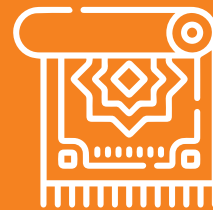


Evaluating India's Middle-Export Districts:

Opportunities under ODOP-DEH



EXPORT-IMPORT BANK OF INDIA

WORKING PAPER NO. 124

Evaluating India's Middle-Export Districts: Opportunities under ODOP-DEH

India Exim Bank's Working Paper Series is an attempt to disseminate the findings of research studies carried out in the Bank. The results of research studies can interest exporters, policy makers, industrialists, export promotion agencies as well as researchers. However, views expressed do not necessarily reflect those of the Bank. While reasonable care has been taken to ensure authenticity of information and data, India Exim Bank accepts no responsibility for authenticity, accuracy, or completeness of such items.



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Executive Summary

Background

India's cultural diversity is renowned and respected worldwide, with each region boasting its distinct terrains, crops, foods, and traditions. Over generations, communities in various parts of the country have developed unique skills and expertise in areas like agriculture, handicrafts, jewelry, textiles, and more. These skills are deeply intertwined with their cultural heritage and have given rise to a wide array of region-specific goods.

Similar case exists with various other countries. Recognizing the potential of promoting regional products to stimulate economic growth and enhance the standard of living for local populations, Japan introduced the "One Village One Product" (OVOP) initiative in 1979. This approach emphasized the importance of thinking locally while acting globally, fostering self-reliance, and nurturing creativity through human resource development. Other countries, including Japan, Thailand, Mexico, Philippines, Ghana, amongst others, later adopted similar models with varying levels of success.

Focusing on specific products yields substantial benefits for regions and their economies. By concentrating efforts and resources on a limited number of products, regions can develop specialization and competitive advantages. This specialization allows artisans and businesses to refine their skills and production processes, resulting in higher-quality and more competitive goods. As regions become renowned for their expertise in particular products, they can differentiate themselves in the market, attracting buyers seeking the unique qualities associated with those goods.

Moreover, concentrating on select products facilitates economies of scale and cost efficiency. When a region dedicates its resources and production capabilities to a specific range of products, it can achieve higher production volumes, leading to cost reductions through bulk purchasing of raw materials, streamlined production processes, and improved supply chain management. As costs decrease, the region becomes more price-competitive, increasing demand and exports.

Additionally, a focused approach enables dedicated regions to build strong brands and market identities. When a region becomes synonymous with a particular product or craft, it gains a significant advantage in marketing and promotion efforts. Targeted marketing campaigns can highlight the unique features, heritage, and cultural significance of the products, attracting buyers, tourists, and investors seeking authentic and exceptional goods.

Furthermore, a concentration on specific products encourages the development of robust value chains and industry clusters within the region. A value chain encompasses all stages involved in the creation, production, and distribution of a product. Specialization leads to collaboration and cooperation among different

stakeholders in the value chain, resulting in industry clusters where suppliers, manufacturers, designers, and service providers work together, sharing knowledge, innovation, and resources.

India's own One District One Product (ODOP) initiative, launched by the Government of Uttar Pradesh in 2018, aimed to promote regional growth by leveraging the unique expertise of each district. Later, Government of India also adopted the ODOP initiative. As of March 2023, out of 766 districts in India, ODOP has been approved for 713 districts of 35 States/ UTs under Centrally Sponsored "Pradhan Mantri Formalisation of Micro Food Processing Enterprises (PMFME) Scheme" implemented by Ministry of Food Processing Industries (MoFPI).

In 2022, ODOP was merged with the 'Districts as Export Hubs Initiative' (DEH), focusing on transforming districts into export centers. The new Foreign Trade Policy (FTP) launched in March 2023 places special emphasis on DEH and aims to achieve a US\$ 2 trillion export target by 2030.

Analysis of District-Level Exports

India's exports reached a record high of US\$ 451 billion in FY 23, marking significant growth from the US\$ 315 billion recorded a decade ago in FY 14. The average annual growth rate of India's exports over the past ten years was 5.2%, despite facing global challenges. In FY 23, petroleum products constituted over 21% of India's total exports, followed by pearls and precious stones (5.6%), drug formulations and biologicals (4.3%), iron and steel (3%), and telecom instruments (2.8%).

The top five commodities accounted for 37% of India's exports in FY 23. However, the concentration of exports is even more pronounced at the state level, with the top five states contributing nearly 70% of India's total exports in FY 23. Gujarat and Maharashtra were the top two states, contributing 33.1% and 16.1% of India's exports, respectively.

This highlights the crucial role that states will play in driving India's future exports. It becomes increasingly important to focus on specific districts within states that have the potential to boost exports further. Adopting a narrower approach, the identification of champion products from these districts can significantly enhance overall exports for both the districts and the states. This approach forms the basis of the ODOP-DEH initiative, aimed at propelling India's exports by leveraging the capabilities of specific districts and promoting champion products to bolster export performance.

As per the analysis conducted in this Study, less than 2% of the districts in India contributes to more than 41% of India's exports – and hence there remains a significant scope to tap the 'missing middle districts' under DEH.

Given the aforesaid, this Study shortlists 59 districts from 20 states/UTs which together account for 29% of India's exports (or US\$ 130.7 billion of exports), as in FY 2023.

Missing Middle Districts: Major Products

State	District	Exports in FY 2023 (US\$ Million)	Products Identified under DEH	Major Products Exported
Andhra Pradesh	East Godavari	3909.7	Coir and Coir Products, Rice, Sugar, Frozen Shrimp, Coir Fibre and Coir Pith, Uppada Jamdani Sarees	Light Vessels, Parboiled Rice, Whiteleg Shrimp, Cane or Beet Sugar
	Chittoor	1966.5	Polished Granite and Granite Monuments, Textile and Garments, Mango and Fruit Pulp, Mango, Srikalahasthi Kalamkari, Tirupathi Laddu	Motor Vehicles, Railway Coaches, Lead-Acid Accumulators, Gold
	Anantapur	1459.9	Readymade Garments, MS Steel Tubes, Automobiles, Banana, Pomegranate, Andhra Pradesh Leather Puppetry, Dharmavaram Handloom Pattu Sarees and Paavadas	Motor cars, Auto parts, T-shirts
	Guntur	1358.1	Tobacco, Cotton Yarn, Chillies, Turmeric, Textiles, Guntur Sannam Chilli	Capsicum, Tobacco, Whiteleg shrimp, Coffee
	SPS Nellore	1358.1	Udayagiri Wooden Cutlery, Quartz, Feldspar, Processed Prawn/Shrimp, Rice	Whiteleg shrimp, Pharmaceuticals, Machinery parts, Footwear, Coffee
	West Godavari	1068.6	Cotton Yarn, Processed Prawns/Shrimp, Aqua Feed, Human Hair, Aspirin, Ceramic, Sanitaryware Products, Cashewnut, Coir Pith, Coffee, Crochet lace products	Shrimp, Human hair, Coffee, Broken Rice
Bihar	Begusarai	1632.2	Mango, Litchi, Maize, Soyabean, Milk Products	Fuels and oils, Maize, Parboiled Rice
Chhattisgarh	Raipur	1487.1	Rice, Maize, Soyabean, Mango	Parboiled Rice, Broken rice, Other Rice, Ferro-Silicomanganese, Agglomerated iron ore pellets
Dadra And Nagar Haveli	Dadra And Nagar Haveli	3902.0	Yarn, Fabrics, Pharmaceuticals, Cables, Rubber, Plastic Products, Readymade garments, Engineering products	Stranded wires and cables, Optical fibres and bundles, Yarn, Pharmaceuticals
Delhi	South-West	2871.9	Electrical Equipment Services, Readymade Garments, Telecom	Turbojets, Smartphones
	New Delhi	2449.1	Electrical Equipment Services, Readymade Garments, Telecom	Basmati Rice, Smartphones
Goa	South Goa	1472.4	Pharmaceuticals, Tourism and Fisheries, Khola Chilli, Feni	Pharmaceuticals, Aerial Reflectors, Optical Fibres
Gujarat	Vadodara	4452.0	Pharmaceuticals, Engineering	Plastic insulated conductors, Light Naphtha, Pharmaceuticals
	Valsad	4436.3	Chemical and paper, Mango, Marine Products	Photovoltaic cells, Insecticides, Herbicides, Fungicides
	Rajkot	2709.8	Engineering goods, Rajkot Patola	Cotton Woven Fabrics, HPS Kernels, Sesamum Seeds, Cotton Yarn
	Mahesana	2574.8	Agro processing (seed/spices), Paper and paper based products, Dairy, minerals, machinery	Motor cars, Cumin, Pysillium husk, Castor Oil
	Morbi	2313.7	Ceramic items	Ceramic Products, Multi-ply paper, Sanitary fixtures
	Panch Mahals	1334.5	Agriculture, Plastics	Pharmaceuticals, Engines parts, Plastic insulated conductors
	Gandhinagar	1037.4	Electrical and electronics, food processing, software, financial services, chemicals	Transmission line towers, Tubes and pipes, Stainless steel wires, Polypropylene articles

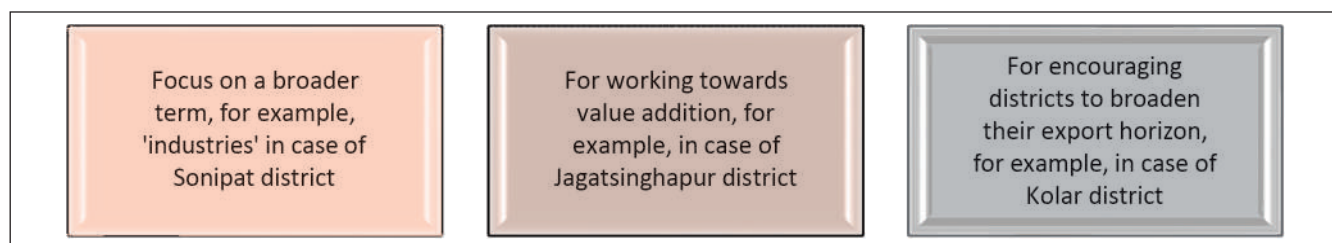
State	District	Exports in FY 2023 (US\$ Million)	Products Identified under DEH	Major Products Exported
Haryana	Faridabad	2403.2	Auto Components, Light and Engineering goods	Vehicle parts, Mechanical shovels, Cotton Dresses
	Karnal	2170.1	Horticulture and Rice	Basmati Rice, Other Rice, Agricultural machinery parts
	Sonipat	1655.4	Industries	Basmati Rice, Mounted brake linings, Stainless steel articles, Natural Honey
	Panipat	1530.7	Handloom, Carpet, Textiles	Toilet linen and kitchen linen, Full Range Naphtha, Carpets, Bedding articles
Himachal Pradesh	Solan	1775.9	Mushrooms, Tourism, Pharmaceuticals, Textile Yarn	Pharmaceuticals, Organic Chemicals, Lead acid accumulators, Decorative laminates
Karnataka	Bengaluru Rural	2957.8	Machine Tools, Bangalore Blue Grapes, Bangalore Rose Onion, Wine, Guava Pulp, Vegetables and Flowers, Readymade garments, Engineering, Processed foods, Silk, Plant extracts, Pharmaceuticals	Static Converters, Electric inverters, Boards for voltage, Cotton Shirts
	Kolar	2149.6	Mango, Tomato, Color Capsicums, Millet Ragi, Rose Onion, Vegetables, Mango pulp, Processed Pulses/ Spices/ Cereals, Engineering, Aerospace and defence components, Automobile, Phones, Apparels	Smartphones
Kerala	Ernakulam	2457.1	Vazhakulam Pineapple, Chendamangalam Dhoties & Set Mundu, Pokkali Rice, Kaipad Rice, Marine products, spice products, Chemical products, Engineering products	Fuels and oils, Babies' garments, Squids, Cuttle fish
Madhya Pradesh	Indore	2241.1	Onion, Potato, Paper & paper products, Pharma, Garments, Engineering, Leather Toys of Indore	Pharmaceuticals, Soyabean, Kabuli Chana, Lecithins
	Dhar	1371.5	FIBC, Plastic products, Automobiles, Automobile parts, Other Engineering products, Garments, Bagh Prints, Sitaphal, Soyabean	Pharmaceuticals, FIBC, Mechanical Shovels, Engine parts, Motor Vehicles
Maharashtra	Palghar	3415.0	Chemicals, "Chikoo" (Sapodilla), Pharmaceuticals, Iron & Steel and Engineering Products, Textiles, Plastics related, Focus Services - Tourism and Hospitality Services, Transport and Logistics Services etc.	Bright Bars of Nickel Chromium, Articles of Stainless Steel
	Aurangabad	3108.4	Engineering, Pharmaceuticals and Agriculture products, Engineering services, Paithani Sarees and Fabrics, Marathwada Kesar Mango, Beed Custard Apple	Motorcycles, Three-Wheelers, Optical Fibres, Pharmaceuticals
	Nashik	2966.3	Agriculture Products, Electrical Products, Pharmaceutical etc., Nashik Grapes, Onion, Nashik Valley Wine, Lasalgaon Onion	Onions, Grapes, Pharmaceuticals, Motor Vehicles, Iron Pipes
	Nagpur	1634.9	Nagpur Orange, Groundnut Oil, Aluminium Sheet, Cane Sugar, Cotton Yarn	Rice, Pharmaceuticals, Polyester Yarn
	Satara	1609.2	Agriculture Products, Mahabaleshwar Strawberry, Waghya Ghevada	Cane Sugar, Engines, Rubber Stoppers
	Kolhapur	1165.6	Agricultural products. Leather & Engineering goods, Banana, Kolhapur Jaggery, Kolhapuri Chappal	Cane Sugar, Cane Molasses, Cotton bedlinen, Machinery Gears

State	District	Exports in FY 2023 (US\$ Million)	Products Identified under DEH	Major Products Exported
Odisha	Jharsuguda	3751.3	Aluminium Ingot, Chilly & Ginger	Aluminium Ingots, Non-alloy aluminium wires
	Angul	1139.2	Aluminium Ingot, Steel Ingots	Aluminium oxide, Alumina calcined, Mild Steel Billets
	Sambalpur	1114.1	Sambalpuri Bandha Saree & Fabrics, Aluminium Ingot, Chilly	Aluminium Ingots, Steel Sheets, Non-Alloy Pig Iron
	Jagatsinghapur	1081.1	Plastic Products	Agglomerated iron ore pellets, Fuels and Oils, Shrimps
	Jajpur	1068.4	Stone carving/Handicraft	Agglomerated iron ore pellets, Ferrochromium, Steel Sheets
Punjab	Ludhiana	2427.1	Readymade Garments, Hosiery, Shirts and T-Shirts, Woolen Yarn, Bakery, Hand Tools, Bicycles	Vehicle Parts, Screws and bolts, non-galvanised iron or steel, Cotton Yarn, T-shirts
Rajasthan	Jaipur	3386.1	Gems & Jewellery, Garments, Furniture, Services Exports and others, Toys, Blue Pottery of Jaipur	Emeralds, Gold and Silver Jewellery, Wooden Furniture
	Alwar	2013.5	Engineering Products	Motor Cars, Rubber, Vehicle Parts, Pharmaceuticals
	Jodhpur	1075.2	Isabgol, Gaur Gum, Furniture Products, Powder, Handicrafts, Stainless Steel Sheets/Utensils	Wooden Furniture, Guar Gum, Metal Furniture, Cabinet Ware
Tamil Nadu	Tiruppur	4530.9	Hosiery Garments & Apparels	Apparel Articles
	Coimbatore	3180.0	Engineering Products, Textiles, Poultry Products, Vegetables, Coconut & Coir Products, Kovai Kora Cotton Sarees, Coimbatore Wet Grinder	Gears for Machinery, Parts of Valves, Coir Pith, T-shirts of Cotton
	Thiruvallur	2882.2	Garments, Engineering- tools and electronics, Chemicals	Dumpers, Electric Plants Parts, Vehicles Chassis
	Krishnagiri	2470.1	Engineering, Food Processing (Mango Pulp), Cut flowers, Diamond Jewellery	Motorcycles, Three-Wheelers, Granite articles
	Vellore	1199.8	Leather Industry, Readymade Garments, Chemicals	Leather footwear, Engines, Track laying Tractors
Telangana	Medchal Malkajgiri	2946.2	Pharmaceuticals, Mines, Fisheries	Pharmaceuticals, Organic Chemicals
	Sangareddy	2502.1	Mango, General engineering products, Seeds	Pharmaceuticals, Organic Chemicals, Liquid dielectric transformers
	Hyderabad	2150.3	Gems and Jewellery	Smartphones, Gems and Jewellery, Pharmaceuticals
	Ranga Reddy	2013.4	Mango, Biscuits & Confectionery, Pharma & Healthcare, Packing Material, Manufacturing of Aero - Structures, Electronic Items Assembling, Flooring Tiles & Carpets, Gerkins Processing, Lead Acid Batteries, etc.	Pharmaceuticals, Airplane parts, Sweet Biscuits, Vegetable Extracts

State	District	Exports in FY 2023 (US\$ Million)	Products Identified under DEH	Major Products Exported
Uttar Pradesh	Ghaziabad	1594.1	Engineering Goods, Sugar, Machinery Parts and Auto parts, Piston and Rings, Textile and home furnishing goods, Electronic and electrical goods, Meat	Boneless meat of bovine animals, Bright Bars, Non-galvanised iron or steel
	Moradabad	1227.2	Moradabad Metal Craft, Mentha Products, Rice	Iron and steel articles, Metal Furniture, Wood Articles, Brass Articles, Glass Articles
	Kanpur Nagar	1119.1	Leather Products, Footwear, Saddlery Goods, Engineering Goods, Plastic Products, Textile & Hosiery items	Saddlery and harness, Leather Skins, Leather Articles, FIBC of man-made textile materials
West Bengal	Kolkata	4859.7	Engineering, Leather, IT/ITES	Gold Jewellery, Ferrous Products, Whiteleg shrimp, Leather Wallets and Gloves, Black tea
	Howrah	1372.5	Engineering & Foundry, Jute, Gem and Jewellery, Forging Industry, Textiles	Iron cast articles, Towers for transmission line, Gold Jewellery
	Purba Medinipur	1166.6	Food Processing, Petrochemicals	Human Hair, Polyethylene terephthalate, Benzene, Grade LV oil, Lead acid accumulators
Total		130676.2	-	

Source: MOCI; Export Hubs, Government of India; India Exim Bank Research

Possible Reasons of Divergence between Export Profile and Products under DEH Initiative

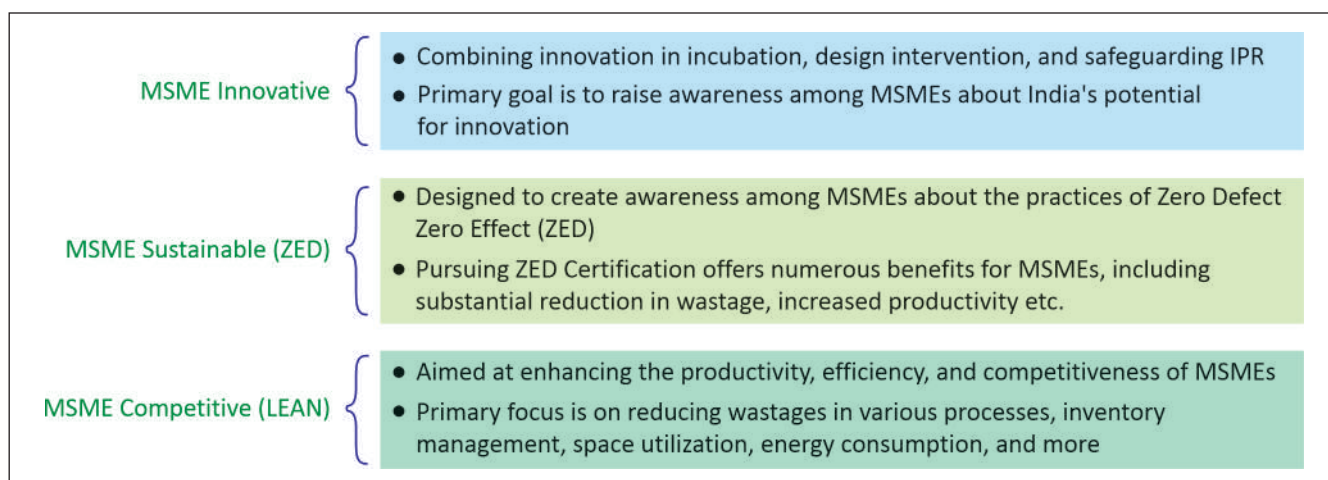


Source: India Exim Bank Research

Select Schemes favourable for ODOP-DEH

MSME Champions Scheme

The MSME Champions Scheme has been designed with three key components: 'MSME-Innovative' (focused on Incubation, Design, and Intellectual Property Rights) launched in March 2022, 'MSME-Sustainable' (ZED) launched in April 2022, and 'MSME-Competitive' (LEAN) launched in March 2023.



Micro & Small Enterprises - Cluster Development Programme (MSE-CDP)

The Micro and Small Enterprises - Cluster Development Programme (MSE-CDP) was previously known as the Small Industries Cluster Development Programme (SICDP) until 2007 and is a vital initiative by the Ministry of MSME to enhance the productivity, competitiveness, and capacity building of MSEs and their collectives across India.

It follows a cluster development approach, focusing on groups of enterprises producing similar or complementary products in identifiable areas. Clusters benefit from shared physical infrastructure and collaboration to address common challenges. The programme aims to support MSE sustainability and growth by addressing issues like technology enhancement, skill development, and market access. It establishes Common Facility Centers (CFCs) and Infrastructure Development Centres (IDCs) to provide essential services for MSEs.

As on 11th July 2023, 95 CFCs have been completed in India, 116 are ongoing and 222 have been approved. Further, for IDC projects, 206 have been completed, while 129 are ongoing and 335 have been approved.

Pradhan Mantri Formalisation of Micro Food Processing Enterprises (PMFME) Scheme

The PMFME scheme was launched in India to address the challenges faced by the unorganized food processing sector. This sector comprises around 25 lakh informal enterprises, contributing significantly to employment and value addition. However, limited access to modern technology, machinery, quality control systems, and marketing skills hinder its development.

The PMFME scheme aims to enhance the competitiveness of existing micro-enterprises, promote formalization, and support Farmer Producer Organizations, Self Help Groups, and Producers Cooperatives in the food processing sector.

ODOP approach is also a part of this scheme. With a proposed outlay of ₹10,000 crore over five years (2020-21 to 2024-25), the scheme will provide credit-linked subsidies and foster the development of common infrastructure to boost the sector's growth.

Efforts by Select States

Uttar Pradesh

Uttar Pradesh was the first State in India to launch the ‘One District One Product’ (ODOP) scheme in 2018, recognizing the immense significance of the MSME sector in its economy. The State is a major contributor to handicraft, carpet, and leather exports in the country. Each district in Uttar Pradesh specializes in unique products, and the scheme aims to preserve and develop local crafts, boost employment, improve product quality, and promote these products through branding and packaging.

The ODOP scheme prioritizes products with potential for generating greater employment and development. The government has taken various initiatives, including creating databases, providing training, conducting research, and formulating micro plans for product development and marketing. The scheme showcases the state’s rich cultural heritage, fosters economic growth, and empowers local artisans and workers.

Maharashtra

Maharashtra, a highly industrialized state with a 14% share in India’s GDP, is a key player in the country’s economy. It had a contribution of 16% to India’s total exports in FY 23. In 2022, the government released the ‘One District One Product’ (ODOP) booklet to promote specific products from all 36 districts of Maharashtra in the international market. The government identified 131 products under this initiative.

The ODOP Promotion Strategy involves assessing infrastructure readiness, promoting products through GI tagging, and improving the state’s ranking in the Export Preparedness Index (EPI). Maharashtra actively collaborates with export organizations, trade bodies, and embassies for market outreach, creating forward linkages, and establishing global value chain arrangements. The state aims to design growth strategies for market expansion, market access, and international tie-ups, boosting its export potential and strengthening its position in the global market.

Telangana

As part of the Pradhan Mantri Formalisation of Micro Food Processing Enterprises (PMFME) scheme’s One District One Product (ODOP) approach, the Telangana State Food Processing Society has identified specific food products for each district in Telangana. The state government’s guidelines focus on providing support for processing agricultural products, reducing wastage, ensuring proper assaying, and enhancing storage and marketing facilities.

The scheme prioritizes providing capital investment support to existing individual micro-units engaged in producing ODOP products. However, existing units manufacturing other products will also receive assistance. For groups processing products other than ODOP items, support will be granted only to those with sufficient technical, financial, and entrepreneurial capabilities. New units, whether individual or group-based, will receive support exclusively if dealing with ODOP products.

The list of ODOP products in Telangana includes various items such as soya-based products, chillies, mango, scented rice, groundnut-based products, rice-based products, millets, and snacks, among others. Additionally, support for common infrastructure and marketing initiatives will be exclusively allocated to ODOP products, although products from non-ODOP districts may also be considered for marketing and branding support at the State or regional level.

Gujarat

In July 2023, the Ministry of Commerce & Industry collaborated with the Government of Gujarat to promote indigenous crafts and artisans as part of the One District One Product (ODOP) program.

Gujarat, with 33 districts, offers a diverse range of 68 unique products, including traditional crafts and agricultural goods.

The collaboration aims to drive consumers towards emporia, boosting sales, and increasing the visibility of Gujarat's products at the national level. Garvi Gujarat Bhawan has also integrated ODOP products into its interiors, providing a better showcase for Gujarat's handicrafts.

Himachal Pradesh

In alignment with its draft export policy released in 2023, Himachal Pradesh is making significant strides to foster a robust ecosystem for promoting exports. The state has established a State Level Export Promotion Committee and District Level Export Promotion Committees for all 12 districts. These committees identify export potential, gaps, and challenges in their respective districts and conduct outreach programs to support exporters.

Himachal Pradesh has also identified potential export products under the ODOP approach, along with specific challenges and proposed interventions. For instance, in Una district, the focus is on promoting light engineering and addressing raw material challenges through training initiatives.

To further facilitate export growth, Himachal Pradesh is setting up a dedicated State-level Export Promotion Cell (HPEPC). This cell will coordinate export-oriented programs, collaborate with trade organizations, and provide marketing assistance to export-oriented industries. Capacity-building workshops will enhance export knowledge, and a B2B exchange will facilitate online trading for small and micro units. The state plans to offer various incentives covering patent assistance, testing and certification, infrastructure development, freight incentives, market assistance, and branding GI products to support exporters and boost export growth from the region.

Key Learnings from the World

Japan

The One Village One Product (OVOP) Movement, originating in Japan in 1979, has been a successful model for regional economic revitalization. It emerged in response to the challenges faced by rural areas due to Japan's shift from agriculture to industrialization. OVOP's approach focused on transforming local products into competitive offerings in local and global markets while preserving the unique cultural and resource aspects of each village. This movement proved effective in improving village economies, enhancing local income, and fostering social solidarity. It prioritized human resource development and preserving social values, promoting a collective, cooperative mindset within the community.

OVOP's success lies in prioritizing social values over mere economic gains, aiming to enhance life satisfaction and happiness among citizens. Regular seminars and workshops engage villagers in discussions about their community's development, nurturing a sense of belonging and camaraderie.

India's ODOP project can draw valuable lessons from Japan's experience, fostering a sense of pride and identity in its communities while promoting sustainable economic growth and social cohesion.

Thailand

The One Tambon One Product (OTOP) program in Thailand is similar to the Japanese OVOP movement but follows a top-down approach initiated by the government in 2001. It aims to enhance national competitiveness, revitalize the local economy, and alleviate poverty, especially in rural areas, by promoting domestic demand. The Thai government's strong commitment and support, extensive assistance in knowledge and technology, and access to markets have contributed to OTOP's success. Coordination, strategic planning, and collaboration with various stakeholders have been vital in establishing OTOP as a benchmark for quality products.

As India explores the ODOP project, it can draw valuable insights from Thailand's OTOP experience. Learning from the effective top-down approach, strategic coordination, and collaboration with stakeholders, India can implement its district-based program with a focus on poverty alleviation, economic revitalization, and fostering local pride and creativity.

Mexico

The Pueblos Mágicos (Magical Towns) policy in Mexico, launched in 2001, aims to promote and revitalize villages and towns with rich cultural heritage, natural beauty, and historical significance. It encourages tourism beyond major cities and beaches, diversifying the country's tourism offerings and spreading economic benefits to rural areas. The selection process involves competitive applications from towns meeting specific criteria, including population size, proximity to well-connected cities, and unique cultural or natural characteristics.

The program has been successful in boosting tourism, creating job opportunities, and preserving Mexico's cultural diversity. However, challenges include balancing tourism demands with cultural preservation and ensuring sustainable development. Nevertheless, the Pueblos Mágicos initiative serves as an exemplary model for promoting rural tourism and revitalizing lesser-known towns.

India's ODOP project can also draw valuable learning from Mexico's Pueblos Mágicos initiative, leveraging the unique characteristics of its districts to promote sustainable tourism and economic growth while preserving and celebrating local culture and heritage.

Philippines

The "One Town, One Product" (OTOP) program in the Philippines, launched in 2004, has been a successful rural economic development initiative. The program brings together local government units, national government agencies, and the private sector to support and empower local communities.

The success of OTOP can be attributed to the convergence of services provided by various stakeholders, including business counseling, training, product design, technology assistance, and marketing support. Key factors contributing to its success include the dedication of local governments, the preservation of local culture and traditions, the abundance of local talent and skills, a ready market for products, and effective government service convergence.

The Department of Trade and Industry (DTI) plays a vital role by aligning OTOP with various industry clusters to foster innovation and global competitiveness among enterprises. Mass media has also been instrumental in promoting OTOP products and inspiring potential entrepreneurs.

As India embarks on its own ODOP project, it can learn from the achievements of OTOP in the Philippines. Emphasizing the importance of partnership, capacity building, and market promotion will be crucial to fostering inclusive and sustainable rural development in India's diverse districts.

Ghana

The “One District One Factory” (1D1F) initiative in Ghana was launched in 2017 with the goal of transforming the nation's economy. The primary objective is to shift the country's economic focus from raw material import and export dependency to a more sustainable model centered around manufacturing, value addition, and the export of processed goods. The program aims to utilize the abundant raw materials found in various districts to establish factories and promote industrial growth.

Operating on a private sector-led model, the 1D1F initiative empowers local entrepreneurs to establish and run factories, taking ownership of their ventures and bearing associated risks and rewards. It seeks to unlock the economic potential of each district by adding value to their natural resources and achieving a balanced distribution of industries across regions. Job creation, particularly for the youth in rural and peri-urban areas, is a central focus to improve income levels and living standards while reducing rural-urban migration.

The 1D1F program also aims to promote export-oriented growth and conserve valuable foreign exchange reserves by encouraging the production of local substitutes for imported goods. The initiative provides technical support services and collaborates with financial institutions to facilitate access to funding for viable projects. Sustainability is a core consideration, encompassing factors such as the availability of raw materials and securing markets through off-taker agreements.

India's One District One Product (ODOP) project can draw valuable lessons from experiences of these countries, fostering community pride and identity while promoting sustainable economic growth and social cohesion.

Way Forward

India's ODOP-DEH initiative is a phenomenal initiative which if well tapped and executed can provide rich dividends to the country as whole. The initiative involves collaboration between central and state governments and local stakeholders to create a conducive environment for investment and business expansion.

To succeed, the initiative must address challenges such as infrastructure development, skill-building, and digitalization. By embracing innovation and technology, India can position its districts as attractive manufacturing and export hubs on the global stage.

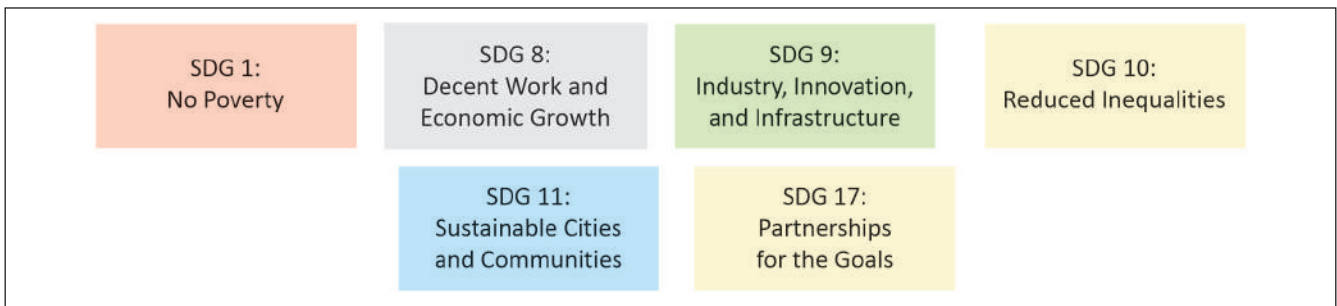
Enhancing the Effectiveness of ODOP-DEH Initiative



Source: India Exim Bank Research

In this paper the emphasis has been made to look at the mid-level districts, which have the exports between US\$ 1 billion to US\$ 5 billion and can be the next champions in the coming years, with initiatives like ODOP-DEH.

ODOP-DEH linkages with SDGs



The programme has the potential to harness the nation's cultural diversity while tapping the potential of the various districts leading to a sustainable economic growth. The study is also well aligned with the Sustainable Development Goals and captures 6 the 17 identified ones.

ODOP-DEH has the potential to facilitate India's aspirations to achieve a USD 2 trillion export by 2030, while promoting inclusive development by empowering local populations with employment opportunities and improved living standards.

Background

Cultural diversity of India is a key hallmark which is respected across the world. There are different kinds of terrains, crops, foods, climate, etc., with diverse community traditions and economic pursuits in India. People in various regions of the country possess unique skills and expertise in agriculture, handicrafts, jewelleryes, textiles, and other related products, evolved through several generations. These skills are often connected with traditions, practices, and culture, to produce the goods associated with geographic area. Individuals with traditional talents, such as carpenters, clay pot makers, blacksmiths, etc., have lived in Indian communities for generations. These abilities encourage community involvement in addition to reflecting the cultural history of the communities.

In 1979, the concept of promoting a competitive and distinctive product from a specific area to stimulate sales and improve the local population's standard of living gained attention as the "One Village One Product" (OVOP) initiative in Japan. The guiding principles of OVOP emphasized thinking locally, acting globally, self-reliance, and nurturing creativity through human resource development.

This model was later adopted by several other countries with different names such as One Tambon One Product (Thailand, 2001), One Town One Product (Philippines, 2004), One District One Factory (Ghana, 2017), etc., each experiencing varying levels of success.

Importance of Focusing on Select Products

Focusing on only specific products to increase exports or the economic size of a particular region can yield significant benefits. By concentrating efforts and resources on a limited number of products, a region can develop specialization and competitive advantage in those areas. Specialization allows businesses and artisans to fine-tune their skills, knowledge, and production processes, leading to higher quality and more competitive products. This, in turn, enhances the region's ability to capture domestic and international markets. By becoming known for their expertise in specific products, regions can differentiate themselves from competitors and attract buyers who seek the unique qualities and craftsmanship associated with those goods.

Exhibit 1.1: Benefits of Focusing on Select Products

Specialization and competitive advantage
Economies of scale and cost efficiency
Regional brand and market identity
Development of value chains and industry clusters

It also enables economies of scale and cost efficiency. When a region concentrates its resources and production capabilities on a limited range of products, it can achieve higher production volumes, leading to economies of scale. Increased production levels allow for cost reductions through bulk purchasing of raw materials, streamlined production processes, and improved supply chain management. As costs decrease, the region becomes more price-competitive in the market, leading to increased demand and exports.

Other than this, concentrating on specific products provides the opportunity to build a strong regional brand and market identity. When a region becomes synonymous with a particular product or craft, it gains a distinct advantage in marketing and promotion efforts. A focused approach allows for targeted marketing campaigns that highlight the unique features, heritage, and cultural significance of the products. By creating a strong brand around these products, the region can attract buyers, tourists, and investors who are seeking authentic and exceptional goods. This branding strength can significantly contribute to increasing exports and growing the local economy. For instance, Darjeeling tea today is sold across the world and at the same time, its tea gardens have become a major source of tourism.

Finally, focusing on a limited number of products encourages the development of robust value chains and industry clusters within the region. A value chain encompasses all the stages involved in the creation, production, and distribution of a product. When a region specializes in specific products, it creates an environment that fosters collaboration and cooperation among different actors in the value chain. This collaboration leads to the formation of industry clusters where suppliers, manufacturers, designers, and service providers work together, sharing knowledge, innovation, and resources. The presence of a strong value chain and industry clusters enhances the efficiency, productivity, and competitiveness of the region's products, ultimately contributing to increased exports and economic growth.

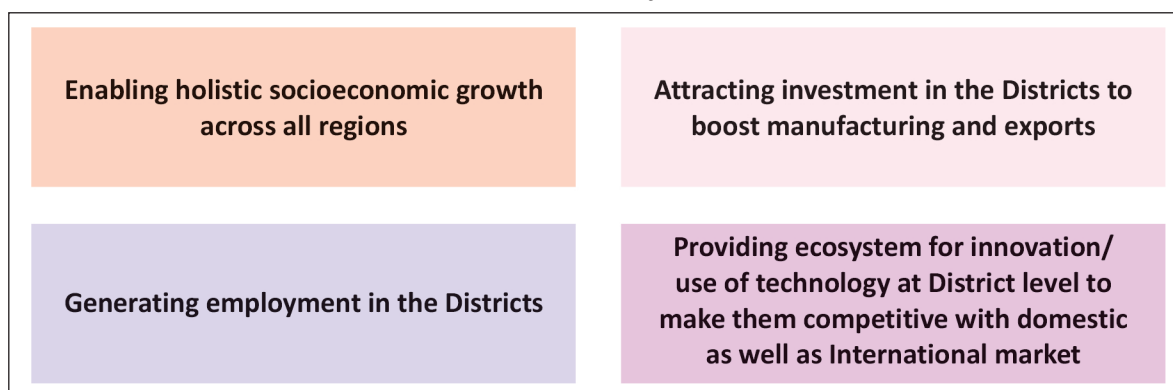
One District One Product (ODOP) Initiative

In 2018, the Government of Uttar Pradesh launched the ODOP initiative, as a step towards its goal of US\$ 1 trillion economy. The project was started to promote regional growth by leveraging the expertise, skills, and capacity of that specific area. In 75 districts of Uttar Pradesh, the plan attempted to establish industrial centers, each focusing on a certain traditional industry (such as leather products from Agra and jaggery from Ayodhya).

Given the success of the program in Uttar Pradesh, the Government of India also adopted the ODOP initiative. As of March 2023, out of 766 districts in India, ODOP has been approved for 713 districts of 35 States/ UTs under Centrally Sponsored "Pradhan Mantri Formalisation of Micro Food Processing Enterprises (PMFME) Scheme" implemented by Ministry of Food Processing Industries (MoFPI).

ODOP offers an opportunity to incorporate, enhance, and streamline local products that hold immense importance not just in terms of their economic impact (such as job creation, value generation, and trade) but also in the sociocultural sphere.

Exhibit 1.2: Aims and Objectives of ODOP



Source: Government of India

ODOP has been merged with 'Districts as Export Hubs Initiative' (DEH) being run by the Department of Commerce (DoC) with Department for Promotion of Industry and Internal Trade (DPIIT) as a major stakeholder.

The DEH Initiative emphasises the necessity of harnessing the potential and diversity of each area of the nation to transform them into export centres. The Department of Commerce (DoC), through the Directorate General of Foreign Trade (DGFT), has worked directly with the States/UTs and the districts to develop institutional frameworks to support the export of certain goods and services from the districts. Under the ODOP-Districts as Export Hubs initiative, products with export potential have been identified from all 765 districts of the country.

Box 1: India Exim Bank's Approach to DEH

Exim Bank's Grassroots Initiatives for Development (GRID) program plays a pivotal role in realizing the vision of economic prosperity for rural India and the informal sector through the One District One Product (ODOP) and District as Export Hub (DEH) initiatives. The program focuses on identifying and nurturing products and services with substantial export potential across districts.

The bank's approach begins with the identification of potential districts that align with the objectives of ODOP/DEH initiatives. Research and data analysis are instrumental in shortlisting districts with significant export potential. Once districts are finalized, Exim Bank engages with district authorities, product-related associations, and District Industry Centres to build partnerships and ensure effective implementation of ODOP/DEH initiatives.

Preliminary meetings with identified associations and industry representatives introduce Exim Bank's role and gather crucial data related to products and associations. Continuous communication with district representatives helps in comprehensively understanding gaps and challenges faced by associations in promoting their products.

Based on the collected data, Exim Bank conducts a gap analysis to identify critical challenges affecting the growth of ODOP/DEH products. Suitable interventions, such as capacity-building programs, market linkages, export promotion, and technology upgrades, are proposed to address these challenges effectively.

On-ground interactions with product associations, government officials, and stakeholders further deepen the understanding of challenges and pave the way for collaborative solutions. This approach ensures that interventions are tailored to the specific needs of the products and districts.

Throughout the implementation of the support program, Exim Bank establishes a monitoring and evaluation system to track the progress of ODOP initiatives continually. This ongoing assessment helps in adapting strategies and interventions as required.

For FY 23, the bank has identified 67 products from 62 districts in 28 states, including two union territories. This strategic approach aims to empower rural India and the informal sector by fostering economic growth, capacity-building, and market access for diverse products and services.

Looking ahead, Exim Bank's future plans within the ODOP/DEH framework involve the continued identification of products and services with export potential, fostering partnerships, enhancing capacity-building initiatives, and expanding market access. The bank remains committed to empowering districts, artisans, entrepreneurs, and various stakeholders to seize growth opportunities and contribute to India's economic advancement. Through its structured approach and collaborative efforts, Exim Bank continues to support the nation's vision of inclusive and balanced regional development.

New Foreign Trade Policy, 2023

The new foreign trade policy (FTP) launched in March 2023 laid a special emphasis on DEH.

Considering India's goal of achieving US\$ 2 trillion in exports by 2030, the role of MSMEs and local artisans from different districts is anticipated to be pivotal in attaining this target, as highlighted in the new FTP. The latest FTP outlines a "bottom-up approach" where the central government will identify approximately 100 districts across the country and transform them into export hubs.

In order to promote exports at the district level and hasten the development of the local trade ecosystem, the FTP seeks to forge partnerships with state governments and advance the Districts as Export Hubs (DEH) project. A systematic institutional apparatus, including the State Export Promotion Committee (SEPC) and the District Export Promotion Committee (DEPC) at the state and district levels, respectively, will be put in place to accomplish this. These committees will concentrate on discovering goods and services that are export-worthy and on resolving issues unique to each district. Aside from that, district-specific export action plans will be created to include strategies designed to encourage the export of designated goods and services in each area.

Scope of the Study

The One District One Product (ODOP)-Districts as Export Hubs (DEH) initiative in India holds significant importance for regional growth, economic development, and the preservation of cultural heritage. By focusing on specific products and crafts within designated districts, the initiative aims to leverage the unique skills, traditions, and resources of each region. This targeted approach offers numerous advantages in terms of economic expansion.

This chapter provided an overview of the significance of district-level development and introduces the ODOP-DEH initiative. The subsequent sections of the Study will delve deeper into the exports of major states at the district level, identifying key products. The analysis will extend beyond the predetermined ODOP-DEH categories, providing fresh insights into the exports at a more granular level and exploring global demand for these products.

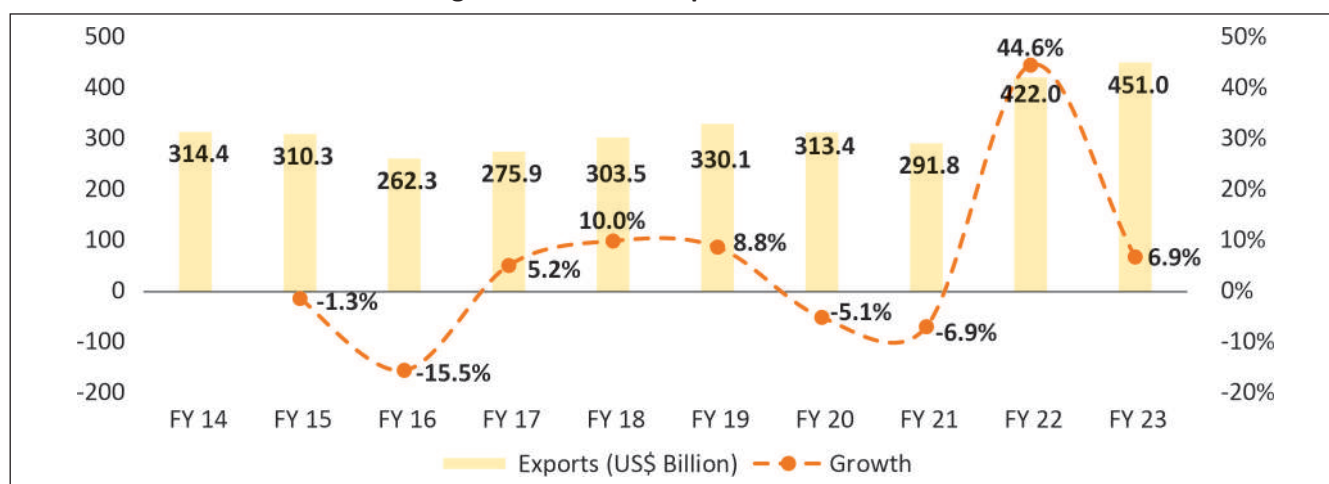
Additionally, the Study will examine case studies that highlight successful implementations of programs like ODOP, across the world.

2

Analysis of District-Level Exports

India's exports were recorded at US\$ 451 billion in FY 23, highest ever for India. The exports registered a decade ago in FY 14 were US\$ 315 billion. The average annual growth rate in India's exports, during the last decade, was 5.2%. It may be noted that India's exports have performed extremely well during the last two years, despite the global headwinds.

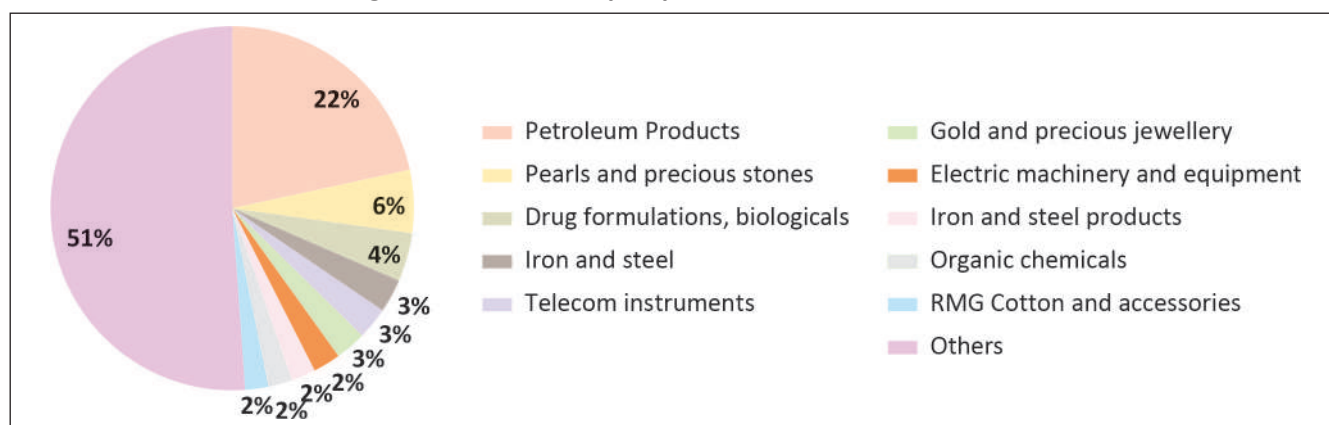
Figure 2.1: India's Exports: FY 14-FY 23



Source: DGCIS; India Exim Bank Research

In FY 23, almost 22% of India's exports were of petroleum products. This was followed by pearls and precious stones (5.6%), drug formulations, biologicals (4.3%), iron and steel (3%), and telecom instruments (2.8%).

Figure 2.2: India's Top Exported Commodities: FY 23

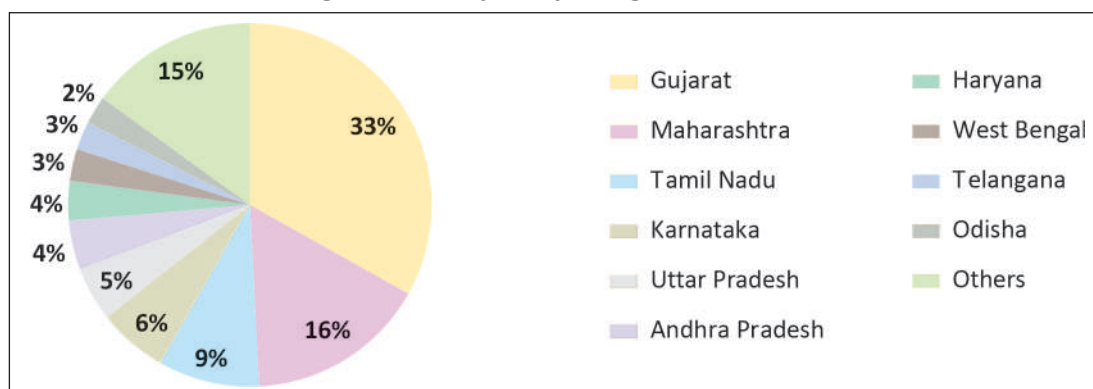


Source: DGCIS; India Exim Bank Research

The top five commodities accounted for 37% of India's exports in FY 23. However, the concentration of exports is even bigger when it comes to the shares of the top states. The top five states contributed to almost 70% of India's exports in FY 23, and the top two, Gujarat (33.1%) and Maharashtra (16.1%) together accounted for almost half of India's exports in FY 23.

A detailed tabular analysis of products exported from major states at HS 6-digit level, along with their global demand, has been covered in the annexure.

Figure 2.3: Major Exporting States: FY 23



Source: DGCIS; India Exim Bank Research

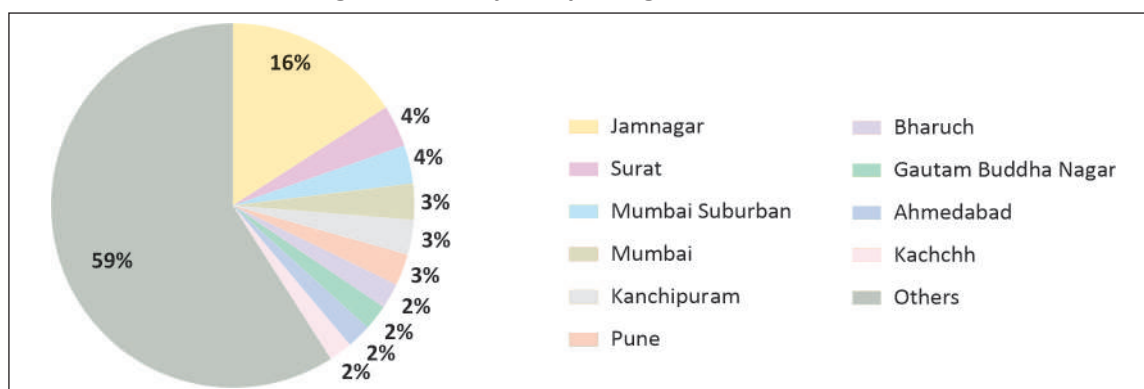
This highlights the role that the states will have to play in propelling India's exports in the coming years. In fact, it becomes more important to focus on the specific districts which have the capability to push the state's exports. An even narrower approach would involve identifying specific champion products from those districts which can enhance the overall exports of the districts and thus of the state as well.

This is, in fact, the rationale behind the ODOP-DEH initiative.

District Level Exports and Methodology

Out of over 760 districts in India, 673 districts exported products in FY 23, i.e., 88.5% of the districts, as per the Ministry of Commerce and Industry, with the highest exports being from Jamnagar, which accounted for 15.9% of India's exports. The top 10 exporting districts contributed to almost 41% of India's exports in FY 23, signifying the high concentration of exports in a few districts.

Figure 2.4: Major Exporting Districts: FY 23



Source: MOCI; India Exim Bank Research

While it is evident from the data that less than 2% of the districts in India contribute to more than 41% of India's exports – there remains a significant scope to tap the 'missing middle districts' under ODOP-DEH initiative.

As a result, the Study identifies and focuses on districts which have exports between US\$ 1 billion to US\$ 5 billion. There are 59 districts from 20 states/UTs which fall under this bracket.

Together, these 59 districts account for 29% of India's exports (or US\$ 130.7 billion of exports) as in FY 2023 and have been classified as 'missing middle districts' in this Study. It becomes extremely important to target these 59 districts, to provide a major jump to India's exports in the medium to long run.

The table below puts together these 59 districts, along with their states and exports in FY 23. The highest number of shortlisted districts are from the state of Gujarat (7 districts), followed by Andhra Pradesh (6), Maharashtra (6), Odisha (5), Tamil Nadu (5), Haryana (4), Telangana (4), etc. The highest combined exports for the shortlisted districts are from the states of Gujarat (US\$ 18.8 billion), Tamil Nadu (US\$ 14.2 billion), Maharashtra (US\$ 13.9 billion), Andhra Pradesh (US\$ 11.1 billion), and Telangana (US\$ 9.6 billion).

Table 2.1: Identified Districts with Export Potential

State		District	Exports in FY 2023 (US\$ Million)
Andhra Pradesh	1	East Godavari	3909.7
	2	Chittoor	1966.5
	3	Anantapur	1459.9
	4	Guntur	1358.1
	5	SPS Nellore ¹	1358.1
	6	West Godavari	1068.6
Bihar	1	Begusarai	1632.2
Chhattisgarh	1	Raipur	1487.1
Dadra And Nagar Haveli	1	Dadra And Nagar Haveli	3902.0
Delhi	1	South West	2871.9
	2	New Delhi	2449.1
Goa	1	South Goa	1472.4
Gujarat	1	Vadodara	4452.0
	2	Valsad	4436.3
	3	Rajkot	2709.8
	4	Mahesana	2574.8
	5	Morbi	2313.7
	6	Panch Mahals	1334.5
	7	Gandhinagar	1037.4
Haryana	1	Faridabad	2403.2
	2	Karnal	2170.1
	3	Sonipat	1655.4
	4	Panipat	1530.7

¹ Sri Potti Sriramulu Nellore District (SPS Nellore)

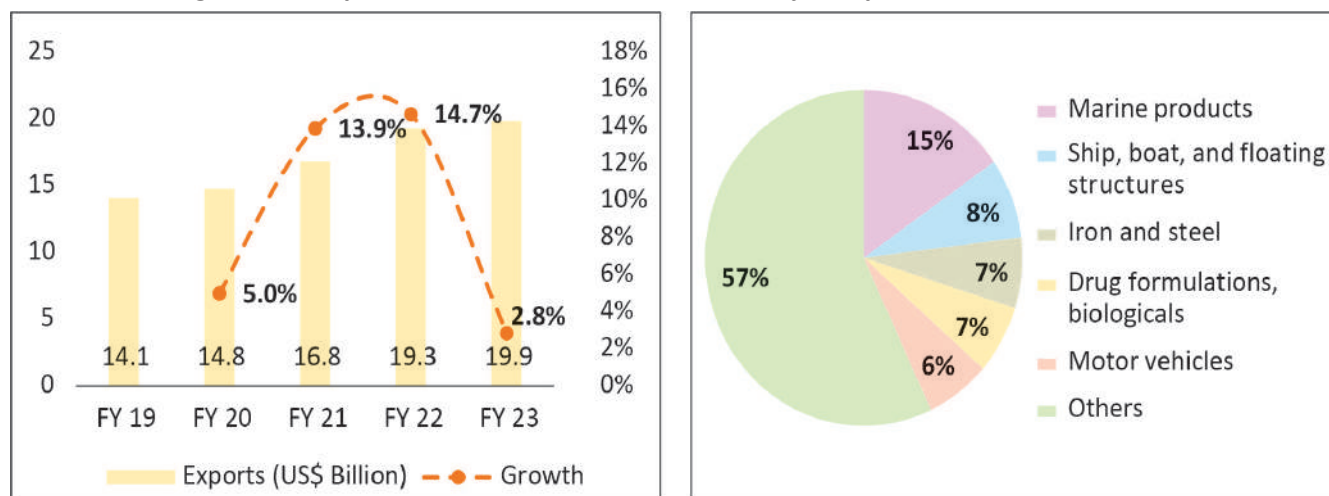
State		District	Exports in FY 2023 (US\$ Million)
Himachal Pradesh	1	Solan	1775.9
Karnataka	1	Bengaluru Rural	2957.8
	2	Kolar	2149.6
Kerala	1	Ernakulam	2457.1
Madhya Pradesh	1	Indore	2241.1
	2	Dhar	1371.5
Maharashtra	1	Palghar	3415.0
	2	Aurangabad	3108.4
	3	Nashik	2966.3
	4	Nagpur	1634.9
	5	Satara	1609.2
	6	Kolhapur	1165.6
Odisha	1	Jharsuguda	3751.3
	2	Anugul	1139.2
	3	Sambalpur	1114.1
	4	Jagatsinghapur	1081.1
	5	Jajapur	1068.4
Punjab	1	Ludhiana	2427.1
Rajasthan	1	Jaipur	3386.1
	2	Alwar	2013.5
	3	Jodhpur	1075.2
Tamil Nadu	1	Tiruppur	4530.9
	2	Coimbatore	3180.0
	3	Thiruvallur	2882.2
	4	Krishnagiri	2470.1
	5	Vellore	1199.8
Telangana	1	Medchal Malkajgiri	2946.2
	2	Sangareddy	2502.1
	3	Hyderabad	2150.3
	4	Ranga Reddy	2013.4
Uttar Pradesh	1	Ghaziabad	1594.1
	2	Moradabad	1227.2
	3	Kanpur Nagar	1119.1
West Bengal	1	Kolkata	4859.7
	2	Howrah	1372.5
	3	Purba Medinipur	1166.6
Total			130676.2

Source: MOCI; India Exim Bank Research

2.1. Andhra Pradesh

The total exports from Andhra Pradesh have increased from US\$ 14.1 billion in FY 19 to US\$ 19.9 billion in FY 23, recording an AAGR of 9.1%. The state's share in India's exports has marginally improved from 4.3% to 4.4%, during this period. Over 15% of Andhra Pradesh's exports were of marine products in FY 23. Other important products were ship, boat, and floating structures (7.7%), iron and steel (6.8%), drug formulations, biologicals (6.6%), and motor vehicles (6.6%).

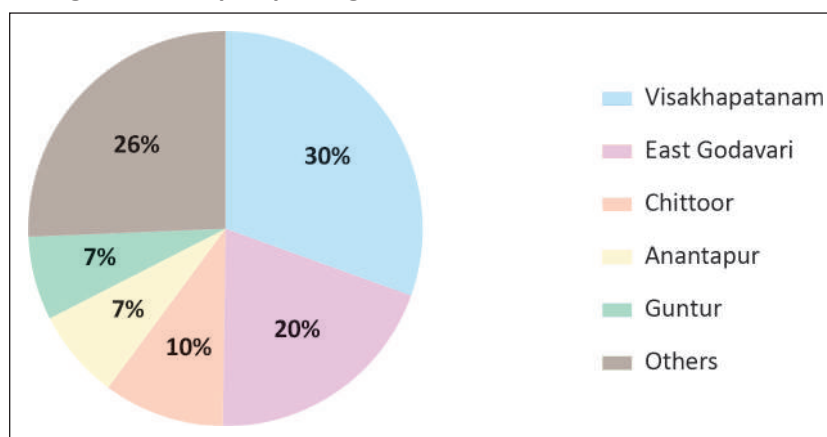
Figure 2.5: Exports from Andhra Pradesh and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, Vishakhapatnam alone contributed to more than 30% of Andhra Pradesh's total exports in FY 23. Other important districts are East Godavari, Chittoor, Anantapur, and Guntur. The top five districts together accounted for almost 75% of Andhra Pradesh's exports in FY 23.

Figure 2.6: Top Exporting Districts of Andhra Pradesh: FY 23



Source: Ministry of Commerce and Industry (MOCI); India Exim Bank Research

As per the Study's methodology, the identified districts in Andhra Pradesh include East Godavari, Chittoor, Anantapur, Guntur, SPS Nellore, and West Godavari.

East Godavari

The total exports from East Godavari were US\$ 3.9 billion in FY 23. The top exported products from the district in FY 23 were light vessels (25%), parboiled rice (14.7%), whiteleg shrimp (13.8%), cane or beet sugar and chemically pure sucrose, in solid form (10.5%), rice other than parboiled (5.7%), frozen or preserved shrimp (3%), amongst others.

Table 2.3: Top Exported Products from East Godavari

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
89059090	Other light-vessels, fire-floats, floating cranes under HS 8905	984.4	1563.3	25.2%	63.0%
10063010	Parboiled rice	572.9	2994.2	14.7%	19.1%
03061720	Whiteleg shrimp	541.4	4083.3	13.8%	13.3%
17019990	Cane or beet sugar and chemically pure sucrose, in solid form	410.2	2804.8	10.5%	14.6%
10063090	Rice except parboiled rice (excl. Basmati rice)	224.1	2203.5	5.7%	10.2%
89040000	Tugs and pusher craft	191.9	337.1	4.9%	56.9%
10064000	Broken rice	178.1	983.5	4.6%	18.1%
89069000	Other vessels, incl. lifeboats	176.2	550.1	4.5%	32.0%
16052900	Frozen or preserved shrimp	116.4	574.6	3.0%	20.3%
89052000	Floating or submersible drilling or production platforms	102.8	352.3	2.6%	29.2%
Total		3909.7	-	100.0%	0.9%

Source: MOCI; DGCIS; India Exim Bank Research

Overall, vessels, rice, and shrimps are the three most important export items from the East Godavari district. Under the district as export hubs (DEH) initiative, identified products include coir and coir products, rice, sugar, frozen shrimps, coir fibre and coir pith, and Uppada Jamdani sarees.

Chittoor

Chittoor's total exports were almost US\$ 2 billion in FY 23 with the top exported item being 'motor vehicles with gross vehicle weight not exceeding 5 tonnes' contributing to 12% of Chittoor's exports. Other top exports include coaches powered from external source of electricity (8.7%), lead-acid accumulators (6.8%), alloyed aluminium ingots (4.7%), amongst others.

Table 2.4: Top Exported Products from Chittoor

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87042100	Motor vehicles with gross vehicle weight <= 5 t	234.6	485.8	11.9%	48.3%
86031000	Self-propelled railway or tramway coaches powered from an external source of electricity	171.4	174.7	8.7%	98.1%
85071000	Lead-acid accumulators of a kind used for starting piston engine	134.2	215.3	6.8%	62.3%
71081200	Gold, incl. gold plated with platinum, unwrought, for non-monetary purposes	123.4	145.8	6.3%	84.7%
76012010	Aluminium ingots, alloyed	92.1	538.7	4.7%	17.1%
20079910	Jams, Fruit Jellies, Marmalades Etc. Of Mangoes	64.8	186.2	3.3%	34.8%
71069220	Semi-manufactured silver bars	55.0	55.8	2.8%	98.6%
85044090	Other static converters	51.5	797.2	2.6%	6.5%
40112010	Radial tyres used on buses/lorries	48.2	505.7	2.4%	9.5%
73170019	Other nails, tacks, drawing pins, corrugated nails, staples and similar articles of iron or steel	47.6	52.4	2.4%	90.9%
Total		1966.5	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

The products identified under DEH initiative are polished granite and granite monuments, textile and garments, mango and fruit pulp, mango, Srikalahasti Kalamkari, and Tirupathi laddu.

It may be noted that Chittoor is known for its fine varieties of mangoes with over 2 lakh hectares of mango orchards. Jams, jellies, marmalades etc. of mangoes are important export items and contributed to 3.3% of Chittoor's exports in FY 23.

Anantapur

Over 75% of Anantapur's total exports of US\$ 1.5 billion are automobiles, given that Kia company has a major plant in this district. Other important items are auto parts and garments.

Table 2.5: Top Exported Products from Anantapur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87032391	Motor cars with cylinder capacity >= 1500 cc but < 3000 cc, with only spark-ignition	540.3	1309.0	37.0%	41.3%
87032291	Motor cars with cylinder capacity >= 1000 cc but < 1500 cc, with only spark-ignition	450.2	3588.4	30.8%	12.5%
87089900	Other parts and accessories of vehicles	79.4	3189.0	5.4%	2.5%
84073410	Spark-ignition engines for motor cars of a kind used for vehicles of a cylinder capacity > 1000 cc	63.8	174.0	4.4%	36.7%
87033191	Motor cars of a cylinder capacity not exceeding 1500 cc	56.7	167.8	3.9%	33.8%
84073310	Spark-ignition engines for motor cars of a kind used for vehicles of a cylinder capacity > 250 cc but <= 1000 cc	45.8	46.8	3.1%	97.7%
87082900	Parts and accessories of bodies for tractors, motor vehicles etc.	28.6	212.3	2.0%	13.5%
61091000	T-shirts etc. of cotton	19.9	1772.1	1.4%	1.1%
87032191	Motor cars with cylinder capacity < 1000 cc, with only spark-ignition	16.3	946.4	1.1%	1.7%
61051020	Knit Shirts of cotton (Except T-shirts), other than hand crocheted	9.5	351.0	0.7%	2.7%
Total		1459.9	-	100.0%	0.3%

Source: MOCI; DGCI; India Exim Bank Research

Under DEH, the identified products include readymade garments (jeans, t-shirt, trousers etc.), MS steel tubes (MS pipes, GI pipes etc.), automobiles (cars, engines etc.), banana, pomegranate, Andhra Pradesh leather puppetry, Dharmavaram handloom pattu sarees and paavadas.

Guntur

Guntur district is famous for its Guntur Sannam which is a variety of chili pepper belonging to the capsicum species. As a result, almost 40% of Guntur's exports in FY 23 were of capsicum. In fact, 63.5% of India's exports of genus capsicum² were from Guntur.

Similarly, flue cured virginia tobacco³ comprises 24.2% of Guntur's exports and the district accounts for 60% of India's exports of this product.

Other important categories of exports are shrimps and prawns, unflavoured instant coffee, etc.

² HS Code 09042110

³ HS Code 24012010

Table 2.6: Top Exported Products from Guntur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
09042110	Of genus capsicum	534.6	1012.7	39.4%	52.8%
24012010	Flue cured virginia tobacco	328.1	562.5	24.2%	58.3%
03061720	Whiteleg shrimp	89.0	4083.3	6.6%	2.2%
21011120	Instant coffee not flavoured	86.4	360.8	6.4%	23.9%
24012040	Burley tobacco, partly or wholly stemmed or stripped	78.4	159.2	5.8%	49.2%
24011090	Other tobacco, unstemmed or unstripped	18.9	38.7	1.4%	48.7%
52051210	Grey single cotton yarn, of uncombed fibres, with a linear density of 232.56 decitex to < 714.29 decitex	16.7	195.6	1.2%	8.5%
09042211	Chilly powder of the genus Capsicum or of the genus Pimenta	16.1	147.5	1.2%	10.9%
03061740	Frozen black tiger shrimp (PENAEUS MONODON)	14.4	268.7	1.1%	5.3%
21011200	Preparations with a basis of extracts, essences or concentrates of coffee	14.2	15.9	1.0%	89.5%
Total		1358.1	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Under DEH, the products identified include tobacco, cotton yarn, chillies, turmeric, textiles, and guntur sannam chilliG

SPSR Nellore

The exports from SPSR Nellore were valued at US\$ 1.4 billion in FY 23. Out of the total exports, 28.5% were contributed by vannamei shrimp. Interestingly, almost 10% of India's exports of this item come from SPSR Nellore.

Table 2.7: Top Exported Products from SPS Nellore

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
03061720	Whiteleg shrimp	387.6	4083.3	28.5%	9.5%
30049099	Other medicaments put up for retail sale n.e.s	247.0	7629.0	18.2%	3.2%
84149090	Parts of air or vacuum pumps, gas compressors etc	115.8	459.5	8.5%	25.2%
64029990	Other footwear with outer soles and uppers of rubber or plastics	83.7	182.1	6.2%	46.0%

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
21011120	Instant coffee not flavoured	50.7	360.8	3.7%	14.1%
16052100	Shrimps and prawns, prepared or preserved, not in airtight containers	45.4	88.6	3.3%	51.2%
87089900	Other parts and accessories of vehicles	35.7	3189.0	2.6%	1.1%
85030010	Parts of generators (AC/DC)	31.5	143.9	2.3%	21.9%
30049073	Losartan	29.8	194.2	2.2%	15.4%
64041990	Other footwear with outer soles of rubber or plastics and uppers of textile materials	25.9	160.6	1.9%	16.1%
Total		1358.1	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Parts of air or vacuum pumps, gas compressors etc.⁴ is also an important export category from the district with a share of 8.5% in SPSR Nellore's total exports. Items covered under DEH for the district include Udayagiri wooden cutlery, quartz, feldspar, processed prawn/shrimp, and rice.

West Godavari

Similar to SPSR Nellore, the exports from West Godavari are heavily concentrated towards vannamei shrimp⁵ with a share of 61.2% in the district's total exports. Prepared shrimps and prawns are another major export item (share of 16%).

In fact, the vannamei shrimp from West Godavari contributes 16% of India's exports of this item and the preserved shrimp from West Godavari contributes 30% to India's exports.

Human hair exports are also significant from the district with a share of 4.4%. Almost 10% of India's exports of this item come from West Godavari.

Unflavoured instant coffee had a share of 3.5% in FY 23 in West Godavari's total exports.

Table 2.8: Top Exported Products from West Godavari

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
03061720	Whiteleg shrimp	654.1	4083.3	61.2%	16.0%
16052900	Frozen or preserved shrimp	171.3	574.6	16.0%	29.8%
67030010	Human hair, dressed or otherwise worked	47.0	498.5	4.4%	9.4%
21011120	Instant coffee not flavoured	37.4	360.8	3.5%	10.4%
10064000	Broken rice	30.1	983.5	2.8%	3.1%

⁴ HS Code 84149090

⁵ HS Code 03061720

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
15159091	Other fixed vegetable fats and oils of edible grade	21.2	39.8	2.0%	53.2%
03061740	Frozen black tiger shrimp (PENAEUS MONODON)	13.9	268.7	1.3%	5.2%
11081200	Starch of maize (corn)	13.8	229.0	1.3%	6.0%
10063010	Parboiled rice	9.5	2994.2	0.9%	0.3%
29039960	Napthalene, Chlorinated	8.1	8.2	0.8%	98.4%
Total		1068.6	-	100.0%	0.2%

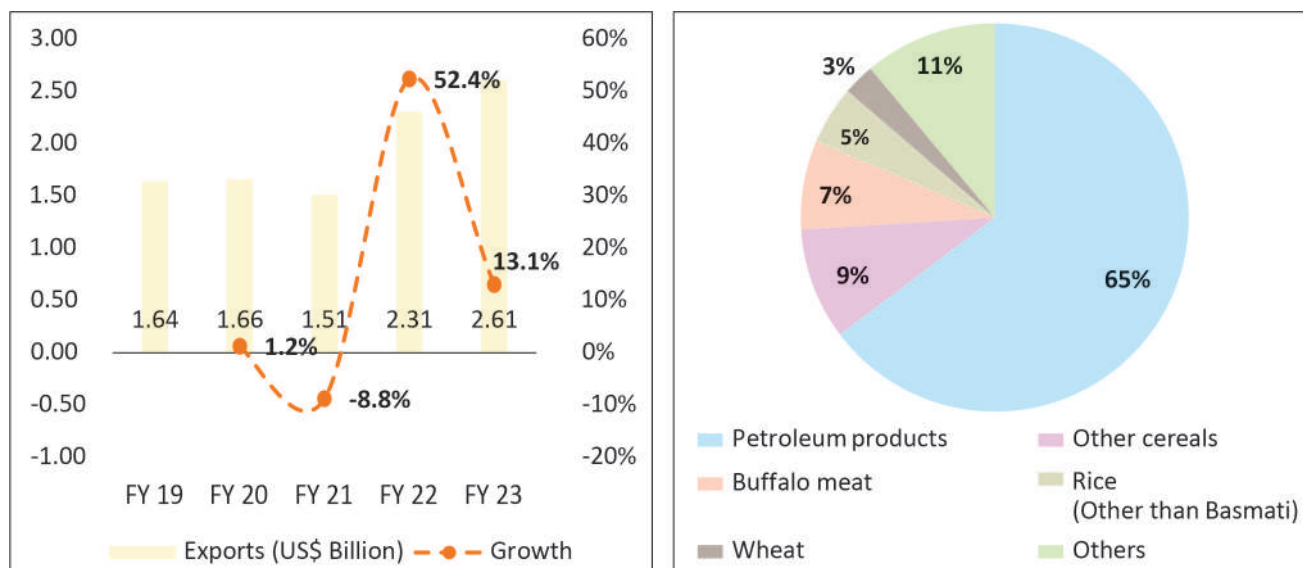
Source: MOCI; DGCIS; India Exim Bank Research

The products from the district identified under the DEH include cotton yarn, processed prawns/shrimp, aqua feed, human hair, aspirin, ceramic, sanitaryware products, cashewnut, coir pith, coffee, and crochet lace products..

2.2. Bihar

The total exports from Bihar were registered at US\$ 2.6 billion in FY 23, up from US\$ 1.6 billion in FY 19. The average annual growth rate in the exports of Bihar during this period was an impressive 14.5%. The share of Bihar in India's total exports increased from 0.50% to 0.58%, during the last five years. The top exported item from the state is petroleum products with a share of 64.7%.

Figure 2.7: Exports from Bihar and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

Like the products, the districts are also significantly concentrated with respect to the exports. Almost 63% of the exports in FY 23 were from Begusarai, the only district with exports of more than US\$ 1 billion in Bihar. Other important export districts are Araria (8.6%), Purbi Champaran (8.1%), Patna (5%), and Purnia (4.3%).

Box 2: Revitalizing Muzaffarpur's Litchi Industry: India EXIM Bank's Transformative Intervention in the ODOP/DEH Initiative

For the Muzaffarpur district of Bihar, Shahi Litchi is not merely some fruit; it symbolizes their sustenance and livelihood. Within this context, a pioneering partnership between India Exim Bank and Litchi Grower's Association of Bihar (LGAB) is shaping the narrative of litchi cultivation. This exceptional collaboration underscores the Bank's steadfast commitment to grassroots development, seamlessly aligning with the Government of India's visionary One District, One Product (ODOP) and Districts as Export Hubs (DEH) initiatives.

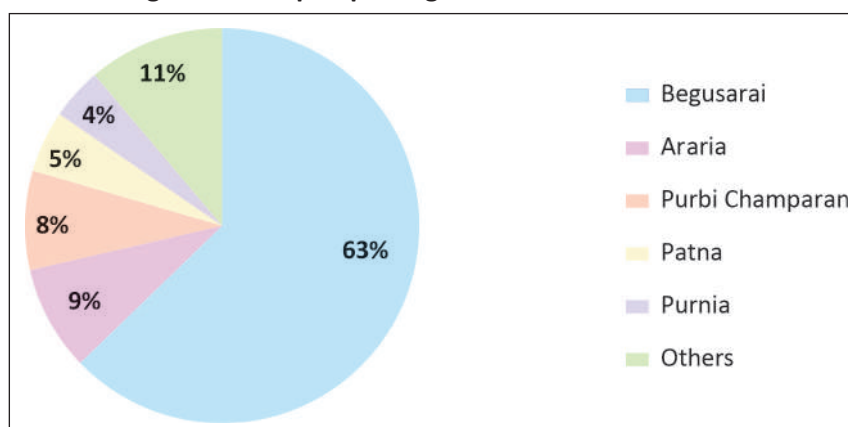
The Shahi Litchi, renowned for its sublime taste and aroma, has long been Muzaffarpur's emblem. However, the industry grappled with an array of challenges, including the fruit's abbreviated shelf life, inadequate cold chain infrastructure, affordability concerns, and logistical hurdles. These impediments not only compromised the fruit's quality and value but also hindered the region's economic advancement. Recognizing the industry's latent potential and the livelihoods at stake, India Exim Bank is making necessary interventions.

The Bank's intervention was meticulously orchestrated, centering on capacity augmentation, equipment procurement, and market diversification. Through its GRID program, the bank extended a grant of INR 43 lakhs to LGAB for the establishment of a pioneering 5-tonne per day solar-powered cold room project. This initiative sought to enhance the quality and longevity of litchis, safeguarding their flavour and appearance during transit. Additionally, the bank facilitated the acquisition of essential equipment such as tractors and mechanized/power sprayers, mitigating the challenges faced by farmers in orchard management and post-harvest processes.

The repercussions of these intervention will be far-reaching. Over 300 farmers affiliated with LGAB are poised to directly benefit from the bank's intervention. By bestowing access to specialized equipment and training, this initiative empowers farmers to enhance agricultural practices, elevate produce quality, and explore uncharted markets.

In the coming years, the bank's GRID program will continue to explore avenues for value augmentation by forging alliances with food processing entities, with the aim of producing diverse products like jams, squashes, and dried litchis. Additionally, training initiatives and collaborations with research institutions promise to unlock the potential of novel litchi varieties, further elevating the industry's commercial viability.

Figure 2.8: Top Exporting Districts of Bihar: FY 23



Source: MOCI; India Exim Bank Research

Begusarai

Begusarai is the only district that is shortlisted as part of the study. Its exports were recorded at US\$ 1.6 billion in FY 23 with a share of 63% in Bihar's total exports.

More than 99% of Begusarai's exports belong to the category of mineral fuels and oil. In fact, over 60% of its total exports are of 'High Flash High Speed Diesel Fuel'. This can be largely attributed to the presence of Barauni Refinery of IOCL in the district.

The products identified under DEH are mango, litchi, maize, soyabean, and milk products.

Table 2.9: Top Exported Products from Begusarai

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
27101949	High flash high speed diesel fuel conforming to Standard IS 16861	1001.2	8513.2	61.3%	11.8%
27101241	Motor gasoline conforming to Standard IS 2796	355.1	14905.8	21.8%	2.4%
27111990	Other gaseous hydrocarbons, liquefied, n.e.s.	166.0	470.0	10.2%	35.3%
27101920	Aviation turbine fuel (ATF)	83.8	17258.9	5.1%	0.5%
27101932	Kerosene conforming to Standard IS 1459	7.3	9.3	0.4%	78.6%
27101229	Full Range Naphtha	6.3	704.7	0.4%	0.9%
27131190	Other petroleum coke, non-calcined	3.4	24.5	0.2%	13.7%
10059011	Yellow maize (excl. seed for sowing)	1.5	389.3	0.1%	0.4%
10059019	Other maize (excl. seed for sowing)	1.5	305.5	0.1%	0.5%
10063010	Parboiled rice	1.4	2994.2	0.1%	0.0%
Total		1632.2	-	100.0%	0.4%

Source: MOCI; DGCI; India Exim Bank Research

2.3. Chhattisgarh

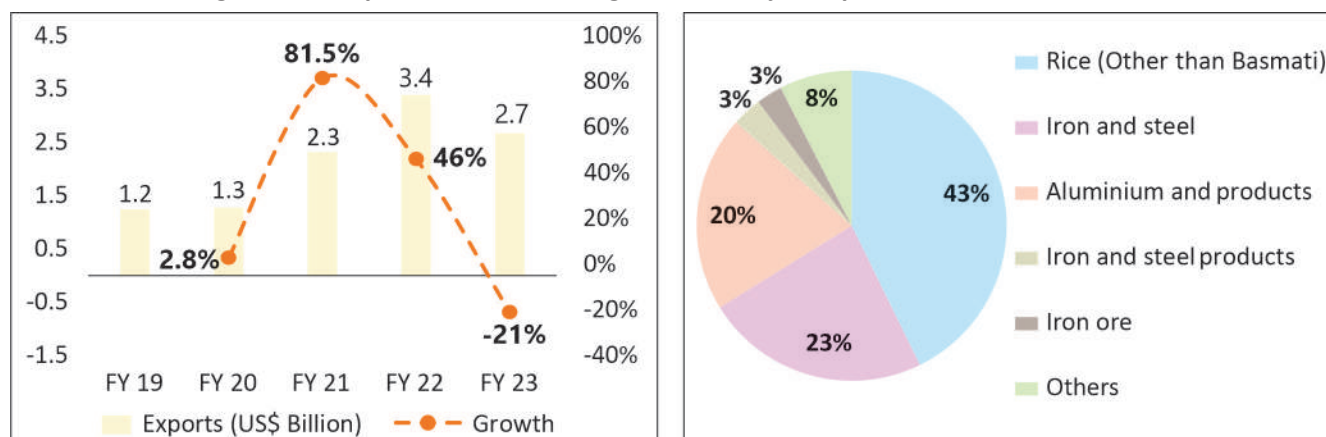
The exports from Chhattisgarh have displayed an impressive growth trajectory in the last five years with exports increasing from US\$ 1.2 billion in FY 19 to US\$ 2.7 billion in FY 23, thereby registering an average growth rate of more than 27%.

Given that Chhattisgarh has a massive iron and steel industry, and the prices of steel were high during FY 21 and FY 22, the same is reflected in the export value.

While the top item exported from the state in FY 23 was rice with a share of 42.7%, the other major export items were iron and steel, aluminium and parts, products of iron and steel, and iron ore.

The top three exported items account for almost 90% of the state's exports. During the last five years, the share of Chhattisgarh in India's total exports improved from 0.38% to 0.59%.

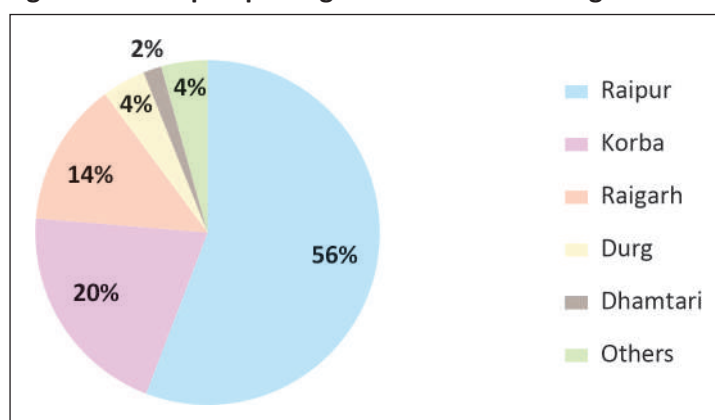
Figure 2.9: Exports from Chhattisgarh and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

More than 55% of Chhattisgarh's exports are from Raipur, followed by Korba at 20.5%, and Raigarh at 13.5%. Overall, the top three districts account for almost 90% of the exports.

Figure 2.10: Top Exporting Districts of Chhattisgarh: FY 23



Source: MOCI; India Exim Bank Research

Raipur

Amongst the shortlisted districts, only one district from Chhattisgarh, which is the state capital, Raipur, features. The exports from the district were valued at US\$ 1.5 billion in FY 23.

Almost 70% of the products exported from the district in FY 23 were of rice varieties such as parboiled rice (41.4%), broken rice (17.7%), and other rice (10%). It may be noted that 20.6% of India's exports of parboiled rice⁶ and 26.7% of India's exports of broken rice⁷ were from Raipur in FY 23.

Other important export items from Raipur include ferro-silicomanganese⁸ with a share of 7.3% in the district's total exports and iron ore pellets⁹ with a share of 6.8%. For both these items, Raipur's share in India's total exports is around 7%.

⁶ HS Code 10063010

⁷ HS Code 10064000

⁸ HS Code 72023000

⁹ HS Code 26011210

Table 2.10: Top Exported Products from Raipur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
10063010	Parboiled rice	616.2	2994.2	41.4%	20.6%
10064000	Broken rice	262.9	983.5	17.7%	26.7%
10063090	Rice except parboiled rice (excl. Basmati rice)	149.2	2203.5	10.0%	6.8%
72023000	Ferro-Silicomanganese	109.1	1467.1	7.3%	7.4%
26011210	Agglomerated iron ore pellets	61.0	901.6	4.1%	6.8%
72021900	Other Ferromanganese	54.6	168.3	3.7%	32.5%
72021100	Ferromanganese, containing by weight > 2% of carbon	40.3	539.4	2.7%	7.5%
73082011	Towers for transmission line whether or not assembled	27.6	483.5	1.9%	5.7%
84295200	Self-propelled mechanical shovels, excavators, and shovel loaders, with a 360° revolving superstructure	18.0	355.6	1.2%	5.0%
7132020	Bengal Gram (Desi Chana)	16.4	116.7	1.1%	14.0%
Total		1487.1	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

The items identified from Raipur under the DEH initiative are rice, maize, soyabean, and mango.

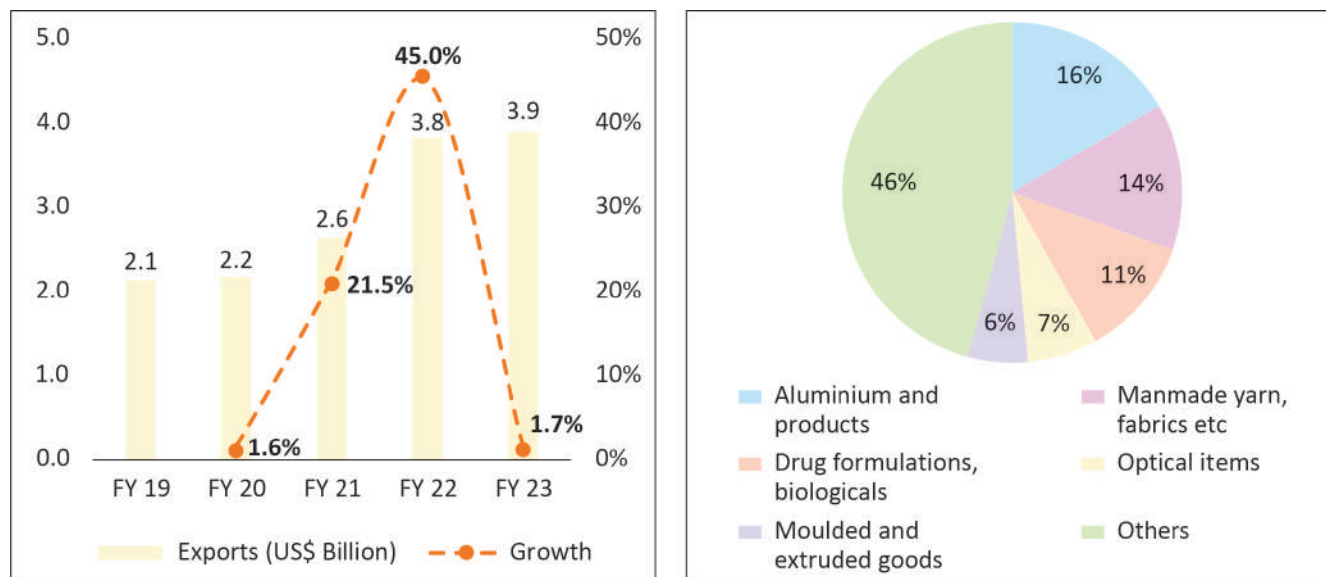
2.4. Dadra and Nagar Haveli

Dadra and Nagar Haveli is an important destination for the industries given its proximity to the states of Maharashtra and Gujarat and the tax concessions that the UT got after its formation. The total exports from the UT were registered at US\$ 3.9 billion in FY 23, much higher than states like Chhattisgarh, Bihar, Himachal Pradesh, Uttarakhand, Assam etc. The exports have grown at an average of 17.5% annually, during the last five years.

Some of the top export items from the state include aluminium and its products (16.5%), manmade yarn, fabrics, etc. (13.9%), drug formulations, biologicals (11.5%), amongst others.

The products identified from Dadra and Nagar Haveli under the DEH initiative include yarn, fabrics, pharmaceuticals, cables, rubber, plastic products, readymade garments, and engineering products.

Figure 2.11: Exports from Dadra and Nagar Haveli and Major Exported Products in FY 23



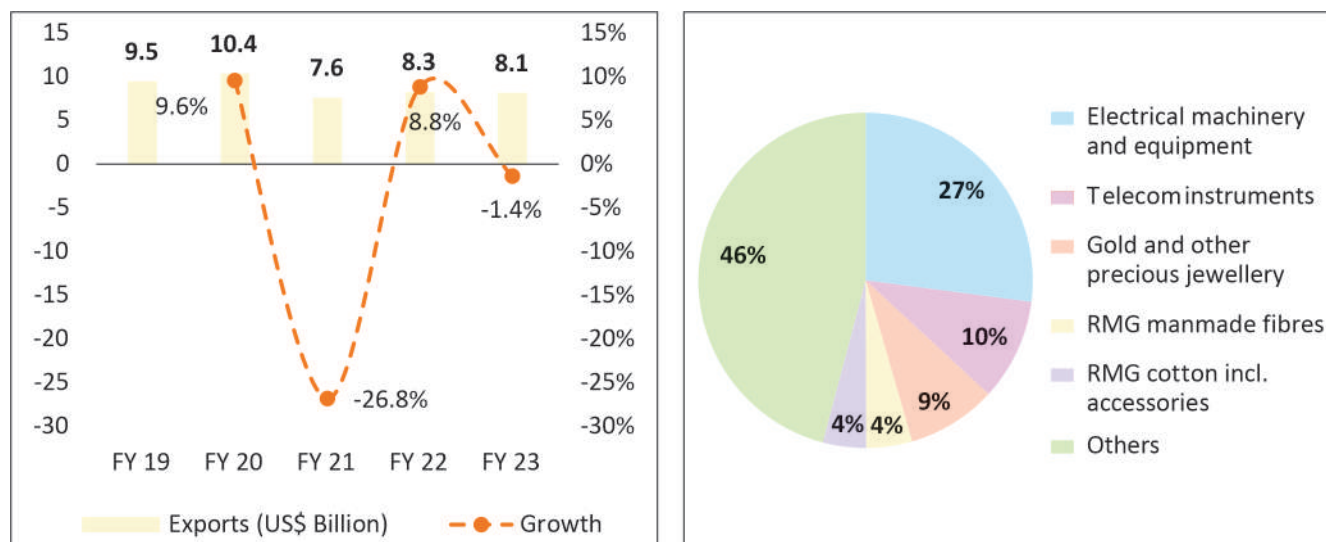
Source: DGCIS; India Exim Bank Research

2.5. Delhi

The total exports from Delhi were valued at US\$ 8.1 billion in FY 23. This is a fall from US\$ 9.5 billion in FY 19, thereby recording an AAGR of (-) 2.4%, during the last five years. The share of Delhi in India's exports, as a result, has fallen from 2.9% to 1.8%, during this period.

Major export items from Delhi include electrical machinery and equipment (27.1%), telecom instruments (9.8%), and gold & other precious metal jewellery (8.7%).

Figure 2.12: Exports from Delhi and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

As per the methodology, two districts from Delhi, namely, South-West and New Delhi, were shortlisted. The exports from South-West Delhi and New Delhi in FY 23 were valued at US\$ 2.9 billion and US\$ 2.4 billion, respectively.

Out of South-West Delhi's total exports, 69% are of 'Turbo-jet engines of a thrust > 25 kilonewtons (kN)' ¹⁰ - interestingly, this also forms 73% of India's total exports. Another important item is the smartphones ¹¹ with a share of 6.5%.

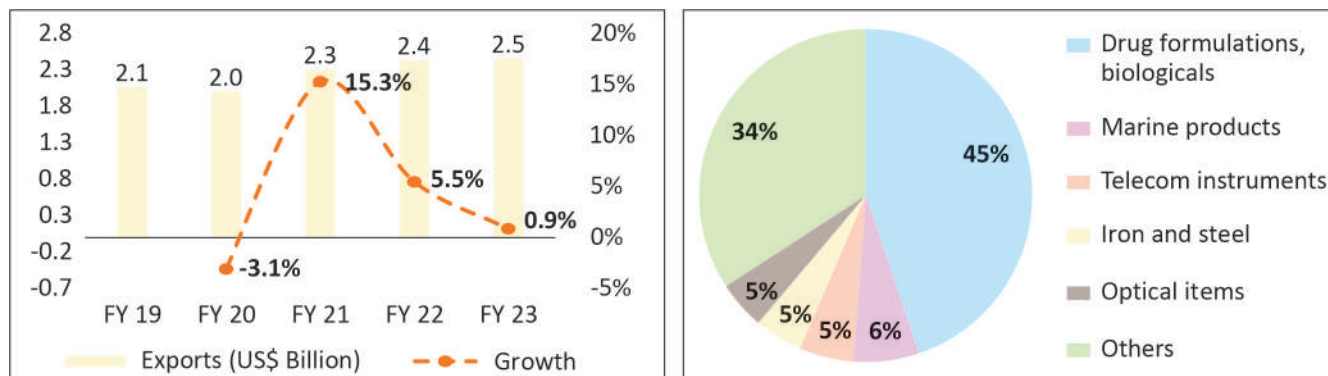
For New Delhi district however, the exports are significantly concentrated with basmati rice being the highest export item with a share of 8.5%. However, this could be from the neighbouring state of Haryana where New Delhi is being used a port of transfer or the businesses having an office in New Delhi. Next largest item is smartphones with a share of 4.6%.

For Delhi, the products identified under the DEH initiative are electrical equipment services, readymade garments, and telecom.

2.6. Goa

Goa's exports have grown at a decent pace in the last half a decade, from US\$ 2.1 billion in FY 19 to US\$ 2.5 billion in FY 23, growing at an AAGR of 4.6% with top exported item being drug formulations, biologicals, with a share of 45%. Other important items are marine products and telecom instruments. Goa's share in the national exports has decreased from 0.63% in FY 19 to 0.54% in FY 23.

Figure 2.13: Exports from Goa and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

There are two districts in Goa - North Goa and South Goa. The exports from North Goa were recorded at US\$ 980 million while the same for South Goa were at US\$ 1.5 billion, thereby South Goa being in the list of shortlisted districts.

Out of the top ten exported items from South Goa district, six items belong to pharmaceuticals (HS 30). The combined share of these items in South Goa's total exports was 32.2% in FY 23. Other important export items are 'Aerials and aerial reflectors of all kinds, of telephone sets, telephones for cellular networks etc.' (share of 8%), 'Optical fibres, optical fibre bundles and cables' (share of 6.5%), amongst others.

¹⁰ HS Code 84111200

¹¹ HS Code 85171300

Table 2.11: Top Exported Products from South Goa

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	248.2	7629.0	16.9%	3.3%
85177100	Aerials and aerial reflectors of all kinds parts suitable for use therewith	117.1	120.7	8.0%	97.0%
90011000	Optical fibres, optical fibre bundles and cables	95.5	703.0	6.5%	13.6%
30049069	Other Nonsteroidal antiinflammatory, analgesics and antipyretic drugs	83.6	919.8	5.7%	9.1%
03035910	Indian mackerels (Rastrelliger spp.)	45.1	186.8	3.1%	24.1%
30049081	Phenobarbitone, mephobarbitone, primidone, phenytoin, carbamazepine, etc.	38.4	333.4	2.6%	11.5%
85369030	Other apparatus: Junction boxes	37.0	76.1	2.5%	48.6%
30049063	Ibuprofen with or without paracetamol or other compounds	33.1	270.0	2.2%	12.3%
30042033	Ciprofloxacin (Fluoroquinolones)	33.0	59.9	2.2%	55.1%
30043200	Medicaments containing corticosteroid hormones, their derivatives or structural analogues	31.5	140.2	2.1%	22.5%
Total		1472.4	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

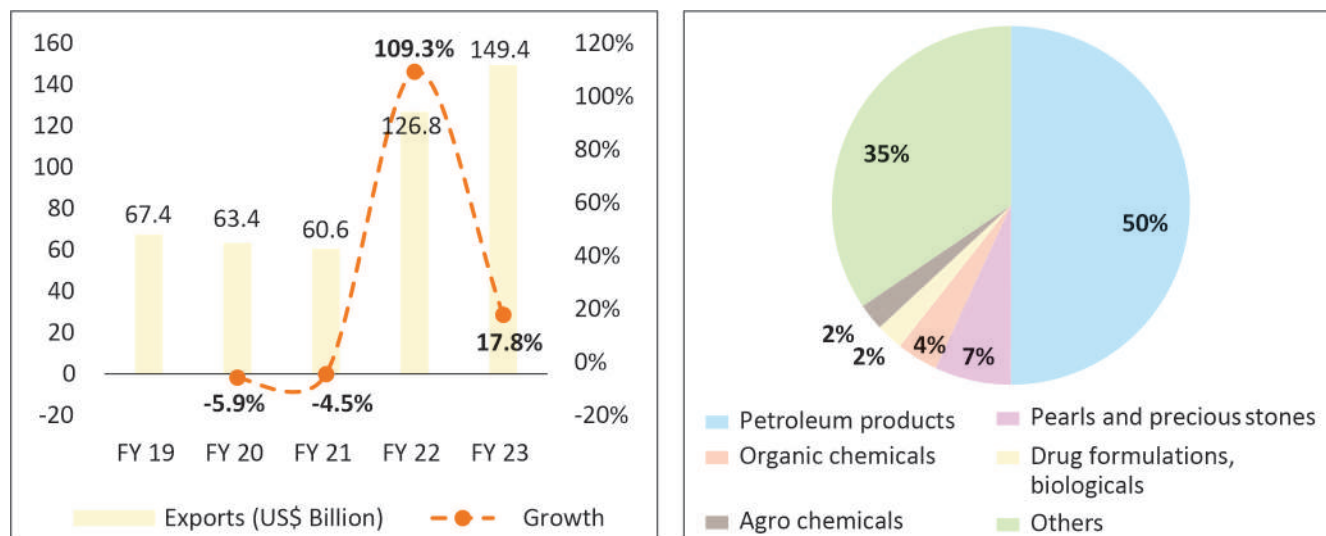
In fact, in the exports of 'Aerials and aerial reflectors of all kinds parts suitable for use therewith' (HS 85177100), South Goa's share in India's exports is 97%. For Optical fibres, optical fibre bundles and cables, South Goa's share is 13.6%. South Goa also has high shares in India's exports of ciprofloxacin (55.1%) and medicaments containing corticosteroid hormones, their derivatives or structural analogues (22.5%).

The products identified under DEH initiative for South Goa are pharmaceuticals, tourism and fisheries, Khola chilli, and feni.

2.7. Gujarat

The total exports from Gujarat have increased from US\$ 67.4 billion in FY 19 to US\$ 149.4 billion in FY 23, recording an AAGR of 29.2%. The state's share in India's exports has increased from 20.4% to 33.1%, during this period, which is the highest in the country. The high jump in the last two years is driven by the petroleum products exports, which got a push from high global crude oil prices. In FY 23, 50% of Gujarat's exports were of petroleum products. Other important items were pearls and precious stones (6.9%), organic chemicals (3.7%), drug formulations, biologicals (2.5%), and agro chemicals (2.4%).

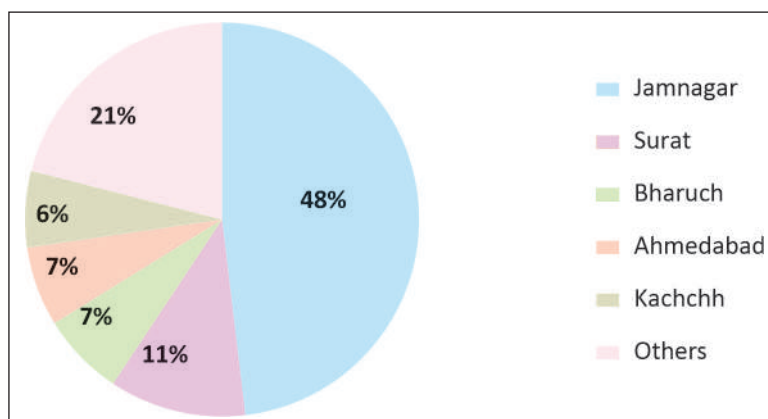
Figure 2.14: Exports from Gujarat and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, Jamnagar alone contributed to 48% of Gujarat's total exports in FY 23. Other important districts are Surat (11.2%), Bharuch (6.9%), Ahmedabad (6.5%), and Kachchh (6.3%). The top five districts together accounted for 79% of Gujarat's exports in FY 23.

Figure 2.15: Top Exporting Districts of Gujarat: FY 23



Source: Ministry of Commerce and Industry (MOCI); India Exim Bank Research

As per the study's methodology, the identified districts in Gujarat include Vadodara, Valsad, Rajkot, Mahesana, Morbi, Panch Mahals, and Gandhinagar.

Vadodara

Amongst the shortlisted districts, Vadodara had the highest exports from Gujarat at US\$ 4.4 billion in FY 23. The exports from this district are significantly diversified with the top ten products accounting for just 17.7% of Vadodara's exports in FY 23.

Some of the top items include plastic insulated conductors, of a kind used in telecommunication; light naphtha; para-acetyl aminophenol (paracetamol); etc. For 'plastic insulated, of a kind used in telecommunication' Vadodara's share in India's exports was 28.8% in FY 23. The share was 38.7% for para-acetyl aminophenol (paracetamol).

The items identified from Vadodara under the DEH initiative are pharmaceuticals and engineering.

Table 2.12: Top Exported Products from Vadodara

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
85444920	Plastic insulated conductors for a voltage <= 1000 V, of a kind used in telecommunication	105.0	364.1	2.4%	28.8%
27101221	Light Naphtha	96.2	5436.6	2.2%	1.8%
30049099	Other Medicaments Put Up for Retail Sale n.e.s	95.2	7629.0	2.1%	1.2%
29222933	Para Acetyl Aminophenol (Paracetamol)	90.7	234.3	2.0%	38.7%
29319090	Other separate chemically defined organo-inorganic compounds	75.0	161.8	1.7%	46.4%
15162039	Hydrogenated castor oil (opal wax)	71.2	130.4	1.6%	54.6%
63053200	Flexible Intermediate Bulk Containers (FIBC) of man-made textile materials	70.6	861.1	1.6%	8.2%
29420090	Diloxanide furoate, Cimetidine, Oxytetracycline, Famotidine: Other	66.9	1242.9	1.5%	5.4%
84825000	Other cylindrical roller bearings, incl. cage and roller assemblies	59.4	80.9	1.3%	73.5%
29173990	Other aromatic polycarboxylic acids, their anhydrides etc.	58.1	101.9	1.3%	57.0%
Total		4452.0	-	100.0%	1.0%

Source: MOCI; DGCIS; India Exim Bank Research

Valsad

Valsad also had almost the same export value as Vadodara's in FY 23 at US\$ 4.4 billion. Over 10% of the district's exports are of photovoltaic cells assembled in modules or made up into panels. Few varieties of insecticides, herbicides, and fungicides, together accounted for another 10%. It may be noted that for photovoltaic cells, Valsad's share in India's exports was almost 45% in FY 23.

The items identified under DEH for Valsad include chemical and paper, mango, and marine products.

Table 2.13: Top Exported Products from Valsad

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
85414300	Photovoltaic cells assembled in modules or made up into panels	463.0	1031.4	10.4%	44.9%
38089199	Other Insecticides n.e.s	254.7	1507.9	5.7%	16.9%
38089390	Other Herbicides-anti-sprouting products	98.4	1935.1	2.2%	5.1%
38089290	Other fungicides n.e.s	92.6	1046.5	2.1%	8.8%
85444920	Plastic insulated conductors for a voltage <= 1000 V, of a kind used in telecommunication	87.2	364.1	2.0%	24.0%

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
63026090	Toilet linen and kitchen linen, of terry towelling or similar terry fabrics, of cotton	82.8	1022.2	1.9%	8.1%
85446020	Plastic insulated conductors for a voltage > 1000 V	80.4	178.3	1.8%	45.1%
38089320	2:4 Dichloro phenoxy acetic acid and its esters	72.0	126.7	1.6%	56.8%
73072100	Flanges of stainless steel	66.5	264.8	1.5%	25.1%
32129090	Other pigments dyes and colouring matter n.e.s	59.8	75.3	1.3%	79.4%
Total		4436.3	-	100.0%	1.0%

Source: MOCI; DGCIS; India Exim Bank Research

Rajkot

Rajkot's exports were registered at US\$ 2.7 billion in FY 23. Some of the top products include 'Plain weave, weighing >100g/m³', 'hand-picked selected (HPS) kernels', 'sesamum seeds', amongst others. For plain weave, Rajkot's share in India's exports is over 40%. Further, in kernels (18.3%) and sesamum seeds (21.3%) also, the shares are impressive.

The items identified under DEH for Rajkot include engineering goods, and Rajkot Patola.

Table 2.14: Top Exported Products from Rajkot

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
52085290	Plain woven fabrics of cotton, containing >= 85% cotton by weight and weighing > 100 g to 200 g/m ² , printed: Other	151.7	374.1	5.6%	40.6%
12024210	Hand-picked selected (HPS) kernels	145.3	794.2	5.4%	18.3%
12074090	Other sesamum seeds whether or not broken	89.7	421.7	3.3%	21.3%
52052310	Grey single cotton yarn, of combed fibres with a linear density of 192.31 decitex to < 232.56 decitex	73.1	739.7	2.7%	9.9%
73259930	Other cast articles of stainless steel, malleable	69.1	191.3	2.6%	36.1%
15081000	Crude groundnut oil	66.8	229.9	2.5%	29.0%
84819090	Other parts of valves and similar articles for pipes, boiler shells, tanks, vats or the like, n.e.s.	55.4	697.3	2.0%	8.0%
10019910	Wheat	52.9	1500.6	2.0%	3.5%
87084000	Gear boxes	52.7	664.6	1.9%	7.9%
87089900	Other parts and accessories of vehicles	46.8	3189.0	1.7%	1.5%
Total		2709.8	-	100.0%	0.6%

Source: MOCI; DGCIS; India Exim Bank Research

Mahesana

The exports from Mahesana were valued at US\$ 2.6 billion in FY 23. From Mahesana, over one-fourth of the exports belonged to 'motor cars with cylinder capacity exceeding 1,000 cc but not exceeding 1,500 cc'. Maruti Suzuki has a manufacturing plant in this district. Another 12% of exports belonged to 'cumin, other than black'. For both these products, Mahesana's share in India's exports was in double-digits at 19.3% and 67.5%, respectively.

Further, for products such as psyllium husk (share of 52.4% in India's exports), castor oil and its fractions (share of 8.1%), and prepared/preserved and frozen potatoes (74.6%) also, Mahesana comes out to be a leader in exports.

The products included under DEH for this district are agro-processing (seed/spices), paper and paper-based products, dairy, minerals, and machinery.

Table 2.15: Top Exported Products from Mahesana

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87032291	Motor cars with cylinder capacity >= 1000 cc but < 1500 cc, with only spark-ignition	692.0	3588.4	26.9%	19.3%
09093129	Cumin, other than black	321.8	477.0	12.5%	67.5%
12119032	Psyllium husk	173.5	330.9	6.7%	52.4%
15153090	Castor oil and its fractions other than edible grade	92.2	1132.8	3.6%	8.1%
30049099	Other medicaments put up for retail sale n.e.s	80.7	7629.0	3.1%	1.1%
20041000	Prepared/preserved and frozen potatoes	80.2	107.5	3.1%	74.6%
12074090	Other sesamum seeds whether or not broken	73.7	421.7	2.9%	17.5%
71023910	Diamonds, cut or otherwise worked but not mounted or set	67.1	22027.1	2.6%	0.3%
73064000	Other tubes, pipes and hollow profiles, welded, of circular cross-section, of stainless steel	63.2	137.1	2.5%	46.1%
73049000	Other tubes, pipes and hollow profiles, seamless, of non-circular cross-section, of iron or steel	60.4	71.0	2.3%	85.1%
Total		2574.8	-	100.0%	0.6%

Source: MOCI; DGCIS; India Exim Bank Research

Morbi

Morbi is the hub of the ceramic and wall clock industries. The district's exports were registered at US\$ 2.3 billion in FY 23 with five out of the top ten products exported being of ceramic. Together, these five products accounted for almost 80% of Morbi's exports. The largest amongst these is 'Ceramic flags and paving, hearth or wall tiles, of a water absorption coefficient by weight <= 0.5 %' which has a share of 60.6% in Morbi's exports. In fact, over 90% of India's exports of this item, are from Morbi. Another important item is multi-ply paper and paperboard, for which, Morbi's share in India's exports is almost 22%.

The products included under the DEH initiative for this district are also ceramic items.

Table 2.16: Top Exported Products from Morbi

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
69072100	Ceramic flags and paving, hearth or wall tiles, of a water absorption coefficient by weight <= 0.5 %	1403.0	1536.4	60.6%	91.3%
69072300	Ceramic flags and paving, hearth or wall tiles, of a water absorption coefficient by weight > 10 %	287.1	307.7	12.4%	93.3%
69072200	Ceramic flags and paving, hearth or wall tiles, of a water absorption coefficient by weight > 0.5 % but <= 10 %	100.3	117.2	4.3%	85.6%
48109200	Multi-ply paper and paperboard	63.8	293.1	2.8%	21.8%
69101000	Sanitary fixtures of porcelain or china	38.6	141.3	1.7%	27.3%
10019910	Wheat	29.3	1500.6	1.3%	2.0%
39232990	Sacks and bags, incl. cones, of other plastics n.e.s	28.4	411.1	1.2%	6.9%
48051900	Other fluting paper	24.4	121.7	1.1%	20.0%
68101990	Other tiles, flagstones, bricks and similar articles, of cement, concrete or artificial stone	22.3	165.0	1.0%	13.5%
69074010	Finishing ceramics	18.8	19.9	0.8%	94.2%
Total		2313.7	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Panch Mahals

For Panch Mahals, the exports were registered at US\$ 1.3 billion in FY 23. Four out of the top ten exported items from this district belonged to the category of pharmaceuticals. Together, these accounted for 26.5% of the district's exports. Further, other important items are parts of engines and motors¹², and plastic insulated, of a kind used in telecommunication¹³. For these two items, the district's share in India's exports were 41% and 19.1% in FY 23, respectively.

The items under DEH initiative for this district are agriculture, and plastic.

¹² HS Code 84129090

¹³ HS Code 85444920

Table 2.17: Top Exported Products from Panch Mahals

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	232.6	7629.0	17.4%	3.0%
84129090	Parts of engines and motors	101.0	246.2	7.6%	41.0%
85444920	Plastic insulated conductors for a voltage <= 1000 V, of a kind used in telecommunication	69.5	364.1	5.2%	19.1%
29420090	Diloxanide furoate, Cimetidine, Oxytroclozanide, Famotidine: Other	54.6	1242.9	4.1%	4.4%
85446090	Other electric conductors of a voltage exceeding 1000 V	54.6	211.3	4.1%	25.8%
30049049	Other anticancer drugs	49.5	1105.9	3.7%	4.5%
39019000	Other polymers of ethylene, in primary forms	45.4	65.0	3.4%	69.8%
30049079	Other antihypertensive drugs	38.9	854.4	2.9%	4.5%
30049073	Losartan	32.4	194.2	2.4%	16.7%
40112010	Radial tyres used on buses/lorries	32.3	505.7	2.4%	6.4%
Total		1334.5	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Gandhinagar

The final shortlisted district from Gujarat is the state capital, Gandhinagar with an export value of US\$ 1 billion in FY 23. Some of the top exported items from the district are 'Towers for transmission line, whether or not assembled'¹⁴, 'Tubes, pipes and hollow profiles, seamless, of circular cross-section, of stainless steel, cold-drawn or cold-rolled'¹⁵, 'wire of stainless steel thicker than 1.5 mm'¹⁶, 'polypropylene articles not elsewhere specified'¹⁷, etc. For all these items, Gandhinagar's share in India's exports is in double-digit. Specifically for HS 38123990, it is more than 30%.

The products included under DEH are electrical and electronics, food processing, software, financial services, and chemicals.

¹⁴ HS Code 73082011

¹⁵ HS Code 73044100

¹⁶ HS Code 72230091

¹⁷ HS Code 39269080

Table 2.18: Top Exported Products from Gandhinagar

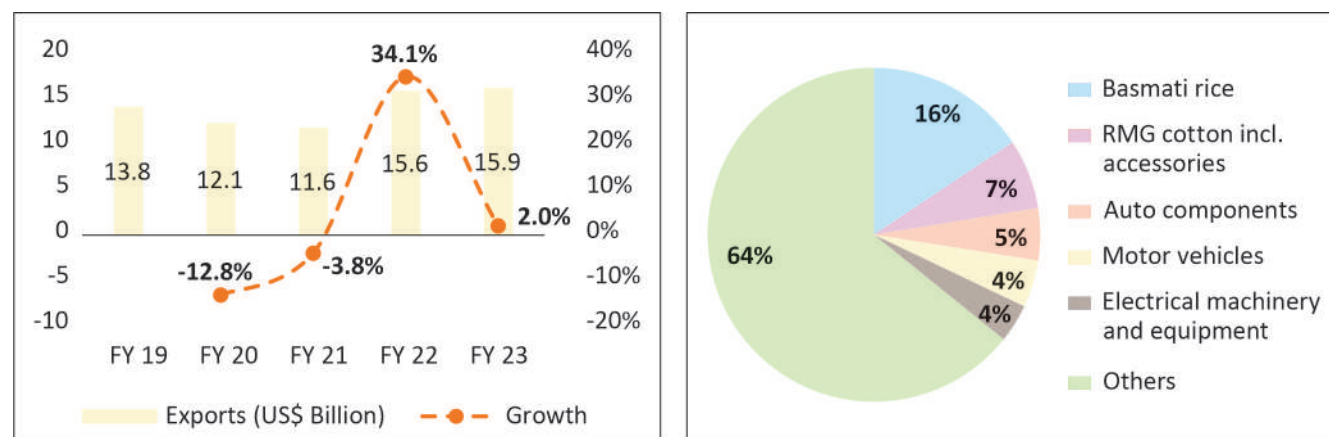
HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
73082011	Towers for transmission line whether or not assembled	61.5	483.5	5.9%	12.7%
73044100	Other tubes, pipes and hollow profiles, seamless, of circular cross-section, of stainless steel, cold-drawn or cold-rolled	55.3	252.6	5.3%	21.9%
72230091	Wire of stainless steel thicker than 1.5 mm	48.8	284.8	4.7%	17.1%
39269080	Polypropylene articles, n.e.s.	44.3	212.2	4.3%	20.9%
38123990	Other anti-oxidising preparations and other compound stabilisers for rubber or plastics	24.7	81.1	2.4%	30.5%
19059090	Other bread, pastry, cakes, biscuits and similar products	22.9	78.2	2.2%	29.2%
72230092	Wire of stainless steel of thickness 0.46 mm and above but not exceeding 1.5 mm	21.3	90.1	2.1%	23.7%
30049099	Other medicaments put up for retail sale n.e.s	20.8	7629.0	2.0%	0.3%
39232990	Sacks and bags, incl. cones, of other plastics n.e.s	20.7	411.1	2.0%	5.0%
12074090	Other sesamum seeds whether or not broken	16.5	421.7	1.6%	3.9%
Total		1037.4	-	100.0%	0.2%

Source: MOCI; DGCIS; India Exim Bank Research

2.8. Haryana

The total exports from Haryana have increased from US\$ 13.8 billion in FY 19 to US\$ 15.9 billion in FY 23, recording an AAGR of almost 5%. In the year of pandemic (FY 21), Haryana's exports declined by only 3.8%, vis-à-vis India's exports which fell by almost 7%. The state's share in India's exports has however fallen from 4.2% in FY 19 to 3.5% in FY 23.

Figure 2.16: Exports from Haryana and Major Exported Products in FY 23

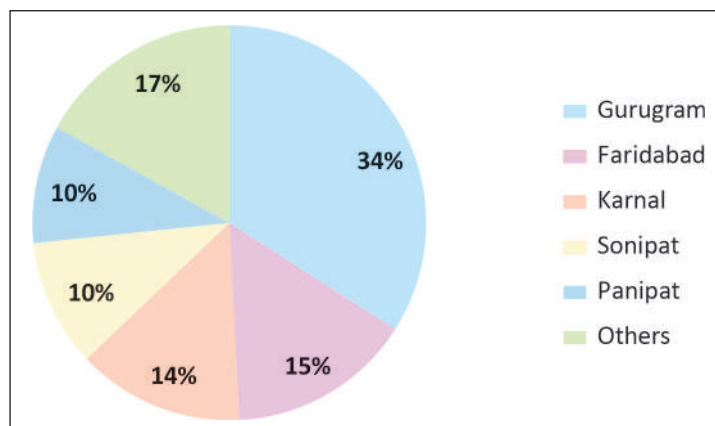


Source: DGCIS; India Exim Bank Research

Over 15% of Haryana's exports in FY 23 were of basmati rice, followed by readymade garments of cotton at 6.8% and auto components at 5.1%. In fact, auto parts and motor vehicles together account for almost 10% of the state's exports with Gururgram (Hero Motocorp, Maruti Suzuki), Manesar (Maruti Suzuki, Revolt Motors), and Faridabad (Escorts Tractors, JCB) being the major auto centers.

With respect to the districts, Gurugram alone contributed to over one-third of Haryana's total exports in FY 23. Other important districts are Faridabad (15.2%), Karnal (13.7%), Sonipat (10.4%), and Panipat (9.7%). The top five districts together accounted for 83% of Haryana's exports in FY 23.

Figure 2.17: Top Exporting Districts of Haryana: FY 23



Source: Ministry of Commerce and Industry (MOCI); India Exim Bank Research

As per the study's methodology, the identified districts in Haryana include Faridabad, Karnal, Sonipat, and Panipat.

Faridabad

The exports from Faridabad district were valued at US\$ 2.4 billion in FY 23. Automobiles is a major industry in the district. The top exported commodity from the district, HS 87089900 (Other parts and accessories of vehicles) has a share of almost 4% in the district's exports. It is followed by another auto part of 'silencers and exhaust pipes'¹⁸ (HS 87089200) with a share of 3.3%. For silencers and exhaust pipes, Faridabad's share in India's exports was 36.2% in FY 23.

Table 2.19: Top Exported Products from Faridabad

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87089900	Other parts and accessories of vehicles	90.7	3189.0	3.8%	2.8%
87089200	Silencers and exhaust pipes	78.7	217.4	3.3%	36.2%
84295900	Other self-propelled mechanical shovels, excavators and shovel loaders	72.3	401.8	3.0%	18.0%
62044290	Other dresses of cotton	71.6	799.0	3.0%	9.0%
61091000	T-shirts etc. of cotton	64.9	1772.1	2.7%	3.7%

¹⁸ HS Code 87089200

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
85014010	Other AC motors, single-phase: Fractional Horsepower motor	58.5	62.5	2.4%	93.5%
90183930	Cannulae	56.9	138.7	2.4%	41.0%
62044390	Other dresses of synthetic fibres	45.8	725.9	1.9%	6.3%
84143000	Compressors for refrigerating equipment	45.5	80.0	1.9%	56.9%
72221111	Bright bars: Chromium type	39.2	40.4	1.6%	97.0%
Total		2403.2	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Other major commodities where Faridabad has high share in India's exports are HS 84295900, Self-propelled mechanical shovels, excavators and shovel loaders (share of 18%); HS 85014010, Other AC motors, single-phase: Fractional Horsepower motor (share of 93.5%); HS 90183930, Cannulae (share of 41%); HS 84143000, Compressors for refrigerating equipment (share of 57%); and HS 72221111, Bright bars: Chromium type (share of 97%). The items identified from Faridabad under the DEH initiative are auto components, and light and engineering goods.

Karnal

Karnal's exports were valued at US\$ 2.2 billion in FY 23 with more than 83% exports coming from the basmati rice. In fact, amongst the top ten commodities exported from Karnal, top four are varieties of rice, together accounting for over 92% of Karnal's exports. It may be noted that for basmati rice, Karnal's share in India's exports is almost 38%. The products identified from Karnal under DEH are horticulture and rice.

Table 2.20: Top Exported Products from Karnal

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
10063020	Basmati rice	1803.7	4787.5	83.1%	37.7%
10063010	Parboiled rice	96.4	2994.2	4.4%	3.2%
10064000	Broken rice	62.4	983.5	2.9%	6.3%
10063090	Rice except parboiled rice (excl. Basmati rice)	43.4	2203.5	2.0%	2.0%
84329010	Parts of agricultural machinery	17.7	57.5	0.8%	30.8%
57023210	Carpets, carpeting and rugs	8.7	98.0	0.4%	8.9%
39076190	Other Polyethylene terephthalate, in primary forms	8.3	590.4	0.4%	1.4%
57023140	Carpeting, floor rugs and the like	6.2	24.4	0.3%	25.6%
87162000	Self-loading or self-unloading trailers and semi-trailers for agricultural purposes	6.2	11.0	0.3%	56.1%
84322100	Disc harrows	6.1	10.2	0.3%	59.6%
Total		2170.1	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Sonipat

Similar to Karnal district, Sonipat also has significant exports of rice. Within the top ten exported items from Sonipat, four are varieties of rice, together accounting for 26% of Sonipat's exports, with basmati rice alone accounting for 20% of Sonipat's exports. Further, 17% of Sonipat's exports come from mounted brake linings¹⁹ and the district has a share of 40% in India's exports of this item. The district also has a share of 32% in India's exports of natural honey. 'Printed books' is another category where Sonipat has a significant share (12.1%) in India's exports. The category identified under DEH for Sonipat is industries.

Table 2.21: Top Exported Products from Sonipat

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
10063020	Basmati rice	333.9	4787.5	20.2%	7.0%
87083000	Mounted brake linings	280.5	696.6	16.9%	40.3%
73239390	Other household articles of stainless steel n.e.s	88.6	400.5	5.4%	22.1%
04090000	Natural honey	64.4	203.1	3.9%	31.7%
73089090	Other structures and parts of structures of iron and steel (excl. floating structures)	39.0	646.9	2.4%	6.0%
10063010	Parboiled rice	35.3	2994.2	2.1%	1.2%
10064000	Broken rice	35.3	983.5	2.1%	3.6%
49011010	Printed books	32.2	265.4	1.9%	12.1%
87089900	Other parts and accessories of vehicles	31.2	3189.0	1.9%	1.0%
10063090	Rice except parboiled rice (excl. Basmati rice)	24.2	2203.5	1.5%	1.1%
Total		1655.4	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

Panipat

Panipat is one of the important textile centers in Haryana and India. Given its strong textile base, seven out of top ten exported commodities from Panipat are in the category of textiles. Out of its top ten exported items, Panipat has a double-digit national share in nine items. For 'Toilet linen and kitchen linen, of terry towelling or similar terry fabrics, of cotton'²⁰, Panipat has a share of 13% in India's exports. Similarly, for full range naphtha²¹, Panipat has a share of 15.3% in India's exports due to the presence of IOCL refinery in the district.

¹⁹ HS Code 87083000

²⁰ HS Code 63026090

²¹ HS Code 27101229

Table 2.22: Top Exported Products from Panipat

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
63026090	Toilet linen and kitchen linen, of terry towelling or similar terry fabrics, of cotton	131.2	1022.2	8.6%	12.8%
27101229	Full Range Naphtha	107.6	704.7	7.0%	15.3%
57039010	Carpets and other floor coverings, of cotton, other than durries	106.8	144.6	7.0%	73.8%
94049000	Other articles of bedding and similar furnishing	98.0	369.0	6.4%	26.6%
10063020	Basmati rice	74.2	4787.5	4.8%	1.6%
57029210	Carpets, carpeting and rugs	39.9	43.4	2.6%	92.0%
57023210	Carpets, carpeting and rugs	36.6	98.0	2.4%	37.4%
63014000	Blankets and travelling rugs, of synthetic fibres	34.9	59.3	2.3%	58.8%
57033990	Other carpets and other floor coverings, of man-made textile materials, tufted needle punched	31.5	58.7	2.1%	53.6%
57029910	Of other textile materials: Carpets and other floor coverings	31.2	36.7	2.0%	85.2%
Total		1530.7	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Further, Panipat has a huge base of carpet manufacturing and is a national leader in the same. For 'Carpets and other floor coverings, of cotton, other than durries'²², the district has a share of 74%. For 'Carpets, carpeting and rugs'²³, the district's share is 92%.

Under the DEH also, the products identified for Panipat include handloom, carpet, and textiles.

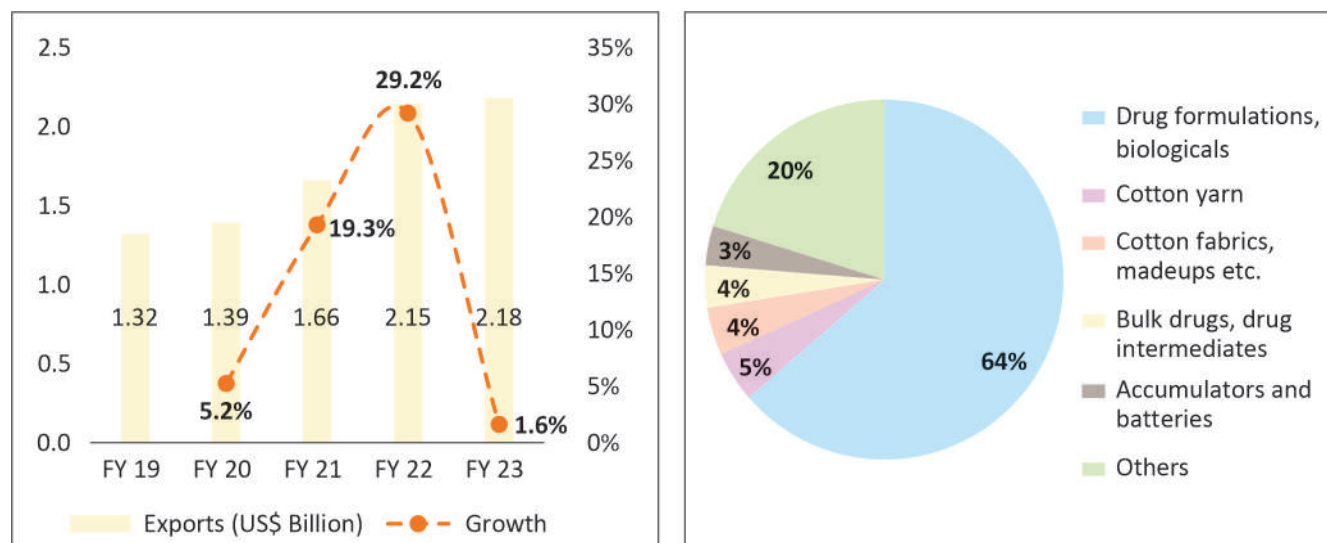
2.9. Himachal Pradesh

The total exports from Himachal Pradesh have increased from US\$ 1.32 billion in FY 19 to US\$ 2.18 billion in FY 23, recording an AAGR of 13.9%. It is one of the few states in India that did not record a fall in the exports during the pandemic, due to its dependence on pharmaceutical exports. The state's share in India's exports has increased from 0.40% to 0.48%, during this period. The highest exported item from the state in FY 23 was drug formulations, biologicals with a share of 63.6%, followed by cotton yarn (4.5%), and cotton fabrics, made ups etc. (4.3%).

²² HS Code 57039010

²³ HS Code 57029210

Figure 2.18: Exports from Himachal Pradesh and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

Himachal Pradesh has a total of 11 exporting districts, out of which, the top two, Solan (81.4%) and Sirmaur (15.4%) together account for almost 97% of the state's exports. This is because of the presence of the major pharma units in Baddi (Solan district) and Paonta Sahib (Sirmaur district). Another 2% is contributed by Una district. As per the Study's methodology, only Solan features in the list of shortlisted districts.

Solan

Solan's exports were valued at US\$ 1.8 billion in FY 23. Over 22% of its exports came from 'Other medicines put up for retail sale'²⁴. Seven out of its top ten items are from the pharmaceuticals category. For 'Other Antitubercular Drugs'²⁵ and 'Ketorolac, Nimesulide, Nabumetone and Nefopam'²⁶, Solan's share in the national exports is 47% and 53%, respectively. Similarly, for pharmaceuticals like 'Ibuprofen with or without paracetamol or other compounds'²⁷ and cephalosporins and their derivatives'²⁸ as well, Solan's share is significant in the national exports (18.3% and 15.9%, respectively).

²⁴ HS Code 30049099

²⁵ HS Code 30049057

²⁶ HS Code 30049067

²⁷ HS Code 30049063

²⁸ HS Code 30042019

Table 2.23: Top Exported Products from Solan

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	395.9	7629.0	22.3%	5.2%
29420090	Diloxanide furoate, Cimetidine, Oxytetracycline, Famotidine: Other	68.5	1242.9	3.9%	5.5%
30049057	Other antitubercular drugs	62.9	133.6	3.5%	47.1%
30049067	Ketorolac, nimesulide, nabumetone and nefopam	61.0	115.0	3.4%	53.0%
85072000	Lead acid accumulators	57.6	424.4	3.2%	13.6%
48239019	Decorative laminates	56.5	286.0	3.2%	19.8%
30049079	Other antihypertensive drugs	51.9	854.4	2.9%	6.1%
30049063	Ibuprofen with or without paracetamol or other compounds	49.4	270.0	2.8%	18.3%
30042019	Other cephalosporins and their derivatives	49.3	309.7	2.8%	15.9%
30049069	Other Nonsteroidal anti-inflammatory, analgesics and antipyretic drugs	33.2	919.8	1.9%	3.6%
Total		1775.9	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

It may also be noted that 'lead acid accumulators'²⁹ and 'decorative laminates'³⁰ are the fifth and sixth largest exported items from Solan. For both these items, Solan's share in the national exports is in double-digits (13.6% and 19.8%, respectively). The industries identified under DEH for Solan are mushrooms, tourism, pharmaceuticals, and textile yarn.

2.10. Karnataka

The exports from Karnataka increased to touch US\$ 27.9 billion in FY 23, from US\$ 17.3 billion in FY 19, growing at an average of 16.5%, annually. After recording two consecutive falls of 4% and 9% in FY 20 and FY 21, respectively, the exports from Karnataka grew by 70% in FY 22 over the previous year.

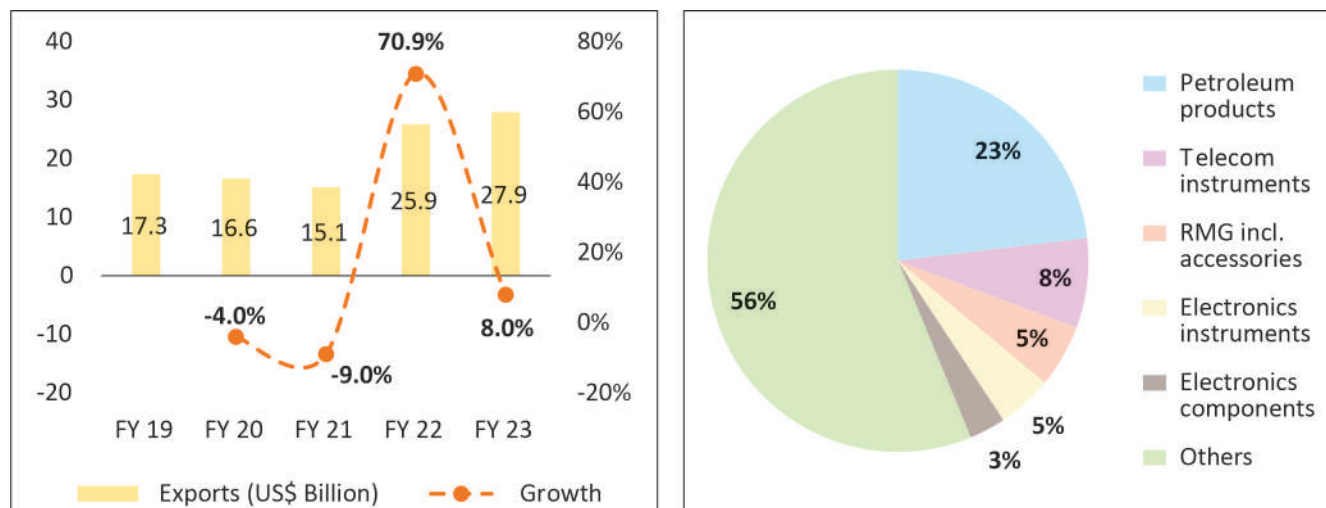
Karnataka's share in India's exports during this period increased from 5.3% to 6.2%. A major push came from the exports of petroleum products which increased due to the rise in oil prices in the last couple of years. Petroleum products was the largest exported item from Karnataka in FY 23 with a share of 23.1%, followed by telecom instruments at 7.8%.

It is important to note that out of the top five exported items from Karnataka, three belong to the category of electronics, showing the advanced manufacturing ecosystem in Karnataka.

²⁹ HS Code 85072000

³⁰ HS Code 48239019

Figure 2.19: Exports from Karnataka and Major Exported Products in FY 23

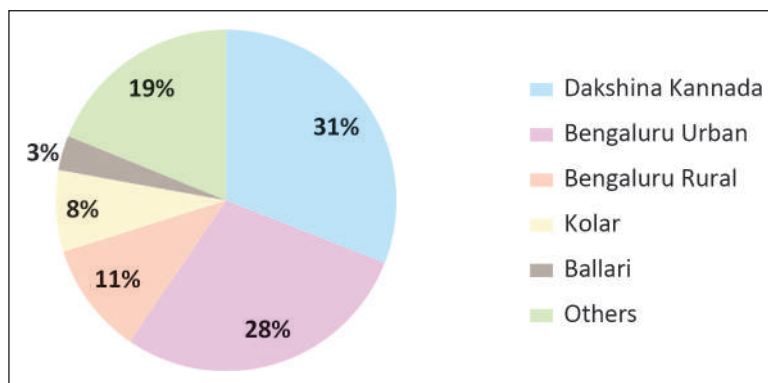


Source: DGCIS; India Exim Bank Research

With respect to the districts, the top three districts of Dakshina Kannada (31%), Bengaluru Urban (28.6%), and Bengaluru Rural (10.6%) contributed to over 70% of Karnataka's exports in FY 23.

Kolar (7.7%) and Ballari (3.3%) contributed another 11%. As per the Study's methodology, the shortlisted districts from Karnataka include Bengaluru Rural and Kolar.

Figure 2.20: Top Exporting Districts of Karnataka: FY 23



Source: MOCI; India Exim Bank Research

Bengaluru Rural

The exports from Bengaluru Rural district were valued at approximately US\$ 3 billion in FY 23 with four out of the top 10 items at HS 8 digit coming under the category of electrical machinery and equipment. It may be noted that for 7 out of the top 10 items, the district's share in India's exports is in double-digits, signifying the importance of this district in India's exports.

For instance, for electric inverters³¹, the district's share in India's exports of FY 23 was almost 32%. For 'boards, cabinets etc. for a voltage <=1000 volts'³², the district's share was 19%. Almost 87% of India's exports of 'Parts and accessories for revolvers or pistols'³³ were from Bengaluru Rural in FY 23.

Table 2.24: Top Exported Products from Bengaluru Rural

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
85044090	Other static converters	248.7	797.2	8.4%	31.2%
85044010	Electric inverters	172.8	545.4	5.8%	31.7%
85371000	Boards, cabinets etc. for a voltage <=1000 volts	96.9	520.1	3.3%	18.6%
62052090	Men's or boys' shirts of cotton: others	84.8	741.6	2.9%	11.4%
30049099	Other medicaments put up for retail sale n.e.s	77.9	7629.0	2.6%	1.0%
85049090	Parts of other electric power machinery	73.1	152.9	2.5%	47.8%
88073000	Other parts of airplanes, helicopters or unmanned aircraft	72.6	1106.0	2.5%	6.6%
84129090	Parts of engines and motors	72.6	246.2	2.5%	29.5%
93051000	Parts and accessories for revolvers or pistols	60.5	69.7	2.0%	86.8%
84111200	Turbo-jets of a thrust>25 kn	46.1	2696.8	1.6%	1.7%
Total		2957.8	-	100.0%	0.7%

Source: MOCI; DGCIS; India Exim Bank Research

A host of products have been identified under the DEH program for Bengaluru Rural. These include machine tools, Bangalore blue grapes, Bangalore rose onion, wine, guava pulp, vegetables and flowers, readymade garments, engineering/ aerospace /automobiles, processed foods, silk, plant/bio extracts, and pharmaceutical products.

Kolar

Kolar's total exports were recorded at US\$ 2.1 billion in FY 23. It may be noted that 89% of these exports were of smartphones. This can be attributed to the Wistron's factory iPhones in the district. However, Wistron, as in 2023, is in the process of selling its assembly unit to the Tata Group, which is currently holding trials to assemble iPhone 15 model in India. Kolar is contributing to over 17% of smartphones exports of India, currently.

³¹ HS Code 85044010

³² HS Code 85371000

³³ HS Code 93051000

Table 2.25: Top Exported Products from Kolar

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
85171300	Smartphones	1910.0	10955.1	88.9%	17.4%
84314100	Buckets, shovels, grabs and grips for machinery	33.1	83.6	1.5%	39.6%
85171219	Mobile phones, push button type	31.8	111.1	1.5%	28.6%
88073000	Other parts of airplanes, helicopters or unmanned aircraft	16.4	1106.0	0.8%	1.5%
4071100	Fertilized eggs for incubation, of domestic fowls	9.6	20.1	0.4%	47.8%
20011000	Cucumbers and gherkins, prepared or preserved by vinegar or acetic acid	9.1	136.3	0.4%	6.7%
85177990	Other parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus	7.8	238.9	0.4%	3.3%
62033300	Jackets and blazers of synthetic fibres	7.8	47.3	0.4%	16.5%
62034300	Trousers, bib and brace, overalls, breeches and shorts of synthetic fibres, mens or boys	6.7	91.7	0.3%	7.3%
85177910	Populated, loaded or stuffed printed circuit boards	6.6	98.3	0.3%	6.7%
Total		2149.6	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Other than this, Kolar has a significant national share in the exports of 'buckets, shovels, grabs and grips for machinery'³⁴ (share of 40% in India's exports) and 'fertilized eggs for incubation, of domestic fowls'³⁵ (share of 48% in India's exports). Kolar also exports 17% of India's 'men's or boys' jackets and blazers of synthetic fibres'³⁶.

The products identified under DEH for Kolar include mango (thothapuri, mlilika, baneshan and alphanso), tomato, color capsicums, millet ragi, rose onion, vegetables, mango pulp, processed pulses/ spices/ cereals, engineering (precision components), aerospace and defence components, automobile, phones, and apparels.

2.11. Kerala

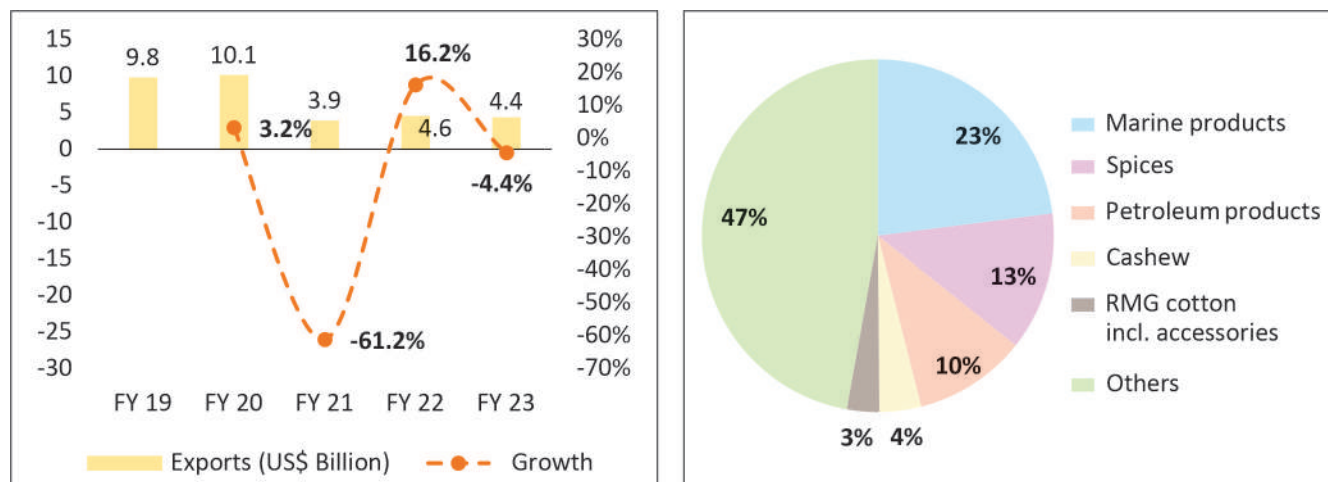
The exports from Kerala have declined from US\$ 9.8 billion in FY 19 to US\$ 4.4 billion in FY 23, recording an AAGR of (-) 11.6%, during this period. A major reason for this fall is the decline in the share of exports of gold and other precious metal jewellery from the state. This item had a share of almost 60% in Kerala's exports in FY 19; however, the same fell to 2.1% by FY 23. In FY 23, marine exports had a share of 23% in Kerala's exports.

³⁴ HS Code 84314100

³⁵ HS Code 04071100

³⁶ HS Code 62033300

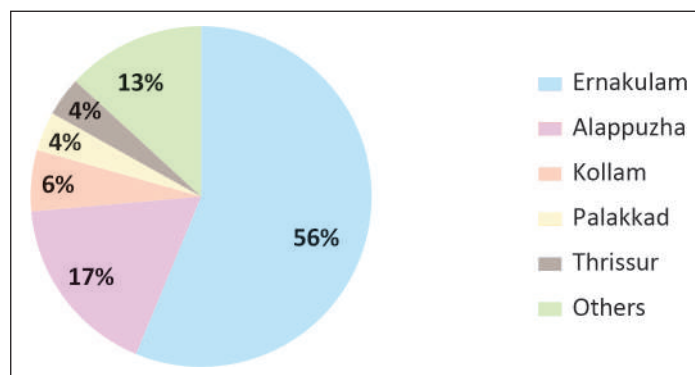
Figure 2.21: Exports from Kerala and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, the top two districts of Ernakulam (56.2%), and Alappuzha (17.4%) contributed to just under 74% of Kerala's exports in FY 23. Kollam (5.8%), Palakkad (3.7%), and Thrissur (3.7%) contributed another 13%. As per the Study's methodology, only Ernakulam was under the list of shortlisted districts for Kerala.

Figure 2.22: Top Exporting Districts of Kerala: FY 23



Source: MOCI; India Exim Bank Research

Ernakulam

The exports from Ernakulam were recorded at US\$ 2.5 billion in FY 23. For the district, three of the top ten exported items belong to the category of minerals fuels and oils and another three belong to the category of marine products.

The top exported item from the district in FY 23 was 'full range naphtha'³⁷ with a share of almost 8% in Ernakulam's total exports and 27% in India's exports of this item.

³⁷ HS Code: 27101229

Ernakulam also had a share of over 40% in India's exports of gas oil³⁸. Furthermore, it had a share of more than 32% in India's exports of capsicum oleoresins³⁹.

Table 2.26: Top Exported Products from Ernakulam

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
27101229	Full Range Naphtha	190.5	704.7	7.8%	27.0%
27101953	MV2 Grade fuel oil	112.0	666.6	4.6%	16.8%
61112000	Babies' garments etc. of cotton	92.6	786.0	3.8%	11.8%
27101941	Gas oil	73.9	183.0	3.0%	40.4%
03074320	Whole squids frozen	66.1	407.2	2.7%	16.2%
03074310	Cuttle fish frozen	63.6	293.5	2.6%	21.7%
33019022	Capsicum oleoresins	57.1	177.4	2.3%	32.2%
03061720	Whiteleg shrimp	56.6	4083.3	2.3%	1.4%
85369090	Other electrical apparatus	52.2	374.4	2.1%	13.9%
33019029	Oleoresins of spices n.e.s	51.5	109.9	2.1%	46.9%
Total		2457.1	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Overall, for nine out of top ten exported items from Ernakulam, the district's share in India's exports was in double-digit territory.

The identified products under DEH for this district are Vazhakulam pineapple, Chendamangalam dhoties & set mundu, pokkali rice, kaipad rice, marine products, spice products, chemical products, and engineering products.

2.12. Madhya Pradesh

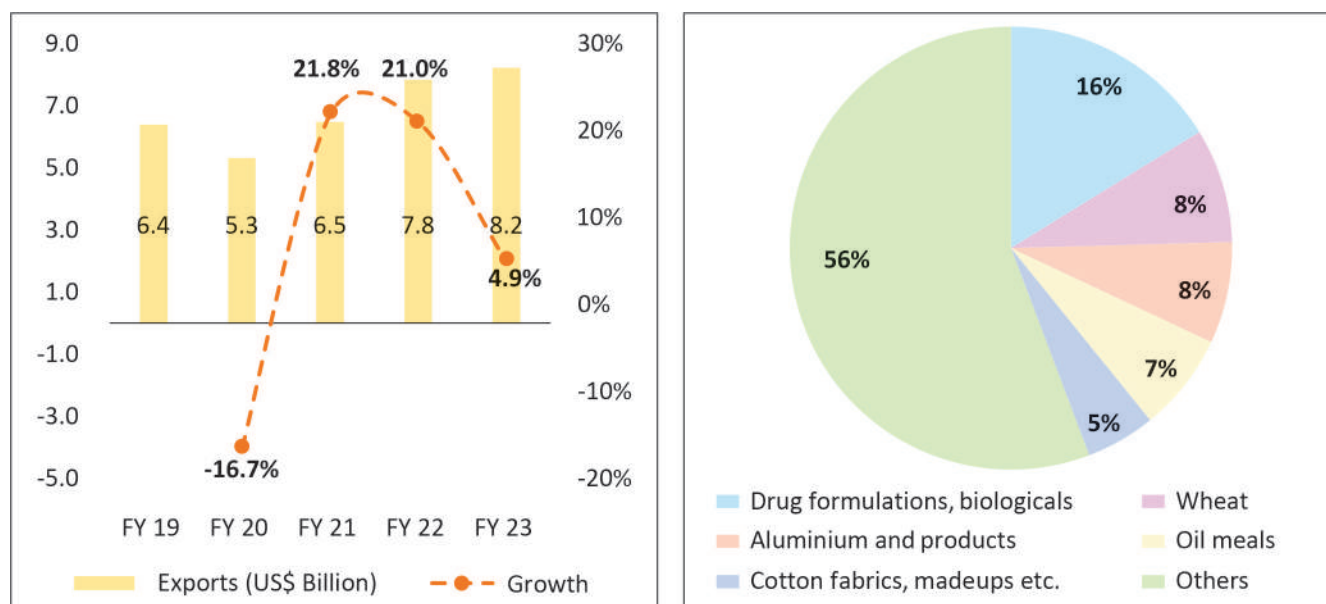
Madhya Pradesh's exports increased from US\$ 6.4 billion in FY 19 to US\$ 8.2 billion in FY 23, thereby registering an AAGR of 7.7%. Madhya Pradesh achieved an export growth of more than 20% in FY 21 (amongst the pandemic year), given its strong pharmaceutical base.

Its share in India's exports is almost the same in FY 23 (1.8%) vis-à-vis FY 19 (1.9%). Over 16% of MP's exports in FY 23 were of drug formulations, biologicals, with wheat consisting of another 8%.

³⁸ HS Code 27101941

³⁹ HS Code 33019022

Figure 2.23: Exports from Madhya Pradesh and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

Box 3: Exim Bank's Support to Gond Artists of Madhya Pradesh

Gond art, an ancient and revered form of tribal visual storytelling, holds the essence of humanity's deep connection with nature and culture. Rooted in the heritage of the Gond tribe, this art form employs vibrant colors, intricate lines, and sacred motifs to depict the symbiotic relationship between humans and the environment. It's an art that mirrors the life of the Gond people, capturing their stories, mythology, and everyday experiences in a mesmerizing blend of tradition and contemporary expression.

Gond art finds its origins in the Gond tribe, one of India's largest tribal communities, dispersed across central India. Their canvases, often walls or floors of their homes, encapsulate vivid stories of peacocks, mythical beasts, trees, and deities, symbolizing the tribe's intimate connection with nature and spirituality.

Recognizing the significance of Gond art and its potential for economic empowerment, India Exim Bank, in collaboration with the Concern India Foundation, facilitated the efforts of Gond artists to showcase this unique artistic heritage. Exim Bank's involvement manifested in various impactful initiatives, illustrating their commitment to fostering both cultural preservation and economic growth.

One such endeavour was the participation of Gond artists in the Art for Concern Exhibition, held in Mumbai in 2014. With the bank's support, these artisans were provided a platform to showcase their extraordinary creations to a wider audience, fostering new market opportunities and drawing the attention of potential buyers. Through this event, Gond artists were able to share their stories with the world and establish connections that transcend geographical boundaries.

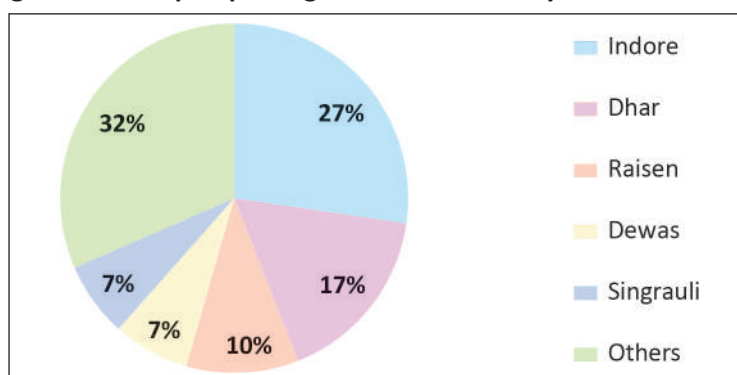
Exim Bank's engagement with Gond artists extended beyond exhibitions. The bank also organized a Product Development Workshop, facilitated by the National Centre for Design & Product Development (NCDPD) and Gond Tribal Art Ltd. This 15-day workshop brought together 30 master Gond artists, aiming to enrich their skills and expand their artistic horizons. The workshop introduced them to contemporary design concepts, product diversification, and market trends, enabling them to develop value-added products that resonate with contemporary audiences while preserving the essence of Gond art.

Additionally, Exim Bank consistently invites Gond artists to showcase their works in various exhibitions organized by the bank, creating opportunities for these artists to gain visibility and access new markets. This consistent support not only promotes their art but also empowers the Gond artists economically.

In today's scenario, the broader context of Exim Bank's interventions lies within the ODOP-DEH initiative which aims to create sustainable economic growth by promoting unique products from specific districts. Gond art aligns perfectly with this initiative, as it holds tremendous economic potential while celebrating the cultural legacy of the Gond tribe. By extending their support to Gond artists, Exim Bank is enhancing the ODOP-DEH initiative's reach and impact.

With respect to the districts, Indore alone accounts for more than one-fourth or 25% of the state's exports. It is followed by Dhar (16.7%) and Raisen (10.4%). As per the Study's methodology, only Indore and Dhar were under the list of shortlisted districts for Madhya Pradesh.

Figure 2.24: Top Exporting Districts of Madhya Pradesh: FY 23



Source: MOCI; India Exim Bank Research

Indore

Indore's exports were valued at US\$ 2.2 billion in FY 23. For six out of its top ten exported commodities, Indore had a double-digit share in India's exports. For instance, the exports of 'meal of soyabean, solvent extracted (defatted)'⁴⁰ from Indore had a share of 35% in India's exports of the same.

Similarly, for kabuli chana⁴¹, Indore's share in national exports was 60% in FY 23.

⁴⁰ HS Code 23040030

⁴¹ HS Code 07132010

Table 2.27: Top Exported Products from Indore

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	465.3	7629.0	20.8%	6.1%
23040030	Meal of soyabean, solvent extracted (defatted)	177.5	509.3	7.9%	34.9%
07132010	Kabuli chana	89.8	149.8	4.0%	59.9%
29232010	Lecithins	80.3	240.4	3.6%	33.4%
39206220	Plates, sheets, etc. of polyethylene terephthalate: Flexible, plain	74.2	211.1	3.3%	35.1%
84148030	Turbo chargers	73.0	141.9	3.3%	51.4%
30049069	Other Nonsteroidal antiinflammatory, analgesics and antipyretic drugs	69.0	919.8	3.1%	7.5%
23040010	Oil-cake and oil-cake meal of soya bean: Expeller variety	65.3	159.1	2.9%	41.0%
63053200	Flexible Intermediate Bulk Containers (FIBC) of man-made textile materials	62.3	861.1	2.8%	7.2%
10019910	Wheat	56.5	1500.6	2.5%	3.8%
Total		2241.1	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Indore also exported majority (51.4% share in India's exports) of India's 'turbo chargers'⁴².

The identified products under DEH for Indore are onion, potato, paper & paper products, pharmaceuticals, garments, engineering, and leather toys of Indore.

Dhar

For Dhar, the exports were registered at US\$ 1.4 billion in FY 23. Three of its top ten exported commodities fall in the category of pharmaceuticals and another three are in the category of machinery and mechanical appliances.

Under pharma, particularly for 'Salbutamol, Terbutaline, Ephedrine, Salmeterol and Methyl Xanthines'⁴³, Dhar's share in national exports was 70% in FY 23. For a few parts of diesel engines for motor vehicles⁴⁴, Dhar's share was 33.2% in India's exports.

⁴² HS Code 07132010

⁴³ HS Code: 30049091

⁴⁴ HS Code: 84099941

Table 2.28: Top Exported Products from Dhar

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	153.3	7629.0	11.2%	2.0%
63053200	Flexible Intermediate Bulk Containers (FIBC) of man-made textile materials	117.1	861.1	8.5%	13.6%
84295900	Other self-propelled mechanical shovels, excavators and shovel loaders	112.5	401.8	8.2%	28.0%
30049091	Salbutamol, Terbutaline, Ephedrine, Salmeterol and Methyl Xanthines	102.5	147.1	7.5%	69.7%
84099941	Component parts of diesel engines for motor vehicles n.e.s	78.1	235.0	5.7%	33.2%
87042200	Motor vehicles with gross vehicle weight > 5t but <= 20t	41.8	268.3	3.0%	15.6%
84082020	Engines of cylinder capacity > 250 cc	35.6	265.0	2.6%	13.4%
30043200	Medicaments containing corticosteroid hormones, their derivatives or structural analogues	34.1	140.2	2.5%	24.3%
76109030	Aluminium plates, rods, profiles, tubes and the like, prepared for use in structure	32.4	46.2	2.4%	70.2%
39202020	Plates, sheets, etc. of polymers of propylene:Flexible, plain	26.4	251.8	1.9%	10.5%
Total		1371.5	-	100.0%	0.3%

Source: MOCI; DGCI; India Exim Bank Research

Dhar also exported over 70% of India's 'Aluminium plates, rods, profiles, tubes and the like, prepared for use in structure'⁴⁵ in FY 23.

The products identified for this district under DEH are flexible intermediate bulk container (FIBC), plastic products, automobiles, automobile parts, other engineering products, garments, bagh prints, sitaphal, and soyabean.

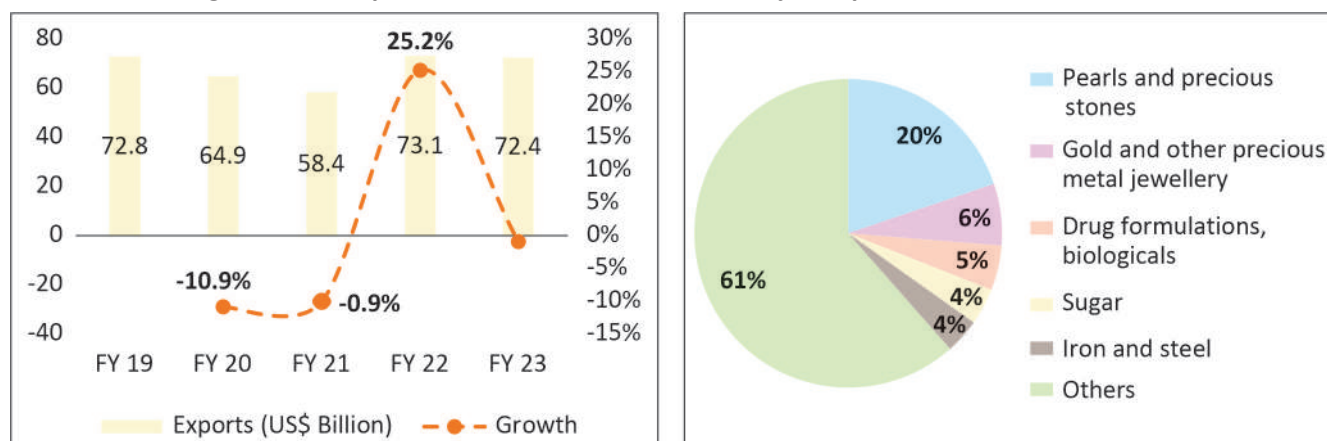
2.13. Maharashtra

Maharashtra's exports in FY 23 were almost at the same level as in FY 19. The exports in FY 23 were valued at US\$ 72.4 billion, marginally down from US\$ 72.8 billion in FY 19. It may be noted that Maharashtra is the second largest exporting state of India. The exports registered an AAGR of 0.9%, during the last five years, from the state.

Maharashtra's share in India's exports has however gone down from 22.1% in FY 19 to 16.1% in FY 23. A major reason for this big fall was the extraordinary jump in the share of Gujarat's exports, which was driven by petroleum exports during the last two years. In case of Maharashtra, almost one-fifth of the state's exports in FY 23 were of pearls and precious stones and another 6.5% were of gold and other precious metal jewellery.

⁴⁵ HS Code: 76109030

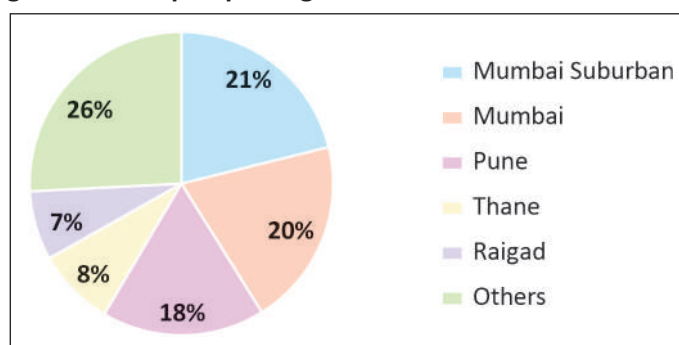
Figure 2.25: Exports from Maharashtra and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, the top three districts of Mumbai Suburban (21.1%), Mumbai (20%), and Pune (17.4%) accounted for over 58% of Maharashtra's exports in FY 23. Other important export centers were Thane (8.3%) and Raigad (7.4%). However, just like Gujarat, none of the top five districts makes it to the shortlisted districts, as per the Study's methodology, showing the scale and concentration of exports, amongst the top five districts. As per the Study's methodology, the shortlisted districts include Palghar, Aurangabad, Nashik, Nagpur, Satara, and Kolhapur.

Figure 2.26: Top Exporting Districts of Maharashtra: FY 23



Source: MOCI; India Exim Bank Research

Palghar

Palghar's exports were valued at US\$ 3.4 billion in FY 23. The district's nine out of the top ten exported items belonged to the category of 'iron or steel' or iron or steel articles. And for all these items, Palghar's share in India's exports was in double-digit. For 'bright bars: Nickel chromium austenitic type'⁴⁶, Palghar was responsible for almost all of India's exports. In case of 'angles etc. of less than 80 mm'⁴⁷, the district exported more than 50% of India's exports in FY 23. For both 'wire of stainless steel thicker than 1.5 mm'⁴⁸ and 'flanges of stainless steel'⁴⁹ Palghar's contribution was almost 44% in India's exports.

⁴⁶ HS Code 72223012

⁴⁷ HS Code 72224020

⁴⁸ HS Code 72230091

⁴⁹ HS Code 73072100

Table 2.29: Top Exported Products from Palghar

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
72222012	Bright bars: Nickel chromium austenitic type	212.5	355.1	6.2%	59.8%
72223012	Bright bars: Nickel chromium austenitic type	194.5	195.0	5.7%	99.8%
72230091	Wire of stainless steel thicker than 1.5 mm	124.6	284.8	3.6%	43.7%
73072100	Flanges of stainless steel	116.3	264.8	3.4%	43.9%
73181500	Other screws and bolts, of iron or steel, whether or not with their nuts and washers	89.0	438.0	2.6%	20.3%
72224020	Angles etc. of less than 80 mm	87.9	167.7	2.6%	52.4%
30049099	Other medicaments put up for retail sale n.e.s	75.1	7629.0	2.2%	1.0%
72210090	Bright bars n.e.s	64.3	128.5	1.9%	50.0%
72104900	Other products of iron/non-alloy steel, otherwise plated or coated with zinc	61.0	343.3	1.8%	17.8%
72259900	Other flat rolled products of other alloy steel	59.7	178.2	1.7%	33.5%
Total		3415.0	-	100.0%	0.8%

Source: MOCI; DGCIS; India Exim Bank Research

The identified products under DEH for Palghar are chemicals, “chikoo” (Sapodilla), pharmaceuticals, iron & steel and engineering products, textiles, plastics related, fisheries, marine & food processing, fruits & vegetables, Warli painting (handicraft), and Focus services - tourism and hospitality services, and transport and logistics services.

Aurangabad

Aurangabad's exports were registered at just over US\$ 3 billion in FY 23, with over 21% of the district's exports coming from 'motorcycle with cylinder capacity >75 cc but <= 250 cc'⁵⁰. With exports of over US\$ 660 million of this particular item from Aurangabad, the district's share in national exports is over 33%. The high share is due to the presence of Bajaj Auto Ltd. Motorcycle plant in Waluj. This plant of Bajaj produces motorcycles like Discover, Platina, CT 100, and Boxer.

The second largest exported item from Aurangabad is 'three-wheeled vehicles with cylinder capacity <=1000cc with spark ignition'⁵¹ with a share of 48.4% in India's exports. Bajaj's Waluj plant also produces three-wheelers. The district also has a share of over 20% in India's exports of 'optical fibres, optical fibre bundles and cables'⁵².

⁵⁰ HS Code 87112029

⁵¹ HS Code 87032120

⁵² HS Code 90011000

Table 2.30: Top Exported Products from Aurangabad

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87112029	Motorcycle with cylinder capacity >75 cc but <= 250 cc	660.1	1976.7	21.2%	33.4%
87032120	Three-wheeled vehicles with cylinder capacity <=1000 cc with spark ignition	235.8	486.6	7.6%	48.4%
90011000	Optical fibres, optical fibre bundles and cables	148.8	703.0	4.8%	21.2%
30049099	Other medicaments put up for retail sale n.e.s	126.3	7629.0	4.1%	1.7%
84089010	Stationary engines of cylinder capacity > 50 cc	87.7	181.5	2.8%	48.3%
02023000	Boneless meat of bovine animals, frozen	80.7	2859.4	2.6%	2.8%
87141090	Parts and accessories of motorcycles excl. saddle	70.5	653.3	2.3%	10.8%
39206929	Sun/dust control film of other polyester n.e.s	64.9	65.6	2.1%	98.9%
39202020	Plates, sheets, etc. of polymers of propylene:Flexible, plain	51.3	251.8	1.6%	20.4%
39202090	Plates, sheets, etc. of polymers of propylene n.e.s	47.4	153.4	1.5%	30.9%
Total		3108.4	-	100.0%	0.7%

Source: MOCI; DGCIS; India Exim Bank Research

The products which are a part of DEH program from Aurangabad are engineering, pharmaceuticals and agriculture products, engineering services, Paithani sarees and fabrics, Marathwada kesar mango, and Beed custard apple.

Nashik

Nashik had exports of almost US\$ 3 billion in FY 23 and exports over 60% of India's onions⁵³ and over 66% of India's grapes⁵⁴. In fact, more than 11% of Nashik's exports are of onions and another 7% are of grapes. Further, the district also exports over 58% of India's 'iron pipes for oil/gas pipelines'⁵⁵.

The products identified under DEH for Nashik are agriculture products, electrical products, pharmaceutical etc., Nashik grapes, onion, Nashik valley wine, and Lasalgaon onion.

⁵³ HS Code 07031010

⁵⁴ HS Code 08061000

⁵⁵ HS Code 73041910

Table 2.31: Top Exported Products from Nashik

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
07031010	Onions, fresh or chilled	338.6	561.4	11.4%	60.3%
08061000	Grapes, fresh	207.8	313.7	7.0%	66.3%
30049099	Other medicaments put up for retail sale n.e.s	174.3	7629.0	5.9%	2.3%
87042100	Motor vehicles with gross vehicle weight <= 5 t	158.8	485.8	5.4%	32.7%
73041910	Iron pipes for oil/gas pipelines	83.9	142.9	2.8%	58.7%
87089900	Other parts and accessories of vehicles	82.3	3189.0	2.8%	2.6%
39202020	Plates, sheets, etc. of polymers of propylene: Flexible, plain	68.4	251.8	2.3%	27.2%
85322500	Other fixed electrical capacitors, dielectric of paper or plastics	66.0	92.7	2.2%	71.2%
85381010	Boards, panels, consoles etc. for industrial use	60.8	220.7	2.0%	27.6%
10059011	Yellow maize (excl. seed for sowing)	59.3	389.3	2.0%	15.2%
Total		2966.3	-	100.0%	0.7%

Source: MOCI; DGCIS; India Exim Bank Research

Nagpur

Nagpur had total exports worth US\$ 1.6 billion in FY 23 with the highest coming from parboiled rice (share of 14.3% in Nagpur's total exports). In fact, the top three exported items from Nagpur are all varieties of rice and together account for 25% of Nagpur's exports.

For the fourth largest exported items from Nagpur, that is, 'Captopril, Enalapril, Lisinopril, Perindopril and Ramipril'⁵⁶ (used in blood pressure issues), the district's share in India's total exports is more than 35%.

The products which are a part of DEH program from Nagpur are Nagpur orange, groundnut oil, aluminium sheet, cane sugar, and cotton yarn.

Table 2.32: Top Exported Products from Nagpur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
10063010	Parboiled rice	233.5	2994.2	14.3%	7.8%
10063090	Rice except parboiled rice (excl. Basmati rice)	98.0	2203.5	6.0%	4.4%
10064000	Broken rice	70.8	983.5	4.3%	7.2%
30049071	Captopril, Enalapril, Lisinopril, Perindopril and Ramipril	45.1	125.8	2.8%	35.8%
30049099	Other medicaments put up for retail sale n.e.s	46.9	7629.0	2.9%	0.6%

⁵⁶ HS Code 30049071

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
54023300	Textured filament yarn of polyester	35.4	527.8	2.2%	6.7%
55032000	Staple fibres of polyesters, not carded, combed or otherwise processed for spinning	35.7	284.2	2.2%	12.6%
73082011	Towers for transmission line whether or not assembled	73.7	483.5	4.5%	15.2%
87019300	Other tractors, of an engine power > 37 kW but <= 75 kW	60.6	857.5	3.7%	7.1%
88073000	Other parts of airplanes, helicopters or unmanned aircraft	41.1	1106.0	2.5%	3.7%
Total		1634.9	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

Satara

Satara's total exports were valued at US\$ 1.6 billion in FY 23. More than 20% of Satara's exports, amongst its top ten exported items, fall in the category of cane or beet sugar⁵⁷. Further, almost 97% of India's 'rubber stops'⁵⁸ exports were from Satara in FY 23. Further, 57% of India's exports of 'generating sets with compression-ignition internal combustion piston engine of an output > 75 kVA but <= 375 kVA'⁵⁹ are from Satara. Over 90% of India's exports of 'artificial aialysis apparatus and haemodialyser (portable or non-portable)'⁶⁰ are also from Satara.

Table 2.33: Top Exported Products from Satara

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
17011490	Other cane sugar	263.7	2713.7	16.4%	9.7%
84089090	Other engines	154.0	909.5	9.6%	16.9%
84099949	Other parts of diesel/semi-diesel engines	79.2	222.0	4.9%	35.7%
40169980	Rubber stoppers	72.3	74.6	4.5%	96.9%
17019990	Cane or beet sugar and chemically pure sucrose, in solid form	71.9	2804.8	4.5%	2.6%
85021200	Generating sets with compression-ignition internal combustion piston engine of an output > 75 kVA but <= 375 kVA	65.3	114.6	4.1%	57.0%
2023000	Boneless meat of bovine animals, frozen	53.0	2859.4	3.3%	1.9%
84798999	Other machines and mechanical appliances, n.e.s.	47.2	396.0	2.9%	11.9%

⁵⁷ HS Codes 17011490 and 17019990

⁵⁸ HS Code 40169980

⁵⁹ HS Code 85021200

⁶⁰ HS Code 90189031

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
39204900	Other plastic sheets of polymers of vinyl chloride	45.4	83.2	2.8%	54.5%
90189031	Artificial aialysis apparatus and haemodialyser (portable or non-portable)	43.1	47.6	2.7%	90.5%
Total		1609.2	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

The products which are a part of DEH program from Satara are agriculture products, Mahabaleshwar strawberry, and Waghya ghevada.

Kolhapur

Kolhapur's exports were recorded at approximately US\$ 1.2 billion in FY 23, with almost 40% exports belonging to the category of sugar⁶¹. Particularly for 'cane molasses resulting from the extraction or refining of sugar', Kolhapur's share in India's exports was 29% in FY 23. Furthermore, for 'stationary engines of cylinder capacity > 50 cc'⁶², the district's share in India's exports was 16%.

The products under DEH for Kolhapur included agricultural products. leather & engineering goods, banana, Kolhapur jaggery, Kolhapuri chappal.

Table 2.34: Top Exported Products from Kolhapur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
17011490	Other cane sugar	205.7	2713.7	17.6%	7.6%
17019990	Cane or beet sugar and chemically pure sucrose, in solid form	188.2	2804.8	16.1%	6.7%
17031000	Cane molasses resulting from the extraction or refining of sugar	73.3	253.3	6.3%	28.9%
63023100	Other bedlinen of cotton	69.2	568.2	5.9%	12.2%
84834000	Gears and gearing for machinery; ball or roller screws; gear boxes and other speed changers, incl. torque converters	59.0	849.1	5.1%	6.9%
63041910	Bedsheets and bed cover of cotton	34.7	400.7	3.0%	8.7%
84089010	Stationary engines of cylinder capacity > 50 cc	29.0	181.5	2.5%	16.0%
84818030	Industrial valves	15.7	687.5	1.3%	2.3%
87084000	Gear boxes	15.2	664.6	1.3%	2.3%
73259999	Other cast articles of iron or steel n.e.s	13.4	253.0	1.1%	5.3%
Total		1165.6	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

⁶¹ HS Codes 17011490, 17019990, and 17031000

⁶² HS Code 84089010

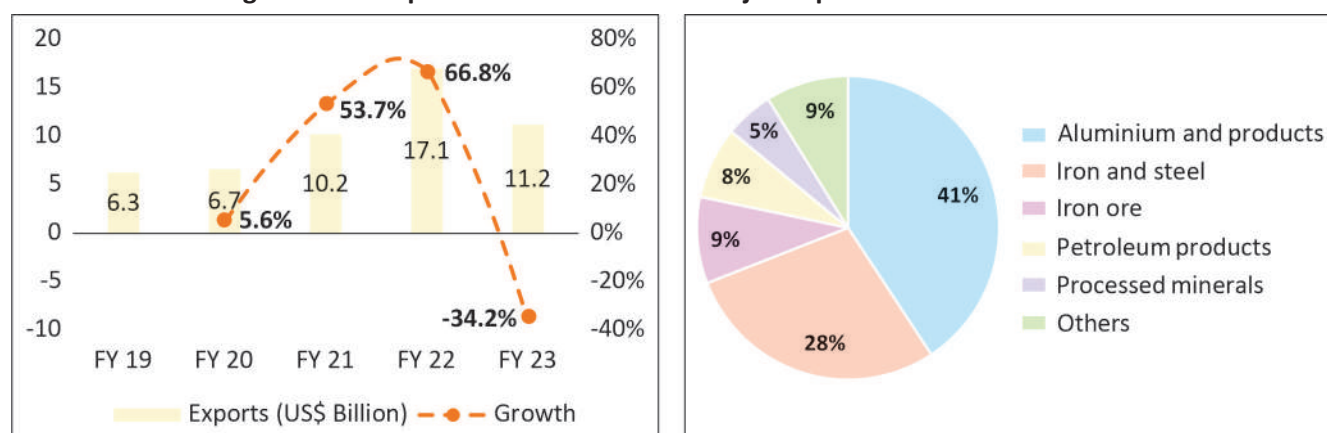
2.14. Odisha

The exports from Odisha have almost doubled in the last five years, increasing from US\$ 6.3 billion in FY 19 to US\$ 11.2 billion in FY 23. The exports from Odisha recorded an AAGR of 23%, during this period. The share of Odisha in India's exports also increased from 1.9% to 2.5%, during the same period.

It is important to note that Odisha's exports reached US\$ 17.1 billion in FY 22, a growth of 66.8% over FY 21. This growth was primarily driven by the aluminium exports. The non-alloyed aluminium exports grew by 131% in FY 22 and had a share of almost 25% in Odisha's exports. Similarly, alloyed aluminium exports registered a growth of over 300% in FY 22 and had a share of almost 10% in Odisha's exports. High international aluminium prices were the major reason for this growth. The prices of aluminium throughout FY 22 displayed an increasing trend reaching a high of US\$ 3849/tonne in February 2022, as compared to US\$ 2182/tonne in February 2021. As a result, Odisha's share in India's exports reached 4% in FY 22 before falling to 2.5% in FY 23.

In FY 23, the top exported category from Odisha was aluminium and products with a share of 40.7%, followed by iron and steel at 28.4% and iron ore at 9.2%. Overall, the top five exported principal commodities accounted for more than 90% of Odisha's exports in FY 23.

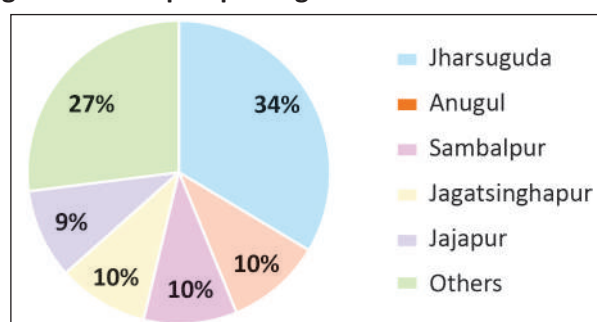
Figure 2.27: Exports from Odisha and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, the top five districts contributed to 73% of Odisha's exports in FY 23, with Jharsuguda alone contributing to over one-third of Odisha's exports in FY 23. As per the Study's methodology, the shortlisted districts from Odisha include Jharsuguda, Angul, Sambalpur, Jagatsinghapur, and Jajapur.

Figure 2.28: Top Exporting Districts of Odisha: FY 23



Source: MOCI; India Exim Bank Research

Jharsugda

Jharsugda's total exports were recorded at US\$ 3.8 billion, with the exports of 'aluminium ingots, not alloyed' having a share of 68.4% in the district's exports in FY 23. For this item, the district's share in India's exports was more than 50% in FY 23. The top five items at HS 8 digit belong to the aluminium industry and together account for almost 99% of Jharsugda's exports.

Further, for various items, the share of Jharsugda in India's exports is more than 90%. For instance, in the case of 'aluminium billets, alloyed', the district's share is 95%. Almost 100% of India's 'aluminium billets, not alloyed' are exported from Jharsugda. Also, for 'chrome magnesite bricks and shapes', the district's contribution to India's exports is 96%. The identified products under DEH are 'aluminium ingot, and chilly & ginger'.

Table 2.35: Top Exported Products from Jharsugda

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
76011010	Aluminium ingots, not alloyed	2566.0	5003.3	68.4%	51.3%
76012020	Aluminium billets, alloyed	650.9	686.1	17.4%	94.9%
76051100	Wire of non-alloy aluminium, with a maximum cross-sectional dimension of > 7 mm	328.2	381.4	8.7%	86.1%
76012010	Aluminium ingots, alloyed	113.8	538.7	3.0%	21.1%
76011020	Aluminium billets, not alloyed	44.8	44.8	1.2%	99.9%
69021090	Other refractory bricks containing more than 50% of magnesium, calcium, chromium and their oxides	9.9	12.5	0.3%	79.3%
69021020	Chrome magnesite bricks and shapes	6.8	7.0	0.2%	96.0%
69022020	Bricks and shapes, high alumina	6.7	135.7	0.2%	5.0%
87041010	Dumpers designed for off-highway use with net weight >8 tons and maximum payload >=10 tons	3.5	787.4	0.1%	0.4%
38160000	Refractory cements, mortars, concretes and similar compositions, incl. dolomite ramming mix	3.2	67.9	0.1%	4.8%
Total		3751.3	-	100.0%	0.8%

Source: MOCI; DGCIS; India Exim Bank Research

Angul

Angul's exports were valued at US\$ 1.1 billion in FY 23. Its top ten exports at HS 8 digit accounted for 97.3% of the district's total exports. In fact, six out of its top ten exported items were from the category of iron or steel. The district had a double-digit share in India's exports of nine out of top ten items. For 'universal plates of flat-rolled products not in coils of thickness exceeding 10 mm hot-rolled pickled'⁶³, Angul's share in India's exports was almost 92%. Further, for 'shot and angular grit of iron'⁶⁴, the share was 96% in India's exports.

⁶³ HS Code 72085120

⁶⁴ HS Code 72051011

The identified products under DEH are ‘aluminium ingot, and steel ingots’.

Table 2.36: Top Exported Products from Angul

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
28182090	Other aluminium oxide	214.6	372.9	18.8%	57.6%
28182010	Alumina calcined	206.8	423.0	18.2%	48.9%
72071920	Mild steel (M.S.) billets	188.6	600.0	16.6%	31.4%
72085120	Universal plates of flat-rolled products not in coils of thickness exceeding 10 mm hot-rolled pickled	167.4	182.6	14.7%	91.7%
72071290	Other semi-finished products of iron or non-alloy steel of rectangular cross section	100.8	157.8	8.8%	63.9%
72051011	Of iron: Shot and angular grit	92.7	96.6	8.1%	96.0%
76011010	Aluminium ingots, not alloyed	69.8	5003.3	6.1%	1.4%
72085110	Plates of flat-rolled products not in coils of thickness exceeding 10 mm hot-rolled pickled	37.3	274.1	3.3%	13.6%
72259900	Other flat rolled products of other alloy steel	23.5	178.2	2.1%	13.2%
26180000	Granulated slag (slag sand) from iron/steel	6.9	66.0	0.6%	10.5%
Total		1139.2	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Sambalpur

Sambalpur's exports were recorded at US\$ 1.1 billion in FY 23. More than 62% of the district's exports in FY 23 came from 'aluminium ingots, not alloyed'. It may be noted that out of its top ten exported items at HS 8-digit level, two belong to aluminium and eight belong to iron or steel. These top ten together account for over 95% of Sambalpur's exports.

The district exports over one-fifth of India's 'sheets of flat-rolled products in coils of a thickness < 3 mm hot-rolled, excl pickled'⁶⁵. Further, it also exports almost 28% of India's 'rectangular (incl square) plates or sheets of aluminium alloys'⁶⁶. Over 62% of India's 'sheets of flat-rolled products in coils not further worked of thickness >= 0.5 mm but < 1 mm'⁶⁷ are also exported from Sambalpur.

The identified products under DEH for Sambalpur include are 'Sambalpuri bandha saree & fabrics, aluminium ingot, and chilly'.

⁶⁵ HS Code 72083930

⁶⁶ HS Code 76061200

⁶⁷ HS Code 72091720

Table 2.37: Top Exported Products from Sambalpur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
76011010	Aluminium ingots, not alloyed	696.6	5003.3	62.5%	13.9%
72083930	Sheets of flat-rolled products in coils of a thickness < 3 mm hot-rolled, excl pickled	82.9	405.5	7.4%	20.4%
72253090	Other hot-rolled products in coils	72.8	784.6	6.5%	9.3%
72011000	Non-alloy pig iron containing ≤ 0.5% of phosphorous	61.5	315.5	5.5%	19.5%
72024100	Ferro-chromium, containing > 4% of carbon	37.4	989.2	3.4%	3.8%
76061200	Rectangular (incl square) plates or sheets of aluminium alloys	34.6	124.4	3.1%	27.9%
72083940	Strips of flat-rolled products in coils of a thickness < 3 mm hot-rolled, excl pickled	26.0	297.1	2.3%	8.7%
72083830	Sheets of flat rolled products in coils of a thickness ≥ 3 mm or more but less than 4.75 mm	25.7	140.6	2.3%	18.3%
72107000	Painted, varnished or coated with plastics	15.4	199.5	1.4%	7.7%
72091720	Sheets of flat-rolled products in coils not further worked of thickness ≥ 0.5 mm but < 1 mm	9.1	14.5	0.8%	62.7%
Total		1114.1	-	100.0%	0.2%

Source: MOCI; DGCIS; India Exim Bank Research

Jagatsinghapur

The district's exports were registered at just over US\$ 1 billion in FY 23 with 'agglomerated iron ore pellets' accounting for almost 20% of Jagatsinghapur's total exports. Given that Indian Oil Corporation's Paradip refinery is situated in this district, eight out of the district's top ten exported items at HS 8-digit belonged to the category of mineral fuels and oils. The top ten items exported make for about 99% of the district's exports.

The identified products under DEH for this district include are plastic products.

Table 2.38: Top Exported Products from Jagatsinghapur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
26011210	Agglomerated iron ore pellets	213.6	901.6	19.8%	23.7%
27101990	Other petroleum oils and oils obtained from bituminous minerals n.e.s	187.3	452.9	17.3%	41.4%
27101290	Other light oils and preparations, of petroleum or bituminous mineral	158.2	7437.4	14.6%	2.1%
27101241	Motor gasoline conforming to Standard IS 2796	135.8	14905.8	12.6%	0.9%

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
27101949	High flash high speed diesel fuel conforming to Standard IS 16861	122.5	8513.2	11.3%	1.4%
27111990	Other gaseous hydrocarbons, liquefied, n.e.s.	117.8	470.0	10.9%	25.1%
27101221	Light Naphtha	64.9	5436.6	6.0%	1.2%
27101953	MV2 Grade fuel oil	33.0	666.6	3.1%	4.9%
27101229	Full Range Naphtha	22.4	704.7	2.1%	3.2%
03061720	Whiteleg shrimp	13.3	4083.3	1.2%	0.3%
Total		1081.1	-	100.0%	0.2%

Source: MOCI; DGCIS; India Exim Bank Research

Jajpur

The final district among the shortlisted category for Odisha is Jajpur, which recorded its exports at just over US\$ 1 billion for FY 23. Similar to Jagatsinghapur, its highest exported item is agglomerated iron ore pellets with a share of 17.6% in district's exports. In India, the district's contribution for this item is 20.9%. This means, together, Jajpur and Jagatsinghapur, exports almost 45% of India's agglomerated iron ore pellets.

It is interesting to note that for all the top ten exported commodities at HS 8 digit, Jajpur has a double-digit share in India's exports. It may also be noted that except the top exported item, the rest nine items from Jajpur belong to the iron or steel category. For 'universal plates of stainless steel/heat resisting steel, nickel chromium austenitic type: exceeding 14 mm'⁶⁸, the district's share in India's exports in FY 23 was 89%. Further, for 'cold-rolled, nickel chromium austenitic type products'⁶⁹, the share in India's exports was more than 93%.

The identified products under DEH for this district include are stone carving/handicraft.

Table 2.39: Top Exported Products from Jajpur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
26011210	Agglomerated iron ore pellets	188.2	901.6	17.6%	20.9%
72024100	Ferro-chromium, containing > 4% of carbon	177.8	989.2	16.6%	18.0%
72083830	Sheets of flat rolled products in coils of a thickness >= 3 mm or more but less than 4.75 mm	58.3	140.6	5.5%	41.4%
72083930	Sheets of flat-rolled products in coils of a thickness < 3 mm hot-rolled, excl pickled	53.2	405.5	5.0%	13.1%

⁶⁸ HS Code 72192122

⁶⁹ HS Code 72193220

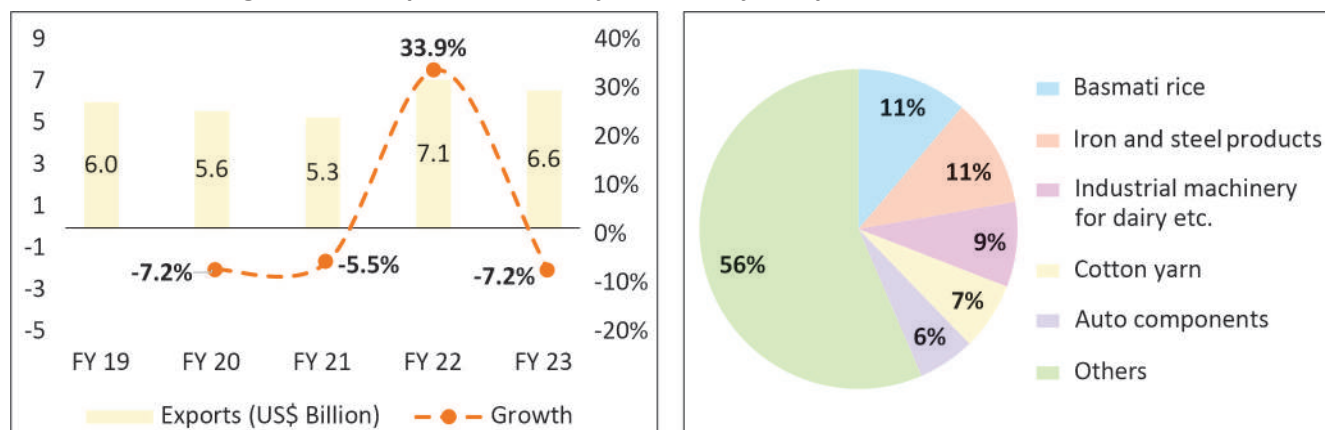
HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
72192122	Universal plates of stainless steel/heat resisting steel, nickel chromium austenitic type: Exceeding 14 mm	79.7	89.7	7.5%	88.9%
72192212	Nickel chromium austenitic type products	27.1	34.2	2.5%	79.1%
72193220	Cold-rolled, Nickel chromium austenitic type products	27.4	29.3	2.6%	93.4%
72193320	Nickel chromium austenitic type	65.2	80.8	6.1%	80.7%
72199013	Sheets and plates < 3 mm,worked	35.7	52.3	3.3%	68.2%
72253090	Other hot-rolled products in coils	144.3	784.6	13.5%	18.4%
Total		1068.4	-	100.0%	0.2%

Source: MOCI; DGCIS; India Exim Bank Research

2.15. Punjab

The exports from Punjab have recorded a decent growth in the last five years with the exports increasing from US\$ 6 billion in FY 19 to US\$ 6.6 billion in FY 23, thereby registering an AAGR of 3.5%. Basmati rice accounted for 11.2% of Punjab's exports in FY 23, followed by iron and steel products at 11%.

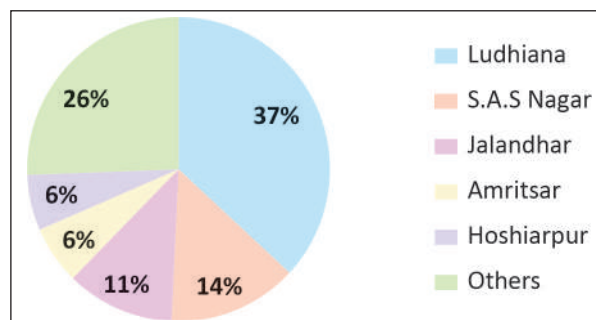
Figure 2.29: Exports from Punjab and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, Ludhiana alone accounts for almost 37% of Punjab's exports. Another 25% was contributed together by S.A.S Nagar and Jalandhar. As per the Study's methodology, only Ludhiana was under the shortlisted districts for Punjab.

Figure 2.30: Top Exporting Districts of Punjab: FY 23



Source: MOCI; India Exim Bank Research

Ludhiana

The exports from Ludhiana were recorded at just under US\$ 2.5 billion in FY 23. For the district, five of the top ten exported items belonged to the category of iron or steel articles. The district also had a double-digit share in India's exports for seven out of top ten items.

For instance, 'props and smaller equipment for scaffolding, shuttering, propping or pit-propping'⁷⁰, Ludhiana's share in India's exports was more than 35%. Similarly, for 'non-galvanised iron or steel', the district's share was almost 35% in India's exports. Further, given that Ludhiana is one of the major garments' centers of India, its share in India's exports of 'shirts of other fibres'⁷¹ was over 35% in FY 23.

Table 2.40: Top Exported Products from Ludhiana

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87089900	Other parts and accessories of vehicles	151.0	3189.0	6.2%	4.7%
73181500	Other screws and bolts, of iron or steel, whether or not with their nuts and washers	102.0	438.0	4.2%	23.3%
73084000	Props and smaller equipment for scaffolding, shuttering, propping or pit-propping	96.5	272.5	4.0%	35.4%
73079190	Non-galvanised iron or steel	71.9	208.7	3.0%	34.5%
73089090	Other structures and parts of structures of iron and steel (excl. floating structures)	69.1	646.9	2.8%	10.7%
52052310	Grey single cotton yarn, of combed fibres with a linear density of 192.31 decitex to < 232.56 decitex	69.1	739.7	2.8%	9.3%
73181900	Other threaded articles of iron or steel	57.9	147.3	2.4%	39.3%
82041110	Hand operated non-adjustable spanners	53.0	148.8	2.2%	35.6%
61091000	T-shirts etc. of cotton	45.5	1772.1	1.9%	2.6%
61059090	Shirts of other fibres	45.4	128.9	1.9%	35.2%
Total		2427.1	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

The identified products under DEH for this district are readymade garments, hosiery, shirts and t-shirts,

⁷¹ HS Code 61059090

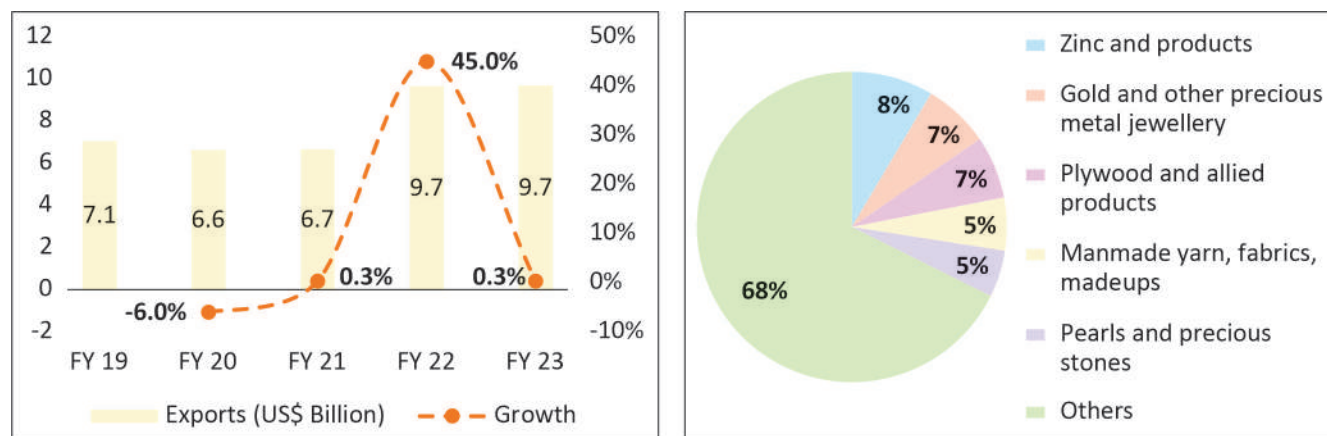
woollen yarn, bakery, hand tools, and bicycles.

2.16. Rajasthan

The exports from Rajasthan have increased at an average of almost 10% annually, during FY 19 to FY 23. The exports were recorded at US\$ 9.7 billion in FY 23, up from US\$ 7.1 billion in FY 19. The state's share in India's exports, during the last five years, has remained almost stable at 2.1%.

The state's top exported categories include zinc and products at 8.5%, followed by gold and other precious metal jewellery at 6.9%, and plywood and allied products at 6.5%.

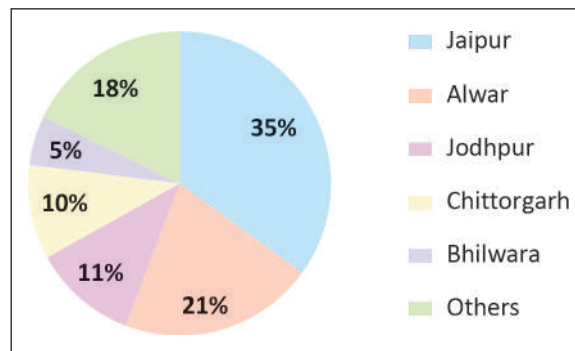
Figure 2.31: Exports from Rajasthan and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, the top five districts account for more than 80% of Rajasthan's exports, with Jaipur alone contributing to 35% of Rajasthan's exports in FY 23. Another 21% is contributed by Alwar. As per the Study's methodology, the shortlisted districts from Rajasthan include Jaipur, Alwar, and Jodhpur.

Figure 2.32: Top Exporting Districts of Rajasthan: FY 23



Source: MOCI; India Exim Bank Research

Jaipur

Jaipur's exports were valued at more than US\$ 3 billion in FY 23, with six out of its top ten exported items at HS 8 digit belonging to the gems and jewellery industry. For emeralds, Jaipur's share in India's exports was almost 98% in FY 23. Furthermore, for 'silver jewellery set with gems', the district's share was more than 22% in India's exports of this item.

The products identified under the DEH program for Jaipur include gems & jewellery, garments, furniture, services exports and others, toys, and blue pottery of Jaipur.

Table 2.41: Top Exported Products from Jaipur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
71039130	Emeralds	206.7	211.4	6.1%	97.8%
71131120	Silver jewellery set with gems	187.4	845.6	5.5%	22.2%
71131930	Jewellery of gold set with diamond	124.4	4273.3	3.7%	2.9%
94036000	Other wooden furniture	119.7	667.4	3.5%	17.9%
71131910	Jewellery of gold unset	102.2	3512.2	3.0%	2.9%
71131990	Articles of other precious metal	96.5	433.5	2.9%	22.3%
84281019	Other lifts	95.8	103.2	2.8%	92.9%
23064900	Other residues of rape or colza seeds	92.0	517.9	2.7%	17.8%
71131940	Jewellery of gold set with precious and semi-precious stones other than diamonds	60.6	1069.5	1.8%	5.7%
73082011	Towers for transmission line whether or not assembled	53.8	483.5	1.6%	11.1%
Total		3386.1	-	100.0%	0.7%

Source: MOCI; DGCIS; India Exim Bank Research

Alwar

Alwar's exports were valued at just over US\$ 2 billion in FY 23. Almost 15% of its exports in this year came from 'motor cars with cylinder capacity ≥ 1000 cc but < 1500 cc, with only spark-ignition'⁷², owing to Honda Cars Tapukara plant in Alwar district. The district performs impressively for a few other items as well.

For instance, in the case of 'split system air conditioning machines, comprising a motor driven fan and elements for changing the temperature and humidity'⁷³, Alwar's share in India's exports was almost 63% in FY 23. In the case of 'crushing/grinding machines for stones and minerals' as well, the district's share was close to 50% in India's exports. The products identified under the DEH program for Alwar include engineering products.

⁷² HS Code 87032291

⁷³ HS Code 84151010

Table 2.42: Top Exported Products from Alwar

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87032291	Motor cars with cylinder capacity >= 1000 cc but < 1500 cc, with only spark-ignition	296.3	3588.4	14.7%	8.3%
40117000	Of a kind used on agricultural or forestry vehicles and machines: Rubber	187.3	1177.7	9.3%	15.9%
87089900	Other parts and accessories of vehicles	77.9	3189.0	3.9%	2.4%
84151010	Split system air conditioning machines, comprising a motor driven fan and elements for changing the temperature and humidity	53.7	85.4	2.7%	62.9%
30042099	Other medicaments containing other antibiotics	53.2	228.8	2.6%	23.2%
30049099	Other medicaments put up for retail sale n.e.s	42.9	7629.0	2.1%	0.6%
85444920	Plastic insulated conductors for a voltage <= 1000 V, of a kind used in telecommunication	41.5	364.1	2.1%	11.4%
84749000	Parts of machinery	37.1	518.9	1.8%	7.1%
84742010	Crushing/Grinding machines for stones and minerals	35.5	73.4	1.8%	48.4%
40118000	Of a kind used on construction, mining or industrial handling vehicles and machines: Rubber	35.2	619.9	1.8%	5.7%
Total		2013.5	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

Jodhpur

Jodhpur's exports were recorded at just over US\$ 1 billion in FY 23 with almost one-third of its exports coming from 'other wooden furniture'⁷⁴. For this item, Jodhpur's share in India's exports was recorded at more than 52% in FY 23. In fact, five out of Jodhpur's top ten exported items in FY 23, belong to the category of furniture; bedding, mattresses; etc. For cabinet ware, the district's share in India's exports was 97% in FY 23. For seats with wooden frames, the share was almost 68% and in the case of seats with metal frames, the share was 91.3%. The identified products under DEH for this district are isabgol, gaur gum, furniture products, powder, handicrafts, and stainless steel sheets/utensils.

Table 2.43: Top Exported Products from Jodhpur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
94036000	Other wooden furniture	350.2	667.4	32.6%	52.5%
13023230	Guargum treated and pulverised	134.3	477.7	12.5%	28.1%
94032090	Other metal furniture	80.5	226.1	7.5%	35.6%

⁷⁴ HS Code 94036000

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
11061010	Guar meal	43.9	139.4	4.1%	31.5%
94033010	Cabinet ware	42.3	43.6	3.9%	97.0%
94016900	Other seats with wooden frames	27.9	41.1	2.6%	67.8%
44219990	Other articles of wood, n.e.s	25.0	185.6	2.3%	13.5%
94017900	Other seats, with metal frames	20.8	22.8	1.9%	91.3%
42022220	Handbags/Shopping bags of cotton	18.6	309.7	1.7%	6.0%
10063090	Rice except parboiled rice (excl. Basmati rice)	16.6	2203.5	1.5%	0.8%
Total		1075.2	-	100.0%	0.5%

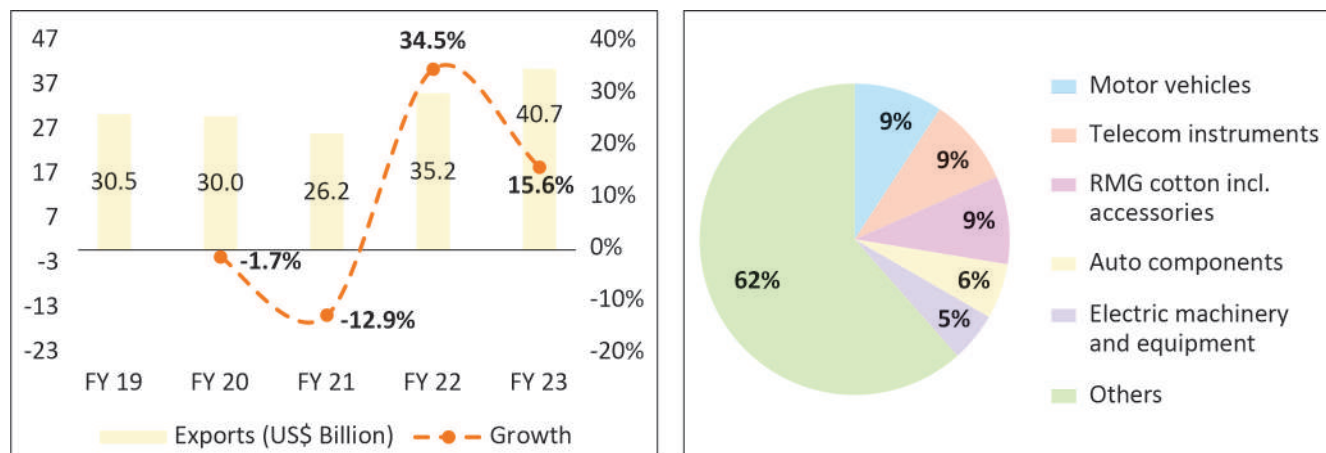
Source: MOCI; DGCIS; India Exim Bank Research

2.17. Tamil Nadu

The total exports from Tamil Nadu have grown by over US\$ 10 billion in the last five years, increasing US\$ 30.5 billion in FY 19 to US\$ 40.7 billion in FY 23, registering an AAGR of 8.9%. The state's share in India's exports has remained almost stable at around 9% in the last five years.

Tamil Nadu has a diverse export portfolio with the top five exported principal commodities accounting under 40% of the state's total exports.

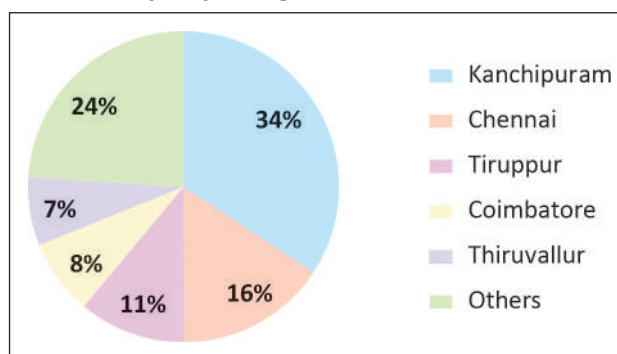
Figure 2.33: Exports from Tamil Nadu and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, Kanchipuram alone contributed to more than one-third of Tamil Nadu's total exports in FY 23. Other important districts were Chennai (15.6%), and Tiruppur (11.1%). Together, the top five districts contributed to 76% of Tamil Nadu's total exports in FY 23, displaying a significant concentration of exports. As per the study's methodology, the identified districts for Tamil Nadu include Tiruppur, Coimbatore, Thiruvallur, Krishnagiri, and Vellore.

Figure 2.34: Top Exporting Districts of Tamil Nadu: FY 23



Source: Ministry of Commerce and Industry (MOCI); India Exim Bank Research

Tiruppur

Tiruppur, which is also known as the knitwear capital of India, registered exports worth US\$ 4.5 billion in FY 23, with more than 23% of exports coming from t-shirts etc. of cotton. In fact, all of its top ten export items at HS 8 digit belong to the category of knitted apparels. The dominance of Tiruppur in this category can be ascertained from the fact that Tiruppur's share in India's exports for each of these ten items is more than 30%. For some categories such as 'nightdresses and pyjamas of cotton', 'nightshirts and pyjamas of cotton', and 'underpants and briefs of other fibres', the share in India's exports is more than 80%.

The identified items under DEH for Tiruppur are hosiery garments & apparels.

Table 2.44: Top Exported Products from Tiruppur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
61091000	T-shirts etc. of cotton	1044.5	1772.1	23.1%	58.9%
61112000	Babies' garments etc. of cotton	471.5	786.0	10.4%	60.0%
61099090	T-shirts etc. of other fibres	310.2	518.5	6.8%	59.8%
61083100	Nightdresses and pyjamas of cotton	228.0	259.6	5.0%	87.8%
61072100	Nightshirts and pyjamas of cotton	160.2	186.6	3.5%	85.9%
61051020	Knit Shirts of cotton (Except T-shirts), other than hand crocheted	133.7	351.0	3.0%	38.1%
61119090	Babies' garments etc. of wool/fine animal hair	100.2	190.7	2.2%	52.5%
61034200	Trousers, shorts etc. of cotton	100.2	164.5	2.2%	60.9%
61142000	Other garments of cotton	87.7	249.1	1.9%	35.2%
61071990	Underpants and briefs of other fibres	85.6	94.4	1.9%	90.7%
Total		4530.9	-	100.0%	1.0%

Source: MOCI; DGCIS; India Exim Bank Research

Coimbatore

Coimbatore's exports were valued at US\$ 3.2 billion in FY 23 with the top three exported items belonging to the category of machinery and mechanical appliances (HS 84) and together accounting for 18% of Coimbatore's total exports in FY 23.

It may be noted that for ‘gears and gearing for machinery; ball or roller screws; gear boxes and other speed changers, incl. torque converters’⁷⁵, the district’s share in India’s exports was 27% in FY 23. Further, for industrial valves, its share was 23%. Coimbatore’s performance was also impressive at national level for coir pith (share of 48% in India’s exports), and test benches (share of 78.7% in India’s exports).

There are a host of identified items under DEH for Coimbatore including engineering products such as foundry, motors & pumps, automobile engineering components, iron castings, aluminium castings, wet grinders & home appliances, textiles such as yarn & fabrics, poultry products, vegetables, coconut & coir products, Kovai kora cotton sarees, and Coimbatore wet grinder (banana).

Table 2.45: Top Exported Products from Coimbatore

HS 8 digit	Description	Exports (USD Mn)	India’s Exports (USD Mn)	Item’s Share in District’s Total Exports	District’s Share in India’s Exports
84834000	Gears and gearing for machinery; ball or roller screws; gear boxes and other speed changers, incl. torque converters	228.3	849.1	7.2%	26.9%
84819090	Other parts of valves and similar articles for pipes, boiler shells, tanks, vats or the like, n.e.s.	186.3	697.3	5.9%	26.7%
84818030	Industrial valves	158.5	687.5	5.0%	23.1%
53050040	Coir pith	96.7	200.9	3.0%	48.1%
61091000	T-shirts etc. of cotton	78.0	1772.1	2.5%	4.4%
71131910	Jewellery of gold unset	67.7	3512.2	2.1%	1.9%
84749000	Parts of machinery	62.4	518.9	2.0%	12.0%
38021000	Activated carbon	48.0	295.8	1.5%	16.2%
90312000	Test benches	46.7	59.4	1.5%	78.7%
63041910	Bedsheets and bed cover of cotton	46.6	400.7	1.5%	11.6%
Total		3180.0	-	100.0%	0.7%

Source: MOCI; DGCIS; India Exim Bank Research

Thiruvallur

Thiruvallur’s exports were recorded at approximately US\$ 2.9 billion in FY 23 with over one-fifth of its exports coming from ‘dumpers designed for off-highway use with net weight >8 tons and maximum payload >=10 tons’⁷⁶. For this item, the district’s share in India’s exports was recorded at more than 79% in FY 23. Further, for another exported item (chassis for vehicles (more than 13 persons)) under the auto and auto parts segment, Thiruvallur had a share of 77.4% in India’s exports. Additionally, 69.5% of India’s exports of front-end shovel loaders were from Thiruvallur in FY 23.

The identified products under DEH for this district are garments, engineering- tools and electronics, and chemicals.

⁷⁵ HS Code 84834000

⁷⁶ HS Code 87041010

Table 2.46: Top Exported Products from Thiruvallur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87041010	Dumpers designed for off-highway use with net weight >8 tons and maximum pay-load >=10 tons	624.2	787.4	21.7%	79.3%
85030090	Parts of other rotating electric plants	156.4	950.6	5.4%	16.5%
87060029	Chassis for vehicles (more than 13 persons)	102.9	133.0	3.6%	77.4%
84295900	Other self-propelled mechanical shovels, excavators and shovel loaders	97.6	401.8	3.4%	24.3%
84295100	Front-end shovel loaders	93.9	135.1	3.3%	69.5%
73063090	Other, welded, of circular cross- section, made up of non-alloy steel tube/pipes	82.3	349.7	2.9%	23.5%
74031300	Billets of refined copper	60.6	134.8	2.1%	45.0%
40112010	Radial tyres used on buses/lorries	55.9	505.7	1.9%	11.0%
87089900	Other parts and accessories of vehicles	52.3	3189.0	1.8%	1.6%
74040012	Copper scrap covered by ISRI code barley, berry, birch, candy, cliff, clove, cobra, cocoa, dream and palms	47.2	85.8	1.6%	55.0%
Total		2882.2	-	100.0%	0.6%

Source: MOCI; DGCIS; India Exim Bank Research

Krishnagiri

Krishnagiri's exports were valued at just under US\$ 2.5 billion in FY 23 with over 14% of exports coming from 'motorcycle with cylinder capacity >75 cc but <= 250 cc'. It may be noted that five of the district's top ten items at HS 8 digit belong to the category of auto and auto parts. The identified products under DEH for this district are engineering, food processing (mango pulp), cut flowers, and diamond jewellery.

Table 2.47: Top Exported Products from Krishnagiri

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
87112029	Motorcycles with cylinder capacity >75 cc but <= 250 cc	356.2	1976.7	14.4%	18.0%
87032120	Three-wheeled vehicles with cylinder capacity <=1000 cc with spark ignition	212.5	486.6	8.6%	43.7%
68022390	Other granite and articles	144.3	783.5	5.8%	18.4%
87141090	Parts and accessories of motorcycles excl. saddle	103.1	653.3	4.2%	15.8%
84089090	Other engines	88.5	909.5	3.6%	9.7%
87084000	Gear boxes	72.0	664.6	2.9%	10.8%

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
84834000	Gears and gearing for machinery; ball or roller screws; gear boxes and other speed changers, incl. torque converters	61.9	849.1	2.5%	7.3%
68101990	Other tiles, flagstones, bricks and similar articles, of cement, concrete or artificial stone	51.3	165.0	2.1%	31.1%
87113020	Motorcycles with cylinder capacity > 250 cc but ≤ 500 cc	50.6	410.4	2.0%	12.3%
20079910	Jams, Fruit Jellies, Marmalades Etc. Of Mangoes	44.3	186.2	1.8%	23.8%
Total		2470.1	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Vellore

Vellore is the last district in the shortlisted districts from Tamil Nadu, as per the Study's methodology. Vellore's exports were valued at approximately US\$ 1.2 billion in FY with five of its top ten exported items belonging to the footwear category. These five together account for over 40% of Vellore's exports. Further, Vellore also performs impressively for a few other industries. For instance, Vellore exports over 27% of India's 'engines of cylinder capacity > 250 cc'. The identified products under DEH for this district are leather industry, readymade garments, and chemicals.

Table 2.48: Top Exported Products from Vellore

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
64039190	Leather footwear of other sole	131.5	449.3	11.0%	29.3%
64039110	Leather boots and other footwear with rubber sole	126.5	241.4	10.5%	52.4%
64061020	Leather uppers (prepared)	90.8	262.3	7.6%	34.6%
64035111	Ankle covered: all leather shoes for men	83.0	189.6	6.9%	43.8%
84082020	Engines of cylinder capacity > 250 cc	72.0	265.0	6.0%	27.2%
87089900	Other parts and accessories of vehicles	70.0	3189.0	5.8%	2.2%
64039120	Leather footwear of plastic and synthetic sole	64.4	202.4	5.4%	31.8%
87013099	Other track laying tractors	52.7	53.6	4.4%	98.3%
84149090	Parts of air or vacuum pumps, gas compressors etc	51.8	459.5	4.3%	11.3%
41071100	Full grains leather, unsplit, of the whole hides and skins of bovine	24.9	75.8	2.1%	32.8%
Total		1199.8	-	100.0%	0.3%

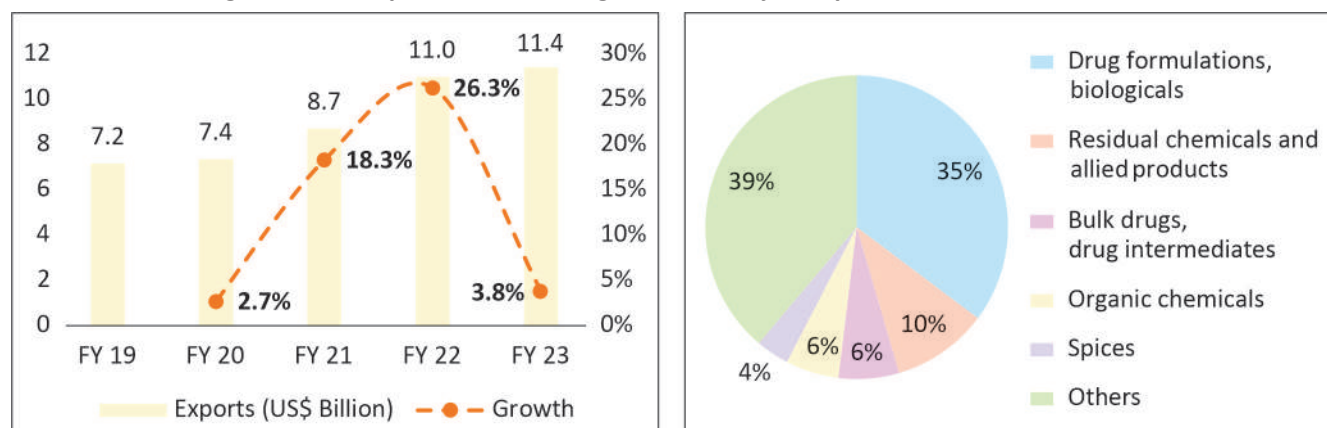
Source: MOCI; DGCIS; India Exim Bank Research

2.18. Telangana

The exports from Telangana have increased at an average of almost 13% annually, during FY 19 to FY 23. The exports were recorded at US\$ 11.4 billion in FY 23, up from US\$ 7.2 billion in FY 19. The state's share in India's exports, during the last five years, has increased from 2.2% to 2.5%, during this period.

Over 35% of Telangana's exports come from drug formulations, biologicals. Another 10% come from residual chemicals and allied products. Overall, the top five categories account for over 60% of Telangana's exports.

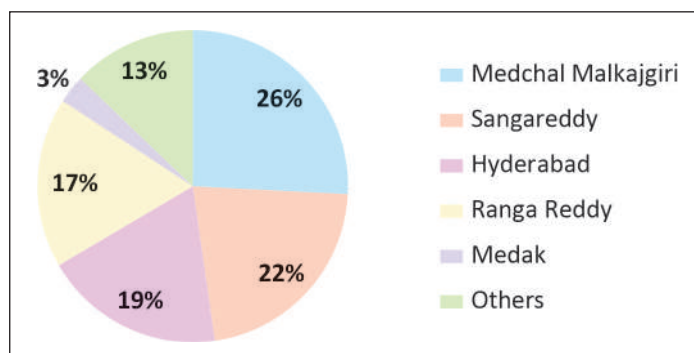
Figure 2.35: Exports from Telangana and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

With respect to the districts, the top four districts account for more than 84% of Telangana's exports, and each of these districts registering exports between US\$ 2 to US\$ 3 billion in FY 23. As a result, these four (Medchal Malkajgiri, Sangareddy, Hyderabad, and Ranga Reddy) were also the shortlisted districts from Telangana.

Figure 2.36: Top Exporting Districts of Telangana: FY 23



Source: MOCI; India Exim Bank Research

Medchal Malkajgiri

The district's exports were valued at just under US\$ 3 billion in FY 23. Eight out of its top ten exported items are from the pharmaceuticals industry and together accounted for 54.3% of Medchal Malkajgiri's total exports in FY 23. In the exports of items such as 'Omeprazole and Lansoprazole', the district had a share of

more than 25% in India's exports. The identified products under DEH for this district are pharmaceuticals, mines, and fisheries.

Table 2.49: Top Exported Products from Medchal Malkajgiri

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	1041.4	7629.0	35.3%	13.6%
30039090	Other medicaments not put up in measured doses or in packing	138.0	232.4	4.7%	59.4%
30041090	Other medicaments containing penicillin or derivatives thereof with a penicillanic acid structure or streptomycin or their derivatives	78.1	357.8	2.7%	21.8%
30049079	Other antihypertensive drugs	77.2	854.4	2.6%	9.0%
30024129	Other vaccines	71.5	332.6	2.4%	21.5%
30049034	Omeprazole and Lansoprazole	65.8	254.4	2.2%	25.9%
30049069	Other Nonsteroidal anti-inflammatory, analgesics and antipyretic drugs	65.8	919.8	2.2%	7.2%
30049082	Other antiepileptic drugs	63.4	287.3	2.2%	22.1%
29333990	Other compounds containing an unfused pyridine ring whether or not hydrogenated in structure	51.1	804.6	1.7%	6.4%
84879000	Other machinery parts	50.5	186.3	1.7%	27.1%
Total		2946.2	-	100.0%	0.7%

Source: MOCI; DGCIS; India Exim Bank Research

Sangareddy

Sangareddy had total exports worth US\$ 2.5 billion in FY 23. Eight out of its top ten exported items are from the organic chemicals industry and together accounted for 28% of Sangareddy's total exports in FY 23.

Further, for the exports of items like 'liquid dielectric transformers, having a power handling capacity ≤ 650 kVA'⁷⁷, the district had a share of more than 60% in India's exports. The identified products under DEH for this district are mango, general engineering products, and seeds.

Table 2.50: Top Exported Products from Sangareddy

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	232.4	7629.0	9.3%	3.0%
29339990	Other heterocyclic compounds with nitrogen hetero atoms	190.9	957.3	7.6%	19.9%
85042100	Liquid dielectric transformers, having a power handling capacity ≤ 650 kVA	85.8	142.3	3.4%	60.3%

⁷⁷ HS Code 85042100

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
29222933	Para Acetyl Aminophenol (Paracetamol)	82.9	234.3	3.3%	35.4%
29359090	Other sulphonamides	74.7	266.3	3.0%	28.1%
29419090	Other antibiotics	72.5	525.0	2.9%	13.8%
29411090	Other penicillins and their derivative with a penicillanic acid structure; salts thereof	71.2	102.4	2.8%	69.5%
29333990	Other compounds containing an unfused pyridine ring whether or not hydrogenated in structure	69.8	804.6	2.8%	8.7%
29335990	Other compounds containing a pyrimidine ring whether or not hydrogenated or piperazine ring in structure	68.0	538.8	2.7%	12.6%
29349990	Other nucleic acids and their salts, whether or not chemically defined; heterocyclic compounds etc.	61.9	490.9	2.5%	12.6%
Total		2502.1	-	100.0%	0.6%

Source: MOCI; DGCIS; India Exim Bank Research

Hyderabad

Hyderabad's export portfolio is quite diverse with its total exports being US\$ 2.2 billion in FY 23 and the top ten items contributing to just 32% in its exports. For items like 'air circuit breakers', Hyderabad's share in India's exports was over 83% in FY 23. The identified products under DEH for this district are gem and jewellery/pearls.

Table 2.51: Top Exported Products from Hyderabad

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
85171300	Smartphones	122.5	10955.1	5.7%	1.1%
71131940	Jewellery of gold set with precious and semi-precious stones other than diamonds	103.4	1069.5	4.8%	9.7%
71131930	Jewellery of gold set with diamond	87.3	4273.3	4.1%	2.0%
30049099	Other medicaments put up for retail sale n.e.s	74.2	7629.0	3.5%	1.0%
84111200	Turbojets of a thrust>25 kn	71.8	2696.8	3.3%	2.7%
29419090	Other antibiotics	51.4	525.0	2.4%	9.8%
29333990	Other compounds containing an unfused pyridine ring whether or not hydrogenated in structure	45.1	804.6	2.1%	5.6%
85362010	Air circuit breakers	43.8	52.6	2.0%	83.1%
85437099	Other electrical machines and apparatus, having individual functions, n.e.s	43.5	128.2	2.0%	33.9%
76109090	Other structures and parts of structures of aluminium n.e.s.	40.6	68.5	1.9%	59.4%
Total		2150.3	-	100.0%	0.5%

Source: MOCI; DGCIS; India Exim Bank Research

Ranga Reddy

The final district of Ranga Reddy had exports worth US\$ 2 billion in FY 23 with over 23% exports of the district coming from 'other medicaments put up for retail sale n.e.s.'⁷⁸. In fact, six of its top ten exported items were from the pharmaceuticals industry and contributed to 43% of the district's exports in FY 23. The district had a share of over 42% in India's exports of 'antibacterial formulations, n.e.s.'⁷⁹.

The identified products under the DEH program for this district are mango, biscuits & confectionery, pharma & healthcare, packing material, manufacturing of aero-structures, electronic item assembling/electronic components/precision engineering products, quartz & feldspar, kraft papers, quartz surface slabs, spices, chilli liquid and powder, flooring tiles & carpets, gherkins processing, lead acid batteries, lubricant additives, manufacturing of IC engine valves, non-dairy whipping cream, socks, solar modules, and telecom duct pipes.

Table 2.52: Top Exported Products from Ranga Reddy

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
30049099	Other medicaments put up for retail sale n.e.s	472.4	7629.0	23.5%	6.2%
88073000	Other parts of airplanes, helicopters or unmanned aircraft	149.4	1106.0	7.4%	13.5%
30049049	Other anticancer drugs	118.9	1105.9	5.9%	10.8%
30049079	Other antihypertensive drugs	101.6	854.4	5.0%	11.9%
30049039	Other antinistatinics, antacids, antiulcer, antiemetics and other gastrointestinal drugs	77.7	632.6	3.9%	12.3%
19053100	Sweet biscuits	66.9	285.5	3.3%	23.4%
30049087	Antibacterial formulations, n.e.s	56.0	132.0	2.8%	42.4%
13021919	Other vegetable extracts	49.0	381.9	2.4%	12.8%
33019022	Capsicum oleoresins	45.4	177.4	2.3%	25.6%
30041090	Other medicaments containing penicillins or derivatives thereof with a penicillanic acid structure or streptomycins or their derivatives	41.0	357.8	2.0%	11.4%
Total		2013.4	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

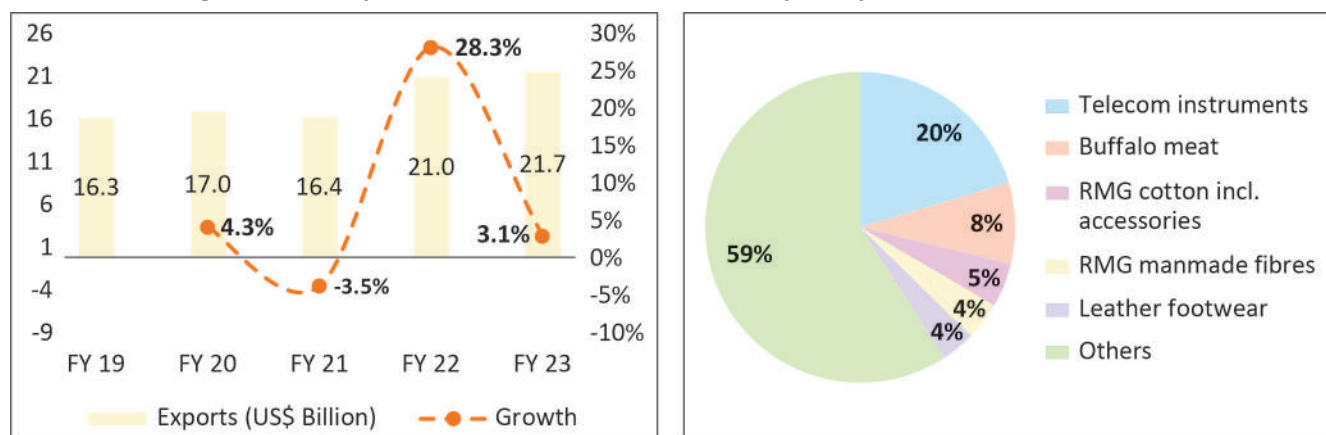
2.19. Uttar Pradesh

UP's exports in FY 23 were recorded at almost US\$ 22 billion, up from US\$ 16.3 billion in FY 19, registering an AAGR of 8.1%. UP had a share of 4.8% in India's exports in FY 23. Over one-fifth of the state's exports were of telecom instruments in FY 23.

⁷⁸ HS Code 30049099

⁷⁹ HS Code 30049087

Figure 2.37: Exports from Uttar Pradesh and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

It may be noted that 47% of the state's exports come from the district of Gautam Buddha Nagar. Given that there are 75 exporting districts in Uttar Pradesh, a high concentration of exports in just one district becomes a significant challenge for the state and it will need to diversify its export centers in the coming years.

Box 4: Empowering Tradition: Banarasi Sarees and India EXIM Bank's Impactful Intervention

The legacy of Banarasi sarees traces back to Varanasi with Banarasi artisans garnering global acclaim for their creation of luxurious silk sarees adorned with distinctive brocade work, incorporating threads of authentic gold and silver zari. Prominent weaving hubs in Varanasi, such as Alaipura and Madanpura, infuse each saree with their unique motifs and weaving techniques.

However, the heritage of Banarasi sarees encountered challenges that threatened its continuation. The increasing mechanization beckoned traditional artisans toward modernization, potentially eroding centuries-old craftsmanship.

Guided by its commitment to grassroots development, the Bank extended support to Silk n Touch (SNT) in Varanasi. With over 200 weavers from marginalized communities employed in Ramanagar, Uttar Pradesh, SNT rekindles the ancient craft of Banarasi saree weaving.

India EXIM Bank's association with SNT commenced in 2016, providing vital financial backing to a nascent enterprise. The Bank facilitated the construction of a Common Facility Centre, nurturing a collaborative space for over 15 handlooms to flourish. Through grants, the Bank fortified SNT's endeavours, enhancing skill development and product design programs. These initiatives revitalized the artisan community, ensuring the perpetuation of the timeless artform.

Apart from the credit facility, the Bank has also been supporting SNT with grants for organizing skill-development workshops and Product Design Development programs for enhancing production and access to new and diversified markets. The workshops and training programs supported by the Bank have benefitted the existing artisan communities engaged with SNT in addressing various challenges such as creating and developing export quality products and a robust brand. The training programs have also motivated the next generation of artisans to carry forward the rich tradition of the Indian Handloom Banarasi Saree from Varanasi.

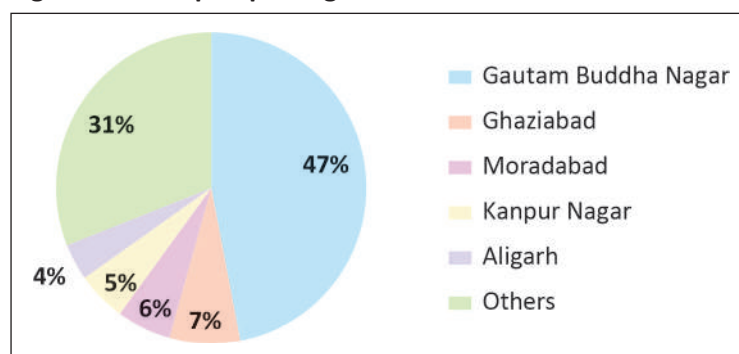
The Bank's handholding empowered artisans, enhancing their global recognition. SNT's association with illustrious fashion brands like Fab India and Taneira, and participation in international fashion shows, signifies the successful fusion of tradition with contemporary markets.

SNT's tenacity yielded remarkable growth. The company's expanding sales and engagement with prominent brands demonstrate the enduring allure of Banarasi sarees. With aspirations of targeting export orders and establishing a comprehensive campus for production, design, and training, SNT's journey represents the harmonious integration of tradition and innovation.

India Exim Bank's intervention encapsulates the spirit of the ODOP/DEH initiative, reinvigorating heritage, preserving tradition, and igniting economic advancement.

Three districts, namely, Ghaziabad, Moradabad, and Kanpur Nagar are in the shortlisted districts, as per the study's methodology.

Figure 2.38: Top Exporting Districts of Uttar Pradesh: FY 23



Source: MOCI; India Exim Bank Research

Ghaziabad

Ghaziabad's exports were valued at US\$ 1.6 billion in FY 23. Almost 28% of the exports from the district are of 'boneless meat of bovine animals, frozen'. Further, for some other categories, Ghaziabad's performance at the national level is impressive. For instance, in the exports of 'bright bars of other types'⁸⁰, the district's export share in India is 83%. Further, for 'other bars and rods not further worked n.e.s.'⁸¹, the share is 98.5%. In the case of 'unwrought antimony; powders' also, the district's dominance can be ascertained from the fact that it has a share of 98% in India's exports of this item.

⁸⁰ HS Code 72221119

⁸¹ HS Code 72221999

Table 2.53: Top Exported Products from Ghaziabad

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
02023000	Boneless meat of bovine animals, frozen	438.2	2859.4	27.5%	15.3%
72221119	Bright bars of other types	75.4	91.0	4.7%	82.9%
72221999	Other bars and rods not further worked n.e.s	51.3	52.1	3.2%	98.5%
02062900	Other edible offal of bovine animals, frozen	47.6	217.2	3.0%	21.9%
73079190	Non-galvanised iron or steel	47.5	208.7	3.0%	22.8%
87089900	Other parts and accessories of vehicles	27.6	3189.0	1.7%	0.9%
84559000	Other parts of metal rolling mills	27.2	103.8	1.7%	26.2%
02013000	Boneless meat of bovine animals, fresh or chilled	24.0	102.9	1.5%	23.4%
81101000	Unwrought antimony; powders	18.9	19.3	1.2%	97.9%
62044390	Other dresses of synthetic fibres	18.2	725.9	1.1%	2.5%
Total		1594.1	-	100.0%	0.4%

Source: MOCI; DGCIS; India Exim Bank Research

The identified products under DEH for Ghaziabad are engineering goods, sugar, machinery parts and auto parts, piston and rings, textile and home furnishing goods, electronic and electrical goods, and meat.

Moradabad

Moradabad's exports were worth US\$ 1.2 billion in FY 23. It may be noted that Moradabad has double-digit shares at the national level for nine of its top ten exported items. For example, for brass articles, the district's share in India's exports is over 38%. Further, in the case of 'chandeliers and other electric ceiling or wall lighting fittings', it holds a share of more than 52%. The identified products under DEH for Moradabad are Moradabad metal craft, mentha products, and rice.

Table 2.54: Top Exported Products from Moradabad

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
73269099	All other articles of iron or steel not elsewhere specified other steering or rudder equipment for ships and boats n.e.s	241.9	812.8	19.7%	29.8%
76169990	Other articles of aluminium, n.e.s	166.1	413.8	13.5%	40.1%
94032090	Other metal furniture	94.0	226.1	7.7%	41.6%
44219990	Other articles of wood, n.e.s	91.1	185.6	7.4%	49.1%
74198030	Articles of brass	79.7	208.2	6.5%	38.3%
70200090	Other articles of glass, n.e.s	51.3	118.9	4.2%	43.1%
94051900	Chandeliers and other electric ceiling or wall lighting fittings	33.3	63.7	2.7%	52.3%

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
73239390	Other household articles of stainless steel n.e.s	32.5	400.5	2.7%	8.1%
70099200	Other glass mirrors, framed	32.2	58.8	2.6%	54.8%
94038900	Other furniture of other materials, including cane, osier or similar materials	28.1	71.0	2.3%	39.5%
Total		1227.2	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Kanpur Nagar

Kanpur Nagar's total exports were valued at US\$ 1.1 billion in FY 23. Given that Kanpur Nagar is a major leather center of India, six of its top ten exported items at HS 8 digit, are either of leather or skins. The top exported item from Kanpur Nagar in FY 23 was 'saddlery and harness for any animal, incl. traces, leads, knee pads, muzzles, saddle cloths, saddlebags, dog coats and the like, of any material'⁸² with a share of over 16%, in the district's total exports. For this item, the district's share in India's exports was more than 82%. Further, for 'other whole hids/skins', Kanpur Nagar's share in India's exports was 78.4% in FY 23.

Under DEH, the products identified for Kanpur Nagar are leather products, footwear, saddlery goods, engineering goods, plastic products, and textile & hosiery items.

Table 2.55: Top Exported Products from Kanpur Nagar

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
42010000	Saddlery and harness for any animal, incl. traces, leads, knee pads, muzzles, saddle cloths, saddlebags, dog coats and the like, of any material	183.1	222.2	16.4%	82.4%
41071900	Other whole hids/skins	85.6	109.2	7.7%	78.4%
41079900	Other leather/hides/skins including sides	64.8	72.9	5.8%	88.9%
64061020	Leather uppers (prepared)	58.8	262.3	5.3%	22.4%
72210090	Bright bars n.e.s	38.6	128.5	3.4%	30.0%
64039190	Leather footwear of other sole	36.1	449.3	3.2%	8.0%
63053200	Flexible Intermediate Bulk Containers (FIBC) of man-made textile materials	34.5	861.1	3.1%	4.0%
64039110	Leather boots and other footwear with rubber sole	32.8	241.4	2.9%	13.6%
84462990	Other hand looms for weaving fabrics	31.6	32.4	2.8%	97.6%
38249900	Other chemical products and preparations of the chemical or allied industries, incl. those consisting of mixtures of natural products, n.e.s.	26.1	328.6	2.3%	8.0%
Total		1119.1	-	100.0%	0.2%

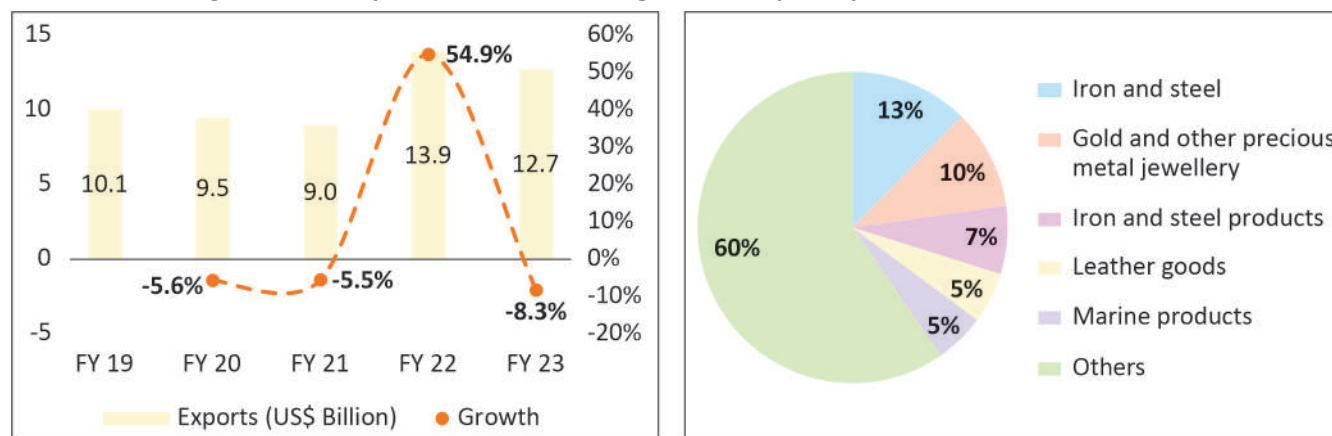
Source: MOCI; DGCIS; India Exim Bank Research

⁸² HS Code 42010000

2.20. West Bengal

West Bengal's exports have increased from US\$ 10.1 billion in FY 19 to US\$ 12.7 in FY 23, recording an AAGR of 8.9%. However, except for FY 22, the state has registered a negative in all other years. Its share in India's exports has come down from 3% in FY 19 to 2.8% in FY 23. The top exported category from the state in FY 23 was iron and steel with a share of 12.4%, followed by gold and other precious metal jewellery with a share of over 10%.

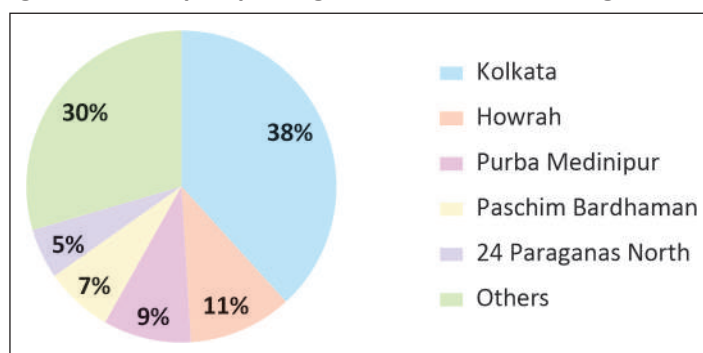
Figure 2.39: Exports from West Bengal and Major Exported Products in FY 23



Source: DGCIS; India Exim Bank Research

It may be noted that 38.2% of the state's exports come from the district of Kolkata and another 10.8% come from Howrah, displaying a high concentration of exports between these two districts. Three districts, namely, Kolkata, Howrah, and Purba Medinipur are in the shortlisted districts from West Bengal, as per the study's methodology.

Figure 2.40: Top Exporting Districts of West Bengal: FY 23



Source: MOCI; India Exim Bank Research

Kolkata

Kolkata's exports were recorded at just under US\$ 5 billion in FY 23, with one-fourth of the exports coming from 'jewellery of gold unset'. For this category, Kolkata had a share of 34.8% in India's exports in FY 23. Kolkata also had a share of 38% in India's exports of 'ferrous products obtained by direct reduction of iron

ore, in lumps, pellets or similar forms'. Further, the district exports 72.4% of India's 'gloves for use in industry'. It also had a share of 30% and 47% in India's exports of 'tea black, leaf in bulk' and 'tea black in packet >3kg but<= 20 kg', respectively. The products identified for Kolkata under DEH are engineering, leather, and IT/ITES.

Table 2.56: Top Exported Products from Kolkata

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
71131910	Jewellery of gold unset	1221.5	3512.2	25.1%	34.8%
72031000	Ferrous products obtained by direct reduction of iron ore, in lumps, pellets or similar forms	179.2	471.2	3.7%	38.0%
03061720	Whiteleg shrimp	174.7	4083.3	3.6%	4.3%
42023120	Wallets and purses of leather	147.1	281.5	3.0%	52.3%
42032910	Gloves for use in industry	145.0	200.1	3.0%	72.4%
42022190	Other leather hand bags	118.5	247.6	2.4%	47.9%
09024020	Tea black, leaf in bulk	98.2	327.4	2.0%	30.0%
52010015	Indian cotton of staple length 28.5mm and above but below 34.5mm	84.2	613.6	1.7%	13.7%
72071920	Mild steel (M.S.) billets	83.9	600.0	1.7%	14.0%
9024010	Tea black in packet >3kg but<= 20 kg	70.8	150.4	1.5%	47.1%
Total		4859.7	-	100.0%	1.1%

Source: MOCI; DGCI; India Exim Bank Research

Howrah

Howrah registered exports worth US\$ 1.4 billion in FY 23. Out of its top ten exported items at HS 8 digit, five are of articles of iron or steel. Howrah has registered an impressive performance at the national level for various items. For instance, in the case of 'other articles of non-malleable cast iron'⁸³, Howrah's share in India's exports was 38.5% in FY 23. Similarly, for 'other bars or rods, of iron or non-alloy steel, cold-formed or cold-finished and further worked, n.e.s.'⁸⁴, its share was 26.7%. Howrah also had a share of almost 30% in India's exports of 'hessian fabrics containing 100% by weight of jute'. The products identified for Howrah under DEH are engineering & foundry, jute, gems and jewellery, forging industry, and textiles.

Table 2.57: Top Exported Products from Howrah

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
73259910	Other cast articles of iron malleable	98.0	298.6	7.1%	32.8%
73251000	Other articles of non-malleable cast iron	91.1	236.9	6.6%	38.5%
73259999	Other cast articles of iron or steel n.e.s	84.7	253.0	6.2%	33.5%
73082011	Towers for transmission line whether or not assembled	62.0	483.5	4.5%	12.8%
71131910	Jewellery of gold unset	38.0	3512.2	2.8%	1.1%

⁸³ HS Code 73251000

⁸⁴ HS Code 72159090

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
73089090	Other structures and parts of structures of iron and steel (excl. floating structures)	36.1	646.9	2.6%	5.6%
72159090	Other bars or rods, of iron or non-alloy steel, cold-formed or cold-finished and further worked, n.e.s	29.4	110.1	2.1%	26.7%
03061720	Whiteleg shrimp	28.8	4083.3	2.1%	0.7%
84312090	Other equipment n.e.s	25.6	51.6	1.9%	49.6%
53101013	Hessian fabrics containing 100% by weight of jute	23.7	80.2	1.7%	29.5%
Total		1372.5	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Purba Medinipur

The district's total exports were valued at US\$ 1.2 billion in FY 23, with 21% of exports coming from 'human hair, dressed or otherwise worked'. The district's share in India's exports of this item was close to 50% in FY 23.

Other important items for Purba Medinipur are 'Other Polyethylene terephthalate, in primary forms' (share of 11.9% in district's exports) and Benzene (share of 10.8%). At the national level, the district's exports for 'Grade LV oil' had a share of over 73%. Further, the district had a share of 50% in India's exports of 'Buta-1.3-diene and isoprene'⁸⁵. The district also had a share of more than 37% in India's exports of 'Methyl tertiary butyl ether (MTBE)'.

Under DEH, the products identified for Purba Medinipur are food processing, and petrochemicals.

Table 2.58: Top Exported Products from Purba Medinipur

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
67030010	Human hair, dressed or otherwise worked	245.1	498.5	21.0%	49.2%
39076190	Other Polyethylene terephthalate, in primary forms	139.2	590.4	11.9%	23.6%
29022000	Benzene	126.1	1445.6	10.8%	8.7%
27101951	Grade LV oil	114.0	155.9	9.8%	73.1%
27101290	Other light oils and preparations, of petroleum or bituminous mineral	81.3	7437.4	7.0%	1.1%
85072000	Lead acid accumulators	59.3	424.4	5.1%	14.0%
29012400	Buta-1, 3-diene and isoprene	54.4	108.2	4.7%	50.3%

⁸⁵ These are part of organic chemicals category

HS 8 digit	Description	Exports (USD Mn)	India's Exports (USD Mn)	Item's Share in District's Total Exports	District's Share in India's Exports
03061720	Whiteleg shrimp	48.9	4083.3	4.2%	1.2%
27111990	Other gaseous hydrocarbons, liquefied, n.e.s.	47.8	470.0	4.1%	10.2%
29091920	Methyl tertiary butyl ether (MTBE)	43.4	116.9	3.7%	37.1%
Total		1166.6	-	100.0%	0.3%

Source: MOCI; DGCIS; India Exim Bank Research

Key Takeaways: Divergence between Export Products and Products under DEH

The evaluation of the variance between the current export profile and the products identified under the 'Districts as Export Hub' (DEH) initiative offers valuable insights into the export orientation and potential discrepancies, shedding light on areas necessitating focused attention. This analysis serves as a compass, guiding the strategic alignment or adjustments between the prevailing major exports and the products earmarked for promotion under the DEH initiative.

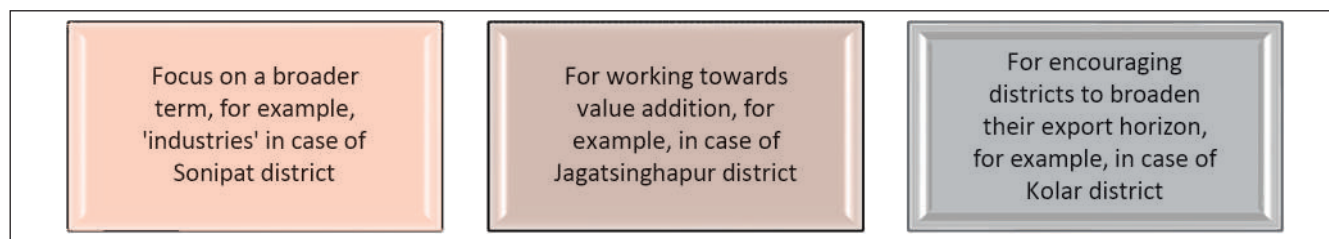
In several cases, a significant synergy exists between the products designated under DEH and the district's current export basket. A notable example is Tamil Nadu's Tiruppur district, a major exporter of hosiery garments (US\$ 4530.9 million), which closely aligns with the DEH emphasis on apparel articles. Similar, in case of Morbi district of Gujarat, ceramic items are identified under DEH and the export basket of the district also majorly consists of ceramic items.

However, there are also few instances of divergence between existing exports and DEH-identified products prompt contemplation and strategic action. For instance, Haryana's Sonipat district exports several products including leather products, footwear, engineering goods, and plastic products (US\$ 1655.4 million), however, there is an intriguing contrast with its DEH focus on 'industries', which is a broad term. This divergence accentuates the need for focused exploration, considering the wide scope covered by the term 'industries.'

It may be noted that in some scenarios the divergence between the export basket and DEH products could also arise due to the inclusion of products that necessitate intensive value addition or have limited marketability. It is vital to gauge the feasibility of transitioning from current major exports to the products identified under DEH. By augmenting the competitiveness, quality, and attractiveness of DEH-identified products, states can strategically pivot towards emerging export prospects while consolidating their existing capabilities.

For instance, Jagatsinghapur district in Odisha currently engages in exports of agglomerated iron ore pellets, fuels and oils, and shrimps, totaling US\$ 1081.1 million. However, under the DEH initiative, plastic products have been identified as potential products for export. The variance between Jagatsinghapur's current exports and the products identified under DEH underscores the need for a strategic evaluation of market feasibility, value addition, and supply chain readiness. Transitioning from agglomerated iron ore pellets, fuels, and oils to plastic products requires a comprehensive analysis of technological adaptation, skill development, and market demand. To address this variance, Jagatsinghapur could consider the possibility of diversifying its export portfolio by leveraging its strengths in fuel and oil exports. For instance, the district could explore opportunities to venture into manufacturing plastic products related to the energy sector, such as components for fuel storage, transport, or distribution. By aligning with the DEH initiative, Jagatsinghapur can capitalize on the emerging prospects in plastic products while tapping into its existing experience in fuels and oils.

Exhibit 2: Possible Reasons of Divergence between Export Profile and Products under DEH Initiative



Source: India Exim Bank Research

Furthermore, the DEH initiative encourages districts to broaden their export horizon and elevate their global competitiveness. For instance, Karnataka's Kolar district is currently a significant exporter, with a remarkable 89% of its total exports being smartphones. However, under the DEH initiative, Kolar has been identified with a diverse range of products, including mango, tomato, colour capsicums, millet ragi, rose onion, vegetables, mango pulp, processed pulses/spices/cereals, engineering, aerospace and defense components, automobiles, phones, and apparels. This provides an opportunity to the district for diversification in the district's economy.

Overall, the divergence between the prevailing major exports and DEH-identified products yields a holistic view of districts' export potential. While alignment signifies a promising stance, disparities illuminate avenues for focused capacity building and strategic calibration. By transitioning from existing exports to DEH products and addressing marketability complexities, states can harness the full potential of the initiative for sustained economic growth and enhanced global competitiveness.

3

Policy Support and Initiatives by Select States

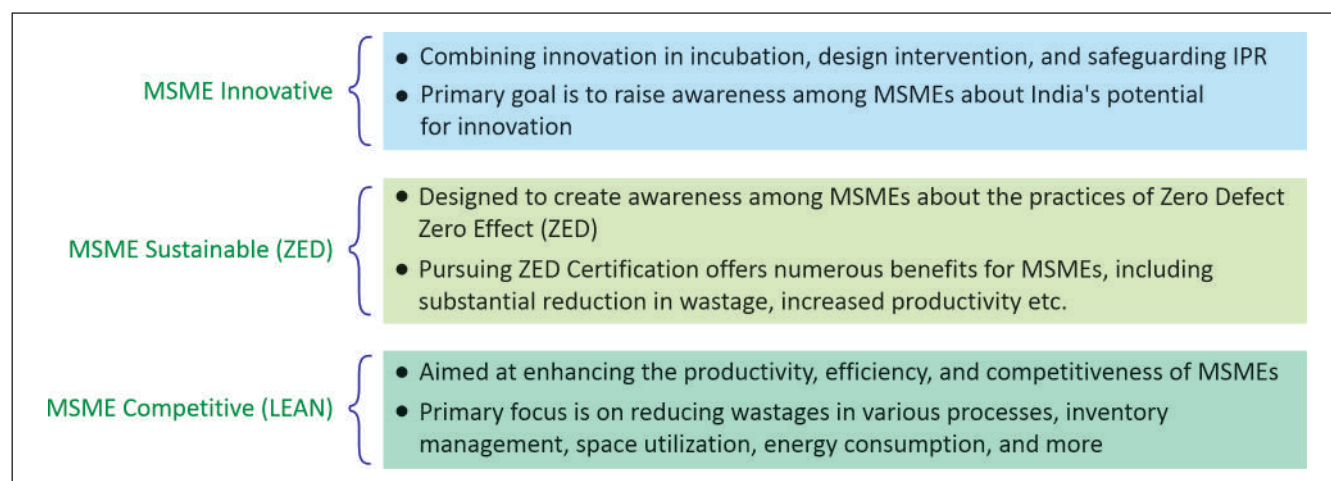
While the ODOP-DEH is a recent initiative in India, this chapter will delve into the possible way ahead for this programme to be successful in the long run. This will entail analysing select central government policies and efforts by few state governments towards the ODOP-DEH initiative.

3.1. Select Government Schemes

3.1.1 MSME Champions Portal

MSME CHAMPIONS (Creation and Harmonious Application of Modern Processes for Increasing the Output and National Strength) portal was launched by Government of India in 2020. The main purpose of the portal was to empower and uplift smaller units by addressing their issues, providing encouragement, support, and guidance. It serves as an all-encompassing solution offered by the MSME Ministry. The MSME Champions Scheme has been designed with three key components: 'MSME-Innovative' (focused on Incubation, Design, and Intellectual Property Rights) launched in March 2022, 'MSME-Sustainable' (ZED) launched in April 2022, and 'MSME-Competitive' (LEAN) launched in March 2023.

Exhibit 3.1: MSME Champions Scheme



Source: Ministry of MSME; India Exim Bank Research

MSME Innovative

The MSME Innovative Scheme is a unique initiative that brings together three existing schemes of the Ministry of MSME: Incubation, Design, and IPR. These three schemes will function as separate verticals but will also

have interconnected operations. Additionally, they will be integrated in a cohesive manner to enhance synergy and efficiency, all in pursuit of promoting and fostering innovative activities.

The core concept of MSME Innovative is to introduce a novel approach for MSMEs, combining innovation in incubation, design intervention, and safeguarding intellectual property rights (IPR) into a single mode. The primary goal is to raise awareness among MSMEs about India's potential for innovation and inspire them to become MSME Champions.

At the heart of MSME Innovative lies its role as a hub for innovation activities, facilitating and guiding the development of ideas into viable business propositions. By doing so, it aims to directly benefit society and enable successful marketing of these innovative solutions.

The scheme's three components—Incubation, Design, and IPR—function independently as separate verticals, each serving specific purposes. Under the Incubation component, eligible institutions will be recognized as Host Institutes (HIs) to act as Business Incubators (BIs). The scheme will assist in the approval of ideas submitted through HIs and provide support for nurturing these ideas, including capital assistance for plant and machinery.

For the Design component, the scheme will facilitate MSMEs in developing new design strategies through design projects. It will also conduct design awareness programs, such as seminars, talks, and workshops, to highlight the value and importance of design for businesses.

Finally, the IPR component will offer legal and intellectual property filing support for patents, trademarks, copyrights, designs, and geographical indications (GI), among others. Additionally, the scheme will provide IP advisory, consultation services, Patentability Searches, Technology Gap Analyses, and promote IP commercialization by establishing Intellectual Property Facilitation Centres (IPFCs) nationwide.

MSME Sustainable (ZED)

The MSME Sustainable (ZED) Certification is an extensive campaign designed to create awareness among MSMEs about the practices of Zero Defect Zero Effect (ZED) and motivate and incentivize them to obtain ZED Certification. It also encourages them to strive towards becoming MSME Champions. Pursuing ZED Certification offers numerous benefits for MSMEs, including substantial reduction in wastage, increased productivity, heightened environmental consciousness, energy savings, optimal utilization of natural resources, and expanded market opportunities. Moreover, MSMEs are motivated to adopt best practices in work culture, product standardization, process efficiency, and system implementation to bolster their global competitiveness and long-term sustainability.

The ZED Certification goes beyond a mere acknowledgment; it is a comprehensive process that involves assessment, handholding, and managerial and technological interventions to enhance the overall competitiveness of an MSME. As a result, it is not limited to being just a certification but an integral part of MSME growth.

The implementation of the ZED Certification Scheme will occur in two distinct phases. Phase 1 will primarily focus on Manufacturing MSMEs with UDYAM Registration, striving to maximize the inclusion of manufacturing units and guiding them through the ZED journey.

Phase 2 aims to extend the scope to include Service Sector MSMEs. During this phase, efforts will be made to integrate both manufacturing and service sector MSMEs, including those registered under State Government protocols/systems but not under UDYAM. To enhance MSME competitiveness further, additional information about their operations and performance may be collected in this phase, leading to the creation of a National MSME Competitiveness Index.

In Phase 2, there are plans to provide funding support to ZED Certified MSMEs to obtain international certifications as required for accessing global markets. Additionally, provisions will be made to align the ZED Certification with international standards, ensuring its acceptance and recognition on the global stage.

MSME Competitive (LEAN)

The Government of India's MSME Competitive (Lean) Scheme is aimed at enhancing the productivity, efficiency, and competitiveness of MSMEs. The primary focus is on reducing wastages in various processes, inventory management, space utilization, energy consumption, and more. By applying Lean Techniques, the scheme aims to boost both domestic and global competitiveness of MSMEs. These techniques encompass a range of improvements, including reducing rejected rates, optimizing product and raw material movements, cutting product costs, maximizing space utilization and resources, enhancing process and product quality, improving production and export capabilities, ensuring workplace safety, promoting knowledge and skill development, bolstering profitability, and creating awareness about industry 4.0 concepts.

The MSME Competitive (Lean) Scheme is divided into several components, such as Industry Awareness Programmes/Workshops, Training Programmes, Handholding, Incentives, PR campaigns, Advertising & Brand Promotion, and Digital Platforms.

To participate in the scheme, MSMEs need to register and take the Lean Pledge. The scheme offers three levels of achievement. Level 1 is the basic stage that involves self-learning through e-modules. At Level 2, a lean consultant will implement tools like 5S⁸⁶, kaizen⁸⁷, visual control, etc. Under Level 3, the consultant will implement advanced tools such as Value stream mapping (VSM), Single-Minute Exchange of Die (SMED), Poka Yoke⁸⁸, and others.

To support MSMEs in adopting Lean Techniques, the Government will contribute 90% of the implementation cost for handholding and consultancy fees. Additionally, there will be an extra contribution of 5% for MSMEs that are part of Scheme of Fund for Regeneration of Traditional Industries (SFURTI) clusters, owned by Women/SC/ST and located in the Northeastern Region. Furthermore, MSMEs registering through Industry Associations after completing all levels will also receive an additional 5% contribution.

3.1.2. Micro & Small Enterprises - Cluster Development Programme (MSE-CDP)

In 2007, the erstwhile cluster development scheme 'Small Industries Cluster Development Programme (SICDP)' was renamed as 'Micro and Small Enterprises – Cluster Development Programme (MSE-CDP)'. The MSE-CDP is a significant initiative adopted by the Ministry of MSME to bolster the productivity, competitiveness, and capacity building of MSEs and their collectives throughout the country. Embracing the cluster development approach, this programme focuses on groups of enterprises situated in an identifiable, and preferably

⁸⁶ Sort (Seiri), Set in Order (Seiton), Shine (Seiso), Standardize (Seiketsu), and Sustain (Shitsuke)

⁸⁷ Kaizen is a Japanese term meaning change for the better or continuous improvement.

⁸⁸ Poka-yoke roughly means "avoid unexpected surprises" or "avoid blunders" in Japanese

contiguous area or a value chain transcending geographical boundaries, producing similar or complementary products or services. The clusters benefit from common physical infrastructure facilities, fostering collaboration to address shared challenges.

Clusters within the MSE-CDP possess essential characteristics, such as similarity or complementarity in production methods, quality control, energy consumption, and pollution control. They also share similar levels of technology and marketing strategies, facilitating communication among members. Furthermore, clusters exhibit common market and skill needs, and they collectively face challenges and opportunities.

The programme's objectives revolve around supporting the sustainability and growth of MSEs by addressing common issues, including technology enhancement, skill development, quality improvement, and better market access. Moreover, it aims to empower MSEs through the formation of self-help groups, consortia, and association upgradation, enabling collective action to strengthen their capabilities.

The establishment of tangible assets as Common Facility Centers (CFCs) plays a crucial role in the MSE-CDP. These CFCs include facilities such as Common Production/Processing Centers (for balancing, correcting, or improving production lines beyond individual unit capabilities), Design Centers, Testing Facilities, Training Centers, R&D Centers, Effluent Treatment Plants, Marketing Display/Selling Centers, Common Logistics Centers, and Common Raw Material Banks/Sales Depots.

Another important intervention is the Infrastructure Development Centre (ID). The Infrastructure Development Centre focuses on creating essential infrastructural facilities for MSEs in new or existing industrial estates/areas. These facilities include power distribution networks, water supply, telecommunication services, drainage and pollution control systems, road connectivity, banking services, raw material storage, marketing outlets, common service facilities, and technological backup services.

As on 11th July 2023, 95 CFCs have been completed in India, 116 are ongoing and 222 have been approved. Further, for ID projects, 206 have been completed, while 129 are ongoing and 335 have been approved⁸⁹.

3.1.3. Pradhan Mantri Formalisation of Micro Food Processing Enterprises (PMFME) Scheme

In India, the unorganized food processing sector comprises nearly 25 lakh enterprises, which operate in an informal manner. Despite only investing 7% in plant & machinery and having access to 3% of outstanding credit, these enterprises contribute significantly to employment, accounting for 74% (with a third being women workers), 12% of output, and 27% of value addition in the food processing sector. About 66% of these units are located in rural areas, and approximately 80% are family-based micro manufacturing units⁹⁰.

The unorganized food processing sector in India faces various challenges that hinder its development and weaken its overall performance. These challenges include limited productivity and innovation due to insufficient access to modern technology and machinery for production and packaging. Additionally, deficiencies in quality and food safety control systems, including a lack of awareness of good hygienic and manufacturing practices, present obstacles to growth. Moreover, these enterprises lack branding and marketing skills, hampering their integration with supply chains.

⁸⁹ Development Commissioner, Ministry of MSME

⁹⁰ Ministry of Food Processing Industries

As a result, Government of India launched the PMFME scheme in June 2020. Interestingly, ODOP approach is a part of this scheme. Other features include credit linked subsidy, seed capital for self-help groups, common infrastructure, capacity building, and marketing and branding.

The scheme aims to enhance the competitiveness of existing individual micro-enterprises in the unorganized food processing sector and promote the formalization of the industry. It also intends to provide support to Farmer Producer Organizations (FPOs), Self Help Groups (SHGs), and Producers Cooperatives across their entire value chain.

The scheme has a proposed outlay of ₹10,000 crore over five years, from 2020-21 to 2024-25. The expenditure under the scheme will be shared in a 60:40 ratio between the Central and State Governments, with a 90:10 ratio with Northeastern and Himalayan States, a 60:40 ratio with Union Territories with legislature, and fully funded by the Center for other Union Territories.

The scheme aims to directly assist 2,00,000 micro food processing units through credit-linked subsidies. Moreover, it will promote the development of supportive common infrastructure and institutional architecture to accelerate the growth of the food processing sector.

3.2. Efforts by Select States

3.2.1. Uttar Pradesh

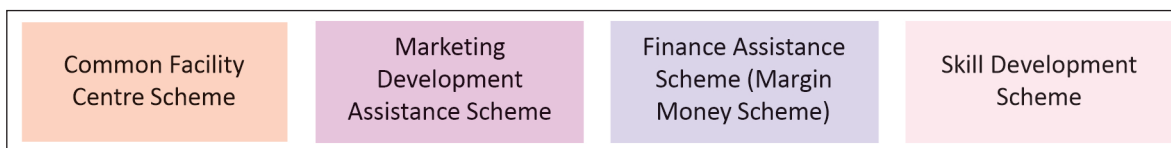
Uttar Pradesh was the first Indian state to launch its One District One Product (ODOP) scheme in 2018. The MSME sector holds immense significance in Uttar Pradesh's economy, contributing significantly to capital investment, production, and employment. With around 46 lakh MSME units, the state stands as the largest contributor in the country. The state has been at the forefront of exporting handicrafts, processed food, engineering goods, carpets, readymade garments, and leather products.

Uttar Pradesh's contribution to the export of handicrafts amounts to 44% of the country's total, while it stands at 39% for carpets and 26% for leather and leather products. The state accounts for 4.73% of India's total exports.

Each district in Uttar Pradesh boasts unique products, such as the silk sarees of Varanasi, brass handicrafts from Moradabad, flutes from Pilibhit, artifacts made of Shajar stone from Banda, and Kala Namak rice from Siddhartha Nagar. These products hold distinct identities at the national and international levels, presenting opportunities to promote marketing efforts and enhance employment opportunities for artisans and workers in these sectors.

In light of the state's rich artistic heritage and diverse craftsmanship, the government launched the 'One District – One Product' scheme. The primary objectives in Uttar Pradesh of this scheme are to preserve and develop local crafts and skills, boost incomes and employment opportunities at the local level, improve product quality and skill development, and promote these products in an artistic manner through packaging and branding. Additionally, the scheme aims to connect production with tourism, resolve economic disparities and regional imbalances, and eventually elevate the concept of ODOP to the national and international level after successful implementation at the state level.

Exhibit 3.2: ODOP Schemes in Uttar Pradesh



Source: ODOP UP, Government of UP; India Exim Bank Research

When multiple products with distinct identities exist within a district, the scheme prioritizes those with potential for generating greater employment and development.

To effectively execute the scheme, several actions are intended for products from each district. These include preparing a database with information on circulation, stakeholders, total production, exports, and availability of raw materials, along with providing training. Research is also conducted on possibilities regarding production, development, and marketing of the products. Micro plans are formulated for product development, marketing promotion, and creating additional employment opportunities for artisans and workers. Advertising, publicity, and marketing opportunities are being provided at district, state, national, and international levels.

The 'One District – One Product' scheme aims to showcase the rich cultural heritage and craftsmanship of Uttar Pradesh, fostering economic growth, and empowering local artisans and workers. By providing a platform to promote and market these unique products, the scheme seeks to create a positive impact on employment and the overall economic development of the state.

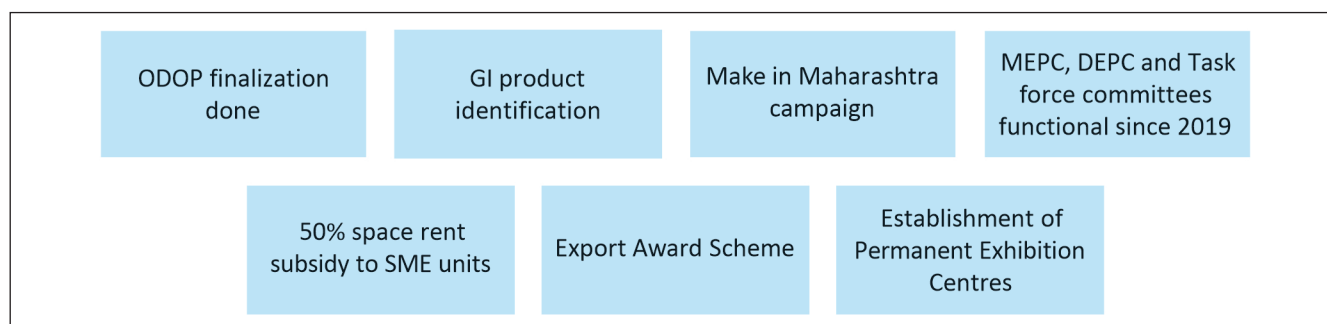
3.2.2 Maharashtra

Maharashtra stands as one of the most industrialized states in India, with its capital Mumbai serving as the country's financial and commercial hub. The state's contributions to agricultural and industrial production, trade, transportation, and education have played a significant role in India's economy. With a massive 14% share in the country's GDP, Maharashtra boasts the largest economy in India. Moreover, it is a leading state in terms of exports, accounting for US\$ 72.4 billion in exports in FY 23, constituting 16% of India's total exports.

In 2022, the Directorate of Industries (Export Division), Government of Maharashtra, released a 'One District One Product' (ODOP) booklet, to promote specific products from all 36 districts of Maharashtra in the international market. Under this initiative, the government identified 131 products, encompassing all districts of the state under the 'Districts as Export Hub' initiative. Additionally, the state is focusing on promoting Geographical Indicator (GI) tagged products from each district.

The list of ODOP products from Maharashtra comprises a diverse range of items, including Nashik Valley Wine, Nashik Grapes, Raisin, Paithani Sarees and Fabrics, Lasalgaon Onion, Electrical components, Automobile and Pharmaceutical from Nashik district, Pomegranate, Dairy Products, Sugar, Jaggery and By-products from Ahmadnagar district, Gems and Jewellery and Leather from Mumbai district, Iron and Steel, Fish and Fish processing, Chemical and White Onion from Raigad district, Beed Custard Apple, Cotton and Cottonseed Oil from Beed district, Soyabean and Soybean products, Turmeric and Banana from Nanded district, and Nagpur Orange, Karvath Kati Sarees & Fabrics, Bhiwapur Chilli, Cotton & processing and Agarbatti from Nagpur district, among others.

Exhibit 3.3: Existing Export Promotion Initiatives in Maharashtra



Source: Maharashtra Industry, Trade and Investment Facilitation Cell; India Exim Bank Research

The government's efforts in the ODOP initiative extend beyond highlighting the contributions of these products to the state's exports. They also focus on assessing the infrastructure readiness of the districts, including logistics and port connectivity, and the availability of manpower. Maharashtra's ODOP Promotion Strategy encompasses various measures, such as identifying existing and potential ODOP clusters district-wise, promoting products through GI tagging via conventional and digital channels, improving the state's ranking in the Export Preparedness Index (EPI), integrating the export portal with the State MAITRI's single window portal, setting up a dedicated exporters' help desk, creating an export guide book for exporters, and conducting capacity-building programs like export-oriented skill development in design, quality, regulations, and promotion.

Moreover, the ODOP roadmap entails Maharashtra's efforts towards market outreach and creating forward linkages. This includes collaborating and matchmaking with various export organizations, trade bodies, and embassies of countries both in India and abroad through trade expos and fairs for exporters. The government also aims to assist exporters in forming international sales and distribution tie-ups, focusing on specific capabilities and needs of buyers and suppliers, and working with them to establish global value chain arrangements for their products. Furthermore, the state is actively involved in designing growth strategies for market expansion, market access, international tie-ups for state products, and other pertinent strategies to boost its export potential.

3.2.3 Telangana

As a part of the Pradhan Mantri Formalisation of Micro Food Processing Enterprises (PMFME) scheme's ODOP approach, the Telangana State Food Processing Society has taken the initiative to identify specific food products for each district, aligning with the scheme's focus. The State Government's guidelines emphasize providing support for the processing of agricultural products, along with measures to reduce wastage, ensure proper assaying, and enhance storage and marketing facilities.

To offer support for capital investment to existing individual micro-units, priority will be given to those engaged in producing ODOP products. However, existing units involved in manufacturing other products will also receive assistance. In the case of capital investment by groups, preference will predominantly be given to those primarily associated with ODOP products.

For groups processing other products in such districts, support will be granted only to those already involved in processing those products and possessing sufficient technical, financial, and entrepreneurial capabilities.

As for new units, whether individual or group-based, support will exclusively be extended to those dealing with ODOP products.

Table 3.1: ODOP for Select Districts in Telangana

S.NO	District	ODOP
1	Adilabad	Soya based products- Soya milk, Soya tofu, Soya curd
2	Bhadrachalam	Chillies
3	Hyderabad	Snacks, Savories and Swagruha foods
4	Jagtial	Mango
5	Jangaon	Scented Rice (Chittimuthyalu) based products
6	Jayashankar Bhupally	Chillies
7	Jogulamba Gadwal	Groundnut based products
8	Kamareddy	Soya based products- Soya milk, Soya tofu, Soya curd
9	Karimnagar	Rice based products
10	Khammam	Chillies
11	Komaram Bheem	Millet based products
12	Mahabubabad	Chillies
13	Mahabubnagar	Millet
14	Mancherial	Mango
15	Medak	Snacks, Savories and Swagruha foods

Source: Telangana State Food Processing Society; India Exim Bank Research

Moreover, as per the guidelines, support for common infrastructure and marketing and branding initiatives will be solely allocated to ODOP products. However, in the context of marketing and branding support at the state or regional level, products from districts that do not have those products as ODOP may also be considered for inclusion.

3.2.4. Gujarat

In July 2023, the Ministry of Commerce & Industry launched its first collaboration with the Government of Gujarat in New Delhi, aiming to promote the indigenous crafts and artisans of the State as part of the One District One Product (ODOP) program. With 33 districts, Gujarat showcases vast geographic coverage and the potential for diverse products across the state. Under ODOP-Gujarat, a rich collection of 68 unique products has been identified, ranging from traditional crafts like Gamthi Block print and Mata-ni-Pachedi to agricultural goods such as groundnuts and cumin.

In partnership with the Government of Gujarat, ODOP implemented product tagging and story cards to enhance the promotion and recognition of the state's unique products. The collaboration aims to drive consumers towards emporia, boosting sales, and increasing the visibility of Gujarat's products at the national

level. Garvi Gujarat Bhawan has also integrated ODOP products into its interiors, providing a better showcase for Gujarat's handicrafts.

The ODOP interventions in Gujarat have been specifically focused on certain products to enhance their market presence. For instance, Government e-Marketplace (GeM) onboarding drives have been conducted for Sujani Handloom, Jamnagari Bandhini, and Patan Patola. Furthermore, support from the National Institute of Design (NID) workshop has been extended to Agate Stone in Khambhat district and Sujani from Bharuch district. These initiatives aim to empower local artisans and elevate the visibility of Gujarat's unique products in the domestic and international markets.

3.2.5. Himachal Pradesh

In line with its draft export policy of May 2023, Himachal Pradesh has taken significant steps to create a comprehensive ecosystem for promoting exports. To facilitate this vision, the state has notified a State Level Export Promotion Committee and formulated District Level Export Promotion Committees for all 12 districts. The District Level Export Promotion Committees consist of government officials and stakeholders/representatives of trade bodies. Their primary role is to identify the export potential, gaps, and challenges faced by exporters in their respective districts and organize outreach programs to support them.

Moreover, the District Level Export Promotion Committees of all 12 districts have identified potential export products under the One District One Product (ODOP) approach. Interestingly, the State Government has also identified specific issues and challenges related to the products in each district. Furthermore, the government has also proposed suitable interventions and designated agencies to implement these measures. For example, in Una district, the product identified for promotion in the non-agro field is light engineering. The challenge identified is on the raw material side where almost all parts of braking system are imported. The proposed intervention is to provide training in fabricating pre-assembled parts of the braking system from raw materials, and the implementing agency will be ITI, Polytechnic, and Himachal Pradesh Kaushal Vikas Nigam (HPKVN).

Table 3.2: Potential Products for Exports from Himachal Pradesh

S No.	District Name	ODOP Product (Agro)	ODOP Product (Non-Agro)
1	Bilaspur	Turmeric Processing of Indian gooseberry	Processing of Indian gooseberry
2	Chamba	Apple based products Chamba Rumal	Chamba Rumal
3	Hamirpur	Milk based product	Processing of corn
4	Kangra	Mango based product	Kangra Painting & Tea
5	Kinnaur	Fruit Wine	Chulli Oil (apricot oil)
6	Kullu	Apple based product	Shawl
7	Lahaul Spiti	Seabuckthorn based product	Processing of Seabuckthorn
8	Mandi	Peas & Vegetables	Steel furniture
9	Shimla	Apple based product	Fruit processing
10	Sirmaur	Garlic & Ginger	Corrugated boxes
11	Solan	Mushroom	Mushroom, Pharma
12	Una	Potato based product	Light Engineering

Source: Draft Export Policy, Government of Himachal Pradesh; India Exim Bank Research

In addition to these efforts, the state is establishing a dedicated State-level Himachal Pradesh Export Promotion Cell (HPEPC). The cell will be responsible for identifying products from each district and coordinating various flagship export-oriented programs of the State Government. It will also collaborate with export promotion councils, trade organizations, and sectoral associations to foster camaraderie and synergy. The HPEPC will organize trade meets, training workshops, and provide marketing assistance to export-oriented industries. Customized capacity-building workshops will be conducted across the state to enhance knowledge about export procedures, taxation, financial practices, and quality standards among entrepreneurs and government officials. A B2B exchange will be set up to facilitate online trading for small and micro units, creating a robust analytical database on exports and exporters in Himachal Pradesh. The cell will also promote the brand “Make in Himachal Pradesh” at various exporting forums and encourage public-private initiatives to develop competitive export infrastructure.

As part of its incentive package, the Himachal Pradesh government will offer various incentives to support exporters. These incentives will cover areas such as patent assistance, testing and certification for export products, infrastructure development charges, freight incentives for exports, market assistance, state exporter awards, building the Brand Himachal, and branding Geographical Indication (GI) products, among others. These measures are aimed at fostering a conducive environment for exporters and promoting the growth of exports from the state.

4

Learnings from the World

In an increasingly interconnected world, exploring foreign countries' policies and initiatives has become crucial for nations seeking to enhance their economic growth and global competitiveness. The One District One Product-District as Export Hub (ODOP-DEH) initiative of India is a visionary program aimed at leveraging the nation's rich cultural diversity and regional potential to drive economic development. By focusing on specific products and crafts within designated districts, ODOP-DEH seeks to unlock the unique strengths and resources of each region, fostering competitiveness both domestically and internationally. Through this targeted approach, India aims to create vibrant centers of economic activity, boost employment, and promote the preservation of cultural heritage. In this pursuit, studying successful ODOP-like policies in other countries and their impact can provide valuable insights and inspiration for India's journey towards inclusive growth and global leadership.

4.1. Japan

The One Village One Product (OVOP) Movement, initiated in Japan in 1979 under the leadership of Dr. Morihiko Hiramatsu, the Governor of Oita Prefecture, stands as a testament to successful regional economic revitalization programs. The movement's approach focused on transforming local products into competitive offerings in local and global markets while preserving the unique cultural and resource aspects of each village. OVOP in Oita proved effective in improving village economic dynamism, enhancing local income, and fostering social solidarity, leaving local communities proud of their heritage. This success story inspired several countries to adopt and adapt the OVOP model to promote economic development, particularly in rural areas.

Development and Success

The OVOP movement emerged in the backdrop of Japan's transition from an agricultural to an industrial economy in the 1960s. This shift left rural areas economically challenged, with increased urbanization and cheaper urban products undermining the competitiveness of rural goods and impacting local incomes. In response, rural communities began harnessing their potential natural resources in the 1970s to bolster their economies. OVOP played a pivotal role in revitalizing local economies, instilling confidence and resilience among villagers, encouraging them to remain in their hometowns. The key to its success lies in prioritizing human resources development and preserving social values, promoting a collective, cooperative mindset within the community.

OVOP's distinctive feature lies in its prioritization of social values over mere economic gains. While an increase in rural income is an added value, the primary goal is to enhance life satisfaction and happiness among citizens. OVOP has conducted regular seminars and workshops to engage villagers in discussions about their

community's development. The movement aims to nurture a sense of belonging and camaraderie among villagers, preventing the emergence of individualism within the society.

To ensure the sustainability of OVOP in Japan, programs focusing on human resource capability and product quality have been undertaken. These include assistance sessions in quality control, management theory workshops, support for saving and loan programs, health insurance, and pension funds. Notably, OVOP has been instrumental in empowering women in Japan. A key factor in the success of women's activities within OVOP lies in separating household finances from business finances, enabling them to contribute significantly to society's well-being and pursue a better quality of life. The emphasis on social value over economic value has empowered women to play a significant role in community development.

Japan's OVOP Movement serves as a role model for successful regional economic revitalization initiatives. By prioritizing social values, human resource development, and community engagement, OVOP has transformed local economies and empowered communities.

India's One District One Product (ODOP) project can draw valuable lessons from Japan's experience, fostering a sense of pride and identity in its communities while promoting sustainable economic growth and social cohesion.

4.2 Thailand

The development of the One Tambon One Product (OTOP) program in Thailand marks the Japanese version of the OVOP movement. Unlike the bottom-up approach in Japan, OTOP is a top-down initiative launched in 2001. The program's primary objectives are to enhance national competitiveness, revitalize the local economy, and alleviate poverty, especially in rural areas, by boosting domestic demand. The National One Tambon One Product Management Committee (Kor Aor Nor Tor Por) oversees the coordination and implementation of OTOP policies, connecting the central government with local communities.

Development and Success

The top-down nature of OTOP in Thailand has been instrumental in its success. The government's strong commitment and support in addressing poverty, creating job opportunities, and improving community income have played a crucial role. Extensive government assistance, ranging from knowledge and technology enhancement to facilitating access to domestic and international markets, has fostered the growth of OTOP products.

Additionally, the clear coordination and strategic planning have been key factors contributing to OTOP's success. The Thai government has effectively established OTOP as a benchmark for quality products, instilling confidence among consumers. Collaborative efforts with various stakeholders, including the private sector, have enhanced the capabilities of OTOP producers and entrepreneurs. The formation of OTOP clusters, encompassing diverse products and all levels, has provided sustainable support for the program.

The increasing consumer preference for handmade products, particularly those with cultural, artistic, traditional, and environmentally friendly attributes, presents a favorable market trend that OTOP is leveraging to thrive.

As India explores the One District One Product project, it can draw valuable insights from Thailand's OTOP experience. Learning from the effective top-down approach, strategic coordination, and collaboration with stakeholders, India can implement its district-based program with a focus on poverty alleviation, economic

revitalization, and fostering local pride and creativity. Addressing the challenges faced by OTOP, such as product differentiation, independence, and international market access, will be crucial to ensuring the sustained success of India's ambitious ODOP-DEH initiative.

4.3 Mexico

The Pueblos Mágicos (Magical Towns) policy in Mexico is a unique initiative launched in 2001 by the federal government to promote and revitalize villages and towns with rich cultural heritage, natural beauty, and historical significance. The program's main goal is to encourage tourism beyond the major cities and beaches, diversifying the country's tourism offerings and spreading economic benefits to rural areas.

The selection of towns to be designated as Pueblos Mágicos involves a competitive process wherein interested towns and villages submit applications to the central government. To be eligible, applicant towns must meet certain criteria, including having a population of at least 5,000 inhabitants, being located within three hours of a major, well-connected city, and possessing adequate health, security, and accommodation services. Moreover, the towns must demonstrate that they possess unique and well-developed cultural, historical, or natural characteristics that make them suitable for tourism development. To be considered for selection, each town must create a formal committee to represent the local community and gain approval from the state government.

The central government provides technical assistance, agglomeration functions, and addresses local regulatory constraints to aid the development of these towns. Additionally, periodic audits are conducted to ensure continued progress and adherence to the program's goals.

Pueblos Mágicos are marketed as enchanting destinations that offer visitors a unique and immersive experience in Mexico's rich cultural and natural heritage. The program aims to attract both domestic and international tourists by highlighting the towns' distinctive attributes, such as traditional festivals, indigenous crafts, historical landmarks, and picturesque landscapes. Collaborations with private sector stakeholders also play a crucial role in promoting and enhancing tourism offerings in these designated towns.

Development and Success

The Pueblos Mágicos program has achieved significant success in boosting tourism and creating job opportunities in the designated towns. The influx of visitors has stimulated local economies, supporting various tourism-related businesses and artisans. Moreover, the program has helped preserve and promote Mexico's cultural diversity and heritage.

However, the program is not without its challenges. Some towns have faced difficulties in balancing the preservation of their unique identity while catering to the growing demands of tourism. Additionally, ensuring the sustainable development of these destinations and maintaining the authenticity of their cultural offerings remains a continuous challenge.

Nevertheless, the Pueblos Mágicos policy in Mexico serves as an exemplary model for promoting rural tourism and revitalizing lesser-known towns and villages. By focusing on their distinct cultural, historical, and natural attributes, the program has successfully encouraged tourism beyond the major urban centers. India's One District One Product project can draw valuable learning from Mexico's Pueblos Mágicos initiative,

leveraging the unique characteristics of its districts to promote sustainable tourism and economic growth while preserving and celebrating local culture and heritage.

4.4 Philippines

The “One Town, One Product” (OTOP) program in the Philippines, initiated by the Government in 2004, has proven to be a successful rural economic development initiative. The program offers a comprehensive assistance package, bringing together local government units (LGUs), national government agencies (NGAs), and the private sector to support and empower local communities.

Development and Success

The success of OTOP-Philippines can be attributed to the convergence of services provided by various stakeholders. LGUs, NGAs, and the private sector collaborate to offer business counseling, entrepreneurial training, product design, technology assistance, and marketing support, fostering a holistic approach to rural development.

Several key factors have contributed to the success of OTOP in the Philippines. These include the dedication of LGUs, ensuring a reliable supply of raw materials, the preservation of rich local culture and traditions, the abundance of local talent and skills, a ready market for products and services, an active core of producers, and the effective convergence of government services.

The program acknowledges the significant contributions of each stakeholder through recognition and awards. Best OTOP Implementer, outstanding OTOP MSME, and most Supportive Partner Organization are honored for their efforts and commitment to the program’s success.

The Department of Trade and Industry (DTI) plays a vital role by aligning OTOP with various industry clusters. This strategic approach aims to foster innovation and global competitiveness among enterprises, contributing to employment generation and inclusive growth, particularly for MSMEs.

Mass media has also played a critical role in promoting the OTOP program in the Philippines. Through extensive coverage, consumers have become aware of OTOP products and are inclined to purchase items with OTOP branding. OTOP Trade Fairs have garnered significant attention, attracting more visitors compared to other trade fairs organized by the DTI. The media’s efforts have also inspired potential entrepreneurs to produce OTOP products in their localities.

Overall, OTOP program in the Philippines has emerged as a model for rural economic development, driven by collaboration, innovation, and a focus on preserving local heritage. By leveraging the distinct products and talents of each town, OTOP has empowered communities, created job opportunities, and showcased the diverse cultural richness of the Philippines. As India embarks on its own “One District, One Product” project, it can learn from the achievements of OTOP in the Philippines. Emphasizing the importance of partnership, capacity building, and market promotion will be crucial to fostering inclusive and sustainable rural development in India’s diverse districts. By celebrating and supporting locally produced goods, India can harness the potential of its unique cultural heritage and empower communities across the nation.

4.5 Ghana

The “One District One Factory” (1D1F) initiative in Ghana was introduced in 2017 by the government with the vision to transform the nation’s economy. The primary objective of this initiative is to shift the country’s economic focus from the dependency on raw material import and export to a more sustainable model centered around manufacturing, value addition, and the export of processed goods. The program aims to harness the abundant raw materials found in various districts that would have otherwise gone to waste.

The 1D1F initiative operates on a private sector-led model, where the government creates a conducive environment for businesses to access funding and support services from government agencies. By empowering local entrepreneurs, the program enables them to establish factories, thus taking ownership of their ventures and bearing the associated risks and rewards.

Development and Success

In 2017, the 1D1F program was officially launched, marking a significant milestone in the nation’s economic development. The inaugural factory, specializing in pineapple/ fruit processing, commenced operations, exemplifying the government’s commitment to promoting industrial growth across the country.

The key objectives of the 1D1F initiative encompass several aspects. Firstly, it seeks to unlock the economic potential of each district by adding value to their natural resources, leveraging their comparative advantages. Additionally, the program aims to achieve a balanced distribution of industries, stimulating economic activity in different regions. Job creation, particularly for the youth in rural and peri-urban areas, is a central focus to improve income levels, living standards, and reduce rural-urban migration.

Moreover, the 1D1F program endeavors to bolster export-oriented growth, enhancing foreign exchange earnings. By encouraging the production of local substitutes for imported goods, the initiative aims to conserve valuable foreign exchange reserves.


To ensure successful implementation, the Secretariat provides technical support services. This includes project registration, business plan review, and advisory services for project restructuring. The Secretariat collaborates closely with financial institutions to facilitate access to funding for viable projects.

Sustainability is a core consideration, encompassing factors such as the availability of raw materials, adherence to good corporate governance practices, and securing markets through off-taker agreements.

As the country continues to forge ahead with the 1D1F initiative, it aspires to create a dynamic industrial landscape, empowering local communities, fostering economic growth, and strengthening the nation’s position in the global market. Through the promotion of decentralized, private sector-led development, the 1D1F initiative sets the stage for a more prosperous and self-reliant nation.

Conclusion

The chapters 3 and 4 present a comprehensive overview of the “One District, One Product” (ODOP) project in India, exploring policies at the national level, state-level efforts, and successful case studies from other countries. The government’s policies in India, such as Make in India and Skill India, indirectly contribute to the objectives of ODOP by promoting domestic manufacturing and skill development. These initiatives align



with the vision of ODOP, aiming to boost local economies and enhance the competitiveness of district-specific products.

Efforts by select state governments further emphasize the significance of decentralized planning and tailored strategies in driving the success of ODOP. State governments' active involvement in identifying and supporting unique products in their respective districts showcases the effectiveness of localized approaches in rural economic development.

Finally, drawing inspiration from successful case studies, particularly from Japan, Mexico, Philippines, Ghana, and Thailand, India can glean valuable lessons in implementing ODOP effectively.

In recent years, India has embarked on a transformative journey of economic development, laying the foundation for sustainable growth and prosperity. Among the crucial initiatives aimed at harnessing the nation's rich cultural diversity and regional potential is the One District One Product-District as Export Hub (ODOP-DEH) initiative.

The government-led program has the potential to emerge as a game-changer, propelling India's districts towards becoming vibrant centres of economic activity and global competitiveness.

The significance of district-level development cannot be overstated. India's vast cultural diversity is mirrored in the unique skills, traditions, and resources found in each region. Recognizing this inherent potential, the ODOP-DEH initiative is designed to unlock economic opportunities by focusing on specific products and crafts within designated districts. This targeted approach allows for the preservation of cultural heritage while driving regional growth and expansion.

The second chapter of this Study explored the multi-faceted dimensions of the ODOP-DEH initiative. The comprehensive analysis of 59 districts across 20 states shed light on the major products and their export potential.

By diving deeper into granular data beyond predetermined ODOP categories, the Study gives fresh insights into global demand for these products from the identified 59 districts. This exercise highlighted the immense untapped potential present in these regions, waiting to be harnessed for India's economic advancement.

The Study also involved evaluation of various schemes and efforts by both Central and State governments. As the ODOP-DEH initiative is a collaborative effort between the Governments at the Centre and at the State, the synergy between these entities is crucial for its success. The Study revealed that several States have taken commendable steps to align their development strategies with the ODOP-DEH vision. Such coordinated efforts not only ensure the efficient implementation of the initiative but also contribute to creating a conducive environment for investment and business expansion.

Furthermore, the learnings from select countries, including Japan, Thailand, Mexico, Philippines, and Ghana, amongst others, can provide valuable insights into the successful district level policies and their impact on regional development. These case studies showcased the positive outcomes of focusing on local products and crafts, emphasizing their unique cultural and economic significance.

Road Ahead

The road ahead for the ODOP-DEH initiative is paved with immense possibilities and as well as challenges. While the initiative has garnered significant momentum, its full potential can only be realized through sustained commitment and perseverance. A cohesive and integrated approach, where all stakeholders collaborate seamlessly, is critical towards ensuring the successful implementation of the initiative.

The success of ODOP-DEH also hinges on robust infrastructure development and the provision of necessary support services to foster entrepreneurship and innovation at the district level. The creation of industrial clusters and the establishment of common facilities centres can further boost productivity and competitiveness.

Additionally, there is a need for continuous skill development and capacity-building programs to equip local communities with the knowledge and expertise required to excel in their chosen fields. By investing in human capital, India can create a workforce that is skilled, adaptable, and capable of embracing new technologies.

Moreover, the ODOP-DEH initiative must harness the power of technology and digitalization to facilitate market linkages, access global markets, and streamline supply chains. E-commerce platforms can serve as powerful tools to connect local producers with consumers worldwide, ensuring the promotion and visibility of Indian products on the global stage.

As India advances towards achieving its ambitious economic goals such as an export target of US\$ 2 trillion by 2030, the ODOP-DEH initiative stands as a testament to the country's unwavering commitment to inclusive growth and sustainable development. By empowering districts to emerge as export hubs and manufacturing centres, India would be poised to realize its vision of becoming a global economic powerhouse.

It may also be noted that the OPOP-DEH initiative by India is also aligned with the Sustainable Development Goals of the United Nations and captures 6 the 17 identified ones. These include enabling holistic socioeconomic growth across all regions (SDG 1, SDG 8, SDG 10, SDG 11); Enabling holistic socioeconomic growth across all regions (SDG 9); Enabling holistic socioeconomic growth across all regions (SDG 8); and Providing ecosystem for innovation/use of technology at District level to make them competitive with domestic as well as international market (SDG 9 and SDG 17).

Figure 5.1: ODOP-DEH linkages with SDGs



Enhancing the Effectiveness of the Initiative

The Government of India, in order to enhance the effectiveness of ODOP initiative and its operational merger with DEH initiative, has been taking a multifaceted approach. The Government is not only engaging with all state governments to promote this initiative, but also with The State Export Promotion Committees (SEPC) and District Export Promotion Committees (DEPC) which have been set up in all States and UTs.

The effectiveness of ODOP-DEH initiative can be further strengthened by working on various fronts. For instance, inter-agency coordination will be crucial. Close collaboration among government departments such as the Department of Commerce, the Department for Promotion of Industry and Internal Trade (DPIIT), Ministry of MSME, and Ministry of Food Processing Industries could be important to ensure a cohesive approach. This collaboration would eliminate redundancy, enhance resource allocation, and maximize the impact of ODOP.

Exhibit 5.1: Enhancing the Effectiveness of ODOP-DEH Initiative



Source: India Exim Bank Research

Additionally, capacity-building programs should be designed to equip local entrepreneurs, artisans, and officials with the necessary skills for export success. These programs can cover topics ranging from product quality improvement to complying with international trade regulations.


Also, conducting export readiness assessments for each district is fundamental. These assessments will provide insights into strengths, weaknesses, opportunities, and threats, enabling district-specific strategies, since every district is unique.

Finally, investing in digital infrastructure will be essential. Creating dedicated e-commerce platforms for ODOP products can enable direct interactions between producers and consumers, transcending geographical barriers and engaging international customers.

To Sum Up

In conclusion, the One District One Product-District as Export Hub (ODOP-DEH) initiative represents a visionary approach to unlock India's economic potential and promote inclusive development.

This Study has brought forth the fact that out of 760 districts in India the top 10 exporting districts, that is less than 2% of the districts, contributing to almost 41% of India's exports as in FY 2023. This signifies the need to also focus on the missing middle exporting districts. In the process, the Study identifies 59 districts whose exports are between US\$ 1 billion to US\$ 5 billion, representing around 20 states/UTs falling under this bracket.



By concentrating on these 59 districts, through strategic planning, innovative policies, and collaborative efforts, ODOP-DEH would be able to successfully achieve its goal and transform these districts into engines of economic growth, job creation, and export excellence.

As India stands at the cusp of a new era of economic resurgence, the success of ODOP-DEH will not only shape the destiny of the many districts but also leave a significant impact on the nation's trajectory towards prosperity and equitable development across districts. It is incumbent upon stakeholders to cater to this opportunity, leveraging the unique strengths of each district and embracing the spirit of entrepreneurship to propel India towards a brighter and more prosperous future.

Annexures

Annexure 1: Top Exported Products from Andhra Pradesh and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
030617	Frozen shrimps and prawns	2.5	USA (60), China (16), Canada (4)	4.8	22.1	USA (27), China (26), Japan (7)
890590	Light-vessels, fire-floats, floating cranes etc.	1.2	Singapore (31), Sri Lanka (30), Indonesia (22)	1.3	7.7	Mozambique (60), Turkey (5), UK (4)
300490	Medicaments for therapeutic or prophylactic purposes	1.1	USA (59), South Africa (3), Malta (3)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
100630	Semi or wholly milled rice	0.9	Guinea (22), Benin (16), Côte d'Ivoire (14)	9.4	17.4	China (8), USA (8), Philippines (7)
720230	Ferro-silico-manganese	0.8	Egypt (13), Japan (12), Italy (12)	1.6	5.2	USA (17), Italy (8), Turkey (8)
240120	Unmanufactured tobacco	0.6	Belgium (31), Russia (9), Philippines (7)	0.8	8.0	China (16), Germany (10), Belgium (8)
160529	Shrimps and prawns, prepared or preserved	0.5	USA (88), Canada (8), Russia (1)	0.6	1.4	Germany (14), Denmark (14), USA (13)
870323	Motor cars with engine of > 1500 cc but <= 3000 cc	0.5	Mexico (38), Saudi Arabia (9), Chile (6)	1.4	234.5	USA (36), China (16), Canada (5)
090421	Fruits of the genus Capsicum	0.5	China (30), Thailand (17), Bangladesh (14)	0.8	1.5	China (23), USA (15), Thailand (13)
870322	Motor cars with engine of > 1000 cc but <= 1500 cc	0.4	Saudi Arabia (13), Chile (11), South Africa (11)	3.5	103	USA (18), France (9), Germany (8)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 2: Top Exported Products from Bihar and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
271019	Medium oils and preparations	1.2	Nepal (100)	65.3	650.8	USA (8), Singapore (6), Australia (5)
271012	Light oils and preparations	0.4	Nepal (98), China (2)	28.7	373.6	USA (9), Mexico (6), Singapore (6)
100590	Maize (excl. seed for sowing)	0.2	Bangladesh (67), Nepal (33)	1.1	62.4	China (11), Japan (9), South Korea (7)
020230	Frozen, boneless meat of bovine animals	0.2	Egypt (34), Iraq (17), Malaysia (17)	2.9	34.2	China (46), USA (9), Japan (6)
271119	Gaseous hydrocarbons, liquefied	0.2	Nepal (100)	0.5	7.1	Turkey (32), Poland (11), Philippines (8)
100610	Rice in the husk	0.1	Nepal (100)	0.2	0.9	Mexico (19), Venezuela (11), Costa Rica (8)
100199	Wheat and meslin (excl. seed for sowing)	0.1	Bangladesh (77), Indonesia (13), Nepal (9)	2.2	52.5	Indonesia (7), Turkey (6), China (5)
300490	Medicaments for therapeutic or prophylactic purposes	0.04	Nepal (98), Nigeria (2)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
100630	Semi or wholly milled rice	0.03	Nepal (63), Bangladesh (22), Senegal (4)	9.4	17.4	China (8), USA (8), Philippines (7)
170114	Raw cane sugar, in solid form	0.02	Bangladesh (68), Nepal (15), Indonesia (13)	2.9	18	Indonesia (16), China (12), USA (9)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 3: Top Exported Products from Chhattisgarh and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
100630	Semi or wholly milled rice	0.82	Benin (17), Côte d'Ivoire (16), Togo (15)	9.4	17.4	China (8), USA (8), Philippines (7)
760110	Aluminium, not alloyed, unwrought	0.64	Netherlands (25), Turkey (16), Mexico (12)	5.7	40.6	USA (17), Japan (10), Turkey (9)
100640	Broken rice	0.29	Senegal (68), China (15), Gambia (5)	1.2	3.3	China (39), Senegal (14), Belgium (7)
720230	Ferro-silico-manganese	0.19	Italy (16), Turkey (15), Egypt (12)	1.6	5.2	USA (17), Italy (8), Turkey (8)
720219	Ferro-manganese, containing by weight <= 2% carbon	0.09	UAE (68), Italy (5), Brazil (4)	0.3	1.6	USA (19), Turkey (9), Germany (9)
721632	I sections of iron or non-alloy steel of a height >= 80 mm	0.09	Canada (49), USA (11), Qatar (10)	0.1	3.2	France (13), UK (9), Germany (6)
260112	Agglomerated iron ores and concentrates	0.08	Italy (28), South Korea (16), Turkey (14)	1.2	18	China (15), Germany (10), Japan (9)
720211	Ferro-manganese, containing by weight > 2% of carbon	0.05	Indonesia (19), UAE (18), Italy (11)	0.6	1.8	USA (25), Japan (10), Germany (9)
720719	Semi-finished products of iron or non-alloy steel containing, by weight, < 0,25% of carbon	0.04	Italy (41), Romania (30), Indonesia (20)	0.9	2.1	Indonesia (26), Egypt (24), Chinese Taipei (7)
721633	H sections of iron or non-alloy steel of a height >= 80 mm	0.03	UK (44), Ireland (21), Qatar (18)	0.04	6.7	Canada (10), Germany (7), Netherlands (6)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 4: Top Exported Products from Dadra and Nagar Haveli and their Global Demand

HS Code	Description	Exports from the UT (US\$ Bn): 2022	Major Export Destinations for the UT (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
540233	Textured filament yarn of polyester	0.29	Turkey (36), Argentina (12), Brazil (9)	0.60	5.2	Turkey (12), Vietnam (8), Brazil (7)
300490	Medicaments for therapeutic or prophylactic purposes	0.27	USA (28), Australia (8), UK (5)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
761490	Stranded wires, cables, ropes etc. of aluminium	0.26	Bangladesh (57), USA (14), Colombia (5)	0.28	0.81	USA (24), Vietnam (6), South Korea (6)
900110	Optical fibres, optical fibre bundles and cables	0.25	USA (53), UK (18), France (5)	0.66	2.6	China (13), USA (12), Romania (6)
761410	Stranded wire, cables, etc. of aluminium, with steel core	0.22	USA (58), Mozambique (7), Iraq (5)	0.24	0.87	USA (38), Germany (8), Pakistan (4)
392690	Plastic articles	0.15	USA (62), Canada (18), UAE (4)	0.77	80.6	USA (15), Germany (8), Mexico (6)
630532	Flexible intermediate bulk containers of textile materials	0.11	USA (27), Italy (16), Spain (8)	0.92	3.2	USA (18), Japan (13), Germany (9)
271019	Medium oils and preparations	0.10	Australia (24), UAE (14), Bangladesh (9)	65.3	650.8	USA (8), Singapore (6), Australia (5)
390110	Polyethylene with a specific gravity of < 0.94, in primary forms	0.10	Egypt (28), Turkey (16), Algeria (10)	0.25	31.8	China (14), Germany (6), Turkey (5)
390769	Poly"ethylene terephthalate", in primary forms, having a viscosity number of < 78 ml/g	0.10	Bahrain (55), UAE (11), Germany (9)	0.27	5.4	Vietnam (8), China (8), USA (7)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 5: Top Exported Products from Delhi and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
841112	Turbojets of a thrust > 25 kN	2.3	USA (40), France (15), Singapore (15)	2.9	68.4	UK (18), Hong Kong (12), USA (10)
711319	Articles of jewellery and parts thereof, of precious metal other than silver	0.66	UAE (62), Qatar (9), USA (8)	9.2	82.9	Hong Kong (19), USA (13), Switzerland (11)
100630	Semi or wholly milled rice	0.40	Iran (19), Kuwait (12), Saudi Arabia (8)	9.4	17.4	China (8), USA (8), Philippines (7)
620443	Women's or girls' dresses of synthetic fibres	0.13	USA (24), UAE (18), UK (9)	0.7	7.7	USA (18), Germany (8), UK (8)
840710	Spark-ignition reciprocating or rotary internal combustion piston engine, for aircraft	0.12	Malaysia (48), Belgium (24), South Korea (10)	0.15	1.7	Singapore (23), Philippines (12), Thailand (7)
300490	Medicaments for therapeutic or prophylactic purposes	0.11	Uzbekistan (10), Tajikistan (6), Nepal (4)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
621143	Women's or girls' tracksuits and other garments	0.09	USA (24), Pakistan (17), Afghanistan (16)	0.4	4.9	USA (23), Japan (8), France (6)
620442	Women's or girls' dresses of cotton	0.08	USA (36), UK (7), UAE (7)	0.87	4.8	USA (22), Germany (8), UK (5)
420310	Articles of apparel, of leather or composition leather	0.07	USA (28), Germany (16), France (9)	0.36	2.5	USA (15), Germany (11), France (8)
610910	T-shirts, singlets and other vests of cotton	0.07	UAE (52), Senegal (11), Nigeria (9)	1.9	35.4	USA (19), Germany (10), France (6)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 6: Top Exported Products from Goa and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
300490	Medicaments for therapeutic or prophylactic purposes	0.92	USA (46), UK (10), Australia (4)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
720110	Non-alloy pig iron by weight, <= 0.5% of phosphorous	0.14	USA (58), China (26), UAE (8)	0.33	7.1	USA (45), Turkey (11), Italy (11)
900110	Optical fibres, optical fibre bundles and cables	0.10	Germany (29), UK (18), Poland (13)	0.66	2.6	China (13), USA (12), Romania (6)
380891	Insecticides, put up in forms or packings	0.08	Brazil (37), Netherlands (27), USA (8)	1.8	10.3	Brazil (19), USA (5), France (4)
300420	Medicaments containing antibiotics	0.07	USA (82), Nepal (3), South Africa (2)	1.1	15.8	USA (21), China (10), Switzerland (7)
030359	Frozen anchovies, Indian mackerels, seerfishes etc.	0.06	Thailand (91), Malaysia (7), Indonesia (2)	0.17	1.0	Thailand (31), China (11), Japan (10)
291450	Ketone-phenols and ketones with other oxygen function	0.06	USA (100)	0.12	0.5	USA (19), Germany (12), Italy (6)
260111	Non-agglomerated iron ores and concentrates	0.06	China (98), Kenya (1), UAE (1)	0.42	165.4	China (76), Japan (7), South Korea (5)
300432	Medicaments containing corticosteroid hormones	0.03	USA (37), South Africa (14), Algeria (11)	0.14	10.3	USA (16), France (9), China (8)
854470	Optical fibre cables made up of individually sheathed fibres	0.03	USA (65), Netherlands (15), Czech Republic (11)	0.06	11.4	USA (26), Mexico (11), Canada (5)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 7: Top Exported Products from Gujarat and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
271019	Medium oils and preparations	47.1	Netherlands (14), Israel (9), Togo (8)	65.3	650.8	USA (8), Singapore (6), Australia (5)
271012	Light oils and preparations	24.2	UAE (20), USA (19), Indonesia (15)	28.7	373.6	USA (9), Mexico (6), Singapore (6)
710239	Diamonds, worked, but not mounted or set	9.1	USA (40), Hong Kong (22), Thailand (8)	23.0	77.7	USA (30), Hong Kong (19), China (10)
300490	Medicaments for therapeutic or prophylactic purposes	3.1	USA (47), Belgium (3), Canada (3)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
711311	Articles of jewellery and parts thereof, of silver	2.5	Hong Kong (98), USA (2)	3.1	9.9	Hong Kong (32), USA (19), Germany (6)
100630	Semi or wholly milled rice	1.5	Iran (31), Somalia (8), Iraq (7)	9.4	17.4	China (8), USA (8), Philippines (7)
380893	Herbicides, anti-sprouting products and plant-growth regulators	1.5	USA (42), Brazil (13), Japan (9)	2.2	18.7	Brazil (18), Canada (6), Australia (6)
690721	Ceramic flags and paving, hearth or wall tiles, of a water absorption coefficient by weight <= 0.5 %	1.39	USA (9), Saudi Arabia (6), UAE (5)	1.42	13.6	USA (13), France (7), Germany (6)
290220	Benzene	1.4	Saudi Arabia (59), Belgium (13), Kuwait (8)	1.6	9.3	China (37), USA (15), Belgium (11)
290243	p-Xylene	1.2	Malaysia (32), China (23), Indonesia (16)	1.2	16.9	China (68), Chinese Taipei (9), USA (6)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 8: Top Exported Products from Haryana and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
100630	Semi or wholly milled rice	2.7	Saudi Arabia (25), Iran (21), Yemen (8)	9.4	17.4	China (8), USA (8), Philippines (7)
871120	Motorcycles, incl. mopeds, with engine capacity exceeding 50 cc but not exceeding 250 cc	0.43	Colombia (19), Bangladesh (19), Philippines (13)	2.5	10.3	Philippines (12), USA (7), Nigeria (5)
870322	Motor cars with engine of > 1000 cc but <= 1500 cc	0.41	South Africa (47), UAE (10), Egypt (7)	3.5	103	USA (18), France (9), Germany (8)
870899	Parts and accessories, for tractors, motor vehicles for the transport of ten or more persons	0.34	USA (33), Germany (13), Japan (6)	3.1	92	USA (19), Spain (8), France (9)
870830	Brakes and servo-brakes and their parts, for tractors, motor vehicles for the transport of ten or more persons	0.33	USA (69), Germany (6), Mexico (5)	0.7	35.7	USA (22), Germany (11), Mexico (8)
870321	Motor vehicles principally designed for the transport of <10 persons with engine capacity of <1000 cc	0.29	Chile (17), South Africa (16), Philippines (9)	1.4	39.2	France (12), Germany (12), UK (12)
620442	Women's or girls' dresses of cotton	0.25	USA (50), UK (14), Spain (6)	0.9	4.8	USA (22), Germany (8), UK (5)
901839	Needles, catheters, etc. used in medical, surgical, dental or veterinary sciences	0.20	USA (17), Brazil (10), UAE (5)	0.4	34.5	USA (21), Netherlands (13), Germany (7)
940490	Articles of bedding etc. fitted with springs or internally filled with any material	0.17	USA (65), UK (6), Australia (6)	0.4	9.1	USA (26), Japan (8), Germany (7)
630492	Articles for interior furnishing, of cotton	0.17	USA (49), UK (8), Germany (5)	1.1	0.7	USA (32), Germany (11), UK (6)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 9: Top Exported Products from Himachal Pradesh and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
300490	Medicaments for therapeutic or prophylactic purposes	1.13	USA (12), Russia (10), Brazil (7)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
300420	Medicaments containing antibiotics	0.13	Tanzania (8), Mexico (7), South Africa (6)	1.1	15.8	USA (21), China (10), Switzerland (7)
294200	Separate chemically defined organic compounds, n.e.s.	0.072	USA (19), Bangladesh (11), Poland (8)	1.4	1.0	Japan (17), USA (9), China (5)
850720	Lead acid accumulators	0.071	UAE (62), Lebanon (20), Turkey (5)	0.4	8.6	USA (17), Germany (8), Italy (5)
482390	Paper, paperboard, cellulose wadding and webs of cellulose fibres, of a width <= 36 cm	0.060	UK (13), Italy (11), Poland (8)	0.5	5.3	USA (13), Mexico (6), Canada (5)
300410	Medicaments containing penicillins or derivatives	0.036	Nigeria (13), Turkey (9), Brazil (8)	0.6	3.4	USA (14), Egypt (10), Austria (5)
520523	Single cotton yarn, of combed fibres, containing >= 85% cotton by weight and with a linear density of 192.31 decitex to < 232.56 decitex	0.024	Bangladesh (38), Portugal (14), Egypt (12)	0.9	1.5	Turkey (11), China (9), Portugal (8)
300460	Medicaments containing antimalarial active principles	0.022	Tanzania (22), Kenya (11), Nigeria (10)	0.2	0.43	UK (41), Sweden (12), Côte d'Ivoire (6)
520522	Single cotton yarn, of combed fibres, containing >= 85% cotton by weight and with a linear density of 232.56 decitex to < 714.29 decitex	0.019	Spain (11), UAE (10), Portugal (8)	0.4	0.9	China (17), Portugal (8), Peru (7)
210690	Food preparations, n.e.s.	0.019	USA (28), Australia (21), UAE (7)	0.6	56.7	USA (14), China (8), South Korea (4)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 10: Top Exported Products from Karnataka and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
271019	Medium oils and preparations	5.7	South Africa (21), Netherlands (18), Singapore (11)	65.3	650.8	USA (8), Singapore (6), Australia (5)
270750	Aromatic hydrocarbon mixtures of which >= 65% by volume	1.4	USA (43), UAE (40), Oman (7)	1.6	10.1	Belgium (26), Ecuador (23), Netherlands (16)
271012	Light oils and preparations	1.3	UAE (60), Iraq (11), Oman (11)	28.7	373.6	USA (9), Mexico (6), Singapore (6)
850440	Static converters	0.8	USA (53), Netherlands (18), Italy (7)	1.7	93.9	USA (17), Germany (9), China (8)
090111	Coffee (excl. roasted and decaffeinated)	0.7	Italy (20), Germany (16), Belgium (13)	0.8	31.6	USA (23), Germany (15), Italy (7)
300490	Medicaments for therapeutic or prophylactic purposes	0.5	USA (33), South Africa (13), Australia (7)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
851712	Telephones for cellular networks	0.37	Japan (28), Netherlands (18), UK (16)	1.27	7.2	Chinese Taipei (45), Philippines (14), Ukraine (9)
620520	Men's or boys' shirts of cotton	0.37	USA (46), UK (8), Germany (5)	0.7	8.9	USA (26), Germany (9), France (5)
170199	Cane or beet sugar and chemically pure sucrose, in solid form	0.34	Indonesia (13), Djibouti (10), Somalia (10)	2.8	11.5	Italy (8), USA (5), Spain (5)
260112	Agglomerated iron ores and concentrates	0.29	China (35), Germany (23), Netherlands (11)	1.2	18.0	China (15), Germany (10), Japan (9)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 11: Top Exported Products from Kerala and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
030617	Frozen shrimps and prawns	0.40	China (39), Japan (10), USA (9)	4.8	22.1	USA (27), China (26), Japan (7)
030743	Cuttle fish and squid, frozen	0.31	Spain (40), Italy (13), Thailand (11)	0.7	6.7	Spain (19), China (13), Italy (12)
271019	Medium oils and preparations	0.30	Bangladesh (35), Singapore (30), Mozambique (15)	65.3	650.8	USA (8), Singapore (6), Australia (5)
271012	Light oils and preparations	0.28	China (41), Malaysia (22), Singapore (22)	28.7	373.6	USA (9), Mexico (6), Singapore (6)
330190	Extracted oleoresins; concentrates of essential oils etc.	0.26	USA (33), Germany (5), France (5)	0.6	0.9	USA (18), Spain (6), France (6)
080132	Fresh or dried cashew nuts, shelled	0.17	UAE (43), Japan (10), Saudi Arabia (10)	0.4	3.6	USA (27), Germany (12), Netherlands (8)
611120	Babies' garments and clothing accessories of cotton	0.12	USA (81), Germany (5), Canada (4)	0.9	7.1	USA (28), Germany (8), France (7)
570390	Carpet tiles of vegetable textile materials or coarse animal hair	0.10	USA (58), UK (6), Italy (5)	0.3	0.5	USA (31), Germany (6), UK (5)
090422	Fruits of the genus Capsicum or of the genus Pimenta	0.08	USA (43), Indonesia (11), UAE (6)	0.2	1.0	USA (28), UK (6), Germany (5)
090111	Coffee (excl. roasted and decaffeinated)	0.08	Italy (17), Germany (14), Tunisia (9)	0.8	31.6	USA (23), Germany (15), Italy (7)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 12: Top Exported Products from Madhya Pradesh and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
300490	Medicaments for therapeutic or prophylactic purposes	1.10	USA (30), South Africa (8), Netherlands (4)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
100199	Wheat and meslin (excl. seed for sowing)	0.68	Indonesia (18), UAE (17), South Korea (16)	2.2	52.5	Indonesia (7), Turkey (6), China (5)
760110	Aluminium, not alloyed, unwrought	0.59	South Korea (30), Malaysia (15), Japan (11)	5.7	40.6	USA (17), Japan (10), Turkey (9)
230400	Oilcake and other solid residues from the extraction of soya-bean oil	0.36	USA (29), Vietnam (16), Germany (11)	0.6	37.0	Indonesia (9), Vietnam (6), Philippines (5)
100630	Semi or wholly milled rice	0.30	USA (30), Yemen (13), Kenya (7)	9.4	17.4	China (8), USA (8), Philippines (7)
630532	Flexible intermediate bulk containers of textile materials	0.22	USA (32), UK (11), Netherlands (9)	0.9	3.2	USA (18), Japan (13), Germany (9)
854511	Electrodes of graphite or other carbon	0.20	USA (23), Saudi Arabia (10), Egypt (10)	0.3	3.5	USA (11), Iceland (8), Turkey (8)
630260	Toilet linen and kitchen linen, of terry towelling or similar terry fabrics of cotton	0.16	USA (82), Poland (3), Australia (3)	1.0	6.6	USA (37), Japan (9), Germany (6)
520523	Single cotton yarn, containing >= 85% cotton by weight and with a linear density of 192.31 decitex to < 232.56 decitex	0.15	Bangladesh (44), Egypt (13), Sri Lanka (9)	0.9	1.5	Turkey (11), China (9), Portugal (8)
292320	Lecithins and other phosphoaminolipids	0.14	Netherlands (35), Italy (7), USA (7)	0.2	1.5	Netherlands (15), USA (9), Germany (7)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 13: Top Exported Products from Maharashtra and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
710239	Diamonds, worked, but not mounted or set	13.8	USA (38), Hong Kong (23), Belgium (12)	23.0	82.5	USA (28), Hong Kong (18), India (11)
711319	Articles of jewellery and parts thereof, of precious metal other than silver	4.5	USA (51), UAE (19), UK (5)	9.2	82.9	Hong Kong (19), USA (13), Switzerland (11)
170114	Raw cane sugar, in solid form	2.2	Indonesia (22), Bangladesh (14), Iraq (9)	2.9	18.0	Indonesia (16), China (12), USA (9)
300490	Medicaments for therapeutic or prophylactic purposes	2.1	USA (22), Philippines (4), France (4)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
871120	Motorcycles, with engine of a cylinder capacity > 50 cc but <= 250 cc	1.2	Nigeria (22), Colombia (10), Uganda (8)	2.5	10.3	Philippines (11), USA (6), Nigeria (5)
271019	Medium oils and preparations	1.0	Singapore (20), Bangladesh (12), Brazil (10)	65.3	650.8	USA (8), Singapore (6), Australia (5)
170199	Cane or beet sugar and chemically pure sucrose, in solid form	0.79	Djibouti (14), Afghanistan (10), Somalia (9)	2.8	11.5	Italy (8), USA (5), Spain (5)
020230	Frozen, boneless meat of bovine animals	0.72	Malaysia (23), Philippines (15), Vietnam (14)	2.9	34.2	China (46), USA (9), Japan (6)
271012	Light oils and preparations	0.71	China (50), Japan (21), Singapore (10)	28.7	373.6	USA (9), Mexico (6), Singapore (6)
870899	Parts and accessories, for tractors, motor vehicles for the transport of ten persons, n.e.s	0.71	USA (35), Mexico (12), Germany (7)	3.1	92.0	USA (19), Spain (8), France (8)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 14: Top Exported Products from Odisha and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
760110	Aluminium, not alloyed, unwrought	3.9	South Korea (18), Netherlands (16), Malaysia (10)	5.7	40.6	USA (17), Japan (10), Turkey (9)
760120	Unwrought aluminium alloys	1.2	USA (24), Mexico (12), Spain (9)	1.8	48.6	USA (17), Germany (12), China (6)
720241	Ferro-chromium, containing by weight > 4% of carbon	0.81	China (42), South Korea (19), Japan (11)	0.9	10.7	China (29), Indonesia (21), Japan (11)
271019	Medium oils and preparations	0.61	Sri Lanka (50), Singapore (26), Malaysia (16)	65.3	650.8	USA (8), Singapore (6), Australia (5)
260112	Agglomerated iron ores and concentrates	0.61	China (66), Turkey (7), Croatia (5)	1.2	18.0	China (15), Germany (10), Japan (9)
281820	Aluminium oxide (excl. artificial corundum)	0.58	UAE (40), Oman (30), UK (9)	0.7	14.4	Canada (11), Russia (8), Bahrain (8)
720839	Flat-rolled products of iron or non-alloy steel, of a width of \geq 600 mm, in coils, simply hot-rolled, not clad, plated or coated, of a thickness of < 3 mm, not pickled	0.55	Vietnam (44), Turkey (17), UAE (16)	1.2	20.2	Vietnam (12), Turkey (9), Italy (8)
030617	Frozen shrimps and prawns	0.51	China (28), Vietnam (25), USA (18)	4.8	22.1	USA (27), China (26), Japan (7)
722530	Flat-rolled products of alloy steel other than stainless, of a width of \geq 600 mm, not further worked than hot-rolled, in coils	0.50	Vietnam (56), Nepal (19), UAE (13)	0.8	6.4	Thailand (14), USA (11), Mexico (8)
271012	Light oils and preparations	0.47	USA (36), Sri Lanka (30), UAE (13)	28.7	373.6	USA (9), Mexico (6), Singapore (6)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 15: Top Exported Products from Punjab and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
100630	Semi or wholly milled rice	0.71	Saudi Arabia (29), UAE (10), Oman (8)	9.4	17.4	China (8), USA (8), Philippines (7)
870899	Parts and accessories, for tractors, motor vehicles for the transport of ten or more persons	0.26	USA (33), Italy (7), Germany (6)	3.1	92.0	USA (19), Spain (8), France (9)
520523	Single cotton yarn, containing >= 85% cotton by weight and with a linear density of 192.31 decitex to < 232.56 decitex	0.22	Bangladesh (64), Egypt (8), Vietnam (4)	0.9	1.5	Turkey (11), China (9), Portugal (8)
730840	Equipment for scaffolding, shuttering, propping or pit-propping	0.18	UK (16), USA (12), UAE (10)	0.3	6.3	Germany (9), USA (8), UK (6)
870193	Tractors, of an engine power > 37 kW but <= 75 kW	0.17	Brazil (21), Thailand (21), Bangladesh (6)	0.9	6.6	USA (31), France (5), Italy (5)
630260	Toilet linen and kitchen linen, of terry towelling or similar terry fabrics of cotton	0.17	USA (50), Australia (13), UK (6)	1.0	6.6	USA (37), Japan (9), Germany (6)
820411	Hand-operated spanners and wrenches, incl. torque meter wrenches, of base metal, non-adjustable	0.15	USA (24), Germany (11), Russia (8)	0.2	1.8	USA (20), Germany (9), China (4)
020230	Frozen, boneless meat of bovine animals	0.13	Malaysia (32), Indonesia (19), Egypt (19)	2.9	34.2	China (46), USA (9), Japan (6)
300490	Medicaments for therapeutic or prophylactic purposes	0.13	USA (40), Canada (10), UK (5)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
730890	Structures and parts of structures, of iron or steel, n.e.s	0.13	USA (52), UK (10), Germany (5)	0.9	42.9	USA (16), Germany (8), France (4)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 16: Top Exported Products from Rajasthan and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
790111	Unwrought zinc, not alloyed, containing by weight >= 99.99% of zinc	0.84	Singapore (19), UAE (14), Taiwan (11)	1.3	10.3	USA (16), Netherlands (9), Germany (9)
940360	Wooden furniture (excl. for offices, kitchens and bedrooms, and seats)	0.57	USA (45), Germany (12), Netherlands (11)	0.7	30.6	USA (30), Germany (8), UK (7)
870322	Motor cars with engine of > 1000 cc but <= 1500 cc	0.32	Turkey (42), Mexico (41), South Africa (6)	3.5	103	USA (18), France (9), Germany (8)
711319	Articles of jewellery and parts thereof, of precious metal other than silver	0.32	USA (36), UAE (13), Hong Kong (11)	9.2	82.9	Hong Kong (19), USA (13), Switzerland (11)
711311	Articles of jewellery and parts thereof, of silver	0.25	USA (41), UK (15), Germany (7)	3.1	9.9	Hong Kong (32), USA (19), Germany (6)
130232	Mucilage and thickeners, derived from locust beans, locust bean seeds or guar seeds, whether or not modified	0.22	USA (37), Russia (20), Germany (9)	0.5	1.7	USA (27), Germany (12), China (6)
710391	Rubies, sapphires and emeralds, worked, whether or not graded	0.21	USA (26), Thailand (21), Hong Kong (20)	0.3	7.8	USA (29), Hong Kong (19), Switzerland (10)
401170	New pneumatic tyres, of rubber, of a kind used on agricultural or forestry vehicles and machines	0.20	USA (18), Germany (16), France (9)	1.2	4.2	USA (17), Germany (13), France (9)
710399	Precious and semi-precious stones, worked, whether or not graded	0.16	USA (30), Thailand (21), Hong Kong (20)	0.2	6.2	China (47), India (30), USA (7)
680223	Granite and articles thereof	0.16	Vietnam (31), USA (15), Nepal (11)	0.9	0.6	Vietnam (15), USA (6), Mexico (5)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 17: Top Exported Products from Tamil Nadu and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
870322	Motor cars with engine of > 1000 cc but <= 1500 cc	1.37	Saudi Arabia (26), Mexico (14), South Africa (13)	3.5	103.0	USA (18), France (9), Germany (8)
610910	T-shirts, singlets and other vests of cotton	1.26	USA (26), Germany (10), UAE (8)	1.9	35.4	USA (19), Germany (10), France (6)
870899	Parts and accessories, for tractors, motor vehicles for the transport of ten or more persons	0.94	USA (19), Turkey (14), Brazil (11)	3.1	92.0	USA (19), Spain (8), France (9)
271012	Light oils and preparations	0.84	China (45), South Korea (41), Taiwan (10)	28.7	373.6	USA (9), Mexico (6), Singapore (6)
850300	Parts suitable for use solely or principally with electric motors and generators, electric generating sets and rotary converters, n.e.s.	0.83	USA (30), Australia (15), Spain (7)	1.2	23.8	USA (14), Germany (14), Mexico (6)
711319	Articles of jewellery and parts thereof, of precious metal other than silver	0.78	UAE (50), Singapore (27), Malaysia (16)	9.2	82.9	Hong Kong (19), USA (13), Switzerland (11)
870321	Motor vehicles principally designed for the transport of <10 persons with engine capacity of <1000 cc	0.66	South Africa (49), Nigeria (13), UAE (6)	1.4	39.2	France (12), Germany (12), UK (12)
611120	Babies' garments and clothing accessories of cotton	0.61	USA (35), UK (20), France (5)	0.9	7.1	USA (28), Germany (8), France (7)
870410	Dumpers for off-highway use	0.59	Indonesia (38), South Africa (14), Belgium (7)	0.6	10.1	USA (16), Indonesia (12), Australia (10)
850440	Static converters	0.55	USA (49), China (26), Netherlands (15)	1.7	93.9	USA (17), Germany (9), China (8)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 18: Top Exported Products from Telangana and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
300490	Medicaments for therapeutic or prophylactic purposes	3.2	USA (54), Belgium (8), Russia (3)	14.9	386.3	USA (19), Germany (8), Switzerland (7)
293399	Heterocyclic compounds with nitrogen hetero-atom[s] only (excl. those containing an unfused pyrazole, imidazole, etc.)	0.34	USA (18), Turkey (7), South Korea (4)	0.9	21.6	Italy (15), Slovenia (15), Singapore (7)
293339	Heterocyclic compounds with nitrogen hetero-atom[s] only, containing an unfused pyridine ring, whether or not hydrogenated, in the structure, n.e.s.	0.26	Bangladesh (6), Brazil (6), Belgium (6)	1.1	14.6	Germany (16), Panama (12), USA (11)
711319	Articles of jewellery and parts thereof, of precious metal other than silver	0.21	UAE (50), USA (45), Singapore (3)	9.2	82.9	Hong Kong (19), USA (13), Switzerland (11)
300390	Medicaments consisting of two or more constituents mixed together for therapeutic or prophylactic uses	0.18	USA (15), Mexico (8), Spain (8)	0.4	8.9	UK (14), USA (13), Canada (12)
090421	Fruits of the genus Capsicum	0.18	China (69), Thailand (19), Indonesia (9)	0.8	1.5	China (23), USA (15), Thailand (13)
293499	Nucleic acids and their salts, whether or not chemically defined; heterocyclic compounds	0.17	UAE (11), USA (8), Turkey (6)	0.5	31.8	USA (31), Belgium (20), Germany (9)
300420	Medicaments containing antibiotics	0.15	USA (70), Mexico (4), Russia (3)	1.1	15.8	USA (21), China (10), Switzerland (7)
300410	Medicaments containing penicillins or derivatives	0.14	USA (55), Malta (10), Brazil (6)	0.6	3.4	USA (14), Egypt (10), Austria (5)
294190	Antibiotics (excl. penicillins and their derivatives with a penicillanic acid structure, salts thereof etc.)	0.14	Turkey (14), Vietnam (11), Bangladesh (11)	0.6	7.2	Italy (13), India (10), Germany (9)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 19: Top Exported Products from Uttar Pradesh and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
020230	Frozen, boneless meat of bovine animals	1.6	Egypt (18), Vietnam (16), Malaysia (15)	2.9	34.2	China (46), USA (9), Japan (6)
851712	Telephones for cellular networks	0.72	UAE (30), Germany (12), France (8)	1.3	7.2	Chinese Taipei (45), Philippines (14), Ukraine (9)
851718	Telephone sets (excl. line telephone sets with cordless handsets and telephones for cellular networks or for other wireless networks)	0.48	UAE (34), UK (8), Italy (8)	0.8	4.9	USA (20), Guatemala (15), France (13)
760110	Aluminium, not alloyed, unwrought	0.46	South Korea (46), Taiwan (14), Malaysia (14)	5.7	40.6	USA (17), Japan (10), Turkey (9)
640391	Footwear with outer soles of rubber, plastics or composition leather, with uppers of leather, covering the ankle	0.45	USA (19), UK (19), Germany (16)	1.0	17.1	USA (33), Germany (9), Netherlands (6)
732690	Articles of iron or steel, n.e.s	0.35	USA (56), UK (6), Netherlands (6)	0.9	55.9	USA (12), Germany (9), Mexico (6)
100630	Semi or wholly milled rice	0.31	Nepal (33), U AE (18), UK (5)	9.4	17.4	China (8), USA (8), Philippines (7)
620442	Women's or girls' dresses of cotton	0.30	USA (36), UK (13), Spain (9)	0.9	4.8	USA (22), Germany (8), UK (5)
620443	Women's or girls' dresses of synthetic fibres	0.27	USA (33), UK (19), Germany (9)	0.7	7.7	USA (18), Germany (8), UK (8)
100199	Wheat and meslin (excl. seed for sowing)	0.24	Bangladesh (50), Indonesia (18), Thailand (8)	2.2	52.5	Indonesia (7), Turkey (6), China (5)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

Annexure 20: Top Exported Products from West Bengal and their Global Demand

HS Code	Description	Exports from the State (US\$ Bn): 2022	Major Export Destinations for the State (Share in %): 2022	India's Exports (US\$ Bn): 2022	Global Imports (US\$ Bn): 2022	Top Global Importers (Share in %): 2022
711319	Articles of jewellery and parts thereof, of precious metal other than silver	1.3	UAE (67), Singapore (20), USA (6)	9.2	82.9	Hong Kong (19), USA (13), Switzerland (11)
030617	Frozen shrimps and prawns	0.52	USA (19), Japan (19), China (15)	4.8	22.1	USA (27), China (26), Japan (7)
720230	Ferro-silicomanganese	0.46	Italy (11), Bangladesh (10), UAE (7)	1.6	5.2	USA (17), Italy (8), Turkey (8)
100630	Semi or wholly milled rice	0.45	Bangladesh (36), Vietnam (14), Benin (11)	9.4	17.4	China (8), USA (8), Philippines (7)
670300	Human hair, worked; wool, other animal hair or other textile materials, prepared for use in making wigs or the like	0.33	China (92), Vietnam (3), Paraguay (2)	0.5	1.2	China (76), Bangladesh (3), Indonesia (2)
100199	Wheat and meslin (excl. seed for sowing)	0.32	Bangladesh (100)	2.2	52.5	Indonesia (7), Turkey (6), China (5)
271019	Medium oils and preparations	0.31	Nepal (35), Bhutan (24), Singapore (19)	65.3	650.8	USA (8), Singapore (6), Australia (5)
100590	Maize (excl. seed for sowing)	0.31	Bangladesh (98), Bhutan (2), Nepal (1)	1.1	62.4	China (11), Japan (9), South Korea (7)
732599	Cast articles of iron or steel, n.e.s	0.30	USA (33), UAE (9), Italy (8)	0.9	3.6	USA (10), Italy (10), Germany (10)
720719	Semi-finished products of iron or non-alloy steel containing, by weight, < 0,25% of carbon	0.27	Nepal (90), Egypt (4), Indonesia (4)	0.9	2.1	Indonesia (26), Egypt (24), Chinese Taipei (7)

Source: DGCIS; ITC Trade Map; India Exim Bank Research

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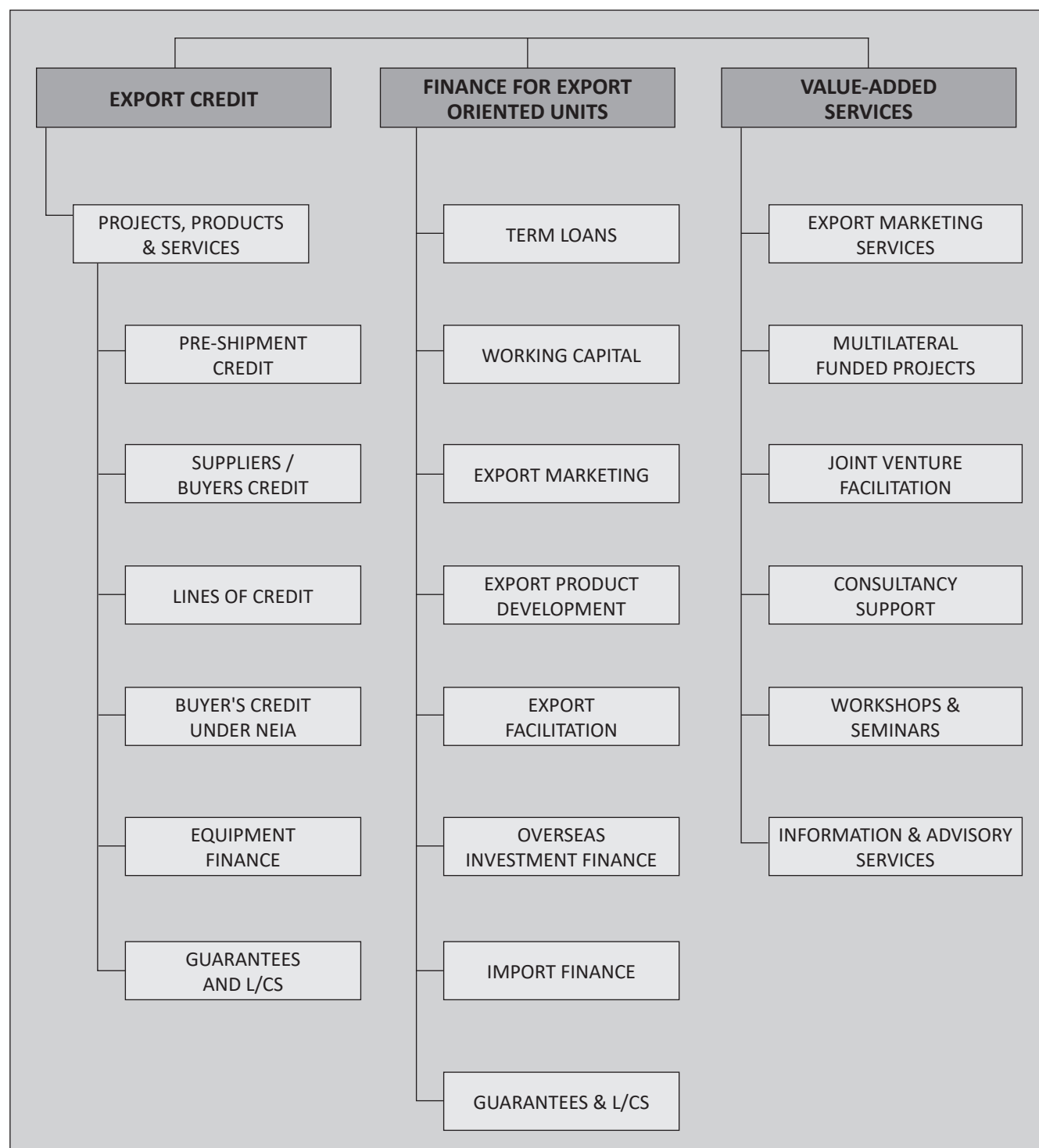
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