), Peru (17.7), Indonesia (13.6), South Korea (4)
130190	Lac; natural gums, resins, gum-resins, balsams and other natural oleoresins	107.7	539.9	0.2%	France	32.3	16.2%	Somalia (33.2), Iran (9.5), Lao (8.2), Germany (8.2), Mali (8)
					China	31.8	16.0%	Indonesia (50.7), Ethiopia (11.2), Somalia (6.6), Madagascar (6.5), India (4.2)
					Germany	27.8	14.0%	Iran (30), India (17.7), Thailand (11.4), Sudan (5.4), Ethiopia (5.1)
					The Netherlands	26.7	13.4%	Germany (54.5), France (31.5), Poland (4.1), Belgium (3.1), India (1.5)
					Italy	14.8	7.4%	Spain (51.9), Germany (13.1), Indonesia (10.3), The Netherlands (6.3), India (6.1)
140490	Vegetable products n.e.s	421.5	966.2	1.4%	China	92.9	17.6%	Malaysia (48.2), India (21.4), Peru (11.6), Indonesia (4.4), Mexico (2.8)
					Japan	91.0	17.2%	China (28.6), Indonesia (28.1), Sri Lanka (15.3), Malaysia (13.4), Thailand (2.8)
					The Netherlands	82.3	15.6%	India (34.4), Czechia (19), Germany (11.5), Belgium (8.9), The UK (5)
					South Korea	70.1	13.3%	Indonesia (48.8), India (21.7), Sri Lanka (14.6), Viet Nam (6.9), The USA (3.6)
					Germany	29.4	5.6%	Austria (54.8), India (7.1), The Netherlands (6), China (5.3), France (4.9)
151550	Sesame oil and its fractions, whether or not refined, but not chemically modified	96.7	258.7	0.4%	The Netherlands	17.1	13.4%	Mexico (42.8), The USA (10.8), Singapore (10.1), Germany (5.9), China (5.8)
					Canada	13.7	10.7%	Japan (41.7), Other Asia, nes (14.9), Mexico (13.7), The USA (6.5), China (5.6)
					Australia	10.3	8.0%	Singapore (28.6), China (23.1), Other Asia, nes (13.3), Malaysia (8.2), South Korea (7.9)
					Germany	9.4	7.4%	Mexico (29.8), The Netherlands (15.8), France (8.8), The UK (6.7), Singapore (6.6)
					Hong Kong	9.3	7.2%	China (53.7), Japan (30.5), Singapore (13.5), South Korea (1.7), France (0.3)
170113	Raw cane sugar, in solid form, not containing added flavouring or colouring matter	194.5	3025.7	1.2%	Iran	414.7	61.2%	The UK (30.2), Singapore (26.1), UAE (21.6), Switzerland (16), Brazil (6.2)
					Kenya	133.5	19.7%	Brazil (51.3), Thailand (17.8), Zimbabwe (7.9), Egypt (7.5), Madagascar (4.4)
					Nepal	30.5	4.5%	India (92.8), Pakistan (5.2), Bangladesh (1.2), Viet Nam (0.8)
					Belarus	20.1	3.0%	Cuba (69.2), Brazil (30.8)
					Japan	11.5	1.7%	Thailand (41.4), China (41.1), Bolivia (Plurinational State of) (7.6), Philippines (7.5), Brazil (1.8)
190220	Pasta, stuffed with meat or other substances, whether or not cooked or otherwise prepared	302.4	1347.5	6.7%	Germany	166.0	17.4%	Italy (29.6), Belgium (16.3), Austria (14.5), Switzerland (11.1), France (8.8)
					France	159.0	16.7%	Italy (55.8), Belgium (18.2), Thailand (6.5), Germany (4.8), Hungary (4.7)
					The Netherlands	150.9	15.8%	Belgium (42.8), Germany (19.7), Italy (19.3), The UK (4.7), France (3.4)
					Canada	75.4	7.9%	The USA (90.3), Italy (5.4), China (2.3), South Korea (0.9), Bangladesh (0.4)
					Belgium	67.2	7.1%	Italy (25.7), France (23.2), The Netherlands (23.2), Germany (8.6), Viet Nam (8)
190300	Tapioca and substitutes therefor prepared from starch, in the form of flakes, grains, pearls	13.5	95.8	0.5%	The Netherlands	7.9	14.3%	China (43.9), The UK (37), Thailand (8.3), Viet Nam (3.5), Germany (1.3)
					Hong Kong	5.8	10.4%	China (56), Other Asia, nes (19.2), Malaysia (9.1), Thailand (8), Indonesia (7.1)
					China	5.1	9.2%	Thailand (93.9), Other Asia, nes (5.4), Indonesia (0.6)
					France	4.8	8.7%	Thailand (58.1), Cote d'Ivoire (14.4), The Netherlands (7.8), Spain (5), Belgium (3.3)
					Japan	4.3	7.7%	Other Asia, nes (45.1), Thailand (43), Malaysia (11.8), India (0.1)
200899	Fruit and other edible parts of plants, prepared or	313.7	4362.5	0.8%	The Netherlands	418.1	19.3%	India (13.9), The USA (13.8), Costa Rica (7.8), Canada (6.8), Germany (6.2)
					Japan	254.8	11.8%	China (50.7), Thailand (15.3), Philippines (7.9), The USA (7.5), India (4)

	preserved				Germany	197.2	9.1%	Italy (11.6), Austria (9.7), The Netherlands (9.3), China (7.8), Costa Rica (7.1)
					Canada	195.4	9.0%	The USA (44.2), Mexico (13.6), South Korea (9), China (8.3), Thailand (6.2)
					France	192.5	8.9%	Germany (17.3), Italy (8.8), China (8.5), India (7.2), The Netherlands (7.1)
252510	Crude mica and mica rifted into sheets or splittings	423.3	78.0	3.7%	China	51.4	75.4%	India (85.3), Madagascar (11.9), Nigeria (1.4), Brazil (0.8), Japan (0.2)
					Japan	8.0	11.8%	India (69), China (13.1), Finland (9.3), Sri Lanka (6.9), Madagascar (1.4)
					Germany	3.4	5.0%	India (80.7), Brazil (16.7), Japan (2.1), The Netherlands (0.3), France (0.1)
					France	1.0	1.5%	Brazil (78.1), Finland (12.9), Madagascar (5), India (3), China (0.4)
					South Korea	1.0	1.5%	India (86.3), China (7.4), Sri Lanka (2.2), Japan (2.1), Madagascar (1.9)
270120	Briquettes, ovoids and similar solid fuels manufactured from coal	609.6	457.3	33.9%	The Netherlands	697.8	91.3%	Germany (96.3), Belgium (2.9), The UK (0.5), Spain (0.1), Italy (0.1)
					Japan	16.0	2.1%	China (100)
					Ireland	14.1	1.8%	The Netherlands (47.5), The UK (30.7), Areas, nes (17.7), Poland (2), Germany (2)
					Germany	12.5	1.6%	Belgium (60.9), Russian Federation (28.4), The Netherlands (8.2), The UK (1.3), Denmark (0.7)
					Belgium	7.0	0.9%	The Netherlands (87.8), The UK (8.9), Ireland (2.1), Germany (1.2)
300339	Medicaments containing hormones or steroids used as hormones, not containing antibiotics	13788.0	937.1	44.0%	Denmark	107.8	21.2%	Poland (57.1), The UK (9.1), Czechia (6.7), Germany (6.4), The USA (2.6)
					Ireland	97.8	19.3%	The USA (63.2), Canada (32.6), The UK (1.9), Belgium (1.8), Italy (0.2)
					Hungary	62.4	12.3%	India (85.3), Australia (13.6), Israel (0.8), Germany (0.3), The UK (0.1)
					Germany	59.9	11.8%	The USA (68.5), Israel (17.4), Austria (7.7), The UK (2.8), Denmark (2.7)
					The Netherlands	25.1	4.9%	Belgium (37.1), Germany (21.4), The UK (10.5), Spain (10.2), Cyprus (5.6)
300432	Medicaments containing corticosteroid hormones, their derivatives or structural analogues	1169.8	9188.4	3.0%	China	1320.8	26.6%	Australia (42), France (17.5), Sweden (15.7), Belgium (6.1), Germany (5.6)
					Japan	650.8	13.1%	France (30.8), The UK (21.2), Sweden (20.1), Spain (11.4), Belgium (6)
					Germany	471.0	9.5%	Italy (28.8), Sweden (26.9), The UK (9.4), Ireland (7.5), France (6.1)
					France	453.5	9.1%	Sweden (45), The UK (15.1), Italy (13.1), Germany (9.9), Spain (4.2)
					Australia	242.8	4.9%	Spain (25), France (24.7), Sweden (12.9), Belgium (12.6), The UK (12.1)
300490	Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes	28117.0	286740.5	0.3%	Germany	22630.1	14.4%	Switzerland (20.6), The USA (12.6), The Netherlands (10.5), Ireland (8.7), Italy (8.2)
					Belgium	15058.2	9.6%	The USA (32.9), Italy (17), France (12.3), Ireland (6.9), Germany (6.5)
					The Netherlands	14284.9	9.1%	Germany (37.7), The UK (13.5), Belgium (9.1), The USA (6.6), France (5.3)
					Italy	12441.8	7.9%	Belgium (16.3), The USA (15.3), Ireland (13.7), Germany (12.8), France (9.7)
					Japan	12235.4	7.8%	The USA (18.6), Germany (17), Switzerland (10.2), France (8.1), The UK (7.9)
320490	Synthetic organic products of a kind used as luminophores, whether or not chemically defined	74.6	827.9	0.4%	South Korea	383.1	55.5%	The USA (53.8), Japan (22.7), Germany (20.6), China (2.6), The UK (0.2)
					China	143.5	20.8%	Japan (47.1), South Korea (21.1), Germany (13), The USA (7.3), The UK (6.2)
					The Netherlands	38.8	5.6%	Spain (36.1), Italy (27.7), Belgium (17.3), Germany (8.2), France (3.8)
					Indonesia	13.4	1.9%	China (41.4), Japan (14.2), Viet Nam (13.6), India (5.8), South Korea (5.4)
					Germany	12.1	1.8%	The USA (17.7), France (14.9), Finland (13.1), Belgium (7.5), The UK (6.6)
330190	Extracted oleoresins;	184.1	835.8	0.0%	The Netherlands	73.5	17.9%	Germany (25.8), Spain (19.1), India (15.5), The USA (9.7), Austria (6.9)

	concentrates of essential oils in fats, fixed oils, waxes and the like				Germany	41.8	10.2%	India (35.8), Brazil (12.6), China (8.6), Sri Lanka (7.2), The USA (6.2)
					South Korea	31.8	7.7%	India (42.4), China (24.9), Spain (16), Turkey (4.4), Germany (3.2)
					France	31.7	7.7%	India (18.6), Ireland (13.7), Germany (11.2), Spain (7.4), Morocco (6.6)
					China	28.3	6.9%	The USA (32.1), India (22.2), Bulgaria (13.6), France (4.7), The UK (3.2)
330741	"Agarbatti" and other odoriferous preparations which operate by burning	43.3	306.8	0.0%	Malaysia	22.6	16.8%	China (46.7), India (21.3), Viet Nam (20.3), Thailand (5.3), Other Asia, nes (2.3)
					Japan	13.8	10.2%	Malaysia (39.4), China (21), Viet Nam (14.5), Other Asia, nes (8), India (5.5)
					The Netherlands	10.3	7.6%	India (35.5), Italy (22.1), Poland (15.3), China (8.7), Belgium (3.9)
					Other Asia, nes	9.6	7.1%	China (70.7), Viet Nam (20), Indonesia (3.6), Germany (2.2), Japan (1.6)
					Nepal	6.7	5.0%	India (55.6), Viet Nam (43.2), China (1.2), Thailand (0.1)
380899	Rodenticides and other plant protection products put up for retail sale or as preparations	2815.2	2240.2	0.6%	The Netherlands	108.6	12.7%	Germany (57.8), Belgium (20), The UK (7.9), France (3.7), China (1.8)
					France	77.8	9.1%	Germany (34.6), Italy (19.2), Japan (10.5), Spain (8.2), Belgium (6.4)
					Italy	67.3	7.9%	Germany (35.5), Spain (19.7), Japan (18.7), Belgium (5.6), The UK (5.2)
					Canada	57.1	6.7%	The USA (91.8), China (2), India (1.9), Germany (1.7), The UK (1.3)
					Germany	52.9	6.2%	The Netherlands (27.3), The UK (11.3), Switzerland (9.2), France (8.8), China (8.3)
420221	Handbags, whether or not with shoulder straps, incl. those without handles	1908.6	13822.0	0.4%	Hong Kong	1930.1	21.5%	France (27.5), Italy (27.1), China (26.3), Switzerland (9.6), China, Macao SAR (1.4)
					France	1254.9	14.0%	Italy (70.6), China (7), Areas, nes (5.7), India (2.9), Spain (2.5)
					China	1027.7	11.5%	Italy (49.9), France (20.5), Viet Nam (11.1), Philippines (2.8)
					Italy	794.7	8.9%	France (35.3), Switzerland (17.3), China (10.6), The Netherlands (7.8), Romania (5.5)
					South Korea	705.6	7.9%	Italy (59.5), France (19.2), China (10.6), Viet Nam (5.3), Spain (1.4)
420231	Wallets, purses, key-pouches, cigarette-cases, tobacco-pouches and similar articles	4314.8	4643.6	0.9%	Japan	724.9	22.4%	Italy (38.8), China (20.9), France (11.6), Viet Nam (9), Spain (7.1)
					Hong Kong	505.2	15.6%	China (32.1), France (24.5), Italy (23.5), Switzerland (11.5), Germany (1.2)
					France	367.2	11.4%	Italy (57.9), China (10.8), Spain (10.4), Areas, nes (6), India (3.3)
					Italy	267.0	8.3%	France (25.6), Switzerland (20.1), China (11), India (10.9), The Netherlands (7.9)
					Germany	238.9	7.4%	India (36.9), Italy (20.2), China (17.2), France (6.2), Thailand (3.7)
420340	Clothing accessories of leather or composition leather	113.8	177.7	0.8%	Italy	10.5	14.6%	France (20.9), The UK (16.2), Germany (9.7), The Netherlands (7.5), India (4.8)
					The Netherlands	8.3	11.6%	India (23.5), Belgium (21.2), Germany (12.3), China (6.5), Italy (6.4)
					France	6.3	8.8%	Italy (38.2), China (14.2), Belgium (11.1), France (8.2), India (4.9)
					China	6.2	8.7%	Canada (20.4), Hong Kong (11.2), Italy (9.1), Japan (5.6)
					Germany	5.5	7.7%	Italy (37.2), Turkey (18.6), China (11.8), India (7.8), Pakistan (3.9)
440810	Sheets for veneering, incl. those obtained by slicing laminated wood, for coniferous plywood	47.7	598.7	1.6%	Japan	100.5	31.5%	Russian Federation (91.9), China (6.2), Indonesia (0.9), New Zealand (0.6), Canada (0.3)
					The Netherlands	27.9	8.7%	France (41.9), Belgium (24.7), Sweden (8.2), Germany (7.2), Latvia (4.2)
					Malaysia	26.4	8.3%	Brazil (30.8), China (30.4), New Zealand (13), Viet Nam (7.4), Finland (5.1)
					Germany	23.7	7.4%	Indonesia (37.1), Romania (32), Sweden (17.8), China (3.3), Austria (2.8)
					South Korea	21.8	6.8%	Chile (42.2), Brazil (29.8), Russian Federation (11.1), China (7.5), Viet Nam (4.3)

530310	Jute and other textile bast fibres, raw or retted (excluding flax, true hemp and ramie)	5168.3	185.0	34.7%	Nepal	44.5	54.0%	India (67), Bangladesh (33)
					China	16.7	20.3%	Bangladesh (99.9), Malaysia (0.1)
					Cote d'Ivoire	4.4	5.4%	Bangladesh (88.2), India (4.3), China (4.3), United Rep. of Tanzania (1.9), Kenya (1)
					Germany	4.1	4.9%	Bangladesh (79.9), Belgium (19), China (1), Philippines (0.1), India (0.1)
					Brazil	2.8	3.4%	Bangladesh (100)
530710	Single yarn of jute or of other textile bast fibres of heading 5303	49.4	433.2	4.1%	China	86.2	51.4%	Bangladesh (99.9), Egypt (0.1)
					Iran	40.6	24.2%	Bangladesh (99.3), Belgium (0.3), China (0.2), India (0.2), Singapore (0.1)
					Cote d'Ivoire	15.1	9.0%	Bangladesh (99.2), India (0.8)
					Kazakhstan	3.0	1.8%	Bangladesh (87.7), Turkey (12.3)
					Belgium	3.0	1.8%	Bangladesh (96.2), The UK (2.2), India (0.9), The Netherlands (0.7)
531010	Woven fabrics of jute or of other textile bast fibres of heading 5303, unbleached	1194.7	196.2	1.3%	The Netherlands	21.7	25.5%	India (62.6), Bangladesh (28.4), Germany (3), Belgium (2), China (0.9)
					Iran	11.6	13.6%	Bangladesh (65.2), Pakistan (18.3), UAE (8.3), India (8.2), China (0.1)
					Germany	9.3	10.9%	India (81.3), Bangladesh (10.3), The Netherlands (6.3), Belgium (1.2), China (0.6)
					Canada	4.9	5.8%	India (73.7), Bangladesh (13.1), The USA (7.2), China (3.2), Indonesia (1.7)
					Japan	4.8	5.6%	India (52.2), Bangladesh (47.3), China (0.5), Viet Nam (0.1)
540771	Woven fabrics of yarn containing >= 85% synthetic filament by weight, incl. monofilament	194.1	204.1	0.5%	Indonesia	20.2	17.0%	China (81.4), South Korea (14.9), Japan (2.3), Hong Kong (0.7), Other Asia, nes (0.4)
					Morocco	18.7	15.8%	Spain (77.8), Italy (13.7), China (4.7), Germany (2), Argentina (1.6)
					Malaysia	14.7	12.4%	Indonesia (52.7), Viet Nam (39.8), South Korea (2.8), Japan (1.4), China (1.1)
					Mexico	11.2	9.5%	Spain (39.8), China (17.8), Israel (13.5), Italy (9.8), The Netherlands (6.7)
					China	8.4	7.1%	Germany (46.8), Other Asia, nes (22.7), South Korea (4.8), Japan (4.5)
540794	Woven fabrics of yarn containing predominantly, but < 85% synthetic filament by weight	47.3	129.8	0.2%	Germany	13.8	21.6%	China (80.1), Turkey (8.7), Italy (4.8), Switzerland (2.7), Spain (1.2)
					Myanmar	6.3	9.9%	China (91.1), Indonesia (3.4), Other Asia, nes (2.3), Japan (1.2), South Korea (1.2)
					Italy	6.2	9.8%	China (53.1), Germany (11.8), Other Asia, nes (7.9), Switzerland (4.9), Japan (4.8)
					Malaysia	4.9	7.6%	China (91.4), India (2.8), Hong Kong (1.8), The UK (1), Other Asia, nes (0.6)
					Kyrgyzstan	3.4	5.4%	China (99.7), Poland (0.2), Turkey (0.1)
540810	Woven fabrics of high-tenacity viscose yarn, incl. monofilament of >= 67 decitex	3.4	191.9	0.1%	Indonesia	53.6	55.2%	China (64.6), Hong Kong (13.5), South Korea (11.9), Spain (3.6), The UK (2.9)
					Italy	7.8	8.0%	China (26), Poland (22.4), Morocco (16.5), Hungary (16.5), Germany (6.4)
					Algeria	7.2	7.4%	China (83.9), Turkey (7.3), Morocco (6), India (2.2), Egypt (0.3)
					Sri Lanka	5.7	5.9%	China (68.5), India (17.8), Hong Kong (7.5), Indonesia (4.4), Other Asia, nes (0.8)
					Dominican Rep.	5.4	5.6%	China (82.3), India (7.4), The USA (3.6), Spain (3.5), Other Asia, nes (1.2)
550820	Sewing thread of artificial staple fibres, whether or not put up for retail sale	5.9	35.1	8.4%	Sri Lanka	1.5	14.6%	Hong Kong (53), China (31.5), The UK (4.3), Germany (4.2), South Korea (2.4)
					Iran	1.5	14.4%	China (91.6), France (6), UAE (1.2), Oman (1.2), Turkey (0.1)
					China	1.3	12.6%	Japan (12.6), Hong Kong (6.9), Other Asia, nes (0.9), South Korea (0.7)
					Indonesia	1.1	10.8%	South Korea (65.2), China (26.4), Japan (7.5), Hong Kong (0.3), Singapore (0.3)
					Nepal	0.6	5.6%	India (91.5), China (7.5), Thailand (1)
551130	Yarn of artificial staple fibres, put up for retail sale	9.8	20.0	0.3%	Denmark	1.9	16.9%	Sweden (42), Spain (23.9), Norway (17.7), Austria (6.2), China (3.7)
					Germany	1.4	12.5%	Italy (62.1), China (20.3), Turkey (12.4), Croatia (2.6), Switzerland (2.1)

	(excluding sewing thread)				Morocco	1.2	11.0%	Italy (58.3), Turkey (16.9), China (8.3), India (7.9), Bulgaria (4.3)
					Indonesia	1.0	9.0%	Sri Lanka (30.7), Hong Kong (21.7), China (18), Japan (14.3), South Korea (2.9)
					Italy	0.8	7.3%	Bulgaria (49.2), Turkey (46.9), China (1.2), France (0.9), Germany (0.5)
551349	Woven fabrics containing predominantly, but < 85% synthetic staple fibres by weight	7.5	159.1	0.1%	Sri Lanka	7.6	19.0%	India (27.4), Hong Kong (23.7), Singapore (13.4), Pakistan (8.8), China (8.1)
					Indonesia	4.0	9.9%	China (96.7), Viet Nam (0.9), Pakistan (0.7), India (0.5), South Korea (0.3)
					Morocco	3.7	9.3%	Spain (62.5), China (18.7), Italy (8.7), Germany (3.8), Turkey (3.6)
					Mauritius	3.0	7.6%	China (86.7), India (9.2), Thailand (1.9), Pakistan (1), South Africa (0.5)
					Mexico	1.9	4.8%	The USA (31.4), China (30.1), India (20.5), Israel (9.3), Pakistan (3.2)
551449	Woven fabrics containing predominantly, but < 85% synthetic staple fibres by weight	51.0	540.8	2.5%	Myanmar	471.8	93.3%	China (85.9), South Korea (6.4), Japan (1.9), Other Asia, nes (1.5), Thailand (1)
					Indonesia	7.2	1.4%	China (64.4), Other Asia, nes (11.1), Thailand (7), Malaysia (6.5), South Korea (5)
					Nepal	7.1	1.4%	China (99.6), Bangladesh (0.4)
					Morocco	3.7	0.7%	Spain (35.7), China (34.2), France (19.5), Egypt (7.2), Turkey (2.9)
					Kenya	1.8	0.4%	China (52.9), India (46.5), Uganda (0.6)
551599	Woven fabrics containing predominantly, but < 85% synthetic staple fibres	33.5	470.4	0.2%	Kyrgyzstan	48.0	24.3%	China (99.1), Turkey (0.6), South Korea (0.1), Italy (0.1)
					Belgium	31.4	15.9%	France (81.8), Germany (11.2), China (4.7), The USA (1.3), Italy (0.4)
					Morocco	14.6	7.4%	France (36.8), Portugal (18.8), Spain (13.1), Turkey (12.2), Italy (10.4)
					Indonesia	10.6	5.3%	China (48.1), Other Asia, nes (23.7), Japan (7.7), Hong Kong (4.2), South Korea (4)
					Georgia	9.9	5.0%	Turkey (45), UAE (28.3), China (24.5), South Korea (0.6), Iran (0.6)
551694	Woven fabrics containing predominantly, but < 85% artificial staple fibres by weight	44.0	106.1	0.5%	Morocco	20.8	43.0%	Italy (38.5), Spain (22.5), Germany (14.8), China (13.1), Turkey (9.8)
					Nepal	5.3	10.9%	China (100)
					Kyrgyzstan	3.7	7.7%	China (99.8), Other Asia, nes (0.2)
					Indonesia	3.0	6.1%	Other Asia, nes (44.5), Hong Kong (43.4), China (11.7), South Korea (0.4)
					France	2.1	4.4%	Japan (33.1), Italy (26.9), China (7.6), South Korea (6.5), Turkey (5.2)
560790	Twine, cordage, ropes and cables, whether or not plaited or braided and whether or not impregnated	41.3	321.8	0.1%	The Netherlands	15.1	9.2%	Germany (28.4), Belgium (21.6), China (15.9), India (6.8), The USA (4.2)
					Indonesia	13.8	8.4%	China (31.1), Japan (17.7), Thailand (14.9), Singapore (10), Viet Nam (8.6)
					France	12.0	7.3%	Tunisia (40), Spain (12.2), China (12.1), Romania (5.8), Portugal (5.6)
					Canada	9.5	5.8%	India (28.5), China (20.1), Portugal (15.2), The USA (15), Philippines (8.7)
					Mexico	8.7	5.3%	The USA (41.8), Bangladesh (17.7), South Korea (14.4), Canada (9.4), China (8.3)
580410	Tulles and other net fabrics (excluding woven, knitted or crocheted fabrics)	75.7	622.8	0.6%	China	61.1	20.1%	Other Asia, nes (34.6), South Korea (32.5), Japan (15.3), Italy (2.3)
					Hong Kong	46.2	15.2%	China (51.7), South Korea (21.8), Other Asia, nes (18.1), Switzerland (1.6), The USA (1.2)
					Indonesia	31.1	10.2%	Hong Kong (40.6), China (20.5), Other Asia, nes (14.9), South Korea (12.3), The USA (7.2)
					Sri Lanka	30.6	10.1%	Other Asia, nes (35.3), China (12.5), Indonesia (11.8), Japan (6.8), India (6.4)
					Myanmar	16.5	5.4%	China (80.4), Viet Nam (6.9), South Korea (5), Hong Kong (3.3), Japan (1.4)
580429	Mechanically made lace in the piece, in strips or in	54.8	321.7	1.1%	Sri Lanka	68.7	46.0%	China (53), Hong Kong (26.5), Thailand (7.3), The USA (4.5), South Korea (3.9)
					Indonesia	14.5	9.7%	China (43.8), South Korea (28), Hong Kong (14), Thailand (5.7), Other Asia, nes (3.6)

	motifs				Italy	12.1	8.1%	France (57.1), China (27.9), Turkey (2.6), The UK (2.6), Germany (2.1)
					Hong Kong	5.3	3.6%	China (68.7), France (8.8), South Korea (6.2), Japan (4.1), Italy (4)
					Bulgaria	5.2	3.5%	France (87.5), Greece (3.1), Italy (3), China (2.5), Germany (2)
581010	Embroidery on a textile fabric ground without visible ground, in the piece, in strips	57.4	130.5	0.1%	Italy	31.6	38.2%	India (75), China (9.1), Switzerland (5.3), Albania (1.9), Thailand (1.8)
					Hong Kong	10.5	12.7%	China (56.4), Other Asia, nes (26.8), Austria (5.2), Thailand (3.6), India (3.4)
					France	8.5	10.3%	India (36.4), Germany (13.4), Switzerland (13.4), Italy (13.3), Thailand (6.3)
					Morocco	4.7	5.7%	Spain (76.1), China (6.8), Italy (6.3), France (4.7), India (2.6)
					Germany	3.3	4.0%	Romania (31.2), Switzerland (16.7), Greece (13.3), Austria (11.4), China (6.8)
600390	Knitted or crocheted fabrics of a width of <= 30 cm	18.4	60.9	5.1%	Indonesia	3.4	38.9%	China (44.4), Singapore (25.7), Japan (12.5), South Korea (9.7), Hong Kong (4.8)
					Nepal	2.0	23.6%	India (97.8), China (2.2)
					Dominican Rep.	0.8	9.3%	Areas, nes (74.3), China (25.7)
					Germany	0.5	5.3%	Other Asia, nes (45.9), China (27.6), Sri Lanka (6.4), Italy (5.7), Portugal (5.1)
					Brunei Darussalam	0.3	3.8%	China (65.9), Hong Kong (33.5), India (0.4), Malaysia (0.2)
610290	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters	218.6	101.9	10.5%	Germany	11.1	19.7%	Italy (30.9), Austria (16.6), France (11.9), China (8.6), The Netherlands (8.2)
					Austria	5.4	9.6%	Germany (72.1), China (7.7), Italy (4.1), Romania (2.7), Bulgaria (1.6)
					Italy	4.9	8.8%	Bulgaria (45.3), France (21.9), Germany (5.8), China (5.7), Romania (3.6)
					France	4.3	7.6%	Italy (26.4), China (12.7), Portugal (8.3), The UK (7.2), Pakistan (4.9)
					Denmark	2.5	4.4%	The Netherlands (27.4), Sweden (19.6), Italy (18.1), Bulgaria (10.2), China (7.7)
610719	Men's or boys' underpants and briefs of other textile materials, knitted or crocheted	130.4	168.6	0.2%	Malaysia	6.7	13.4%	China (89.2), Hong Kong (3.3), Italy (2.4), Sri Lanka (1), Bangladesh (0.9)
					Ireland	5.1	10.3%	The UK (98.1), India (0.8), China (0.6), Bangladesh (0.5)
					Germany	4.4	8.8%	China (32.3), Viet Nam (21.7), Sweden (15.9), The Netherlands (4.9), Denmark (4)
					Denmark	2.9	5.9%	Italy (31.2), China (29.4), Lithuania (18.4), The Netherlands (4.9), Germany (4.5)
					France	2.5	5.0%	China (31.3), Italy (22.4), Poland (10.3), Tunisia (6.1), Viet Nam (4.9)
610729	Men's or boys' nightshirts and pyjamas of textile materials, knitted or crocheted	10.5	21.4	0.0%	Italy	1.0	10.6%	Romania (25), Bangladesh (18), Albania (16.6), Pakistan (14.8), Croatia (5.8)
					Malaysia	0.9	9.4%	China (96), Hong Kong (2.1), Australia (1.7), The USA (0.2), Thailand (0.1)
					Canada	0.8	8.6%	The USA (66.8), China (11.8), Germany (4), France (3.5), Japan (3.3)
					Kuwait	0.6	6.7%	China (44.8), India (42.4), Portugal (8.3), Turkey (2.3), Bangladesh (1.1)
					Jordan	0.6	6.3%	Turkey (94.8), China (5.2)
610799	Men's or boys' bathrobes, dressing gowns and similar articles of textile materials, knitted	35.8	234.6	1.3%	South Korea	13.7	22.1%	China (45.1), Viet Nam (30.8), Indonesia (9.6), Cambodia (7.9), Myanmar (4)
					Australia	5.9	9.5%	China (92), Bangladesh (3.9), Thailand (1.2), Australia (0.7), El Salvador (0.4)
					Canada	5.4	8.7%	China (78.3), Cambodia (9.4), El Salvador (2.7), Viet Nam (2.2), Bangladesh (2.1)
					Germany	4.8	7.6%	China (62.9), Poland (9.9), Turkey (9.6), Bangladesh (8.6), Cambodia (2.1)
					France	4.3	6.9%	China (61.9), Belgium (6.8), Tunisia (6.3), Spain (2.3), Cambodia (2.2)
620469	Women's or girls' trousers,	404.1	3207.8	0.4%	Germany	258.5	16.6%	China (24.3), Bangladesh (16.9), Turkey (8.7), India (6.3), Cambodia (5.5)

	bib and brace overalls, breeches and shorts of textile materials				Japan	241.6	15.5%	China (58.4), Cambodia (14.2), Viet Nam (10.2), Indonesia (5.3), Myanmar (2.8)
					France	184.0	11.8%	China (25.8), Areas, nes (13.7), Italy (10), Bangladesh (8.5), Morocco (5.9)
					Canada	94.9	6.1%	China (35.8), Cambodia (21.1), Bangladesh (14.4), The USA (6.6), Viet Nam (4.1)
					Italy	78.8	5.1%	China (11.9), Romania (11), France (8.5), Bulgaria (7.1), Bangladesh (6.6)
620990	Babies' garments and clothing accessories of textile materials	47.5	305.9	0.1%	France	11.1	11.9%	China (34.8), Cyprus (8.5), Bangladesh (6.9), Italy (5.6), Tunisia (5.4)
					Lebanon	8.0	8.5%	China (39.9), Germany (38.5), Hong Kong (9.2), The USA (2.5), Turkey (1.5)
					Armenia	6.4	6.9%	Turkey (87.2), China (11.2), UAE (0.9), Russian Federation (0.4), Iran (0.1)
					Italy	6.1	6.5%	France (12.7), China (12.7), Poland (12.7), Spain (8.9), Bangladesh (6.7)
					Germany	5.1	5.4%	China (46.5), Bangladesh (21.6), India (4.7), Italy (3.9), The Netherlands (2.9)
								China (37.5), Italy (30.3), The UK (20.8), France (4.2), India (3.2)
621420	Shawls, scarves, mufflers, mantillas, veils and similar articles of wool or fine animal hair	183.1	948.9	0.3%	Japan	146.1	22.5%	Italy (58.6), The UK (15.5), China (8.4), India (5.6), Nepal (3.3)
					France	104.4	16.1%	France (41.5), Italy (22.5), The UK (12.8), Switzerland (7.2), China (6.4)
					Hong Kong	77.3	11.9%	Italy (56.9), The UK (23.8), France (12), India (3.7),
					China	73.2	11.2%	Switzerland (23.9), France (22.5), The UK (18.8), Tunisia (9.2), China (8)
					Italy	58.3	9.0%	China (28.2), Poland (18), Spain (8.6), Romania (8), Philippines (6.1)
640690	Parts of footwear; removable in-soles, heel cushions and similar articles; gaiters, leggings	648.3	2740.1	2.5%	Germany	202.6	13.6%	The USA (44.3), Viet Nam (21.4), South Korea (6.5), Other Asia, nes (4.6)
					China	201.7	13.5%	Albania (21.5), Romania (20.4), Bulgaria (15.3), China (11.2), Spain (5.4)
					Italy	183.6	12.3%	China (32.4), Hong Kong (25.7), Viet Nam (17.3), The USA (12.1), South Korea (4.8)
					Indonesia	121.0	8.1%	China (48.5), The USA (23.4), Viet Nam (20.1), South Korea (2.6), Other Asia, nes (1.6)
					Hong Kong	107.5	7.2%	Poland (37.5), Czechia (16.1), Denmark (9.5), India (6.5), France (4.8)
741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring	36.5	166.4	0.4%	Germany	12.9	20.0%	China (41.8), India (28.7), France (8.2), The USA (7.8), Italy (4.3)
					Canada	4.6	7.1%	Slovakia (51.8), Germany (15.9), Poland (7.9), Italy (6.7), France (5)
					Czechia	3.6	5.6%	Italy (17.8), France (16.5), Germany (14.6), Spain (9.3), The UK (8.6)
					France	3.3	5.1%	India (99.6), China (0.3), Thailand (0.1)
					Nepal	2.7	4.2%	Belgium (44.1), The Netherlands (15.9), The UK (14.5), France (7.1), Sweden (7.1)
780110	Unwrought lead, refined	532.3	4941.1	0.2%	Germany	259.7	14.0%	Germany (44.9), Poland (30.6), Russian Federation (11.3), The UK (9.5), Belgium (2.3)
					Czechia	217.3	11.7%	Kazakhstan (46.1), India (16.3), Australia (14.3), China (10.2), UAE (4.1)
					Other Asia, nes	197.9	10.6%	Australia (50.5), Kazakhstan (34.2), France (5), South Korea (4.4), Italy (3)
					China	190.0	10.2%	India (24.2), UAE (20), Australia (12.2), France (10), Iran (8.3)
					South Korea	171.2	9.2%	France (25.8), Japan (19.5), South Korea (16.1), Germany (15.1)
821195	Handles of base metal for table knives, pocket knives and other knives of heading 8211	2.5	20.9	4.0%	China	2.0	21.5%	China (73.8), Other Asia, nes (20.3), The USA (1.5), Israel (1), Austria (1)
					Germany	2.0	20.5%	China (92.5), South Korea (2.9), Viet Nam (1.9), Pakistan (1.5), Other Asia, nes (0.8)
					Japan	1.0	10.9%	China (64.3), Singapore (25.5), Other Asia, nes (1.7), Austria (1.6), The USA (1.5)
					Indonesia	0.6	6.4%	China (43.9), The USA (32.8), Thailand (4.3), Germany (3.8), Japan (3.5)
					Canada	0.3	3.5%	

830610	Bells, gongs and the like, non-electric, of base metal (excluding musical instruments)	41.0	139.7	0.7%	Germany	11.4	21.1%	China (67.2), Other Asia, nes (10.1), Japan (5.1), India (5), Hong Kong (3)
					Japan	8.3	15.4%	China (83.9), Other Asia, nes (6.2), Indonesia (4.7), South Korea (1.6), The USA (0.8)
					Canada	5.6	10.3%	China (65.5), The USA (18.2), Other Asia, nes (5.2), India (3.8), Japan (2.4)
					France	3.6	6.7%	China (64.9), The Netherlands (6.7), Germany (4.9), Other Asia, nes (3.4), The UK (3.1)
					Italy	2.4	4.5%	China (46.9), India (10.1), The Netherlands (6.3), Spain (4.3), France (4.2)
841320	Hand pumps for liquids (excluding those of subheading 8413.11 and 8413.19)	67.4	895.9	0.7%	Canada	57.8	13.9%	China (35.7), The USA (29.3), Other Asia, nes (9.2), Mexico (8.2), France (4.8)
					Germany	50.8	12.2%	China (28.1), Poland (16.1), The Netherlands (8.5), France (7.7), Italy (7.1)
					Japan	43.7	10.5%	Thailand (38.3), China (35.8), South Korea (10.2), Other Asia, nes (4), France (3.3)
					France	25.8	6.2%	Spain (26.7), China (15.1), The UK (14.3), The Netherlands (13), Germany (8.5)
					Myanmar	22.0	5.3%	China (81), Germany (4.5), Japan (3.2), Thailand (3.1), Italy (1.9)
841451	Table, floor, wall, window, ceiling or roof fans, with a self-contained electric motor	632.0	4420.1	1.1%	Japan	235.5	12.5%	China (82), Thailand (6.3), Malaysia (5.4), Other Asia, nes (2.9), Viet Nam (1.8)
					South Korea	226.9	12.1%	China (81.5), Malaysia (11.7), Japan (2.1), The USA (2), Other Asia, nes (1.2)
					China	149.6	8.0%	Malaysia (18.8), Germany (15.4), Hungary (8.9), Philippines (8.5)
					Australia	121.3	6.5%	China (76), Malaysia (10.3), Other Asia, nes (4.9), Spain (2.9), Canada (1.3)
					Canada	113.2	6.0%	China (81.9), The USA (8.9), Malaysia (5.4), Mexico (1.5), Italy (0.5)
845290	Furniture, bases and covers for sewing machines and parts thereof; other parts of sewing machines	100.4	928.7	1.1%	China	77.0	16.0%	Japan (56.6), Other Asia, nes (28.3), Viet Nam (8.4), Germany (1.5)
					Japan	74.4	15.4%	China (48.6), Viet Nam (28.7), Other Asia, nes (20.3), South Korea (0.6), The USA (0.4)
					Malaysia	53.8	11.2%	China (45.5), Japan (30.6), India (8.9), Other Asia, nes (3.9), The Netherlands (3.5)
					Other Asia, nes	48.0	10.0%	China (77.5), Japan (14), Thailand (5.1), Viet Nam (1.2), Areas, nes (0.9)
					Germany	31.0	6.4%	Czechia (20.5), Romania (16.4), China (14.7), Japan (9.7), Other Asia, nes (8.7)
940159	Seats of cane, osier or similar materials (excluding of bamboo or rattan)	9.4	97.1	2.6%	Italy	14.8	32.0%	Romania (49.5), Bulgaria (26.5), Indonesia (10.6), Germany (3.8), China (2)
					Germany	5.4	11.8%	The Netherlands (34.5), Poland (13.6), Indonesia (13.5), Denmark (13.3), Czechia (5.1)
					Canada	2.9	6.4%	China (86.4), Viet Nam (7.8), Indonesia (2.2), Philippines (2), The USA (1.3)
					France	2.9	6.3%	China (16.8), Indonesia (14.3), Viet Nam (11.9), Italy (11.9), Belgium (10.6)
					South Korea	2.0	4.3%	China (53.7), Viet Nam (32), Indonesia (6.3), The USA (2.5), France (1.7)
960891	Pen nibs and nib points	17.3	132.6	0.1%	Germany	9.7	18.0%	Japan (76.8), France (9.3), The USA (4.7), Indonesia (3.4), China (1.6)
					Italy	6.6	12.2%	Japan (43.6), Germany (39.2), China (12.1), Other Asia, nes (2.8), Czechia (1)
					Malaysia	6.2	11.5%	Japan (61.7), Thailand (12.9), Switzerland (7.6), China (6), The USA (3.2)
					Indonesia	5.0	9.2%	Japan (64.8), Thailand (18.7), China (14.5), India (1), Other Asia, nes (0.4)
					Kenya	4.4	8.2%	France (74.6), South Africa (14.8), Mexico (5.5), India (4.5), Switzerland (0.7)

Note: Data for Bihar is for 2017-18. Data for world imports and importers is for 2017

Source: DGCI&S, UNCOMTRADE, Exim Bank Research

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EXPORT-IMPORT BANK OF INDIA

HEAD OFFICE

Centre One Building, 21st Floor, World Trade Centre Complex, Cuffe Parade, Mumbai 400 005.

Phone: (91 22) 22172600 Fax : (91 22) 22182572

E-mail : ccg@eximbankindia.in Website: www.eximbankindia.in

LONDON BRANCH

5th Floor, 35 King Street, London EC2V 8BB United Kingdom

Phone : (0044) 20 77969040 Fax : (0044) 20 76000936 E-Mail : eximlondon@eximbankindia.in

DOMESTIC OFFICES

Ahmedabad

Sakar II, 1st Floor,
Next to Ellisbridge Shopping Centre,
Ellisbridge P. O.,
Ahmedabad 380 006
Phone : (91 79) 26576843
Fax : (91 79) 26578271
E-mail : eximahro@eximbankindia.in

Bangalore

Ramanashree Arcade, 4th Floor,
18, M. G. Road,
Bangalore 560 001
Phone : (91 80) 25585755
Fax : (91 80) 25589107
E-mail : eximbro@eximbankindia.in

Chandigarh

C- 213, Elante offices, Plot No. 178-178A,
Industrial Area phase 1,
Chandigarh 160 002
Phone : (91 172) 2641910
Fax : (91 172) 2641915
E-mail : eximcro@eximbankindia.in

Chennai

Overseas Towers,
4th and 5th Floor,
756-L, Anna Salai,
Chennai 600 002
Phone : (91 44) 28522830/31
Fax : (91 44) 25224082
E-mail : eximchro@eximbankindia.in

Guwahati

NEDFi House, 4th Floor, GS Road,
Dispur, Guwahati 781 006
Phone : (91 361) 2237607/609
Fax : (91 361) 2237701
E-mail : eximgro@eximbankindia.in

Hyderabad

Golden Edifice, 2nd Floor,
6-3-639/640, Raj Bhavan Road,
Khairatabad Circle,
Hyderabad 500 004
Phone : (91 40) 23379060
Fax : (91 40) 23317843
E-mail : eximhro@eximbankindia.in

Kolkata

Vanijya Bhawan, 4th Floor,
(International Trade Facilitation Centre),
1/1 Wood Street,
Kolkata 700 016
Phone : (91 33) 22891728/29/30
Fax : (91 33) 22891727
E-mail : eximkro@eximbankindia.in

New Delhi

Office Block, Tower 1, 7th Floor,
Adjacent Ring Road, Kidwai Nagar (E)
New Delhi - 110 023
Ph.: +91 11 61242600 / 24607700
Fax: +91 11 20815029
E-mail: eximndo@eximbankindia.in

Pune

No. 402 & 402(B) 4th floor Signature
Building, Bhamburda, Bhandarkar Rd.,
Shivajinagar, Pune - 411 004
Phone : +91 20 25648856
Fax: +91 20 25648846
E-mail: eximpro@eximbankindia.in

OVERSEAS OFFICES

Abidjan

5th Floor,
Azur Building,
18-Docteur Crozet Road,
Plateau,
Abidjan,
Côte d'Ivoire
Phone : (225) 20 24 29 51
Mobile : (225) 79707149
Fax : (225) 20 24 29 50
Email : eximabidjan@eximbankindia.in

Addis Ababa

House No. 46,
JakRose Estate Compound,
Woreda 07,
Bole Sub-city,
Addis Ababa,
Ethiopia.
Phone : (251 116) 630079
Fax : (251 116) 610170
E-mail : aaro@eximbankindia.in

Dhaka

Madhumita Plaza, 12th Floor,
Plot No. 11, Road No. 11, Block G,
Banani, Dhaka, Bangladesh - 1213.
Phone : (088) 0170820444
E-mail : eximdhaka@eximbankindia.in

Dubai

Level 5, Tenancy 1B,
Gate Precinct Building No. 3,
Dubai International Financial Centre,
PO Box No. 506541, Dubai, UAE.
Phone : (971 4) 3637462
Fax : (971 4) 3637461
E-mail : eximdubai@eximbankindia.in

Johannesburg

2nd Floor, Sandton City Twin Towers East,
Sandhurst Ext. 3, Sandton 2196,
Johannesburg, South Africa.
Phone : (27) 716094473
Fax : (27 11) 7844511
E-mail : eximjro@eximbankindia.in

Singapore

20, Collyer Quay, #10-02,
Tung Centre, Singapore 049319.
Phone : (65) 65326464
Fax : (65) 65352131
E-mail : eximsingapore@eximbankindia.in

Washington D.C.

1750 Pennsylvania Avenue NW,
Suite 1202, Washington D.C. 20006,
United States of America.
Phone : (1 202) 223 3238
Fax : (1 202) 785 8487
E-mail : eximwashington@eximbankindia.in

Yangon

House No. 54/A, Ground Floor,
Boyarneyunt Street, Dagon Township,
Yangon, Myanmar
Phone : (95) 1389520
Mobile : (95) 1389520
Email : eximyangon@eximbankindia.in



Centre One Building, 21st Floor, World Trade Centre Complex, Cuffe Parade, Mumbai - 400 005.

Ph.: (91 22) 22172600 | Fax: (91 22) 22182572

E-mail: ccg@eximbankindia.in | Website: www.eximbankindia.in, www.eximmitra.in

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