

INDIA'S FOOD & AGRI EXPORTS

MAPPING AGGRESSIVE POTENTIAL IN GLOBAL MARKETS

A COMPREHENSIVE REPORT ON INDIA'S FOOD AND AGRI SECTOR PRODUCTION, CURRENT EXPORT VOLUMES AND PREDICTIVE ANALYSIS OF POTENTIAL MARKETS CLASSIFIED IN DEVELOPED, DEVELOPING AND LDC'S.

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Executive Summary

Despite the spending on the export promotion and developmental activities by Government and the private counterparts, the exports of Processed Agricultural Food and Allied Product are not on the track of healthy growth. Provided with existence of export potential on one side and simultaneous spending on export promotion on other side, the reason of sluggish exports are lesser effective execution of export promotional activities and neglecting the unexplored markets, which could have significant potential for export.

In order to achieve the optimum results, first we have to revamp our export promotion strategies to let the industry players fully know about our presence and competitiveness. The novel marketing strategies have been utilized in order to get the more channels open for the exports. Secondly, we have to diversify the export destinations in order to magnify export demand and ultimately export values. For example instead of focusing only on the existing markets and fighting for the larger piece of share in developed nations, we should shift our focus to potential markets in developing nation and least developing nations, where we can export with lesser hassles.

To give the insight about the situation, this report has five broader segments namely Production Summary, which is dedicated to give the insight about the current production situation of the principle agricultural products. The second segment illustrates about the category wise Exports. The third segment is Expenditure and Outlays, which includes the spending by the government in order to achieve the better results on developments in terms of quality, market share, awareness, etc. which will directly or indirectly boosts up the exports. The fourth segment is the highlighting the lag in export despite the competitiveness and existence of significant trade values and justifying the same by listing the top crucial/aggressive Processed Agricultural Food and Allied Products. The fifth segment has included the picture of existing markets, and the potential markets, where we can tap the potential for the future exports.

Salient Features of the Report

Objective

To highlight the lag in the India's exports of Processed Agriculture Food and Allied Products, despite the competitiveness, significant trade opportunity (in terms of value of total world imports) and genuine inflow of monetary resources.

To map for the aggressive/crucial products, the existing markets, where the country is currently focusing for the export and the potential markets where the country can focus to enhance the exports.

Methodology

This report consists of five main segments besides the executive summary and conclusion. The details of each segment is given below:

Segment 1: Production Summary

This segment briefs about the Production scenario and share of India in the global output of the Principle Agriculture Products in order to get the clearer idea about the domestic supply.

Segment 2: Category-wise Export Details

In this segment, the exports details (Agricultural Products only) have been summarized in Group wise and category-wise manner in order to get the export situations in briefs and without the hassles of long lists.

Segment 3: Expenditure and Outlays

The data of expenditure and Outlays has been taken from the Outcome Budgets reports available on website of Ministry of Commerce and Industries and the Budget reports available on website of Ministry of Food Processing and Industries (MoFPI).

- Aggregating Plan and Non Plan Expenditure and Outlays of each section like APEDA, MPEDA, Spice Board, and adding them as Total.
- Adding all of the expenditure and outlays of each section as Grand Total. Only Revised estimates have been taken into the reference for the purpose concerned here.

Segment 4: Lag in Export and Listing of the Crucial Commodities

The picture of lag in export besides their competitiveness has been portrayed in this section by using the

- Calculation of Revealed Comparative Advantage (RCA) for each processed food, agri and allied product at 6 digit HS level, using the ITC Trade Map data of Year 2015. Selecting the Products/commodities whose RCA are equal to greater than 1.
- Categorizing the products/commodities those were selected in the previous step, further into two categories that is Priority list 1 and Priority list 2 based on two parameters that is respective value of total world import and their share in the world imports.
 - In priority list 1, the listed products are those whose value of total world imports are equal to or greater than USD 200 million and the respective share is equal to or below 10%
 - In Priority list 2, the listed products are those whose value of total world imports are equal to or greater than USD 200 million and the respective share ranges from 10% to 20%.
- Taking top 15 products/commodities consecutively from the both of the list starting from Priority List 1, considering the top world imports values as sequence benchmark.

Segment 5: Indian Export Flows and Existing & Potential Markets

The section consists of the export flows and the existing & potential markets of the product listed crucial in the previous section. The listing of these three elements is done as follow:

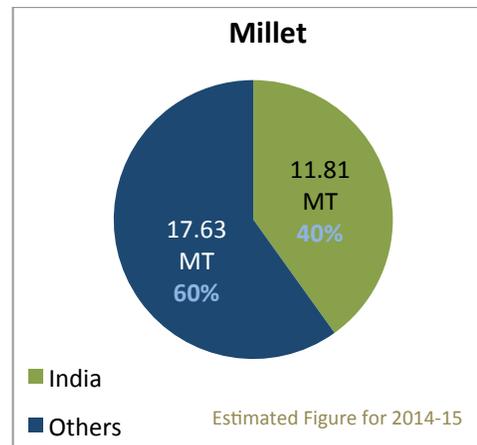
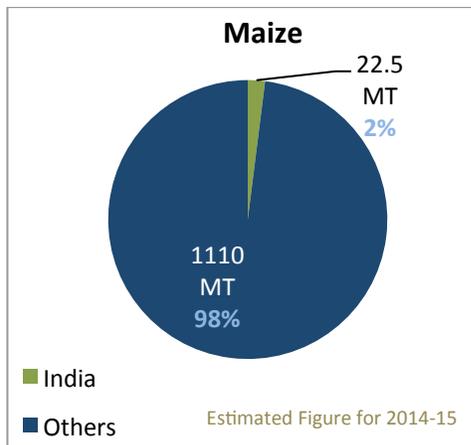
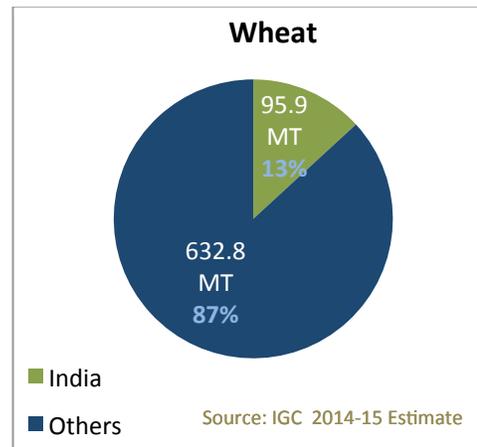
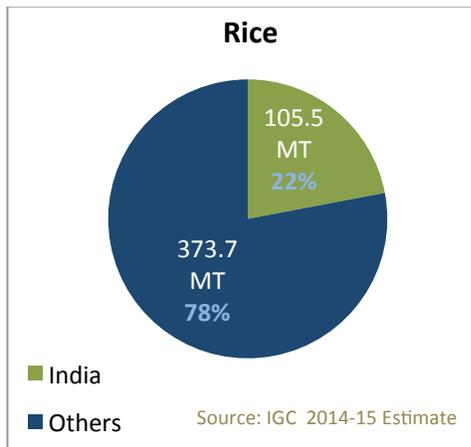
- Presentation of India's shares in the world imports and the list of top export destinations of India.
- Listing of the top existing market, i.e where India already exports, in developing and least developed nations.
- Listing of the top potential market, i.e. where India does not exports so far, in developing and least developed nations.
- We are not considering the developed nation for the export promotion of aggressive products as due to their higher standard of food safety and security, which makes entering into their market a tough task.

Production Summary (Commodity-wise)

Being the agrarian economy, India has the significant share in the world’s production of Agriculture products. India holds good rank in production of some of the principle agriculture products. We have tried to highlight the share of India in production of some of the major agricultural products.

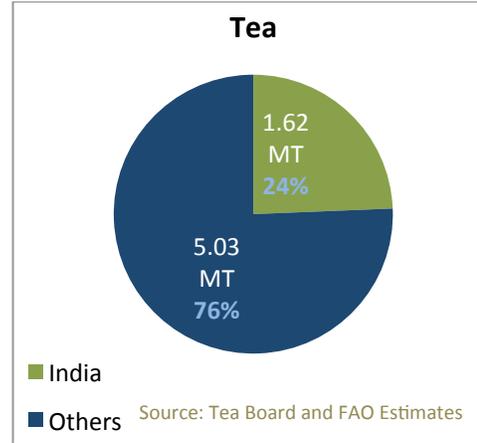
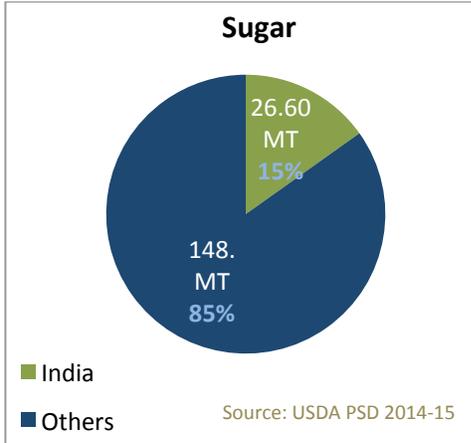
Grain and Cereals

India holds the second rank in the world’s major producers of rice and wheat separately, according to the FAO data for year 2013. India is the largest producer of Millet in the world with the share of 40% and the sixth largest producers of Maize.



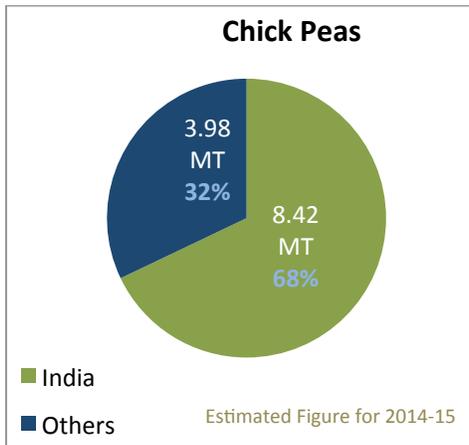
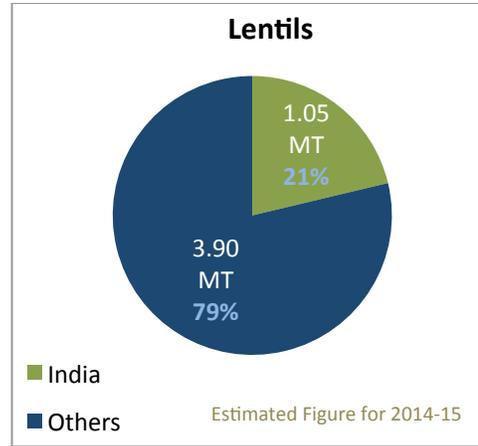
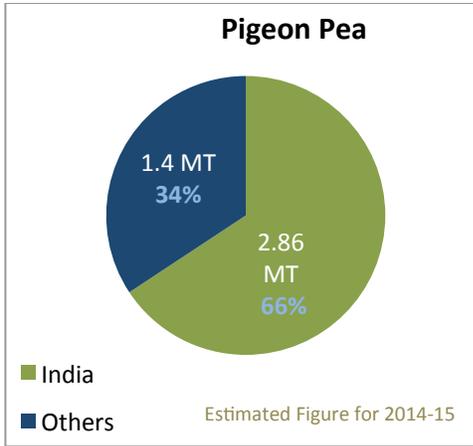
Sugar and Tea

India produces around 15% of the world sugar and holds the second rank in the world in the top sugar producing nation after Brazil. In case of Tea, the country holds the second rank following China, with the share of around 24%.



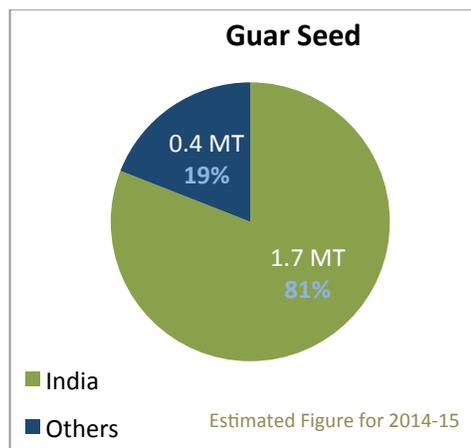
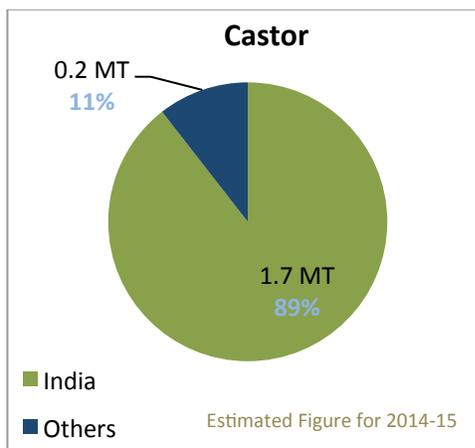
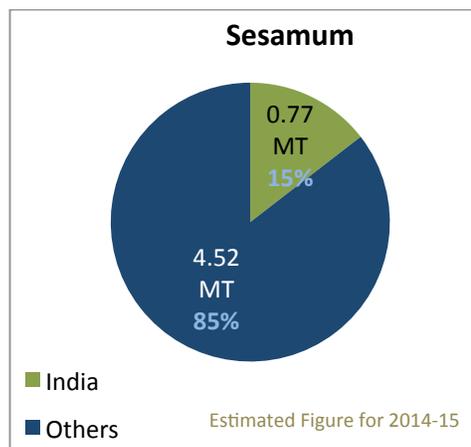
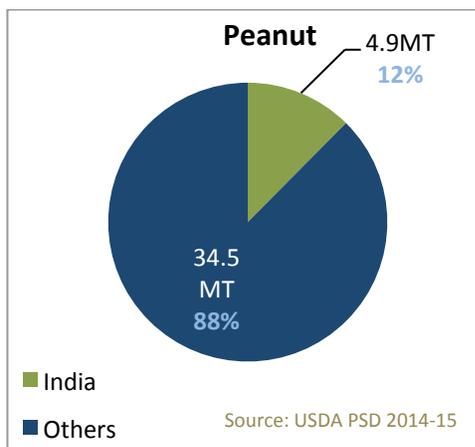
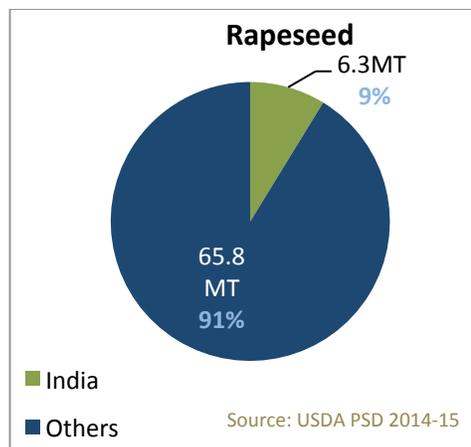
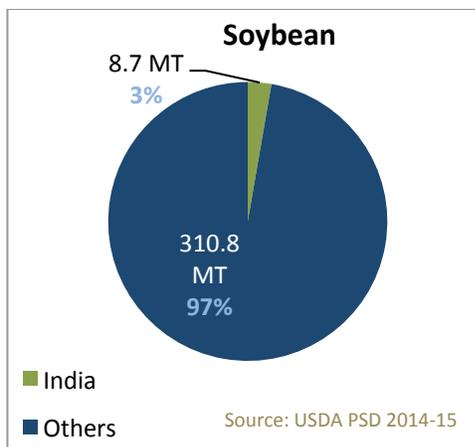
Pulses

India is top producer of Pigeon Peas (Tur) in the world, holding the share of around 66% in total global production. In case of Chick Peas (Chana) too, according to the FAO data of year 2013, India hold the first rank among the producers of top producers of Chickpeas, with the share of around 68%. The country is the second largest producer of lentils in the world and holds the share of 21% in the production of same.



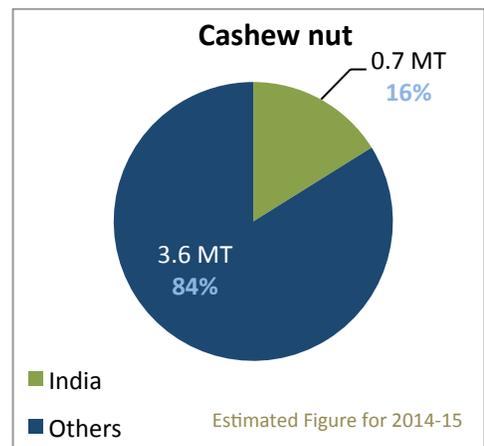
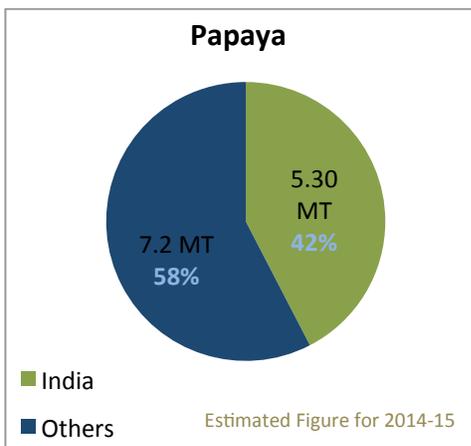
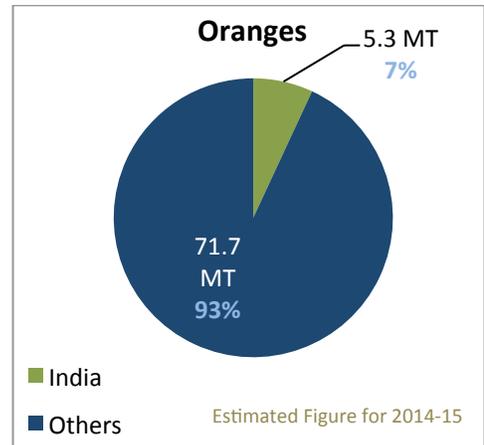
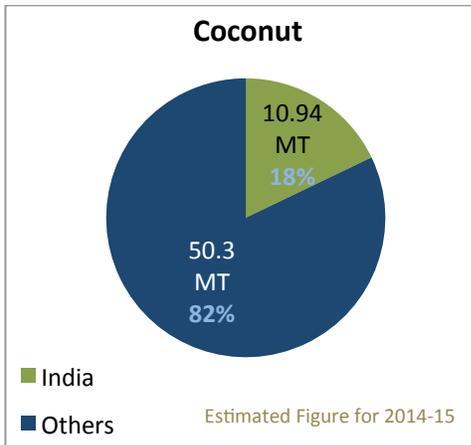
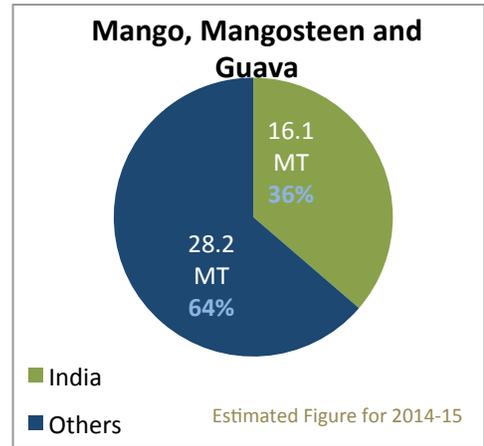
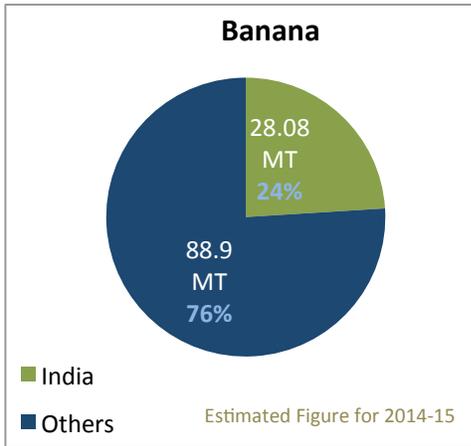
Oilseeds and Guar

Although the shares are very less, India hold the fifth rank in the Soya bean production following United States, Brazil, Argentina, China and India. In Rapeseed it holds the third position in global production, after Canada and China. India is the second largest producers of peanuts, after China. Similarly the country is the second largest producer of Sesamum, after Myanmar. In case of Castor oil seed and Guar Seed, the country holds the first rank in global production of each of them.



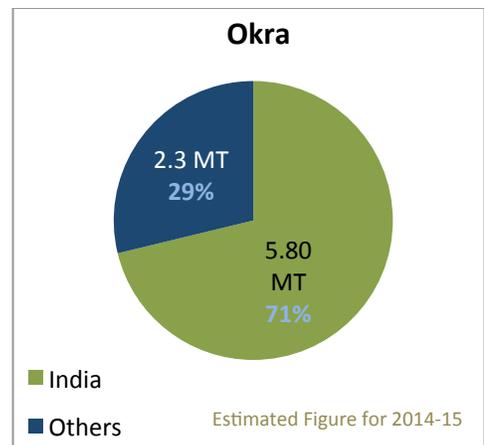
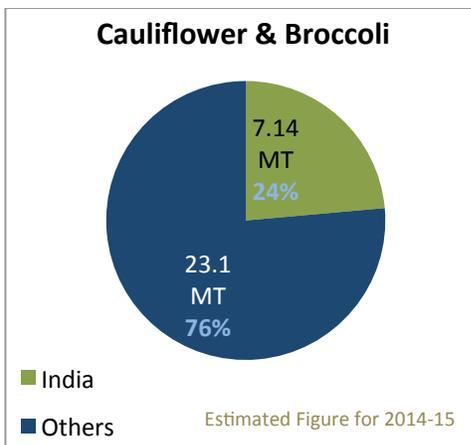
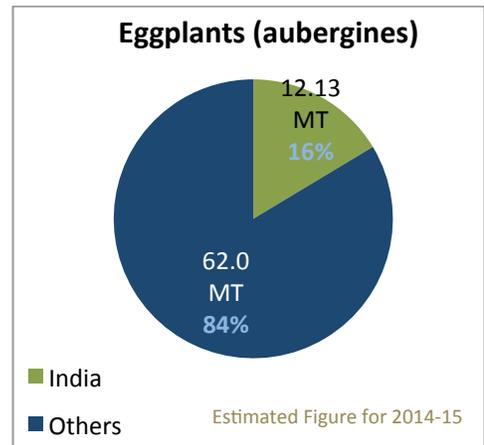
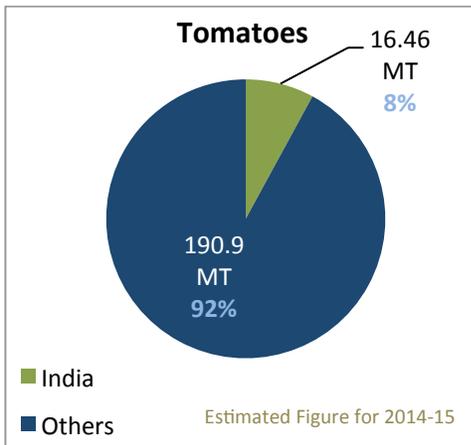
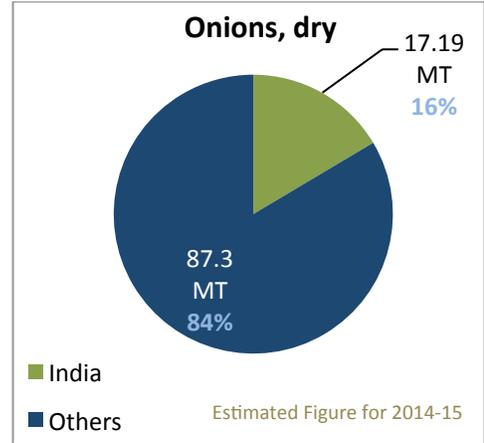
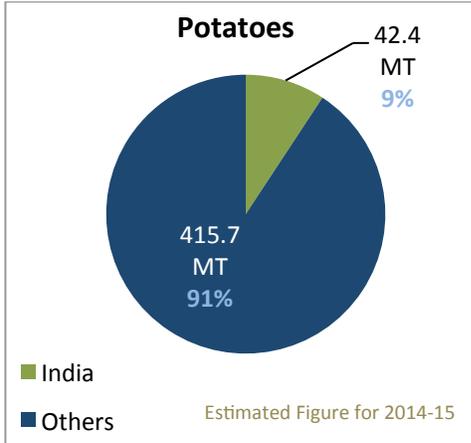
Fruit and Nuts

India holds first rank in the Banana production in the world, with the approximate share of 24%. In the collective production of Guava, Mangosteen and Mango, the country holds the first rank again. The country’s rank in Coconut production is third, after Indonesia and Philippines. The rank of country in Orange production is fourth, after Brazil, United States and China. India is top producer of Papaya in the world with more than 40% of the share. In case of Cashew nuts, the country’s rank is third after Vietnam and Nigeria.



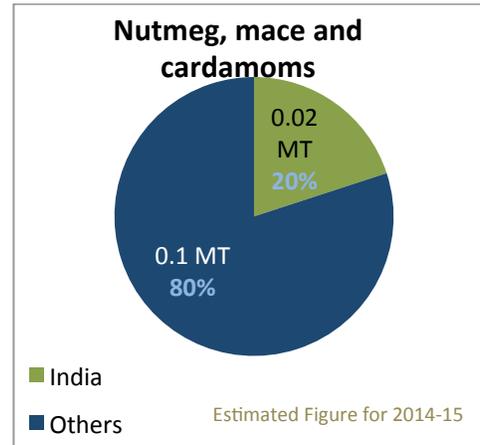
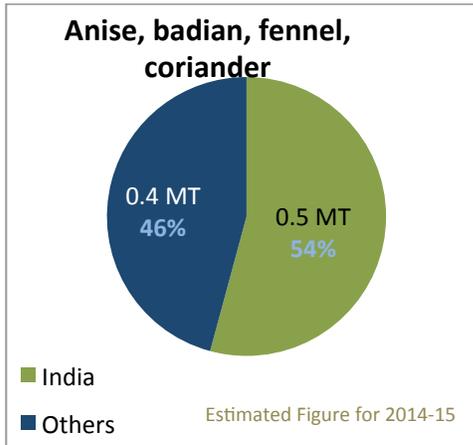
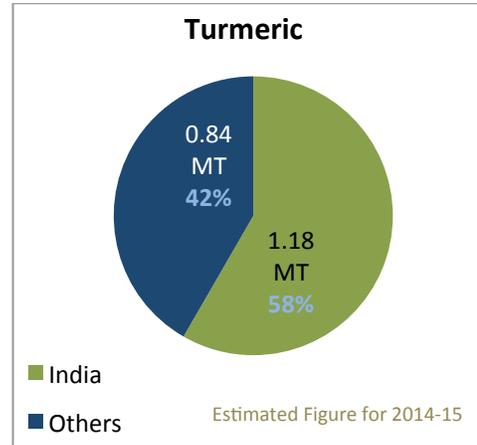
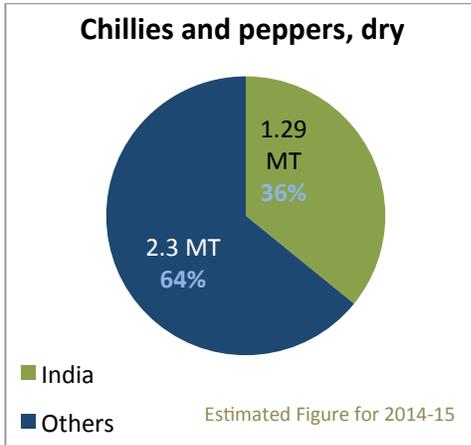
Vegetables

India is the second largest producer of Potatoes, Onion (Dry) and Tomatoes individually in the world, after China. The country holds second rank in Eggplant and Cauliflower & Broccoli production too. In Okra (Lady’s Finger) production, India ranks first in the world.



Spices

Known for its Spices, India is top producer of Chilli and Pepper in the world. Similarly the country is largest producer of Turmeric as well. The production of Anise, Badian, Fennel and Coriander together constitute the share of 54% in the total global production. The production of Nutmeg, Mace and Cardamom together constitute the share of 20% of the total global production of same.



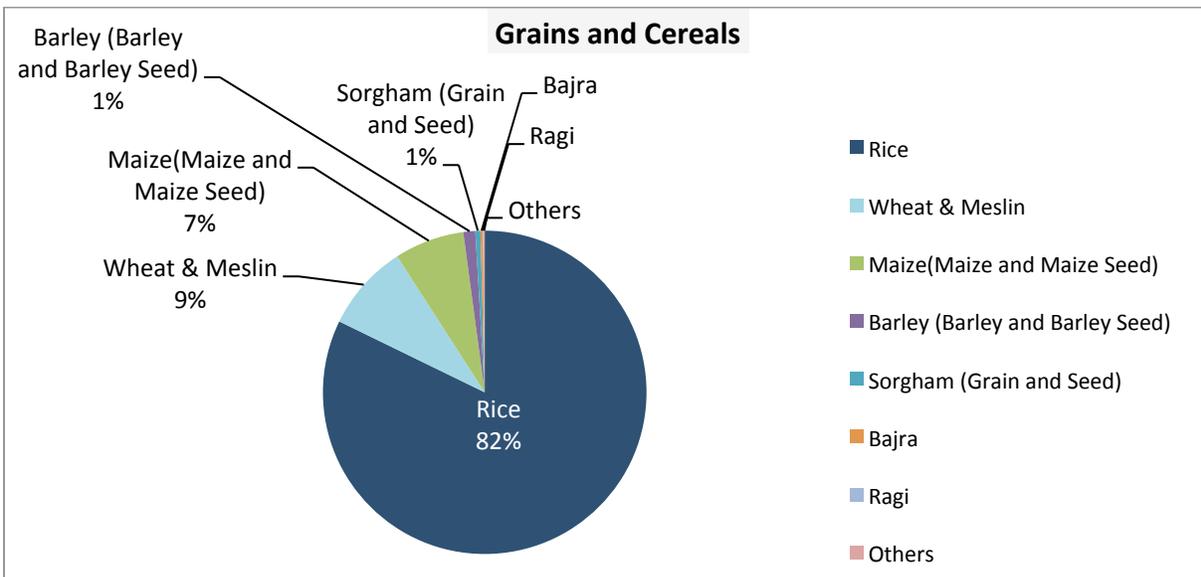
Category wise Export's Value and Shares

To get the clearer picture of the exports of the agricultural products, we have divided the exports figures into various groups and combined them into the various categories for example Grains and Cereals, Marine Products etc. exports figures of year 2014-15 has been taken into consideration. Data source is Ministry of Commerce and Industry.

Grains and Cereals

USD Million

Grains and Cereals	Item	Export Value
	Rice	7853.12
Wheat & Meslin	828.75	
Maize(Maize and Maize Seed)	666.77	
Barley (Barley and Barley Seed)	113.52	
Sorgham (Grain and Seed)	48.86	
Bajra	22.97	
Ragi	2.82	
Others	14.18	
Total	9550.99	

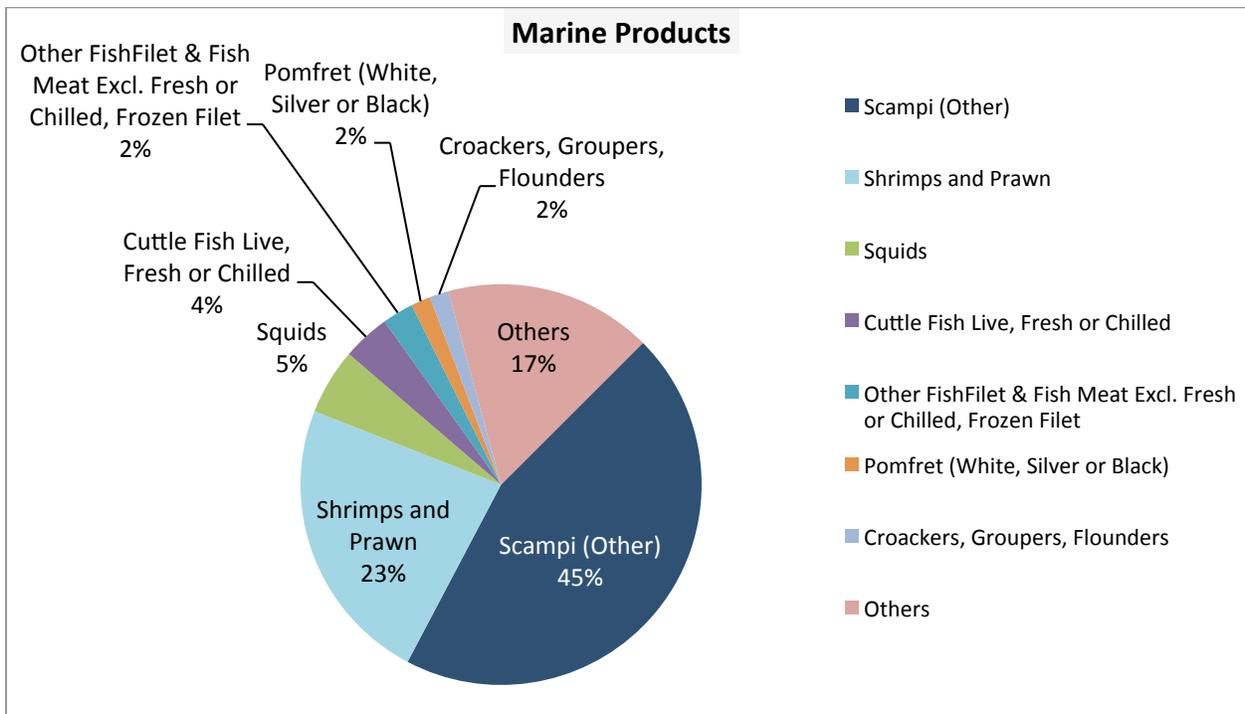


In Grain and Cereals, Rice topped as the product with maximum export value with the share of 82%, followed by Wheat & meslin and Maize (Maize and Maize Seed) with their share of 9% and 7% respectively. Other major products, after these three were Barley (Barley and Barley Seed), Sorghum (Grain and Seed), Bajra and Ragi.

Marine Products

USD Million

	Item	Export Value
Marine Products	Scampi (Other)	2373.72
	Shrimps and Prawn	1220.39
	Squids	279.69
	Cuttle Fish Live, Fresh or Chilled	201.12
	Other FishFilet & Fish Meat Excl. Fresh or Chilled, Frozen Filet	132.37
	Pomfret (White, Silver or Black)	82.39
	Croackers, Groupers, Flounders	81.22
	Others	878.58
	Total	5249.48

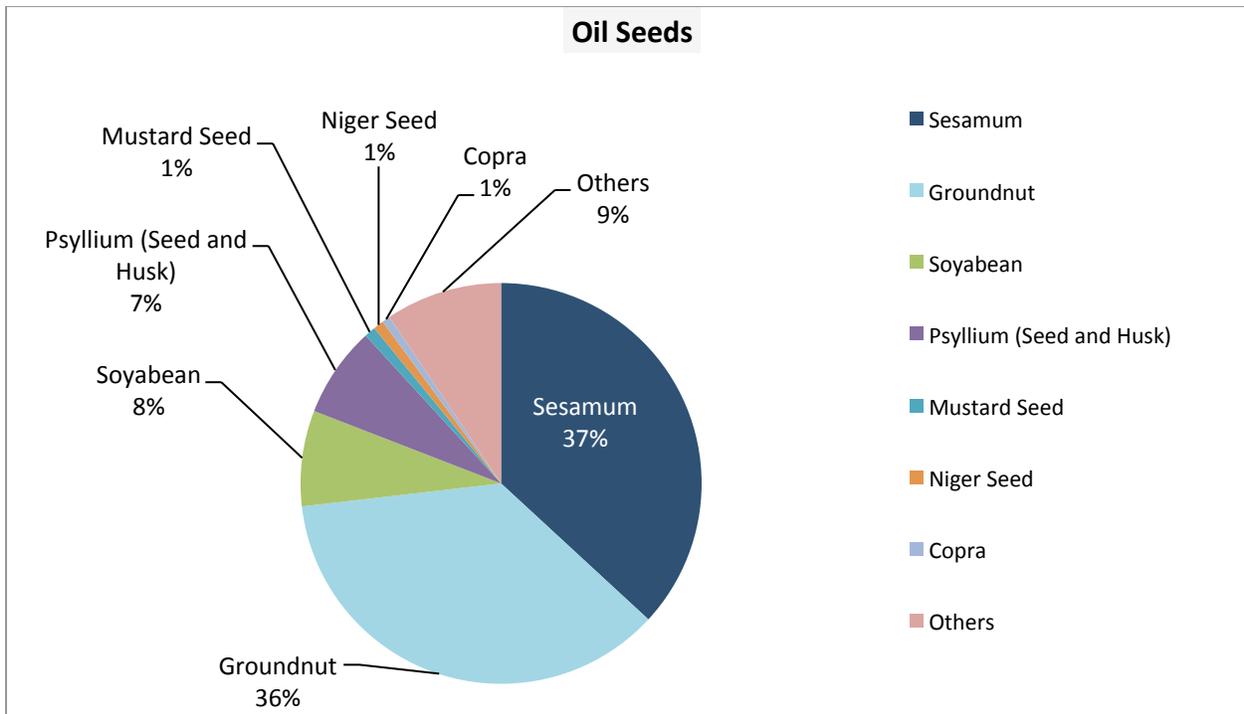


Scampi has the maximum export value in the category of Marine Products with the share of 45% in the value terms. Scampi is followed by Shrimps and Prawns with the share of 23% and the Squids with the share of 5%. Other major constituents in the category of Marine Products are Fresh or Chilled Live Cuttle Fish, Fish Fillet and Fish Meat, Pomfret, Croackers, Gruoupers and Flounders.

Oil Seeds

USD Million

Oil Seeds	Item	Export Value
	Sesamum	772.27
Groundnut	760.37	
Soyabean	161.74	
Psyllium (Seed and Husk)	153.21	
Mustard Seed	18.93	
Niger Seed	17.71	
Copra	13.4	
Others	197.08	
Total	2094.71	

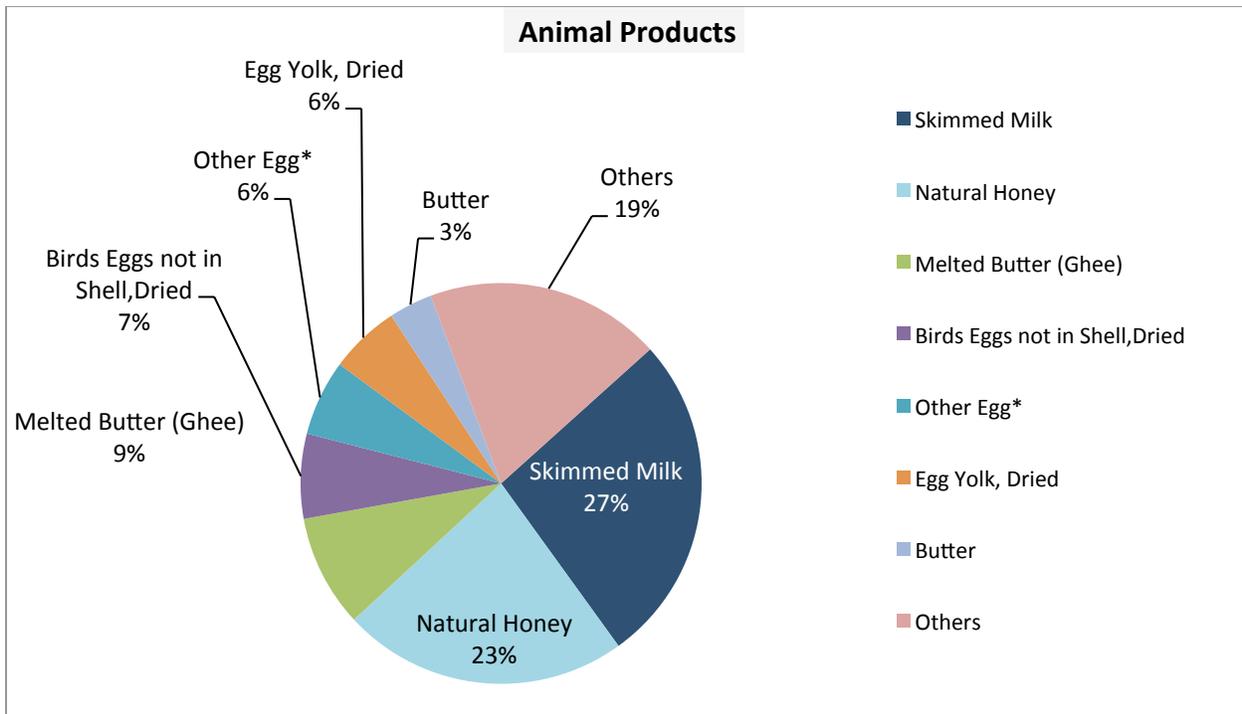


In the Oilseeds, Sesamum gained the maximum export value with the share of 37% in the total oilseed export basket. Groundnut stood the second with the share of 36%, followed by Soyabean with the share of 8%. Other oilseeds besides these top three with the fair export values were Psyllium (seed and husk), Mustard seed, Niger Seed and Copra.

Animal Products

USD Million

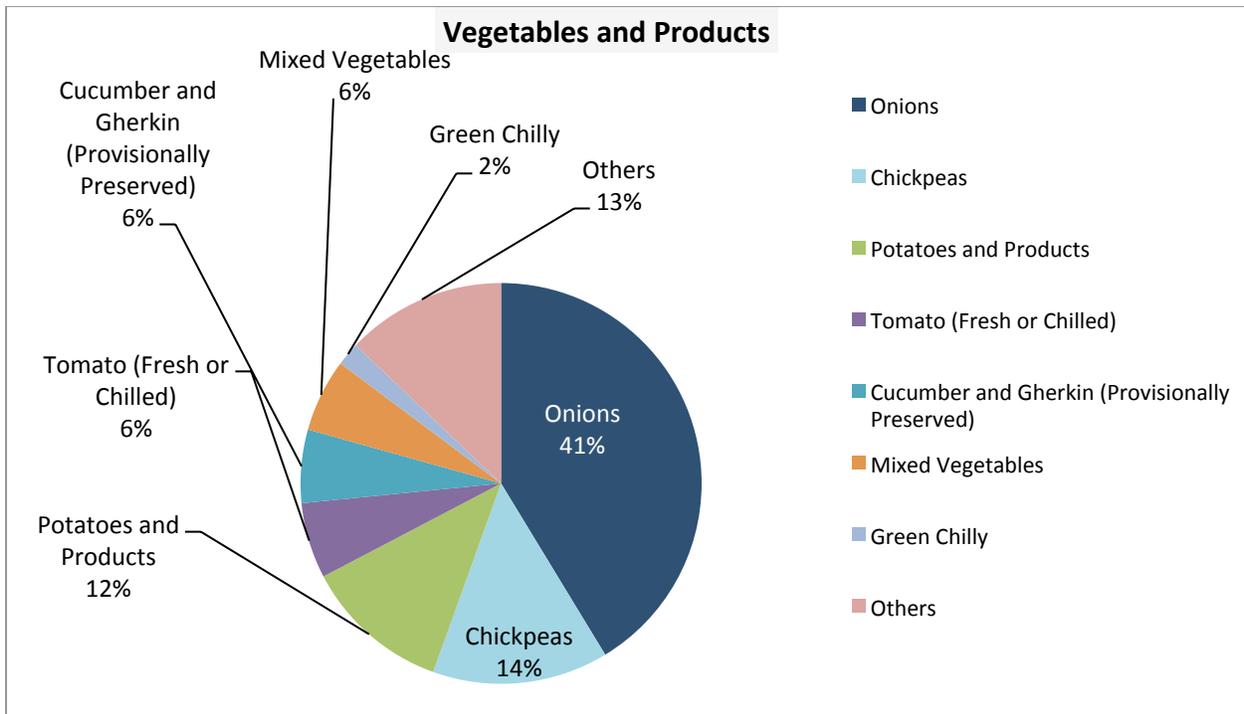
	Item	Export Value
Animal Products	Skimmed Milk	101.24
	Natural Honey	87.4
	Melted Butter (Ghee)	34.35
	Birds Eggs not in Shell,Dried	25.92
	Other Egg*	23.17
	Egg Yolk, Dried	21.47
	Butter	13.31
	Others	72.17
	Total	379.03



Skimmed Milk stood as product with maximum export value in the category of Animals Products. The share of skimmed milk was 27% in the total export value of Animal Products. After, Skimmed milk, Natural Honey and Melted Butter (Ghee) has the top shares in Animal Products with the share of 23% and 9% respectively. Besides these three top products, other products of importance in this category was Birds Eggs (Dried, not in Shell), Other Egg, Egg Yolk (Dried), and Butter.

Vegetable and Products

		USD Million
Vegetables and Products	Item	Export Value
	Onions	487.78
	Chickpeas	167.59
	Potatoes and Products	139.49
	Tomato (Fresh or Chilled)	72.14
	Cucumber and Gherkin (Provisionally Preserved)	69.81
	Mixed Vegetables	69.5
	Green Chilly	22.25
	Others	152.24
	Total	1180.8

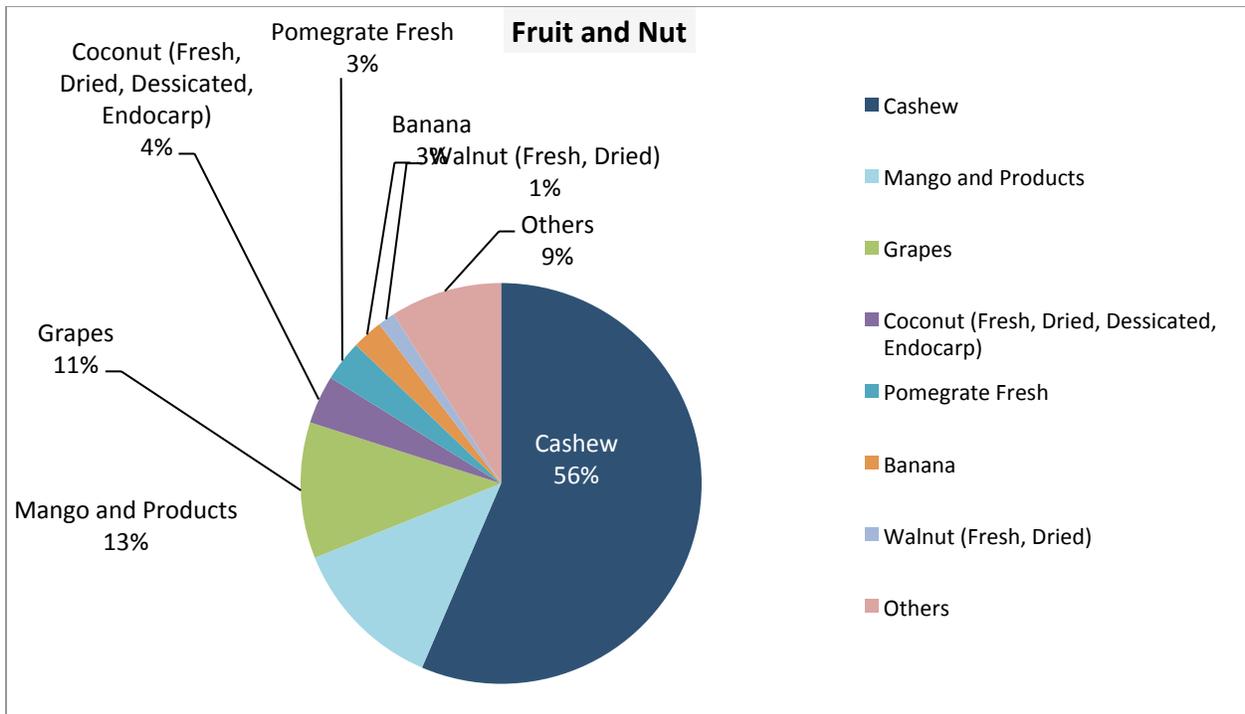


In the category of Vegetable and Vegetable Products, Onion has the highest export value and it constituted the 41% of the value in the total value of the export of products falling in the category, during the year 2014-15. Other major products of values in this category are Chickpeas which contributed 14% in the export value and the Potatoes and Products with the contribution of 12% in the total export values.

Fruit & Nuts

USD Million

	USD Million	
	Item	Export Value
Fruit and Nut	Cashew	909.26
	Mango and Products	201.44
	Grapes	176.77
	Coconut (Fresh, Dried, Dessicated, Endocarp)	62.94
	Pomegrate Fresh	52.97
	Banana	40.03
	Walnut (Fresh, Dried)	22.27
	Others	145.07
	Total	1610.75

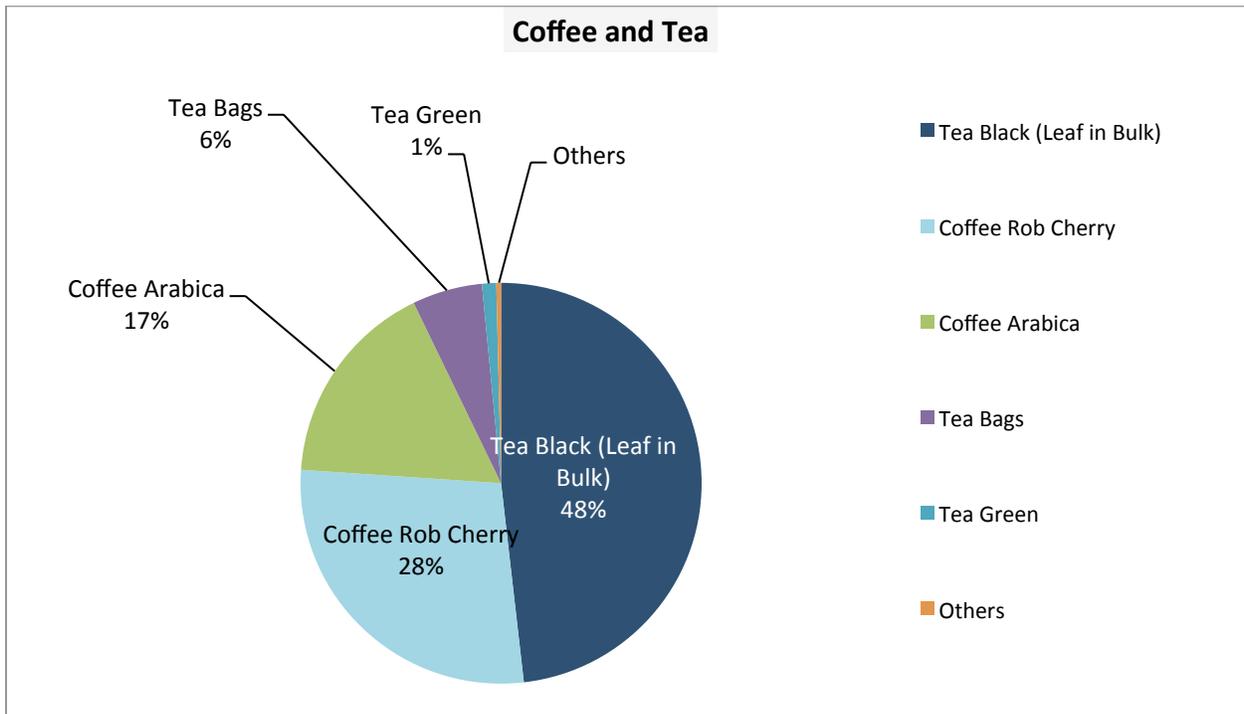


Cashew has the highest contribution in the terms of export values, in the category of Fruits and Nuts. Cashew contributed 56% in the total export value of fruit and nuts in 2014-15. Following Cashew, there are Mango and Products with the contribution of 13% and Grapes with the share of 11%. Other major products which have the significant shares are Coconut, Fresh Pomegranate, Banana and Walnut.

Coffee & Tea

USD Million

	Item	Export Value
Coffee and Tea	Tea Black (Leaf in Bulk)	566.86
	Coffee Rob Cherry	328.07
	Coffee Arabica	197.02
	Tea Bags	66.41
	Tea Green	13.57
	Others	4.46
	Total	1176.39

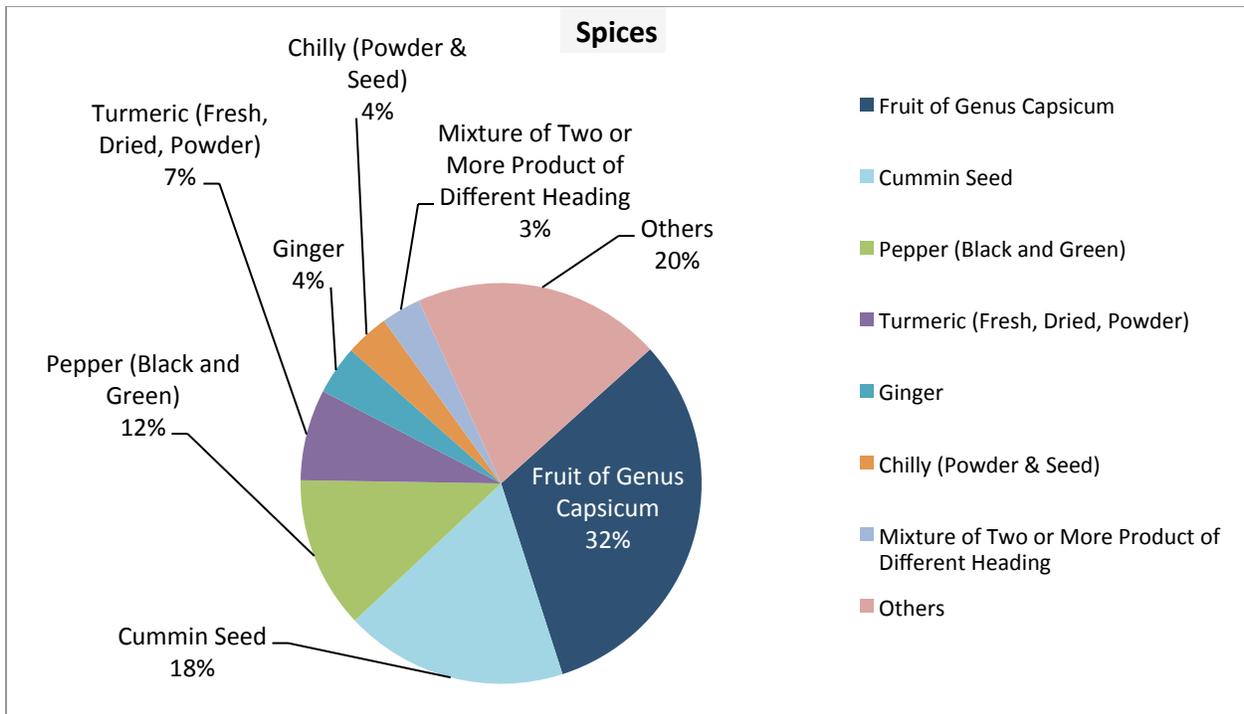


Black Tea had the largest piece of share in the export in value term in the category of Coffee and Tea with the share of 48% during the year 2014-15. Black Tea was followed by Coffee (Rob Cherry) with the share of 28% and Coffee Arabica with the share of 17%. Other major components in this category were Tea (In Bags) and Green Tea.

Spices

USD Million

Spices	Item	Export Value
	Fruit of Genus Capsicum	537.6
Cummin Seed	304.66	
Pepper (Black and Green)	207.65	
Turmeric (Fresh, Dried, Powder)	124.52	
Ginger	67.22	
Chilly (Powder & Seed)	59.48	
Mixture of Two or More Product of Different Heading	54.22	
Others	340.16	
Total	1695.51	

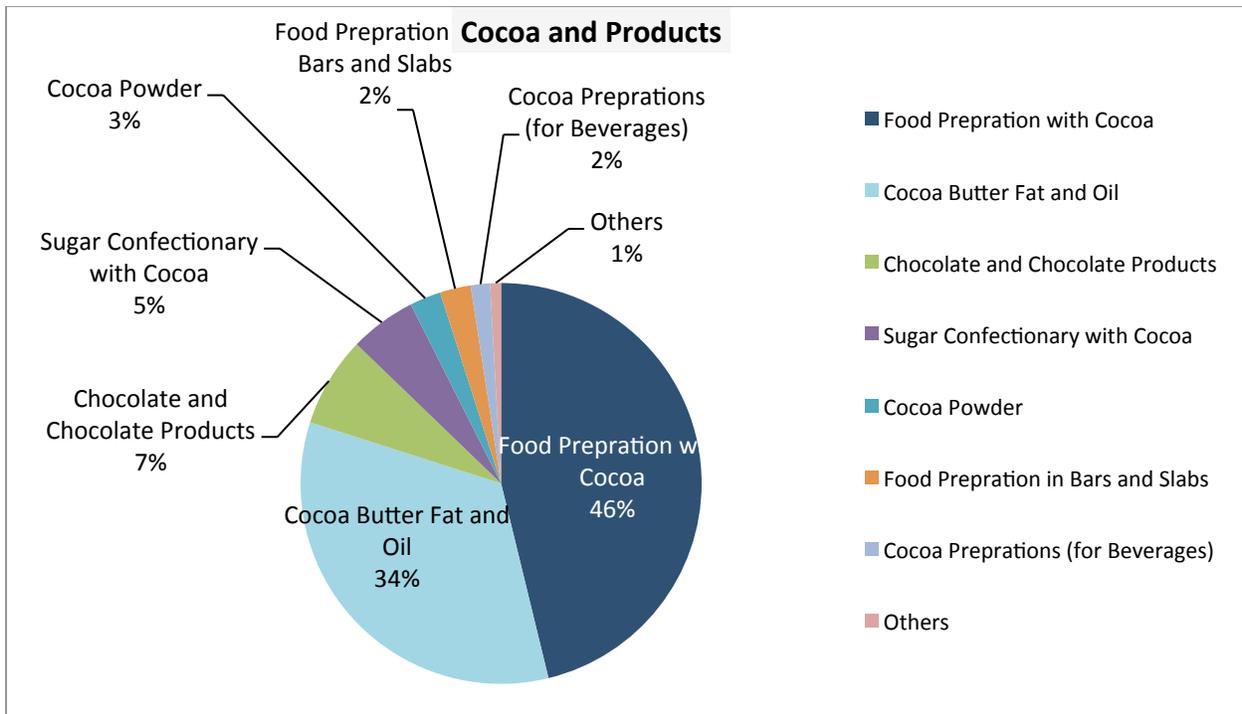


In the category of Spices, the major export values were drawn by the Fruit of Genus Capsicum which constituted the share of 32%. Other major products of export values were Cummin Seed with the share of 18% and Pepper (Green and Black) with the share of 12%. Besides these three products other spices which constituted the major portion of export value are Turmeric, Ginger, Chilly, and Mixture of two Products etc.

Cocoa and Products

USD Million

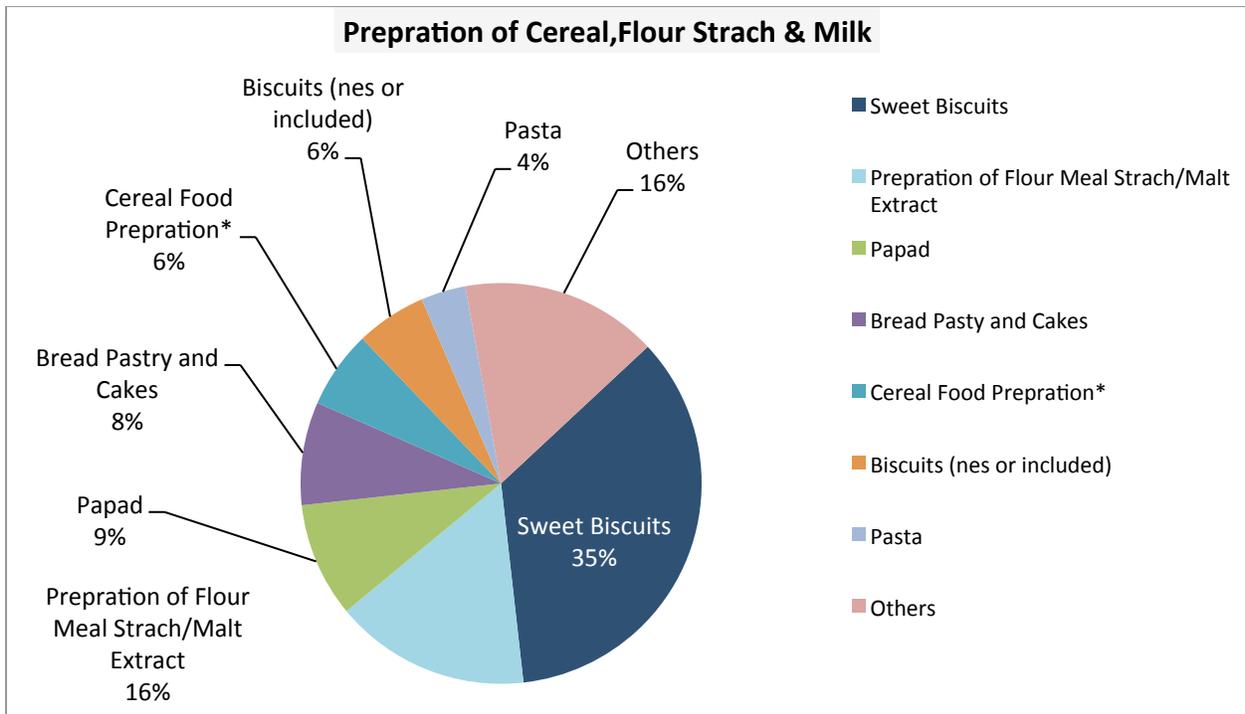
	Item	Export Value
	Cocoa and Products	Food Preparation with Cocoa
Cocoa Butter Fat and Oil		46.85
Chocolate and Chocolate Products		10.1
Sugar Confectionary with Cocoa		7.44
Cocoa Powder		3.49
Food Preparation in Bars and Slabs		3.45
Cocoa Preparations (for Beverages)		2.16
Others		1.22
Total		138.86



Food Preparation with Cocoa gained the maximum export values during the 2014-15, with the share of 46% in the total export values generated by the category Cocoa and Products. The second Product with good export value was the Cocoa Butter Fat and Oil with the share of 34%, followed by Chocolate and Chocolate Products with the share of 7%. Other products of significance were Sugar Confectionary with Cocoa, Cocoa Powder, Food Preparation in Bars and Slabs and Cocoa Preparation (for Beverages).

Preparation of Cereal, Flour Starch & Milk

		USD Million
Preparation of Cereal, Flour Starch & Milk	Item	Export Value
	Sweet Biscuits	172.22
	Preparation of Flour Meal Starch/Malt Extract	77.36
	Papad	45.33
	Bread Pastry and Cakes	40.76
	Cereal Food Preparation*	30.69
	Biscuits (nes or included)	27.85
	Pasta	17.66
	Others	77.97
	Total	489.84

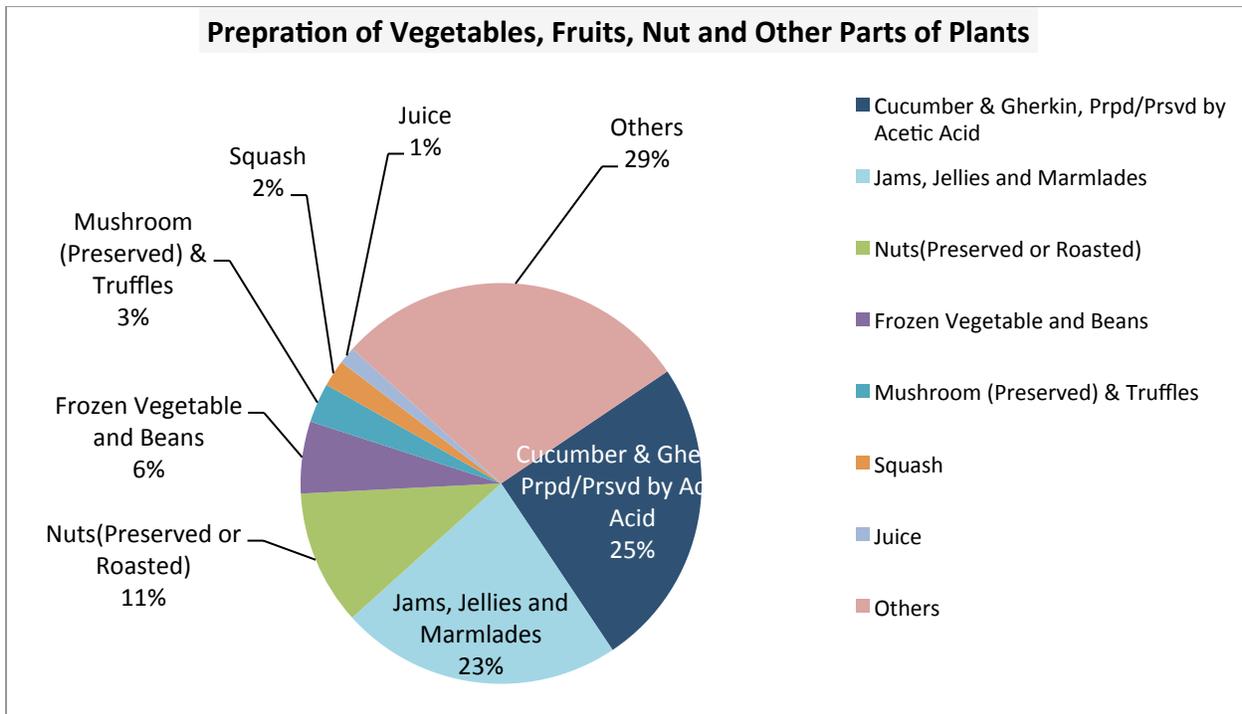


Sweet biscuit was the top product in the category Preparation of Cereal, Flour Starch and Milk with the share of 35% in the value terms. Following sweet biscuit, Preparation of Meal Starch/Malt Extract stood second with the share of 16% and Papad with the share of 9% in the total export value of the category. Other products in this category with the significant share were Bread, Pastry and Cakes, Cereal Food Preparations, Other Biscuits and Pasta.

Preparation of Vegetables, Fruits, Nut and Other Parts of Plants

USD Million

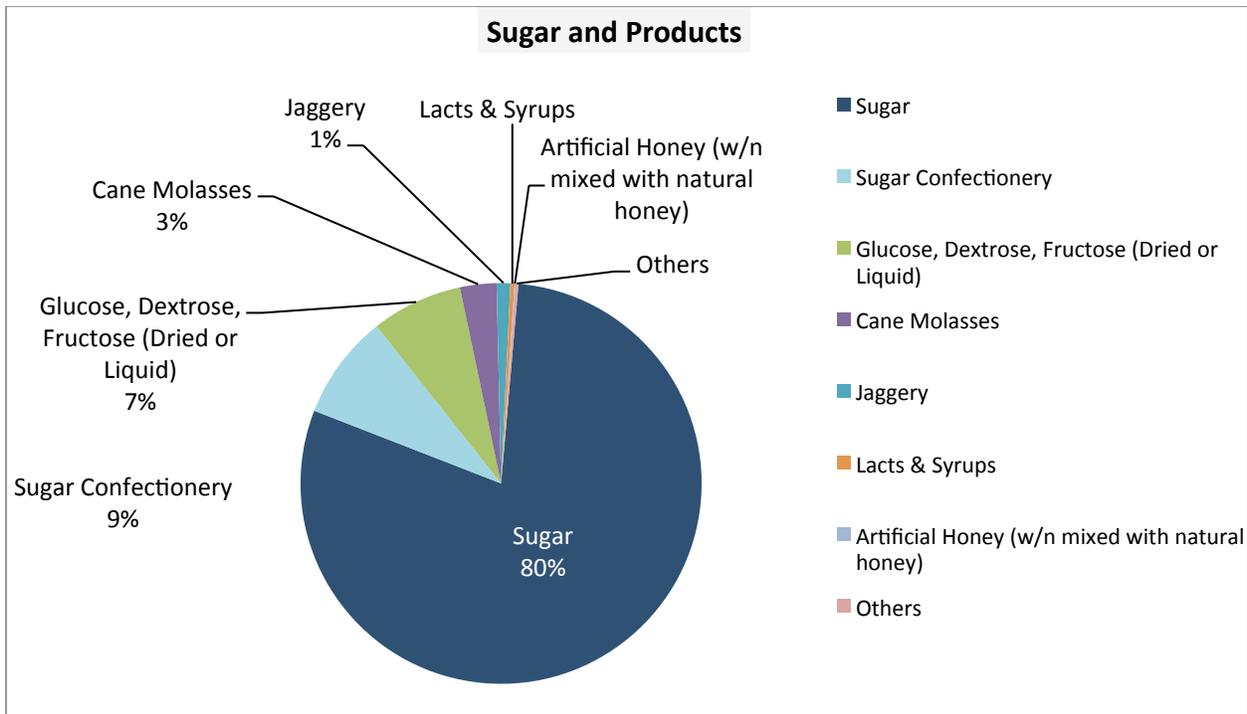
	Item	Export Value
Preparation of Vegetables, Fruits, Nut and Other Parts of Plants	Cucumber & Gherkin, Prpd/Prsvd by Acetic Acid	126.46
	Jams, Jellies and Marmalades	114.58
	Nuts(Preserved or Roasted)	54.87
	Frozen Vegetable and Beans	29.33
	Mushroom (Preserved) & Truffles	16.08
	Squash	10.87
	Juice	6.94
	Others	145.54
	Total	504.67



In the category of Preparation of Vegetables, Fruits, Nut and Other Parts of Plants, Cucumber and Gherkins(Prepared/Preserved by Acetic Acid) remained the product of top export values with the share of 25% in the total export value by the category. Following Cucumber and Gherkins, there is Jam, Jellies and Marmalades with the share of 23%, Preserved and Roasted nuts with the share of 11%. Other products of fair exports values in this category were Frozen Vegetables and Beans, Mushroom (preserved) & Truffles, Squash and Juice.

Sugar and Products

		USD Million
Sugar and Products	Item	Export Value
	Sugar	854.96
	Sugar Confectionery	90.66
	Glucose, Dextrose, Fructose (Dried or Liquid)	79.12
	Cane Molasses	31.61
	Jaggery	11.81
	Lacts & Syrups	3.67
	Artificial Honey (w/n mixed with natural honey)	0.77
	Others	2.54
	Total	1075.14



Sugar stood as the top product in terms of export values in the category Sugar and Product with the share of 80% in the total export values derived by the exports of total products in the this category. Other crucial product in the terms of exports values were Sugar Confectionery with the share of 9% and Sugar Syrups (Glucose, Dextrose and Fructose). Besides these three products other products with fair exports values were Cane Molasses, Jaggery, Lacts and Syrup and Artificial Honey.

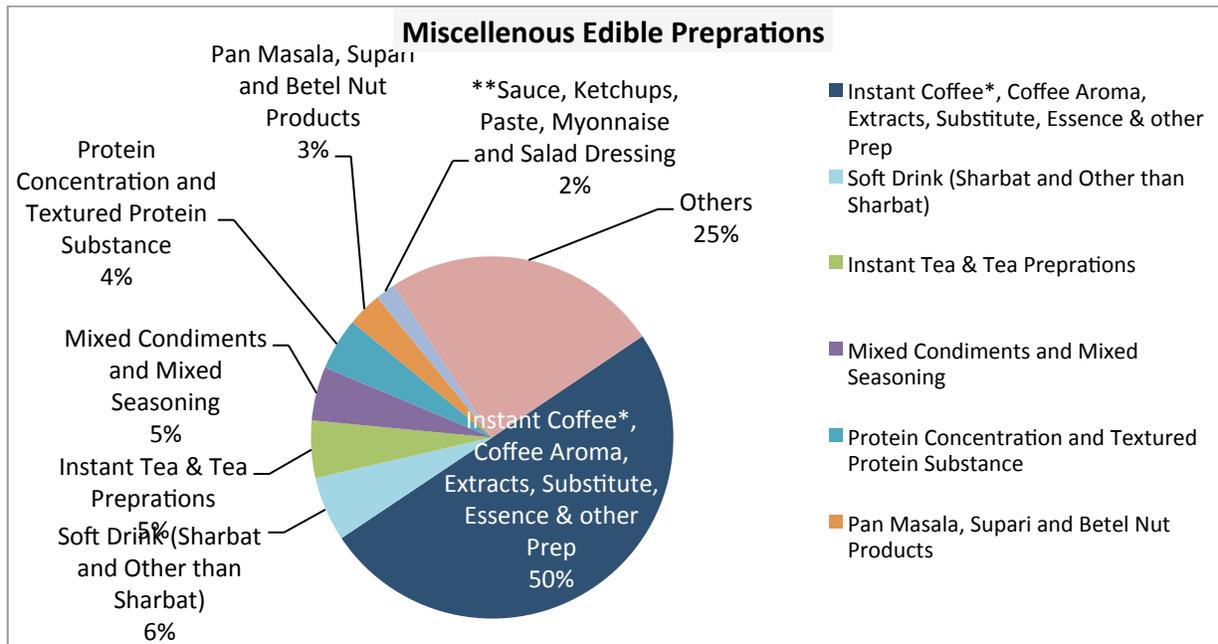
Miscellaneous Edible Preparations

USD Million

	Item	Export Value
	Miscellaneous Edible Preparations	Instant Coffee*, Coffee Aroma, Extracts, Substitute, Essence & other Prep
Soft Drink (Sharbat and Other than Sharbat)		33.95
Instant Tea & Tea Preparations		30.07
Mixed Condiments and Mixed Seasoning		28.29
Protein Concentration and Textured Protein Substance		27.39
Pan Masala, Supari and Betel Nut Products		18.16
**Sauce, Ketchups, Paste, Myonnaise and Salad Dressing		10.6
Others		144.94
Total		587.5

*Flavoured and Not Flavoured

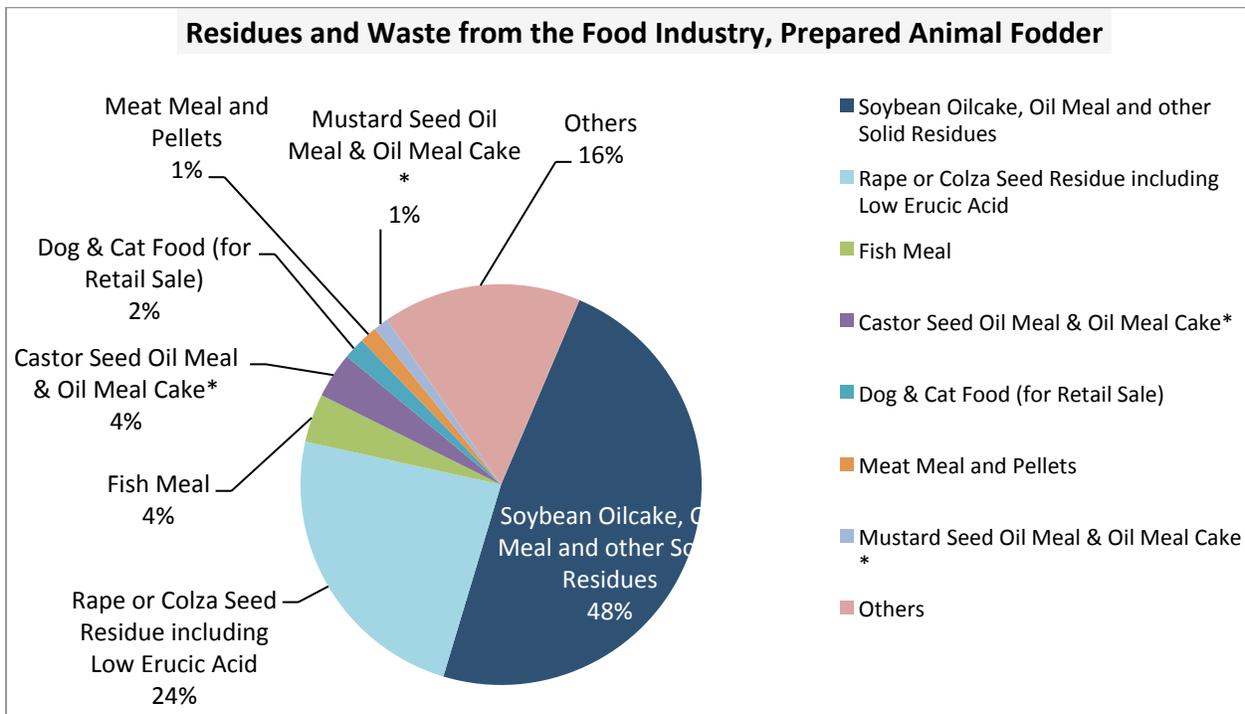
**Soya Chilli & Tomato Sauce, Tomato Ketchup, Chilli Paste



In miscellaneous Edible Preparations, Instant Coffee Extract and Aroma gained the maximum export values with the share of 50%. Following this, Soft Drinks (Sharbat and Other than Sharbat) stood at 6% and Instant Tea and Tea Preparation stood at 5%. Other major products with the fair export values in this category were Mixed Condiments and Seasoning, Protein Concentrations and Textured Protein Substance, Pan Masala & Betel Nut Products, Sauce, Ketchups, Paste, Mayonnaise and Salad Dressing.

Residues and Waste from the Food Industry, Prepared Animal Fodder

		USD Million
Residues and Waste from the Food Industry, Prepared Animal Fodder	Item	Export Value
	Soybean Oilcake, Oil Meal and other Solid Residues	786.67
	Rape or Colza Seed Residue including Low Erucic Acid	387.97
	Fish Meal	63.73
	Castor Seed Oil Meal & Oil Meal Cake	59.99
	Dog & Cat Food (for Retail Sale)	28.25
	Meat Meal and Pellets	22.86
	Mustard Seed Oil Meal & Oil Meal Cake	19.41
	Others	261.26
	Total	1630.14

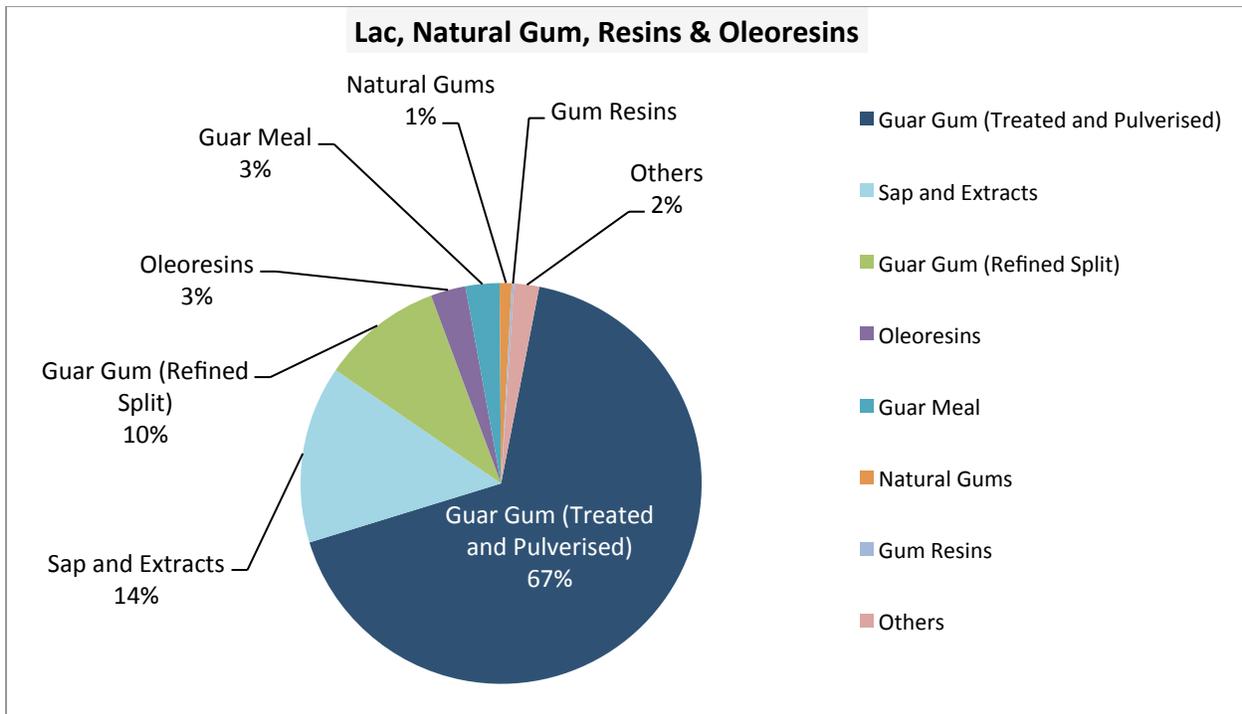


Soybean Oilcake, Oil Meal and Other residues of Soybean constituted the major share in the export value of Residues and Waste from Food Industry, with the share of 48%. Rape or Colza Seed Residues stood at second place with the share of 24%. Following this, Fish Meal gained the third place in the export value by the category, with the share of 4%. Other products which are contributing significantly to the categories are Castor Seed oil meal and cake, Dog and Cat Food, Meat Meal and Pellets and Mustard Seed Oil Meal and Cake.

Lac, Natural Gum, Resins & Oleoresins

USD Million

	Item	Export Value
	Lac, Natural Gum, Resins & Oleoresins	Guar Gum (Treated and Pulverised)
Sap and Extracts		279
Guar Gum (Refined Split)		190.1
Oleoresins		54.87
Guar Meal		53.32
Natural Gums		18.81
Gum Resins		3.59
Others		39.39
Total		1947.52

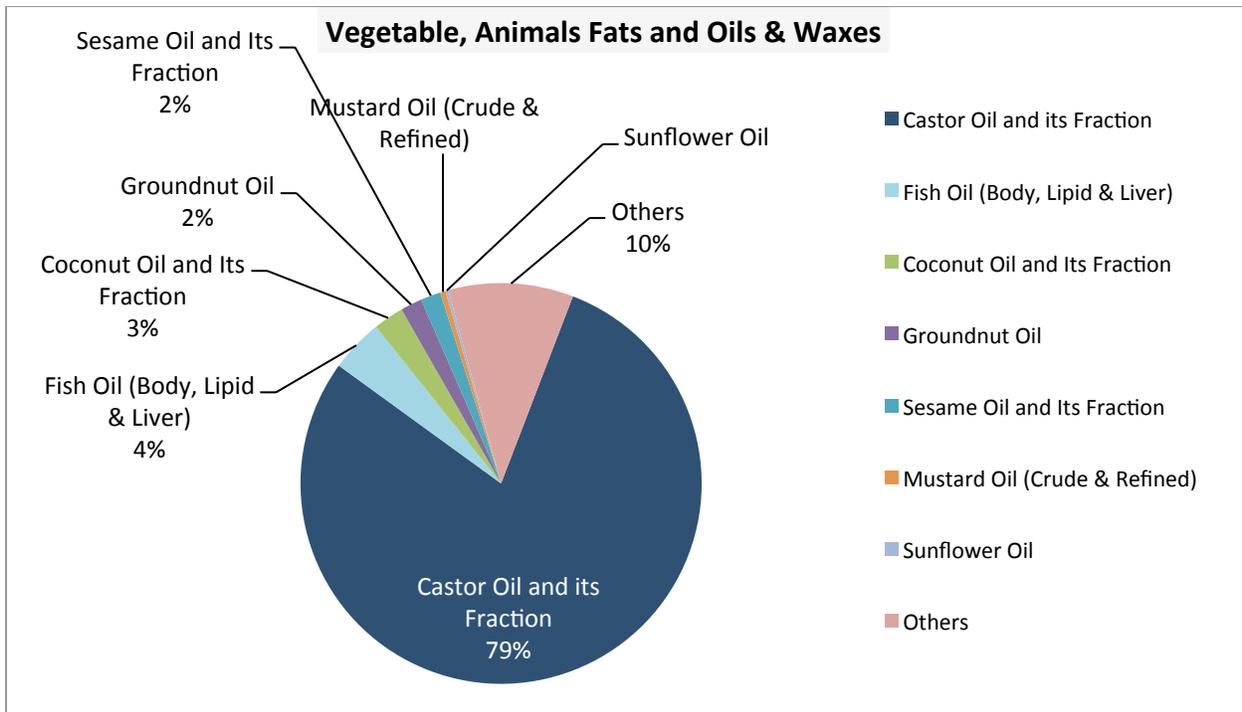


Guar Gum (Treated and Pulverised) stood as the product with maximum exports value in the category of Lac, Natural Gums, Resin and Oleoresins with the share of 67% in the total export value by all the products in the category. The Saps and Extracts remained at second place with the share of 14% in the total export values, followed by Guar Gum (Refined Split) with the share of 10%. The other major products of significant export values in this category were Oleoresins, Guar Meal, Natural Gums and Gum Resins.

Vegetable Animals Fats and Oils & Waxes

USD Million

Vegetable Animals Fats and Oils & Waxes	Item	Export Value
		Castor Oil and its Fraction
	Fish Oil (Body, Lipid & Liver)	41.63
	Coconut Oil and Its Fraction	23.9
	Groundnut Oil	16.95
	Sesame Oil and Its Fraction	15.66
	Mustard Oil (Crude & Refined)	4.28
	Sunflower Oil	2.26
	Others	98.08
	Total	973.25

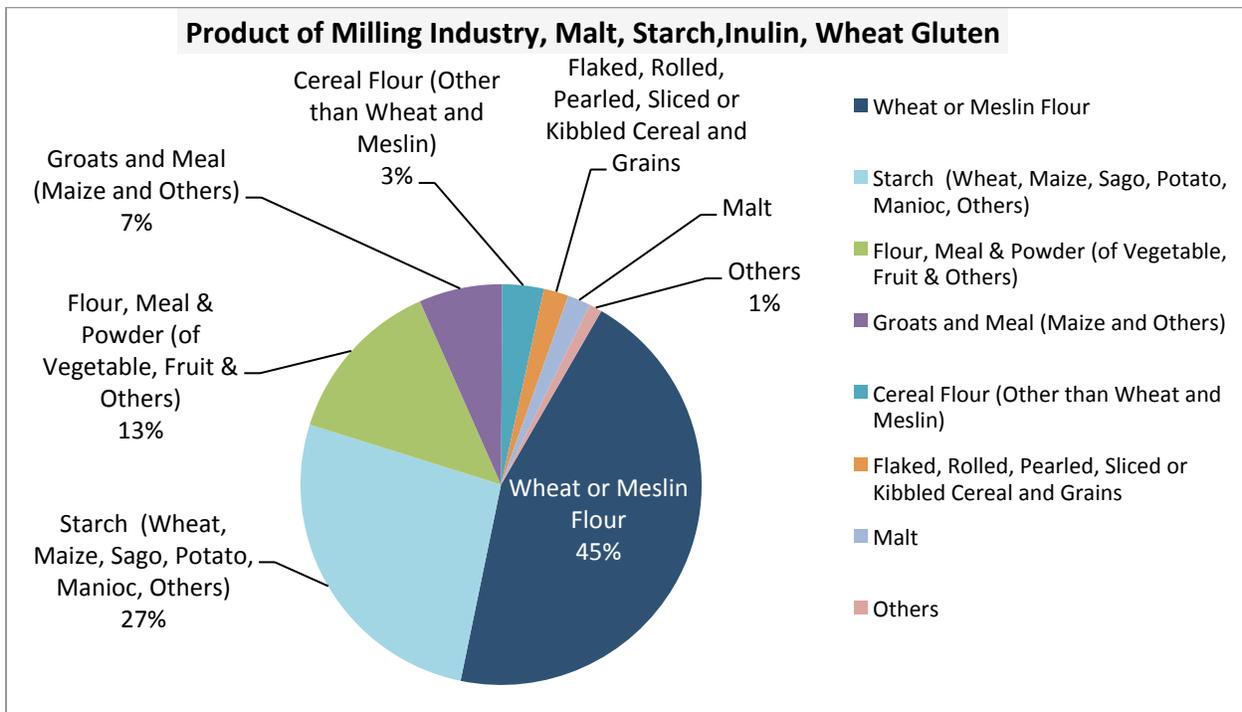


In the category of Vegetable, Animals Fats and Oils and Waxes, Castor oil and its fraction had the maximum piece of share of 79% in year 2014-15. Following Castor Oil and Its Fractions, Fish Oil and Coconut Oil stood at second and third place with their respective share of 4% and 3%. Other major products in this category were Groundnut oil, Sesame Oil, Mustard oil and Sunflower Oil.

Product of Milling Industry, Malt, Starch, Inulin, Wheat Gluten

USD Million

Product of Milling Industry, Malt, Starch, Inulin, Wheat Gluten	Item	Export Value
	Wheat or Meslin Flour	137.21
Starch (Wheat, Maize, Sago, Potato, Manioc, Others)	81.29	
Flour, Meal & Powder (of Vegetable, Fruit & Others)	41.33	
Groats and Meal (Maize and Others)	20.53	
Cereal Flour (Other than Wheat and Meslin)	10.23	
Flaked, Rolled, Pearled, Sliced or Kibbled Cereal and Grains	6.12	
Malt	5.72	
Others	3.13	
Total	305.56	

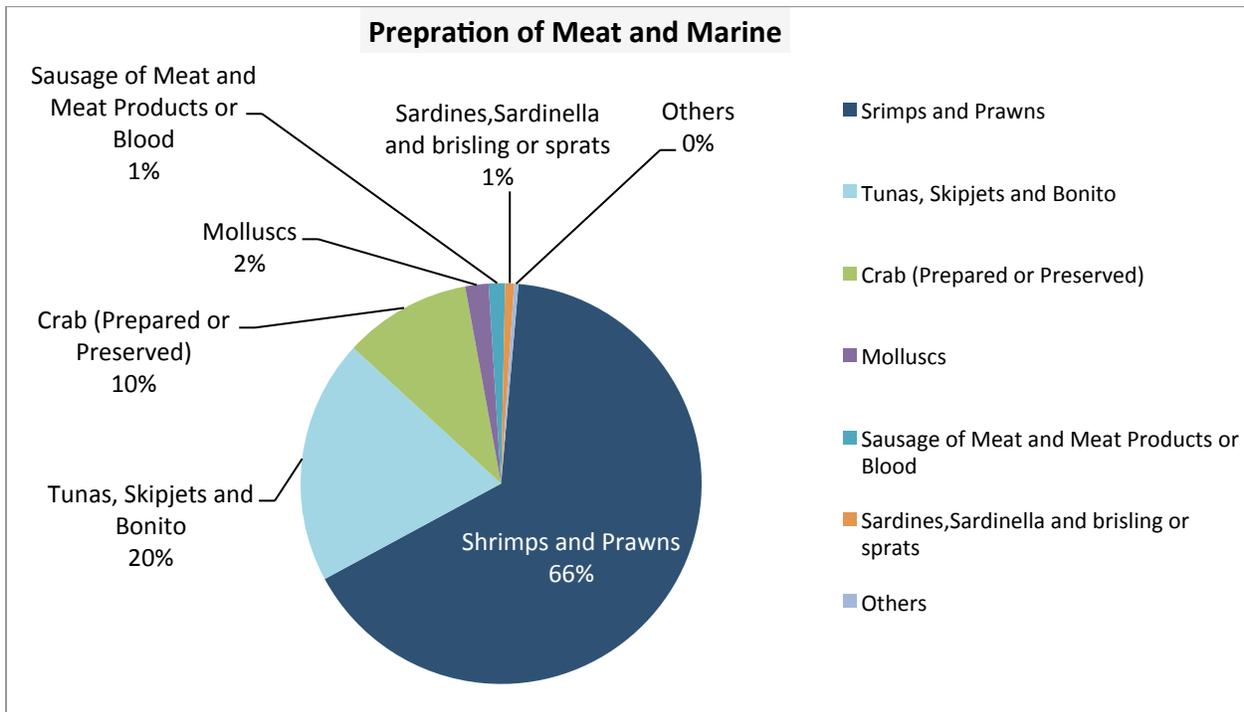


Wheat and Meslin Flour gained the maximum export value in the category of Product of Milling Industry, Malt, Starch, Inulin and Wheat Gluten with the exports share of 45% in the total exports by the products in the category. Starch stood at second with the share of 27% and Flour, Meal and Powder at Third with the share of 13%. Other major products in this category are Groats and Meal (maize and Others), Cereal Flour (other than wheat and meslin), Flaked, Rolled, Pearled, Sliced or Kibbled Cereal and Grain and Malt.

Preparation of Meat and Marine

USD Million

Preparation of Meat and Marine	Item	Export Value
	Shrimps and Prawns	102.1
Tunas, Skipjets and Bonito	30.66	
Crab (Prepared or Preserved)	16	
Molluscs	2.91	
Sausage of Meat and Meat Products or Blood	2.05	
Sardines, Sardinella and brisling or sprats	1.12	
Others	0.54	
Total	155.38	



In the category of Preparation of Meat and Marine, Shrimps and Prawns had the maximum exports values with the share of 66% in the total exports by the all of the products of category. Tuna, Skipjets and Bonito stands at second with the share of 20% followed by Prepared and Preserved Crabs with the share of 10%. Other important products which have contributed in the export values are Molluscs, Sausage of Meat and Meat Products or Blood, and Sardines, Sardinella and Brisling or sprats.

Expenditure and Outlays

The expenditure and outlays incurred by the Government for the development, including the export promotion activities, of Processed Agricultural Food and Allied Product.

	2011- 12	2012- 13	2013- 14	2014- 15
APEDA	2011- 12	2012- 13	2013- 14	2014- 15
Plan Outlays				
Grants-in-aid General	55	52	10	10
Subsidies	125	98	67.5	75
Grants for creation of capital assets			37.5	45
NER				
Total Plan Outlays	180	150	115	130
Non-Plan Outlays	1	1	1	1
Total	181	151	116	131
MPEDA	2011- 12	2012- 13	2013- 14	2014- 15
Plan Outlays				
Subsidies	110	95	115	105
Non Plan Outlays	5	4	5	7.98
Total	115	99	120	112.98
Agricultural Sector	2011- 12	2012- 13	2013- 14	2014- 15
Tea Board				
Plan Outlays				
Subsidies	117.15	79.17	72	42.5
Grants-in-aid+C.Assets: (R&D)	4	4	14.5	7.5
Subsidies to small growers	0	0	0	0
Subsidies to NER	82	61.5	31.5	59.5
Grants-in-aid+C.Assets to NER	8	6	8	8
SCSP -Subsidies	10	10	10	10
Small Growers Development Scheme	0	0	3	5
Implementation of regulatory Provision of Tea Act including e-auction and allied activities	0	0	1	1
Total Plan Outlays	221.15	160.67	140	133.5
Tea Plantation Fund				
Grants-in-aid: Tea development fund	6.2	0	0	0
Non Plan Outlays	38	37	39	47.09
Total	265.5	197.7	179	180.6

Indian Food exports – Mapping aggressive potential in global markets

Coffee Board				
Subsidies	43.5	43.5	40	40
Grants-in-aid-General+C.Assets	51	56	47	37
Grants-in-aid-General(NER)	4	4	9	15
Subsidies to NER	1.5	1.5	4	8
SCSP -Subsidies	5	0	5	5
Total Plan Outlays	105	105	105	105
Non-Plan	97	47.15	56	65
Total	202.41	152.15	161	170
SPICES BOARD				
Grants-in-aid-General+C.Assets	36	36	38	38
Subsidies	49	49	44	42
Grants-in-aid: NER	5	5	5	5
Subsidies (NER)	5	5	5	5
SCSP-Grants-in-aid-General+C.Assets	2.5	2.5	2.5	2.5
SCSP -Subsidies	2.5	2.5	2.5	2.5
Total Plan Outlays	100	100	97	95
Non Plan Outlays	6	9	9.35	15
Total	106	109	106.35	110
Cashew EPC				
Grants-in-aid-General	4.02	0.5	2.9	4
Ministry of Food Processing and Industries				
	2011-12	2012-13	2013-14	2014-15
Scheme for Infrastructure Development	189	184.19	241.72	229.62
Scheme for Technology Upgradation / Establishment/ Modernization of Food Processing Industries	185.47	186.19	163.92	157.03
Scheme for Quality Assurance, Codex Standards, R&D and other Promotional Activities	43.52	31.91	35.66	41.28
Scheme for Strengthening of Institutions	117.51	68.12	74	43
Scheme for Street Food	0			
National mission on Food Processing		185.32	30.5	125.32
Total	535.5	655.73	545.8	596.25
				Rs. Crore
Grand Total	1409.43	1365.08	1231.05	1304.83

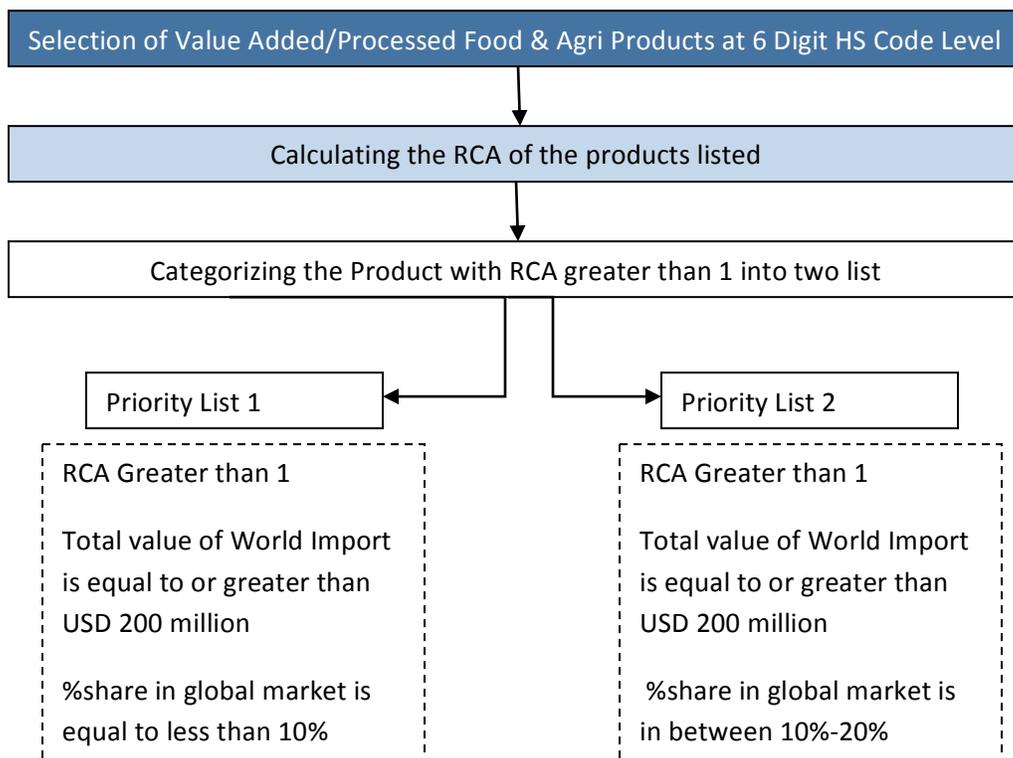
Lag in Exports despite Competitiveness and Listing of Aggressive Products

Calculation of Competitiveness

In the previous section we have briefed about the expenditure and outlays borne by government for the development of the Processed Food, Agri and Allied product sector. In this section we would highlight the lag in the India’s exports of crucial commodities and product falling in the category of Processed Food, Agri, and Allied Product, despite their competitiveness in the global market and significant value of global exports in that particular product.

Selection of Crucial Commodities/Product:

- To determine the competitiveness we have calculated the RCA (Revealed Comparative Advantage) of individual product at 6 digit HS level.
- We have selected only those processed food/product whose RCA is equal to or greater than 1.
- After listing the product on the basis of competitiveness, we have further shortlisted the products considering the two parameters i.e. percentage share in world market and the total value of world export of that particular commodity/product.
- Based on the above consideration, two lists are created that is priority list 1 and priority list 2. In Priority list 1 we have taken the products (a) whose RCA are greater than 1, (b) whose total world imports are equal to or greater than 200 USD million (c) whose percentage share in the world export is equal to or less than 10%. Similarly, in Priority list 2 we have taken the products whose RCA is greater than 1, (b) whose total world imports are equal to or greater than 200 USD Million and (c) whose share is in between 10%-20% in global market.



Listing of Top Crucial Products/Items

To be the part of the global trade, especially in the case of the exports, the product has to be competitive. To determine the competitiveness the Revealed Comparative Advantage (RCA) has been utilized here.

After using the Index called Revealed Comparative Advantage (RCA) for determining the competitiveness of the processed/value added products, we came to the conclusion that despite having RCA greater than 1, a lot of products are showing up the shares as low as 2.4% in the total value of world's import, besides the availability of opportunities in form significant global imports values. For example in case of sweet biscuits, the value of total world imports during the year 2015 was USD 7168.72 million, out of which India only owns 2.4% share with the value of USD 176.54 millions.

Also, there are the cases where the share are quite less, despite the competitiveness validated by RCA, but simultaneously the value of overall global imports are too low that the efforts to push those product for exports may not bring the fruitful result as the overall demand is low.

Besides these two cases, we have another situation, the one where the share is moderate to high but the overall values of global import are not again very high as compared to the other products. Other where the overall value global imports is significantly high and our shares are moderate to high too. For example in case of Crushed and Ground Cardamom (HS Code 090832), in year 2015, the value of India's exports was USD 13.02 million, in the total global imports of USD 15.36 million, constituting the share of 85%. Similarly, in case of Castor oil and its Fraction (HS code 151530), India's exports values were USD 690.08 million out of total imports of USD 842.17 million, constituting the share of 82%. This clarifies the fact that we are providing the major portion of supplies to the demanding partners.

So our focus should be on the products that are competitive, and whose shares are remarkably low despite the strong global demand.

After doing the priority listing, we have taken the fifteen products into the consideration based on the criteria that despite their competitiveness in world market and significant world trade values, their share are quite low.

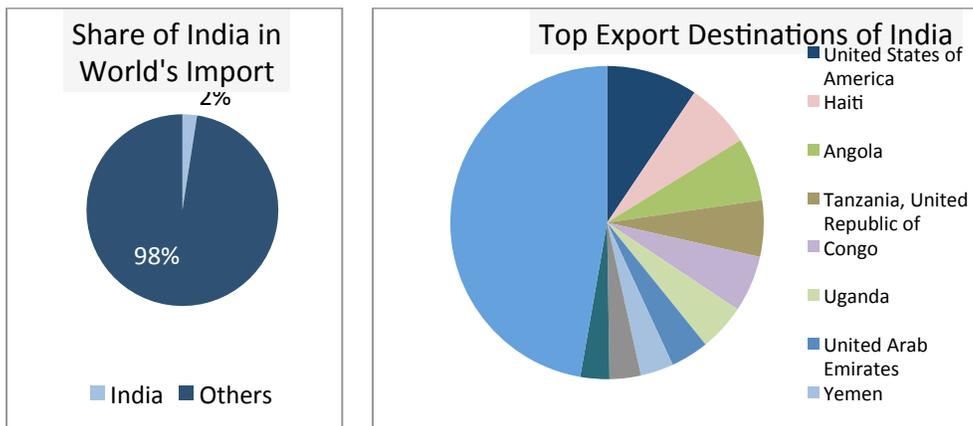
The list of these products is given below. The list can be extended further if we want to consider more products this way.

Priority List 1					
HS Code	Items	World	India	%Share	RCA
190531	Sweet biscuits	7168.729	176.544	2.46	1.05
210111	Coffee extracts, essences, concentrates	4448.555	254.338	5.72	2.44
080450	Guavas, mangoes and mangosteens, fresh or dried	2481.821	183.616	7.40	3.16
200799	Jams,fruit jellies,fruit/nut purée&paste,ckd prep,sugard,sweetend/not	2144.985	132.305	6.17	2.64
170230	Glucose&glucose syrup nt cntg fruct/cntg in dry state <20% by wt fruct	1955.243	85.645	4.38	1.87
160529	Prepared or preserved Shrimps and prawns : In airtight container	1073.73	74.966	6.98	2.99
210120	Tea or maté extracts,essences & concentrates & preparations thereof	1033.038	35.349	3.42	1.46
110812	Maize (corn) starch	809.094	76.544	9.46	4.05
170310	Cane molasses	657.024	43.863	6.68	2.85
110313	Maize (corn) groats and meal	421.874	23.557	5.58	2.39
110630	Flour,meal&powder of edible fruits&nuts&peel of citrus fruit or melons	329.536	22.904	6.95	2.97
151550	Sesame oil&its fractions whether/not refind,but not chemically modifid	243.231	17.952	7.38	3.16
Priority List 2					
HS Code	Items	World	India	%Share	RCA
091099	Spices nes	754.551	135.328	17.93	7.67
090412	Pepper of the genus Piper, except cubeb pepper, crushed or ground	682.711	95.715	14.02	5.99
120810	Soya bean flour and meals	644.241	77.251	11.99	5.13

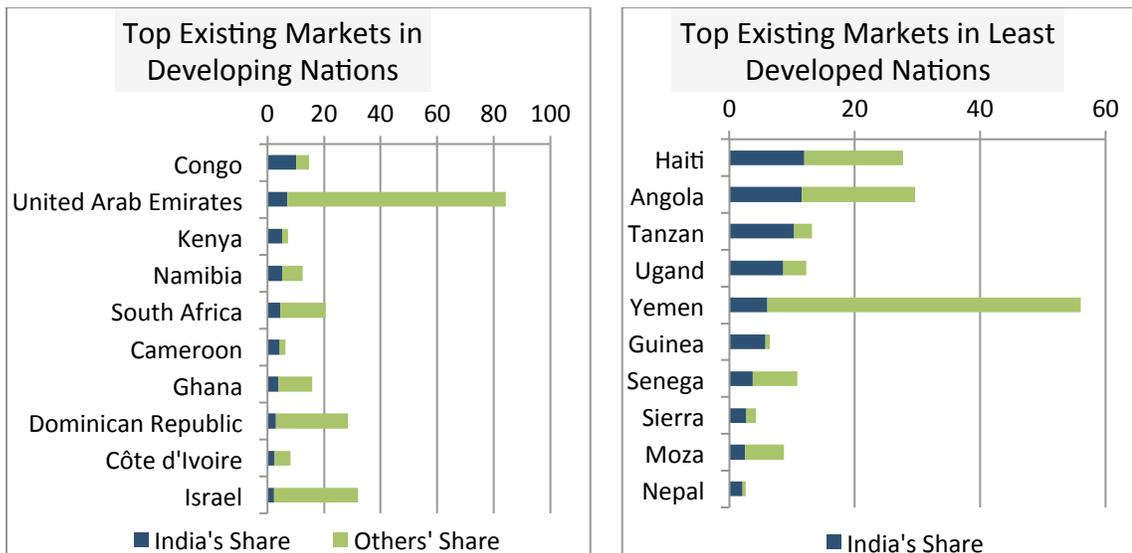
Sweet Biscuit

Product Description HS 190531: Sweet Biscuits

The global import of sweet biscuit was USD 7168.73 million in 2015, according to the data released by ITC. India possesses only 2.4% share in the total global imports of sweet biscuits with the export value of USD 176.5 millions. The top importers of sweet biscuits in the world were United States of America, France, United Kingdom, Germany and China. India sold its sweet biscuits primarily to United States of America, Haiti, Angola, Tanzania and Uganda.



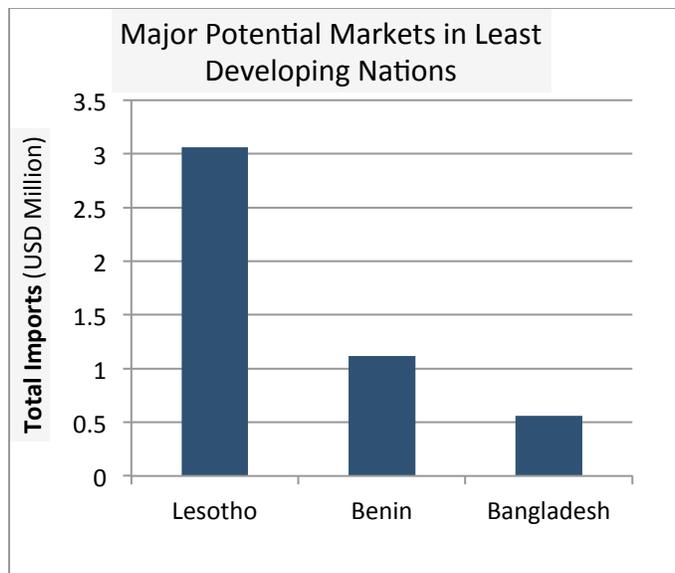
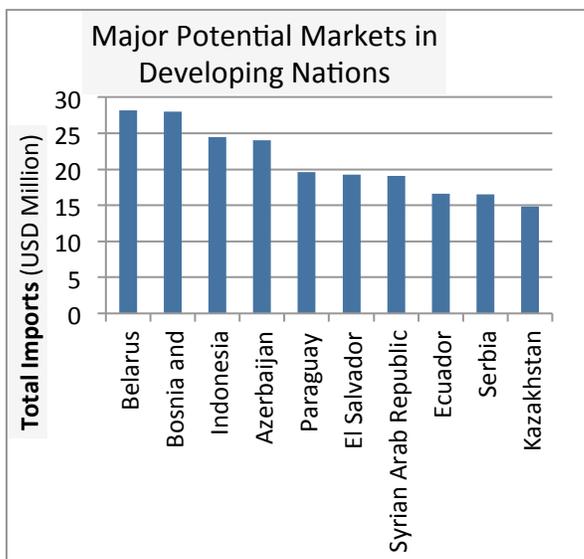
India's top existing market for sweet biscuits in developing nations and least developed nations are as follow:



Sweet Biscuit

If we talk about developing nations, India majorly exported to Congo, United Arab Emirates, Kenya and Namibia and in Least Developed Nations (LDC’s) India exported sweet biscuits to Haiti, Angola, Tanzania, Uganda and Yemen during 2015.

Besides the existing markets, India can diversify the trade flow to the potential markets especially to the developing and Least Developed Nations. The developing and least developed countries to which India does not export in general are as follow:



We can see that the besides the huge market of sweet biscuit, India’s share is only 2.4%. There are many developing nations, where India does not exports, despite their significant import demand. For this, our recommendation is to shift the focus on the developing nation and Least Developed Nation as it may give us some fruitful results.

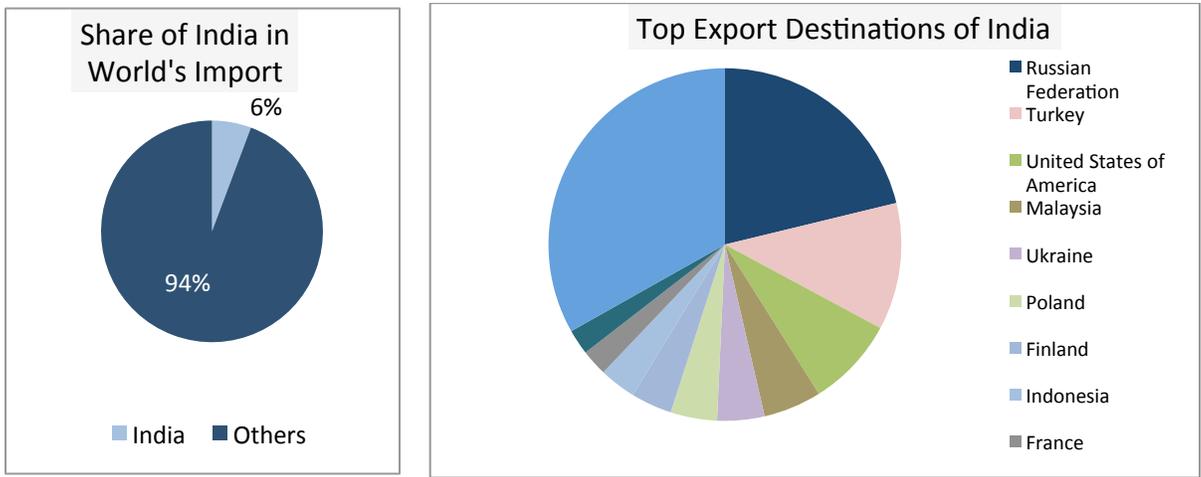
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years we would be able to increase the export value of sweet biscuits by USD 21.5 million, which is 12% of the total exports value of sweet biscuits currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 53.83 millions, which is around 30.5% of the total exports value of sweet biscuits currently.

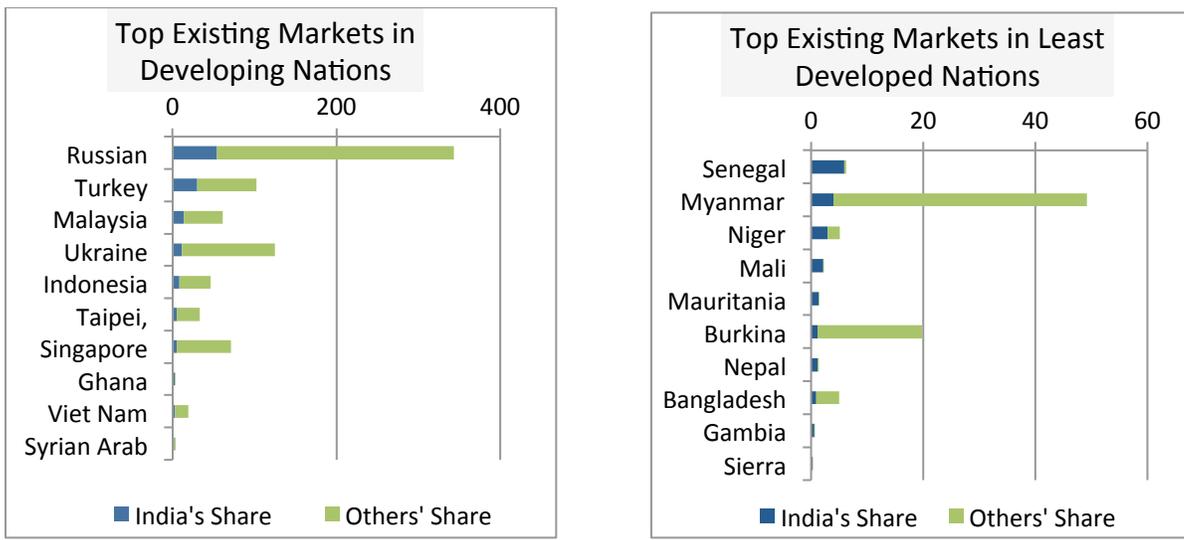
Coffee Extract

Product Description HS 210111: Coffee extracts, essences, concentrates

The total global imports of Coffee Extract, Extract and Concentrates during the year 2015 was USD 4448.5 million in 2015, according to the data released by ITC. India possesses only 6% share in the total global imports of Coffee extract and essence with the export value of USD 254.3 million. The top importers of Coffee extract and essence in the world were United States of America, Russian Federation, Germany, United Kingdom and Poland during 2015. India exported coffee extract, essence and concentrate primarily to Russian Federation, Turkey, United States of America, Malaysia and Ukraine.



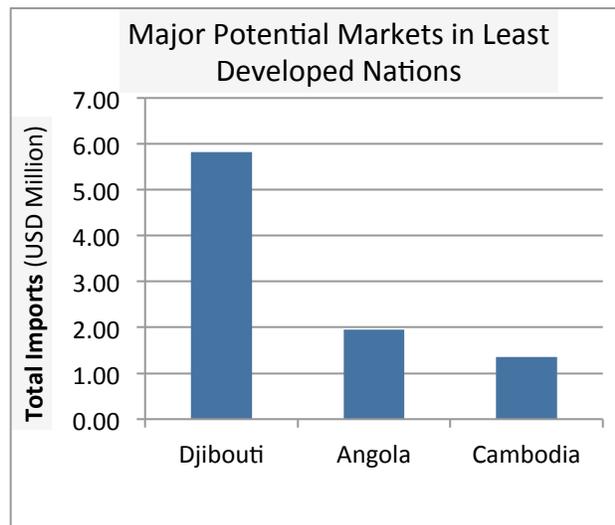
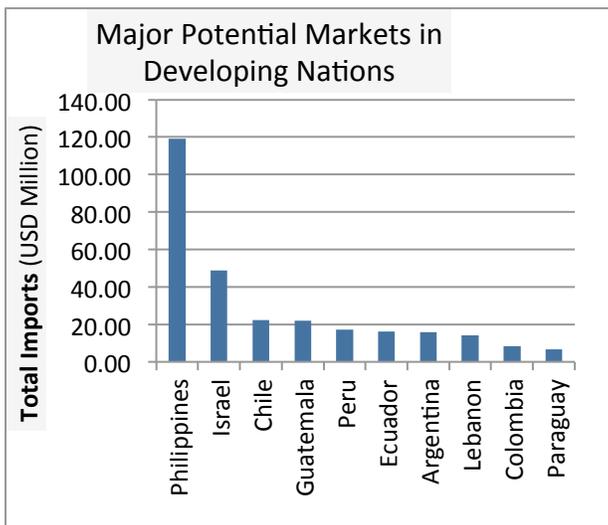
India's top existing market for coffee extract & essence in developing nations and LDC's are as follow:



Coffee Extract

In developing nations, India majorly exported to Russian Federation, Turkey, Malaysia, Ukraine and Indonesia and in Least Developed Nations (LDC’s) India primarily exported coffee extracts, essence and concentrates in to Senegal, Myanmar, Niger, Mali and Mauritania in 2015.

The developing and least developed countries to which India does not export in general are as follow:



In the huge market of more than USD 4000 million, India only possess the export value of around USD 250 million. That means there is significant export potential that needed to be tapped. Again we need to focus on developing and least developed nations for the more number of channels opened for the exports.

In case of coffee extracts, essence and concentrates, If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years we would be able to increase the export value of coffee extract and essence by USD 30 million, which is 12% of the total exports value of coffee extracts, essence and concentrates currently.

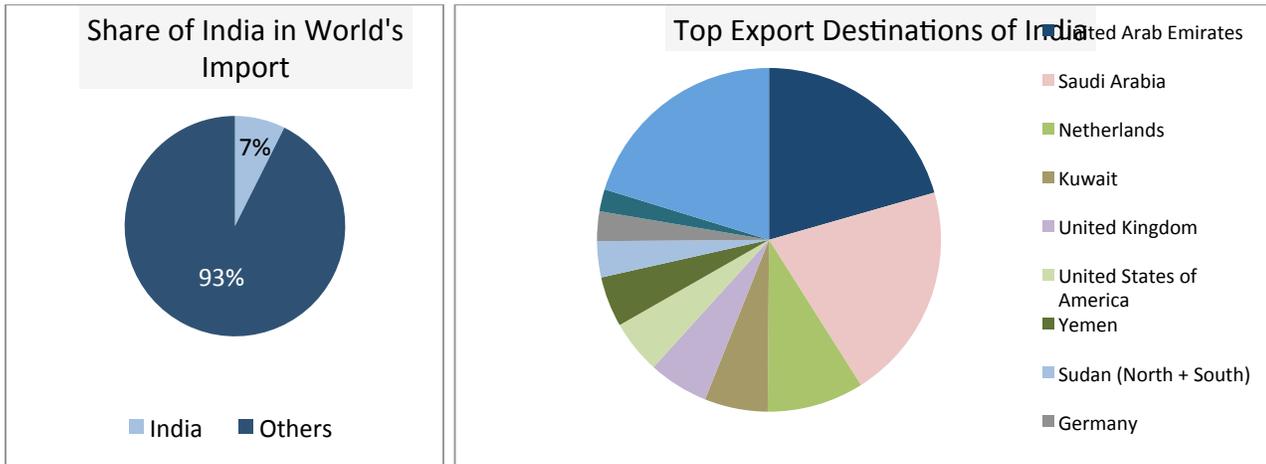
Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 53.83 millions, which is around 29.5% of the total exports value of coffee extracts, essence and concentrates currently.

Guava, Mango & Mangosteen*

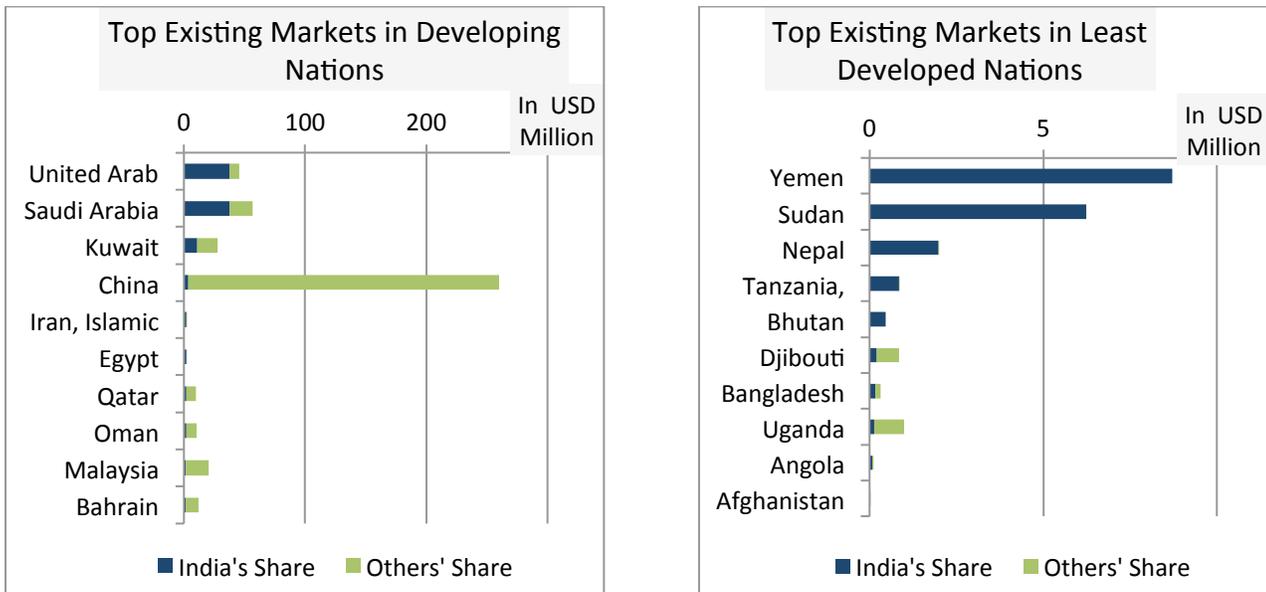
Product Description HS 080450: Guavas, mangoes and mangosteens, fresh or dried.

***Indicative for Mango Pulp, which gives weight of 65-70% in the total exports value by this category.**

The total global imports of Guavas, mangoes and mangosteens (fresh or dried) during the year 2015 was USD 2481.82 million in 2015, according to the data released by ITC. India possesses only 7% share in the total global imports of Guavas, mangoes and mangosteens (fresh or dried) with the export value of USD 183.6 million. The top importers of Guavas, mangoes and mangosteens (fresh or dried) in the world were United States of America, Netherlands, China, Germany and United Kingdom during 2015. India exported primarily to United Arab Emirates, Saudi Arabia, Netherlands, Kuwait and United Kingdom.



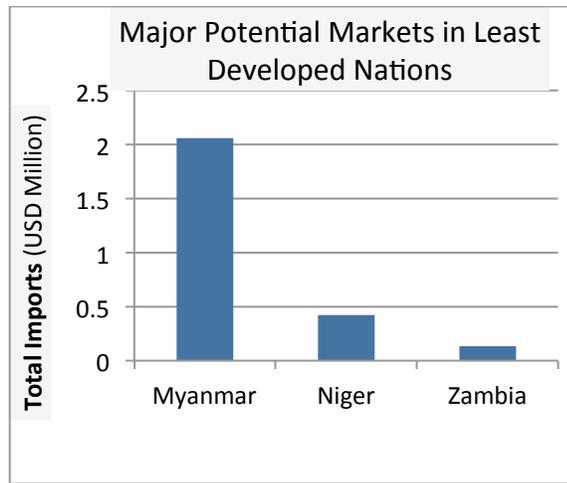
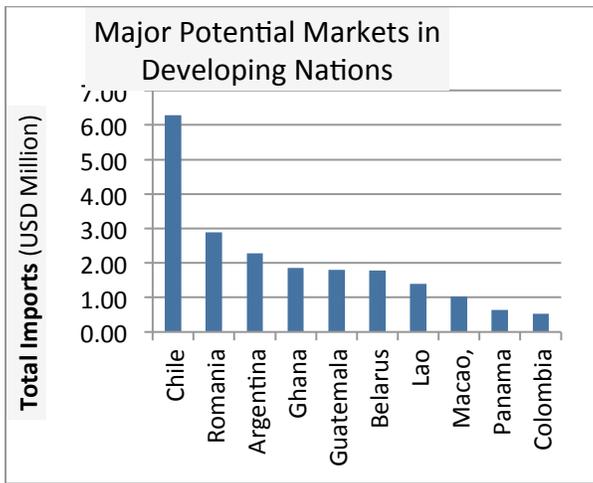
India's top existing market for this product in developing nation and LDC's are as follow:



Guava, Mango & Mangosteen

The major markets for export from India in developing nations were United Arab Emirates, Saudi Arabia, Kuwait, China and Iran while in Least Developed Nations (LDC's) India exported Guavas, mangoes and mangosteens (fresh or dried) to Yemen, Sudan, Nepal, Tanzania and Bhutan during 2015.

As the export potential is there for the country, India can diversify the trade flow to the potential markets especially to the developing and Least Developed Nations. The developing and least developed countries to which India does not export in general are as follow:



Now we have noticed that besides the existence of significant global import demand of Guavas, mangoes and mangosteens (fresh or dried), India's share is only 7%. There is a need of export destination diversification for and the focus should be shifted to developing and least developed nation for the hassle free entry into the new markets.

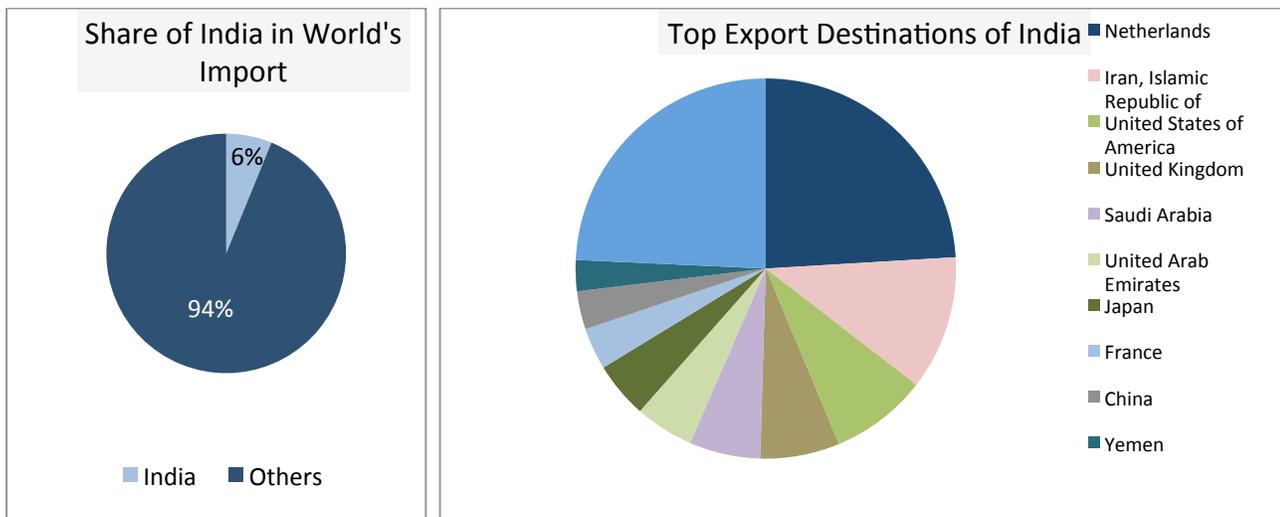
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years we would be able to increase the export value of Guavas, mangoes and mangosteens (fresh or dried) by USD 2.3 million, which is 1.3% of the total exports value of Guavas, mangoes and mangosteens (fresh or dried) currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC's in long run, it may bring us to the additional export orders of USD 5.77 millions, which is around 3.1% of the total exports value of Guavas, mangoes and mangosteens (fresh or dried) currently.

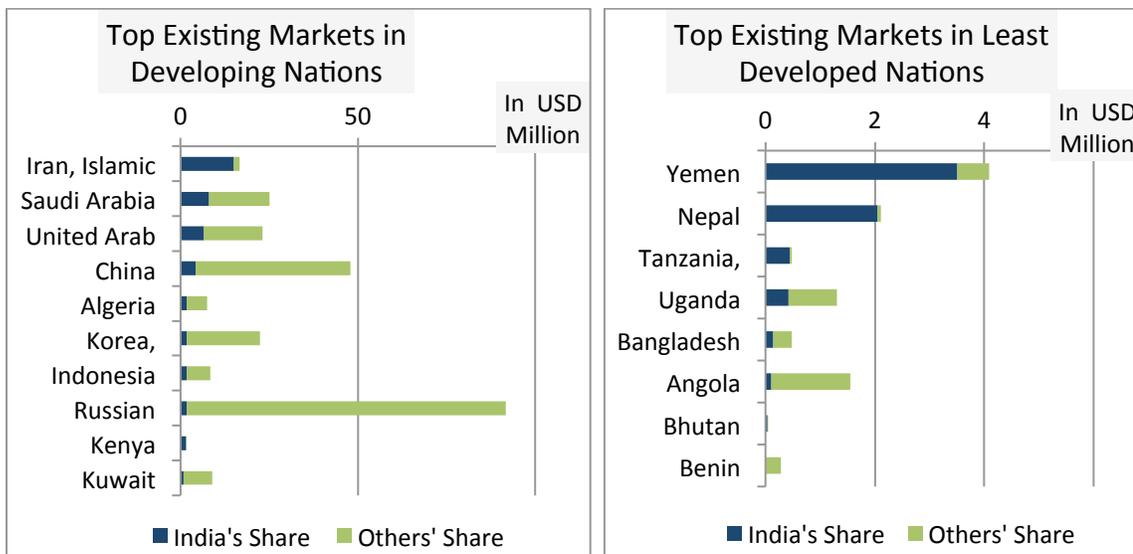
Jam, Jellies & Marmalades

Product Description HS 200799: Jams, Fruit Jellies, Marmalades, Fruit or Nut Puree and Fruit or Nut Pastes, obtained by cooking, whether or not containing added sugar or other sweetening matter.

Global import of Jams, Jellies and Marmalades during the year 2015 was USD 2145 million in 2015, according to the data released by ITC. India possesses only 6% share in the total global imports of Jams, Jellies and Marmalades with the export value of USD 132.3 million. The top importers of Jams, Jellies and Marmalades in the world were United States of America, Germany, France, United Kingdom and Netherlands during 2015. India exported Jams, Jellies and Marmalades primarily to Netherlands, Iran, United States of America, United Kingdom and Saudi Arabia.



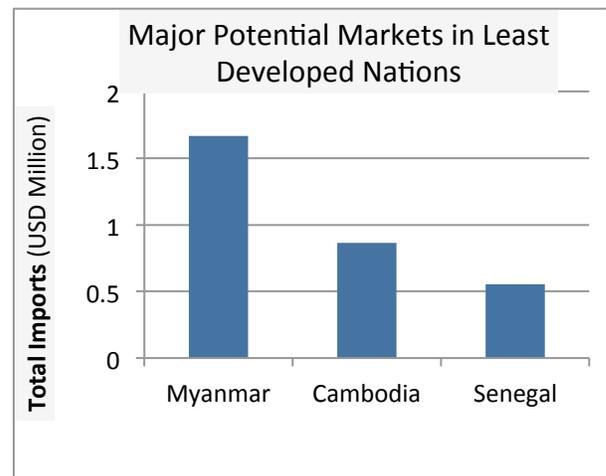
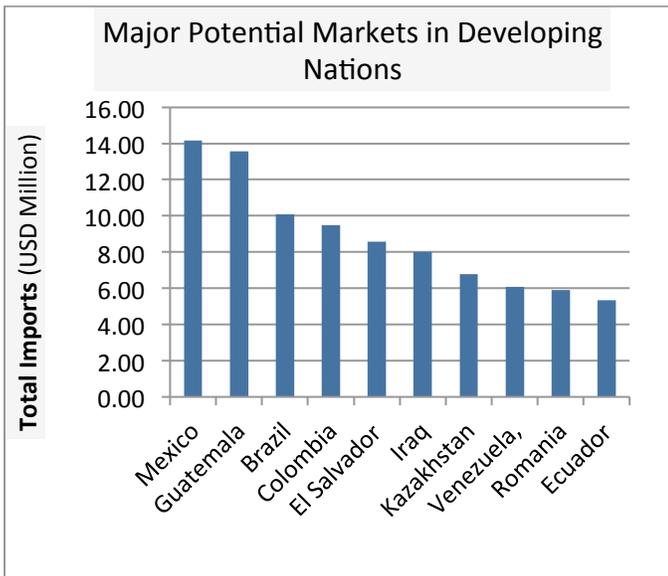
India's top existing market for Jams, Jellies and Marmalades in developing nations and LDC's are as follow:



Jam & Jellies

As far as developing nations are concerned, India majorly exported to Iran, Saudi Arabia, United Arab Emirates, China and Algeria and in Least Developed Nations (LDC’s) India exported for Jams, Jellies and Marmalades to Yemen, Nepal, Tanzania, Uganda and Bangladesh during 2015.

For the better export flows of Jams, Jellies and Marmalades, India can look up for the opportunities in the potential markets in especially in developing and least developed nations. The developing and least developed countries to which India does not export in general are as follow:



Jams, Jellies and Marmalades hold the good market for export of around USD 2145 million, out of which our contribution was just USD 132.3 million in 2015. Again there is need of the export destination diversification.

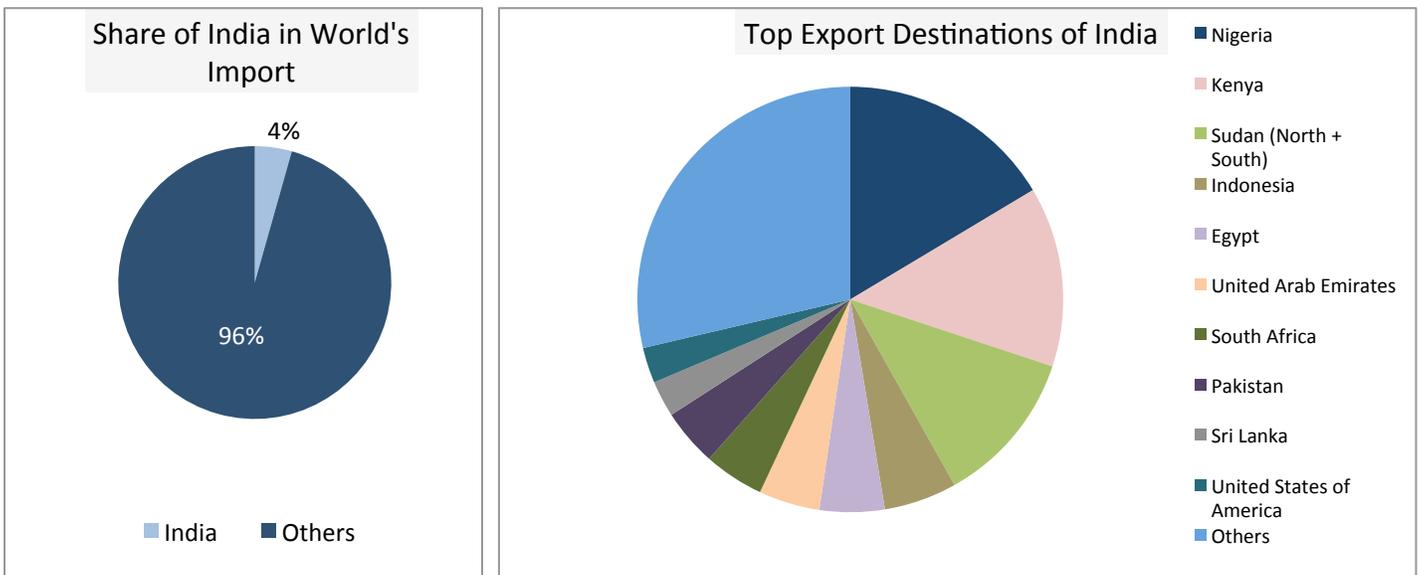
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years we would be able to increase the export value of Jams, Jellies and Marmalades by USD 9.10 million, which is 7% of the total exports value of Jams, Jellies and Marmalades currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the export orders of additional USD 22.7 millions, which is around 17.2% of the total exports value of Jams, Jellies and Marmalades currently.

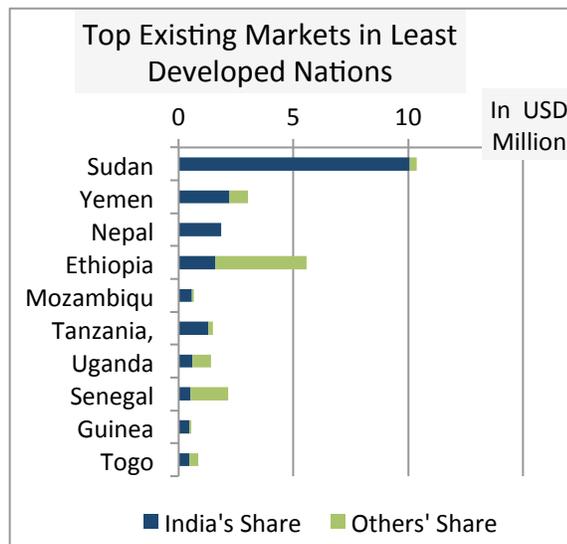
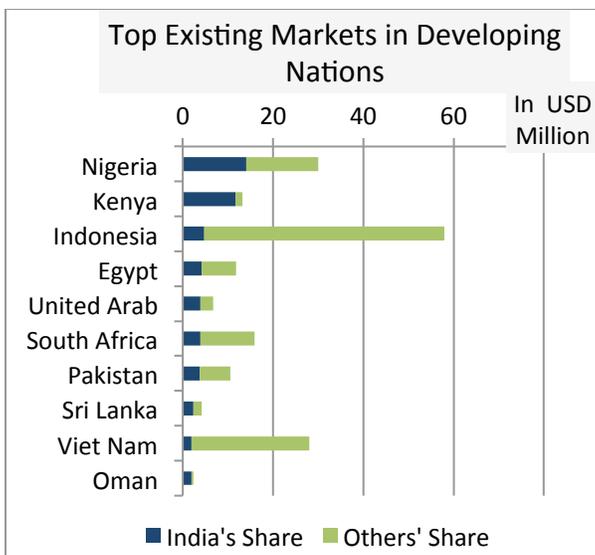
Glucose & Glucose Syrup

Product Description HS 200799: Glucose and Glucose Syrup, not containing fructose or containing in the dry state less than 20% by the weight of fructose.

The total global imports of Glucose and Glucose Syrup during the year 2015 was USD 1955.24 million in 2015, according to the data released by ITC. India poses only 4.3% share in the total global imports of Glucose and Glucose Syrup with the export value of USD 85.65 million. The top importers of Glucose and Glucose Syrup in the world were Germany, United States of America, United Kingdom, Belgium, and Mexico during 2015. India exported Glucose and Glucose Syrup primarily to Nigeria, Kenya, Sudan, Indonesia and Egypt.



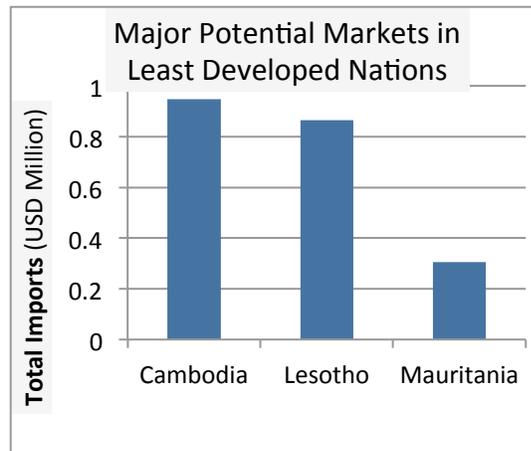
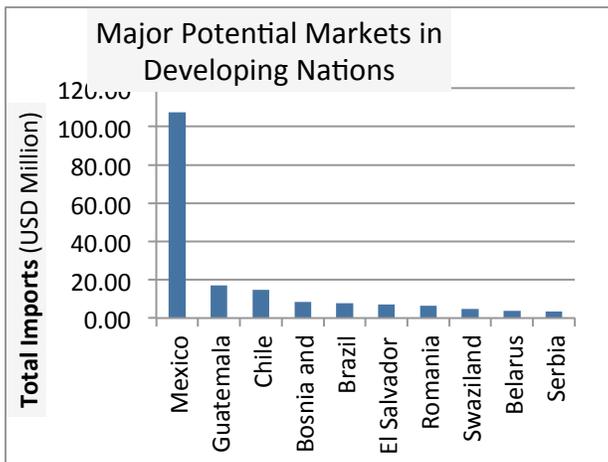
India's top existing market for Glucose and Glucose Syrup in developing nations and LDC's are as follow:



Glucose & Glucose Syrup

In developing nations, India majorly exported to Nigeria, Kenya, Indonesia, Egypt and United Arab Emirates and in Least Developed Nations (LDC's) India exported Glucose and Glucose Syrup to Sudan, Yemen, Nepal, Ethiopia and Mozambique during 2015.

The developing and least developed countries to which India does not export in general are as follow:



We can see that the besides significant value of global imports of Glucose and Glucose Syrup, India's share is only 4.3%. We can enlarge our share as we know that there is an opportunity because there is the demand. Developing nations has huge potential to look for, in case of Glucose and Glucose Syrup for example in Mexico, the total import during the year 2015 was more than USD 100 million.

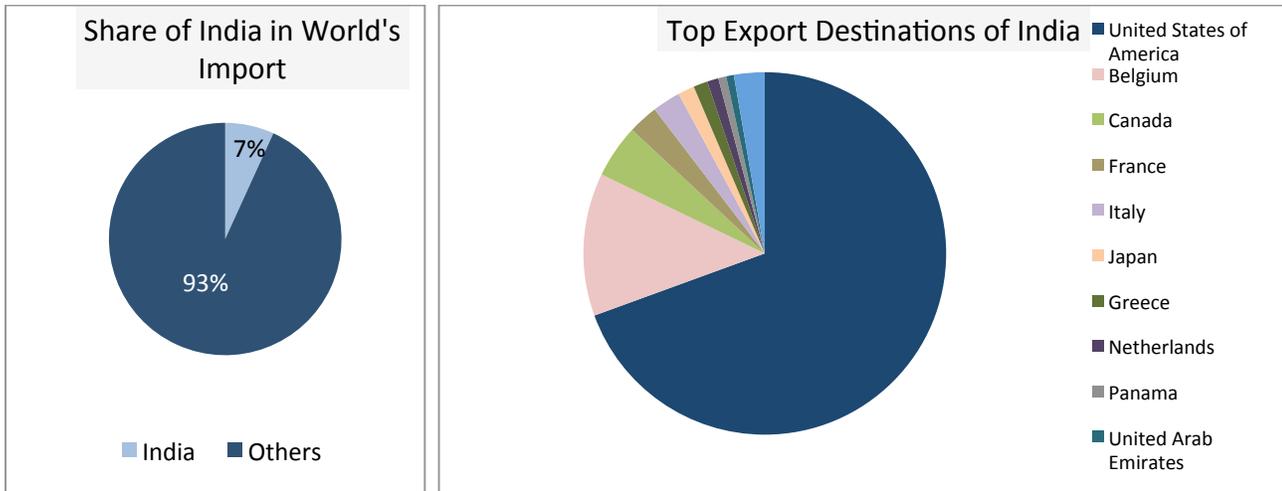
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Glucose and Glucose Syrup by USD 18.3 million, which is 21.4% of the total exports value of Glucose and Glucose Syrup currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC's in long run, it may bring us to the additional export orders of USD 45.8 millions, which is around 53.5% of the total exports value of Glucose and Glucose Syrup currently.

Processed Shrimps and Prawns

Product Description HS 160529: Prepared or Preserved Shrimps and Prawns (In air tight Containers)

The Global imports of Processed Shrimps and Prawns (In air tight containers) during the year 2015 was USD 1074 million in 2015, according to the data released by ITC. India possesses only 7% share in the total global imports of Processed Shrimps and Prawns with the export value of USD 73.06 million. The top importers of Processed Shrimps and Prawns in the world were Denmark, United States of America, United Kingdom, Netherlands and Germany during 2015. India exported Processed Shrimps and Prawns primarily to United States of America, Belgium, Canada, France and Italy.



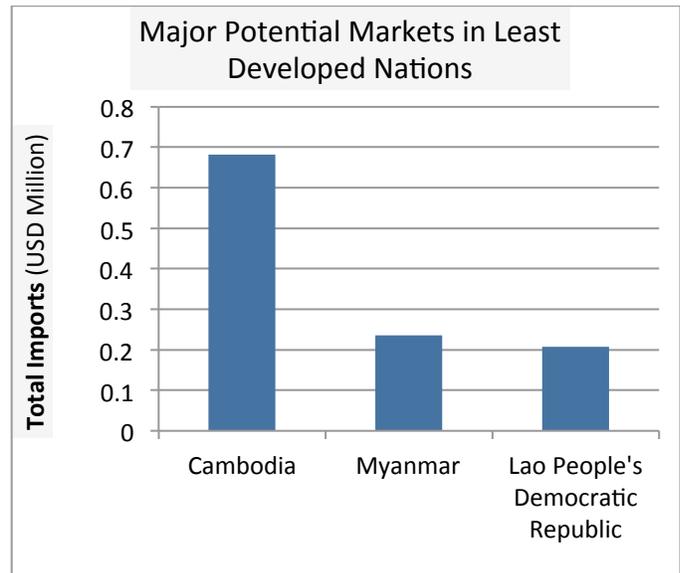
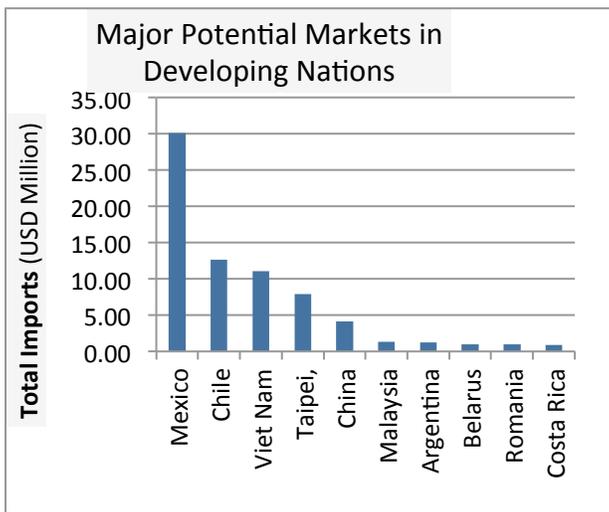
India's top existing markets for Processed Shrimps and Prawns in developing nations are as follow. India did not export to any LDC during 2015.



Processed Shrimps and Prawns

In developing nations, India majorly exported to Panama, United Arab Emirates, Russian Federation Israel and Iraq during the year 2015. The country did not export to any LDC in the same year.

Besides the existing developed and developing markets, India should focus on the new markets in the developing Nations as well as the least developed nations. The developing countries and the least developed nations to which India does not export in general are as follow:



We have noticed that besides the significant value of global imports of Processed Shrimps and Prawns, India’s share is only 7%. Again diversification would be a good move for capturing the market shares and increasing the export values.

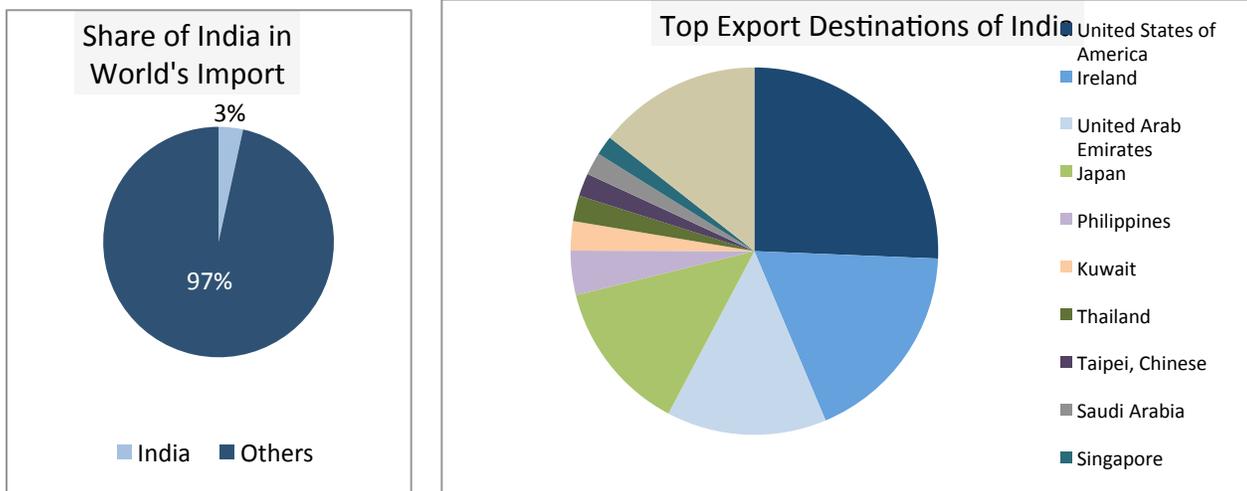
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Processed Shrimps and Prawns by USD 7.23 million, which is 10% of the total exports value of Processed Shrimps and Prawns currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 18.08 millions, which is around 25% of the total exports value of Processed Shrimps and Prawns currently.

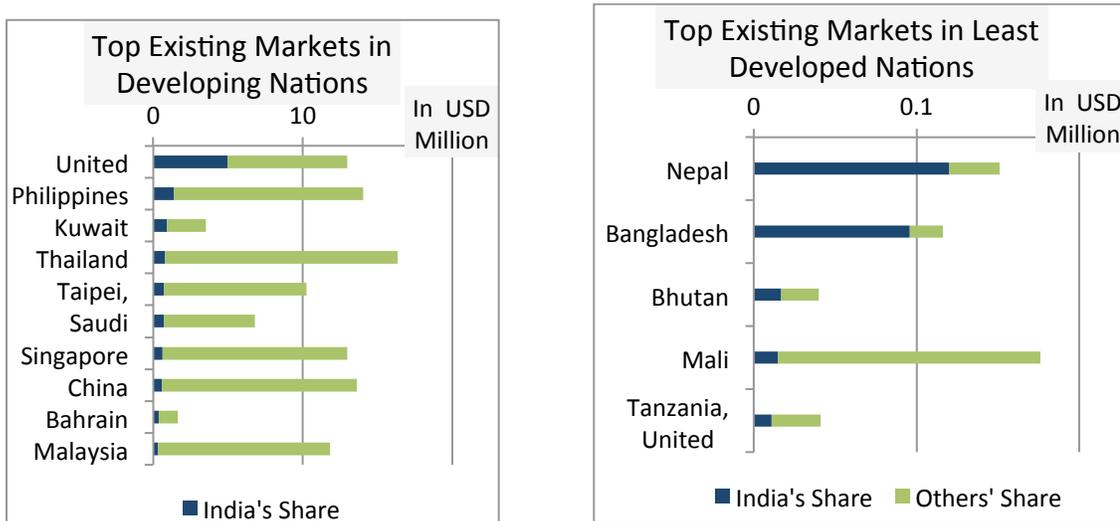
Tea Essence and Extracts

Product Description HS 210120: Tea or Maté Extracts, Essences & Concentrates & Preparations thereof.

The total global imports of Tea essences and extracts during the year 2015 was USD 1033 million in 2015, according to the data released by ITC. India possesses only 3% share in the total global imports of Tea essences and extracts with the export value of USD 35.35 million. The top importers of Tea essences and extracts in the world were United States of America, Netherlands, Mexico, France and Canada during 2015. India exported Tea essences and extracts primarily to United States of America, Ireland, United Arab Emirates, Japan and Philippines



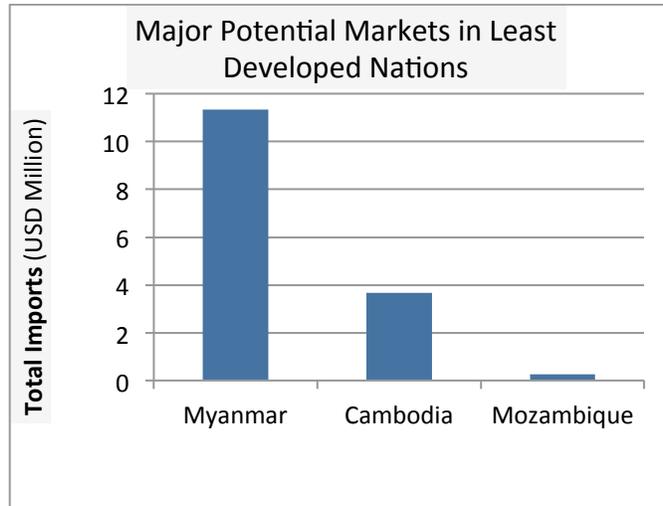
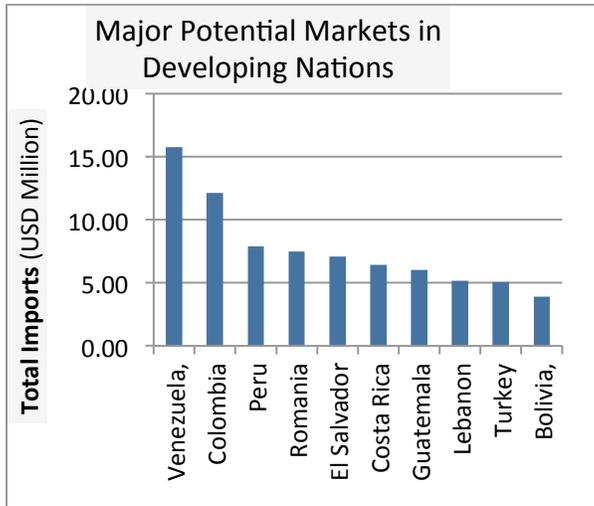
India's top existing market for Tea essences and extracts in developing nations and LDC's are as follow:



Tea Essence and Extracts

In developing nations, India majorly exported to United Arab Emirates, Philippines, Kuwait, Thailand and Taipei and in Least Developed Nations (LDC’s) India exported Tea essences and extracts to Nepal, Bangladesh, Bhutan, Mali and Tanzania during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Possessing just the 3% of the share in the product whose total global imports is above USD 1000 million is something we need to discuss. Few of the developing and least developed nations have genuine export potential for India, which we should focus on.

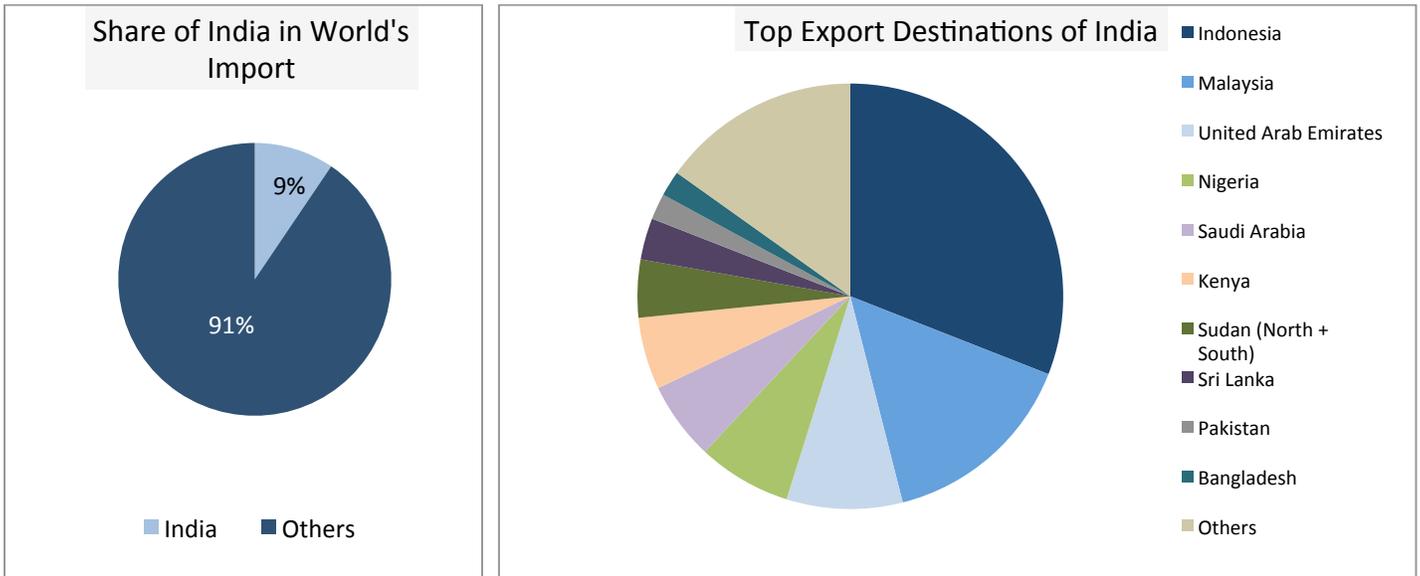
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Tea essences and extracts by USD 9.2 million, which is 26% of the total exports value of Tea essences and extracts currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 23.07 millions, which is around 65.3% of the total exports value of Tea essences and extracts currently.

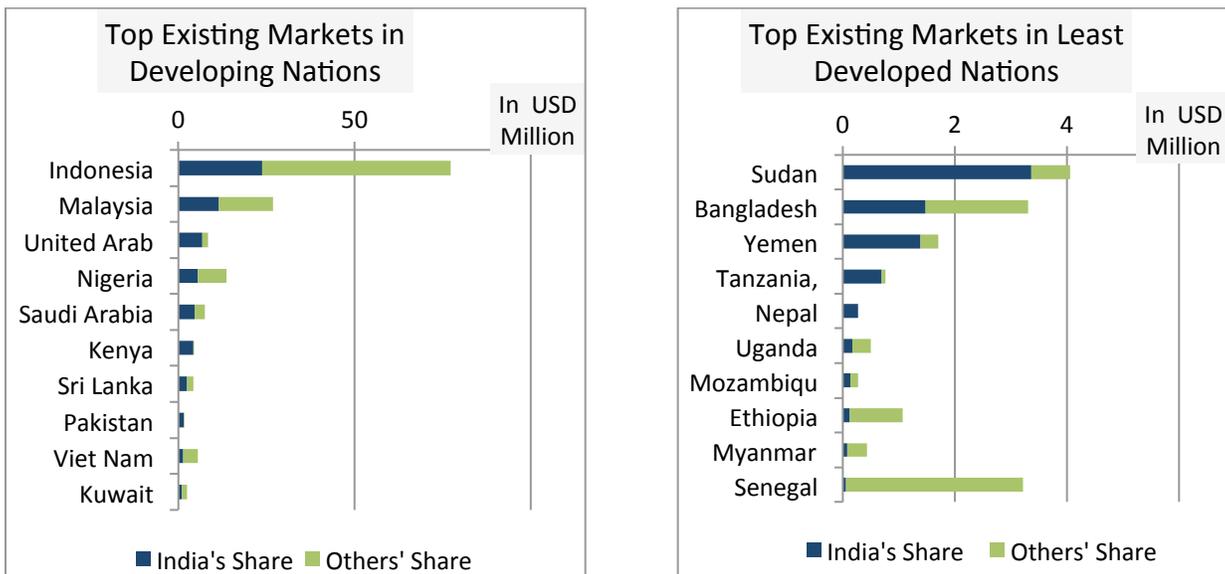
Maize (Corn) Starch

Product Description HS 110812: Maize (Corn) Starch

The total global imports of Maize Starch during the year 2015 was USD 809.09 million in 2015, according to the data released by ITC. India poses only 9% share in the total global imports of Maize Starch with the export value of USD 76.54 million. The top importers of Maize Starch in the world were Germany, Indonesia, United Kingdom, France and United States of America during 2015. India exported Maize Starch primarily to Indonesia, Malaysia, United Arab Emirates, Nigeria, and Saudi Arabia.



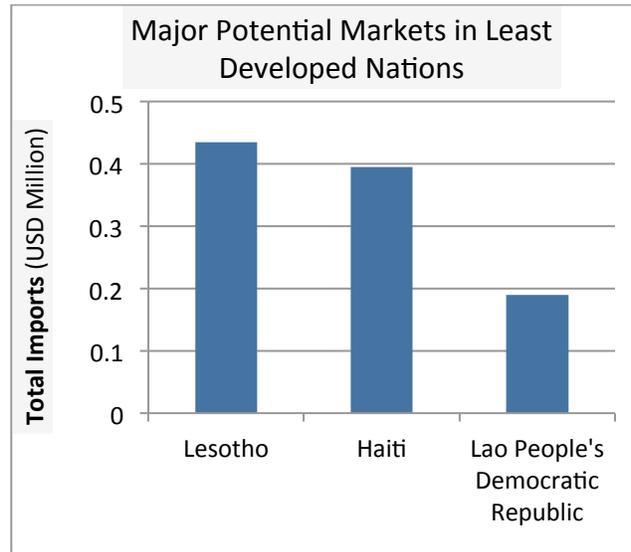
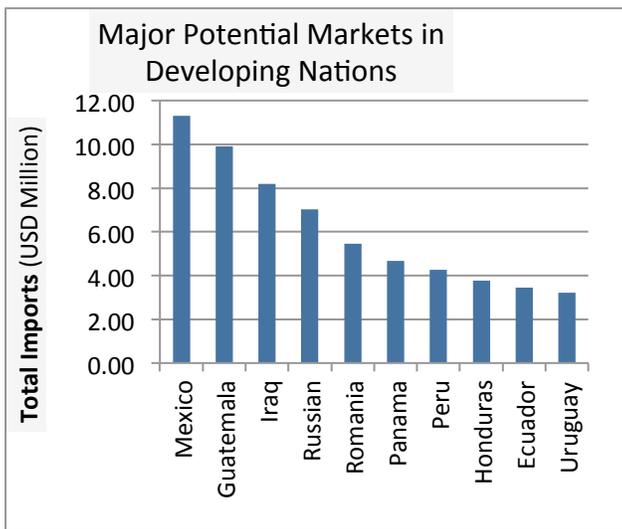
India's top existing market for Maize Starch in developing nations and LDC's are as follow:



Maize (Corn) Starch

In developing nations, India majorly exported to Indonesia, Malaysia, United Arab Emirates, Nigeria, and Saudi Arabia and in Least Developed Nations (LDC’s) India exported Maize Starch to Sudan, Bangladesh, Yemen, Tanzania and Nepal during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Although the share of Maize Starch is not bad as the share of products discussed above, but still this percentage can be increased to higher figure if we try to capture the export orders as it is very clear that there is a fair demand of Maize Starch at the global front.

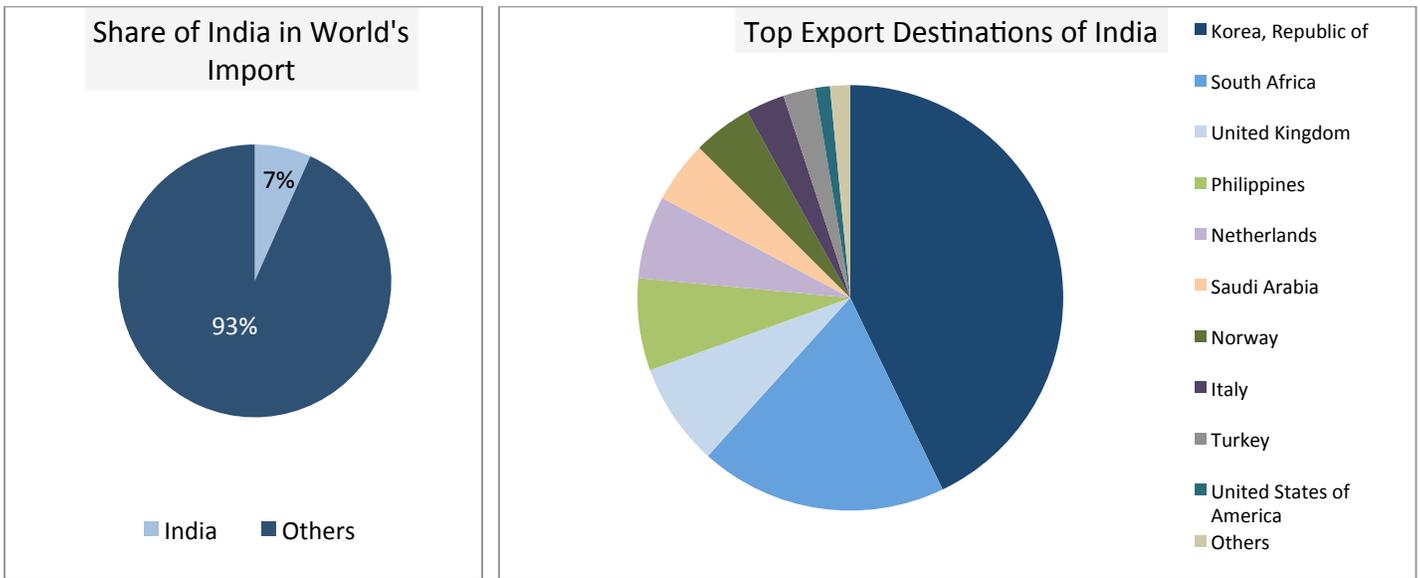
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Maize Starch by USD 6.2 million, which is 8% of the total exports value of Maize Starch currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 15.06 millions, which is around 20% of the total exports value of Maize Starch currently.

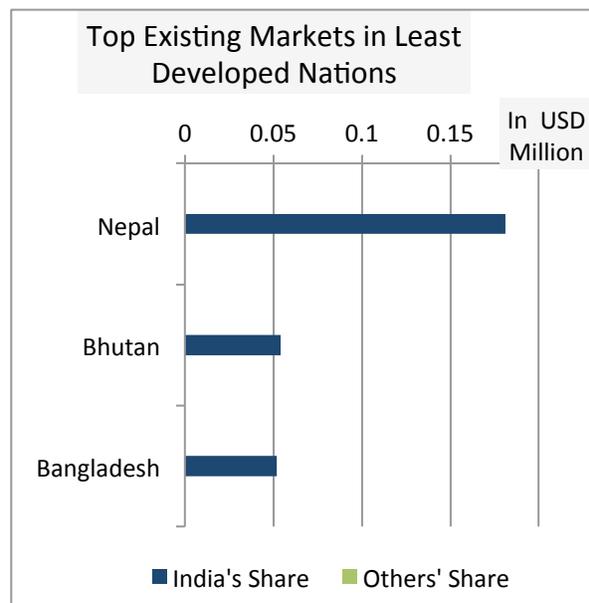
Cane Molasses

Product Description HS 170310: Cane Molasses

The total global imports of Cane Molasses during the year 2015 was USD 657.02 million in 2015, according to the data released by ITC. India possesses only 7% share in the total global imports of Cane Molasses with the export value of USD 43.86 million. The top importers of Cane Molasses in the world were United States of America, Korea, United Kingdom, Netherlands and France during 2015. India exported Cane Molasses primarily to Korea, South Africa, United Kingdom, Philippines and Netherlands.



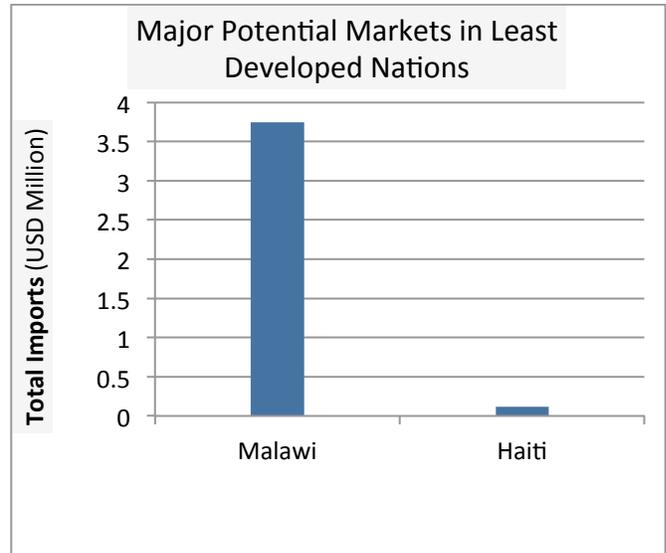
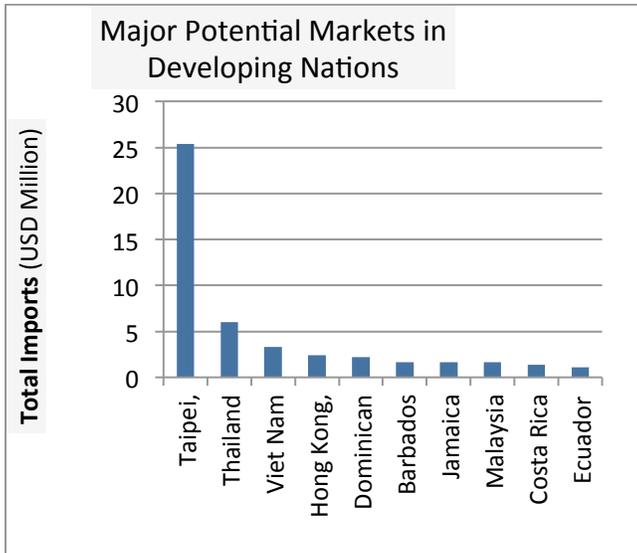
India's top existing market for Cane Molasses in developing nations and LDC's are as follow:



Cane Molasses

In developing nations, India majorly exported to Korea, South Africa, Philippines, Saudi Arabia and Turkey and in Least Developed Nations (LDC’s) India exported Cane Molasses to Nepal, Bhutan and Bangladesh during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Like other products we have discussed earlier, for Maize Starch too, we will look for the export opportunity in developing and least developed nations, where either we are not exporting at all or do not focus for export regularly.

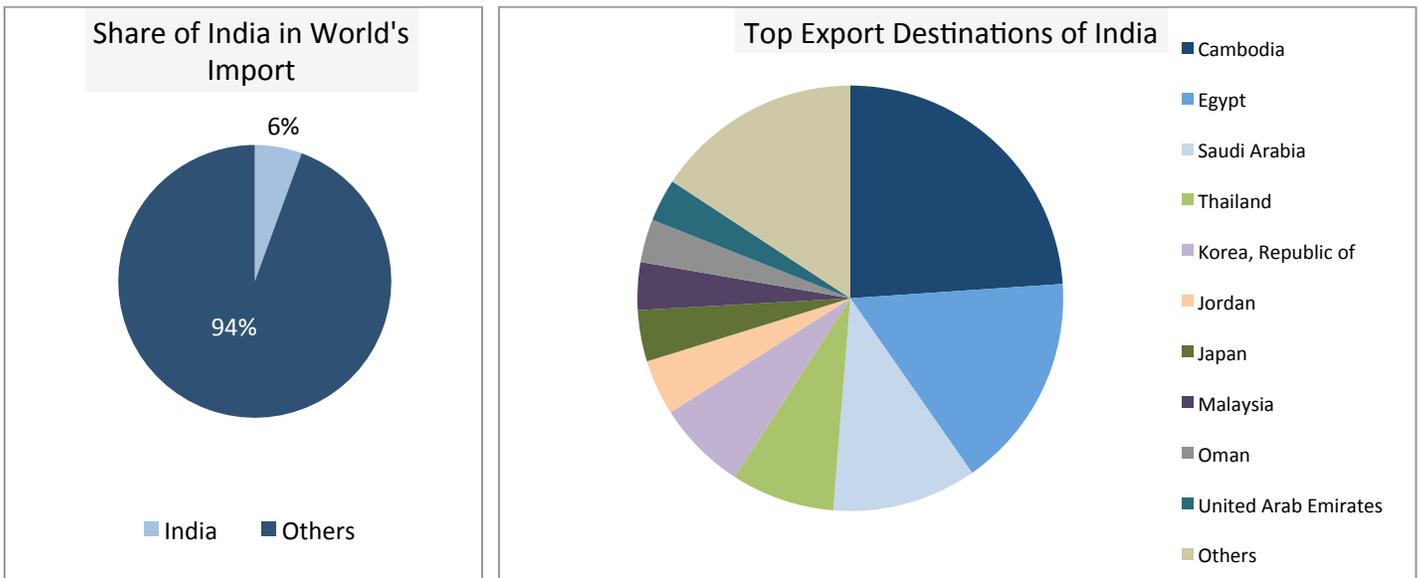
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Cane Molasses by USD 5.06 million, which is 11.5% of the total exports value of Cane Molasses currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 12.6 millions, which is around 28.7% of the total exports value of Cane Molasses currently.

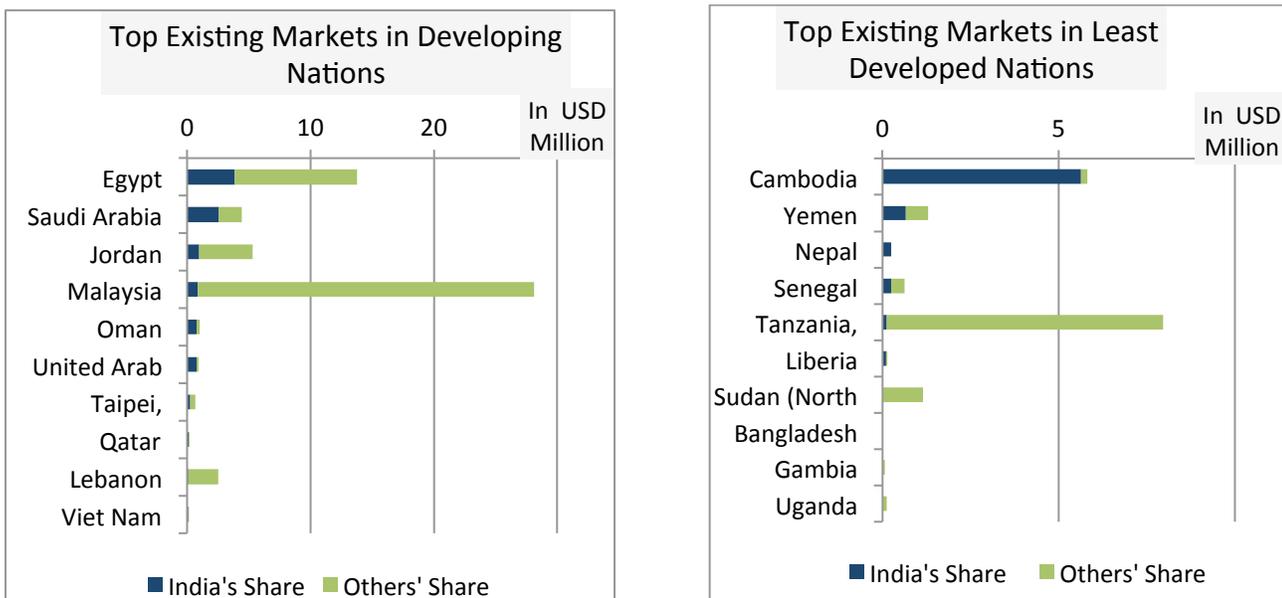
Maize Meal & Groats

Product Description HS 110313: Cereal Groats, Meal and Pellets of Maize

The Global imports of Maize meal and groats during the year 2015 was USD 422 million in 2015, according to the data released by ITC. India possesses only 6% share in the total global imports of Maize meal and groats with the export value of USD 23.56 million. The top importers of Maize meal and groats in the world were Angola, Mexico, Malaysia, Iraq and United States of America during 2015. India exported Maize meal and groats primarily to Cambodia, Egypt, Saudi Arabia, Thailand and Korea.



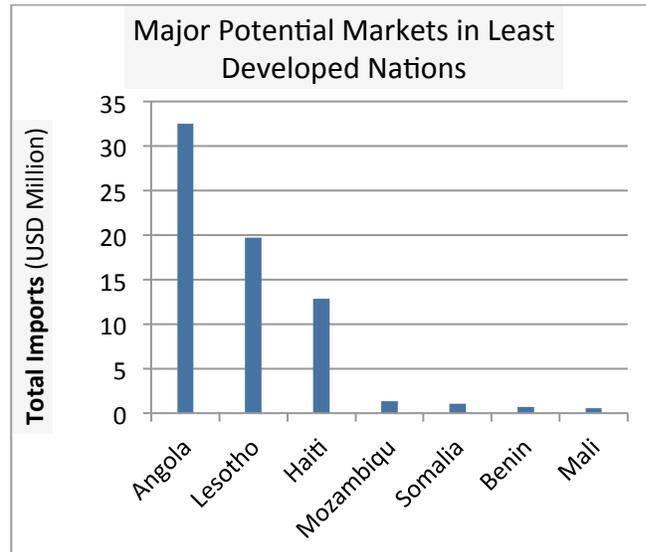
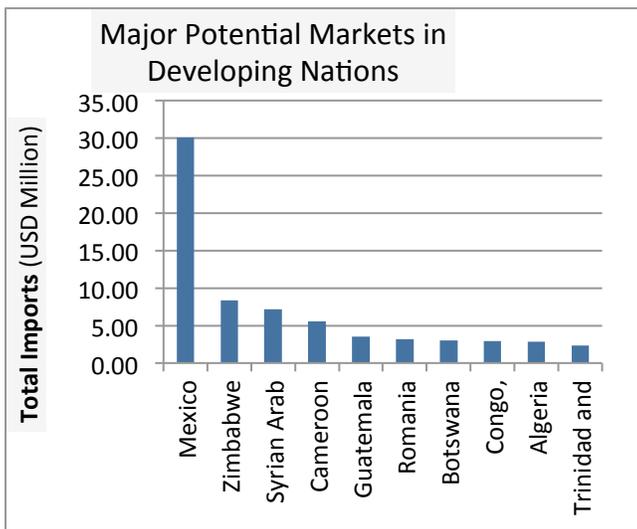
India's top existing market for Maize meal and groats in developing nations and LDC's are as follow:



Maize Meal & Groats

In developing nations, India majorly exported to Egypt, Saudi Arabia, Jordan, Malaysia and Oman and in Least Developed Nations (LDC’s) India exported Maize meal and groats to Cambodia, Yemen, Nepal, Senegal and Tanzania during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Like other products we have discussed earlier, for Maize meal and groats too, we will look for the export opportunity in developing and least developed nations, where either we are not exporting at all or do not focus for export regularly.

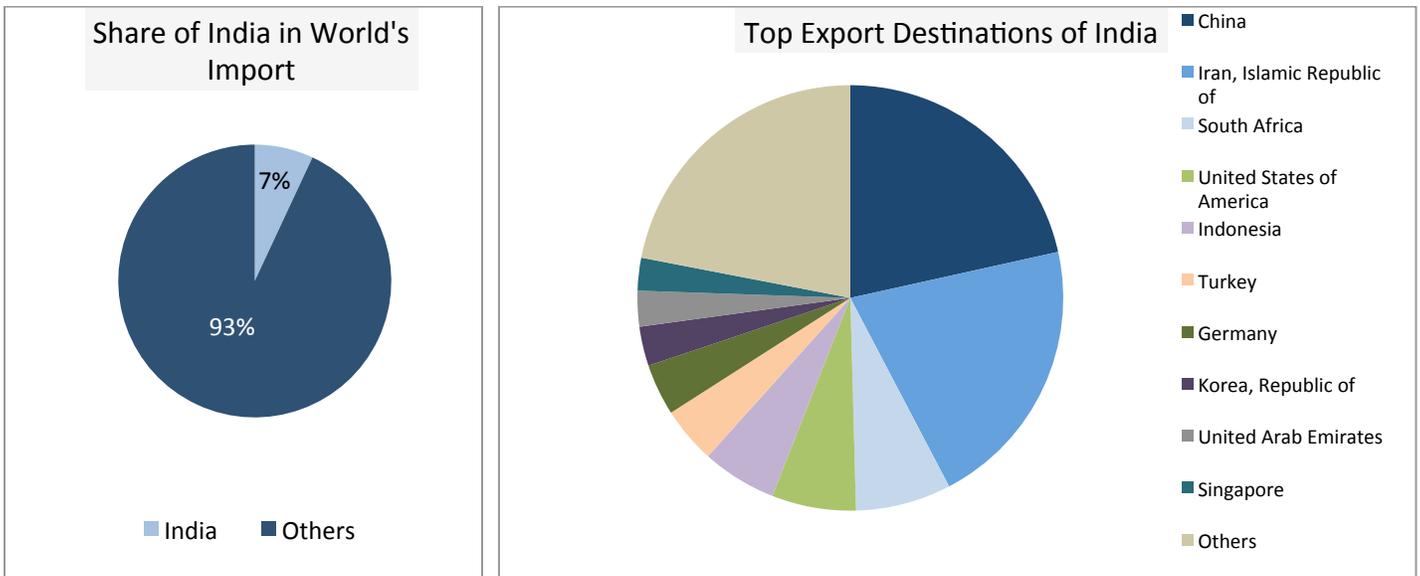
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Maize meal and groats by USD 13.4, which is 57% of the total exports value of Maize meal and groats currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 26.3 millions, which is around 112% of the total exports value of Maize meal and groats currently.

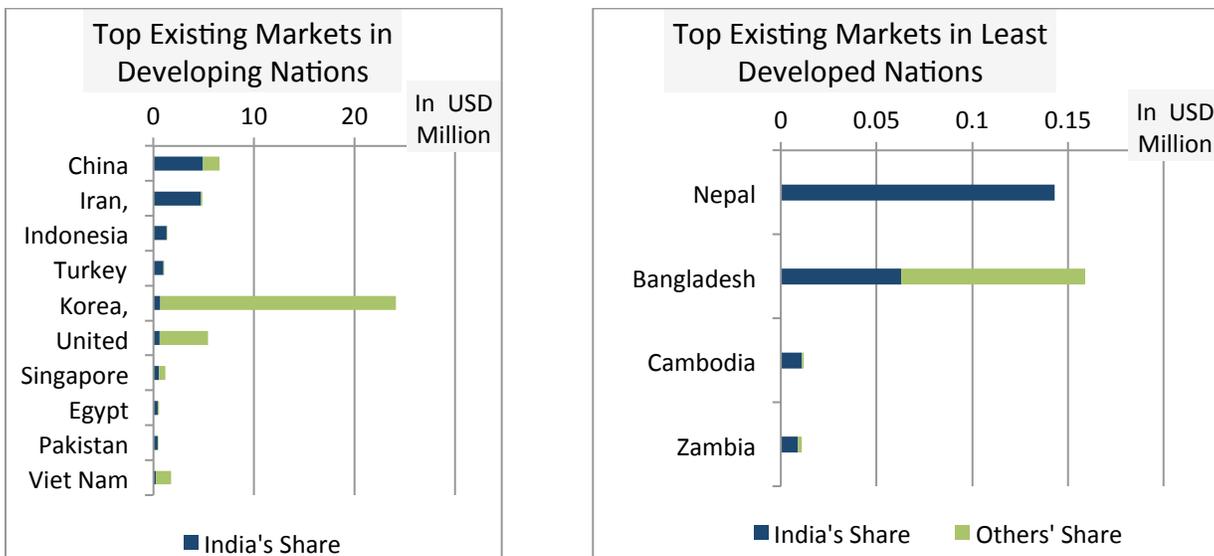
Flour, Meal, Powder of Fruit & Nuts

Product Description HS 110630: Flour, meal & powder of edible fruits & nuts & peel of citrus fruit or melons.

The total global imports of Flour, meal & powder of edible fruits & nuts during the year 2015 was USD 329.5 million in 2015, according to the data released by ITC. India possesses only 7% share in the total global imports of Flour, meal & powder of edible fruits & nuts with the export value of USD 23 million. The top importers of Flour, meal & powder of edible fruits & nuts in the world were France, Germany, Korea, Japan and United Kingdom during 2015. India exported Flour, meal & powder of edible fruits & nuts primarily to China, Iran, South Africa, United States of America and Indonesia.



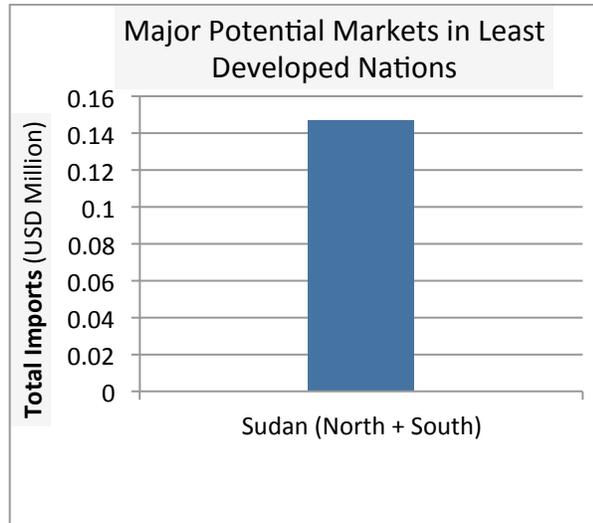
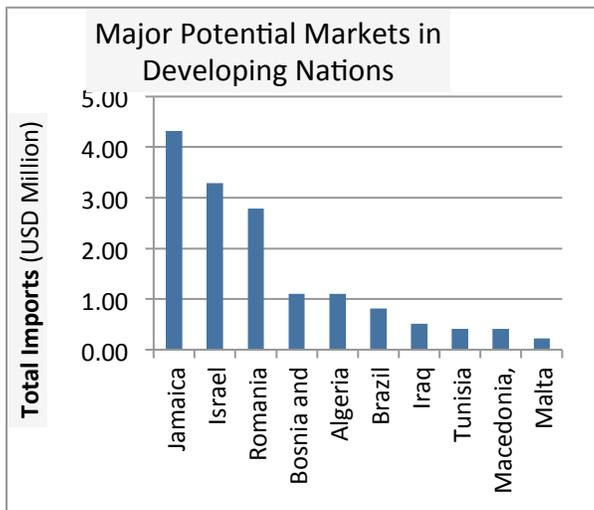
India's top existing market for Flour, meal & powder of edible fruits & nuts in developing nations and LDC's are as follow:



Flour, Meal, Powder of Fruit & Nuts

In developing nations, India majorly exported to China, Iran, Indonesia, Turkey and Korea and in Least Developed Nations (LDC's) India exported Flour, meal & powder of edible fruits & nuts to Nepal, Bangladesh, Cambodia and Zambia during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Again we would say, to capture the market, we need to focus on the developing and least developed nations in order to get the broader channels open for the exports

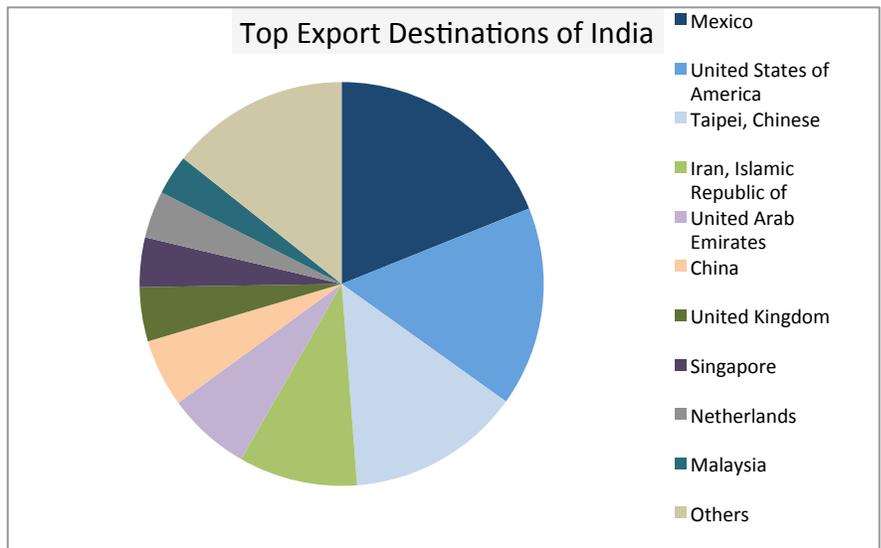
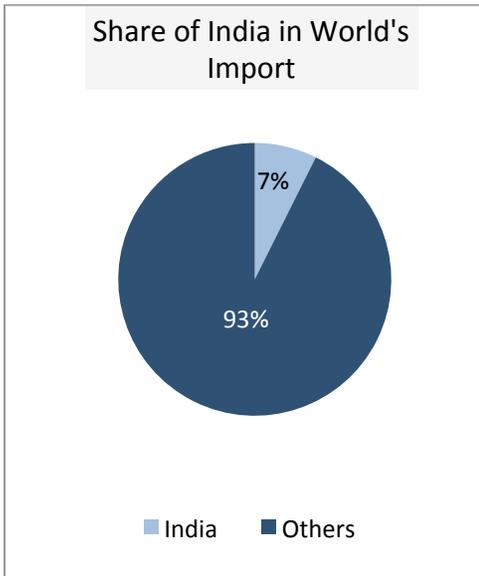
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Flour, meal & powder of edible fruits & nuts by USD 1.5 million, which is 6.5% of the total exports value of Flour, meal & powder of edible fruits & nuts currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC's in long run, it may bring us to the additional export orders of USD 3.8 millions, which is around 16.6% of the total exports value of Flour, meal & powder of edible fruits & nuts currently.

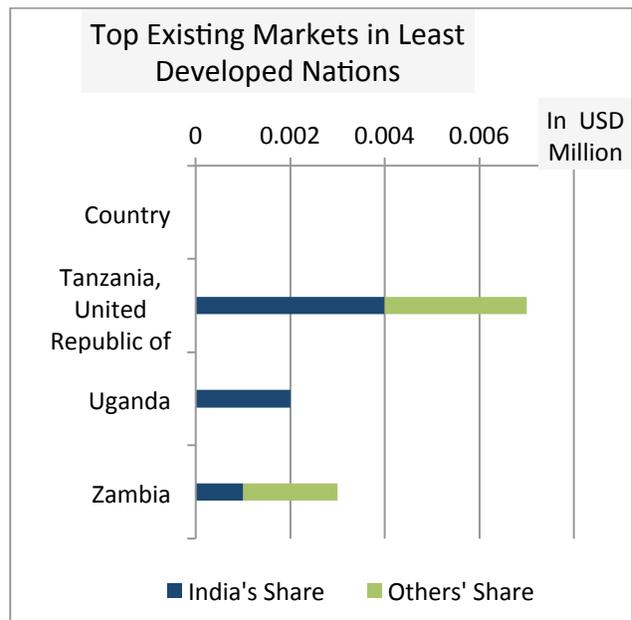
Sesame Oil

Product Description HS 151550: Sesame oil & its fractions (whether/not refined, but not chemically modified)

The Global imports of Sesame Oil during the year 2015 was USD 243.2 million in 2015, according to the data released by ITC. India possesses only 7% share in the total global imports of Sesame Oil with the export value of USD 17.95 million. The top importers of Sesame Oil in the world were United States of America, United Kingdom, Canada, Hong Kong and Germany during 2015. India exported Sesame Oil primarily to Mexico, United States of America, Taipei, Iran and United Arab Emirates.



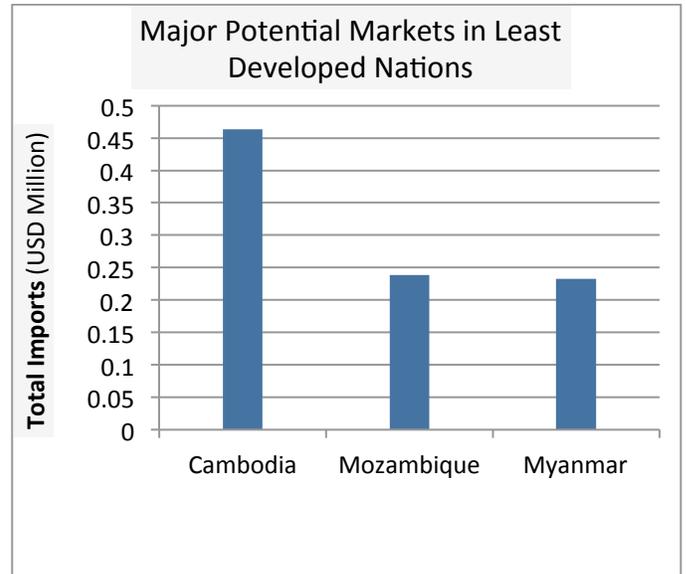
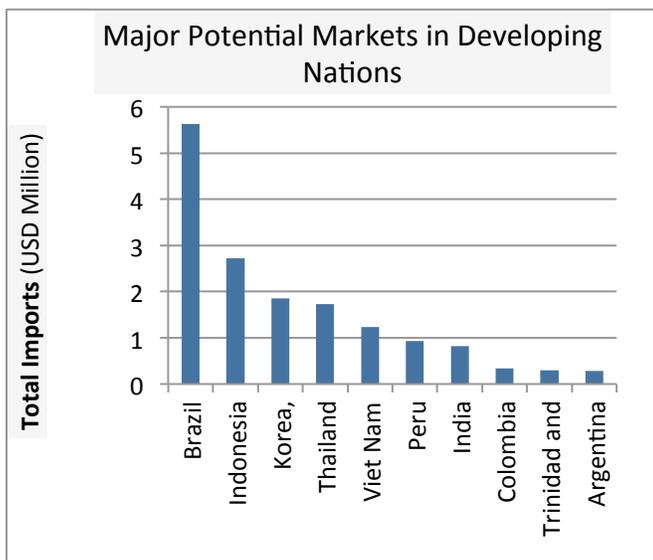
India's top existing market for Sesame Oil in developing nations and LDC's are as follow:



Sesame Oil

In developing nations, India majorly exported to Mexico, Taipei, Iran, United Arab Emirates and China and in Least Developed Nations (LDC’s) India exported Sesame Oil to Tanzania, Uganda and Zambia during 2015.

The developing and least developed countries to which India does not export in general are as follow:



For the Sesame Oil as well, we will try the same strategy mentioned earlier for the entry in new market for the growth in the export value and our focus will be the developing and the least developed nations.

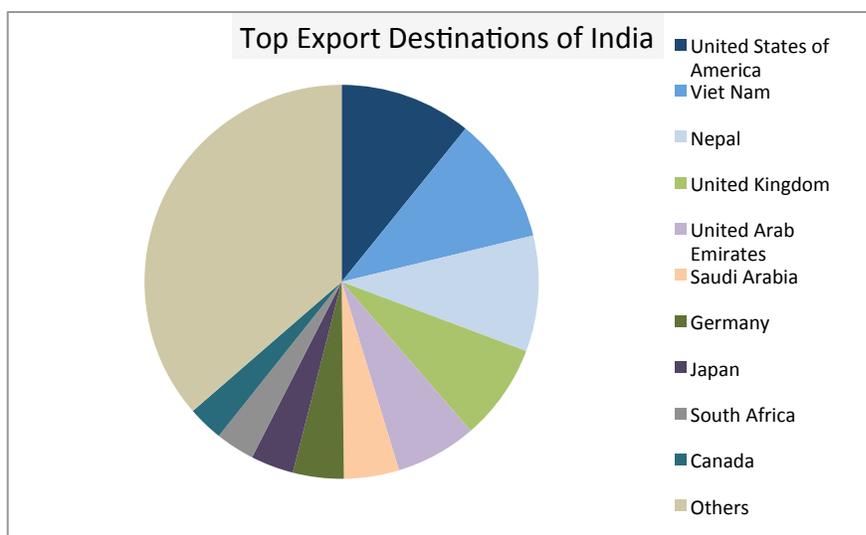
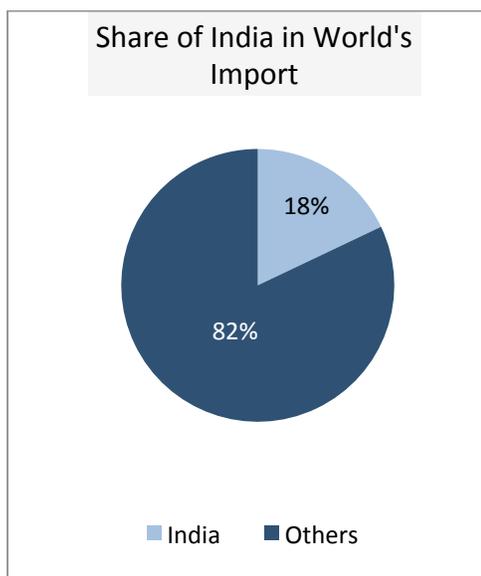
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Sesame Oil by USD 1.7 million, which is 9.5% of the total exports value of Sesame Oil currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 4.20 millions, which is around 23.4% of the total exports value of Sesame Oil currently.

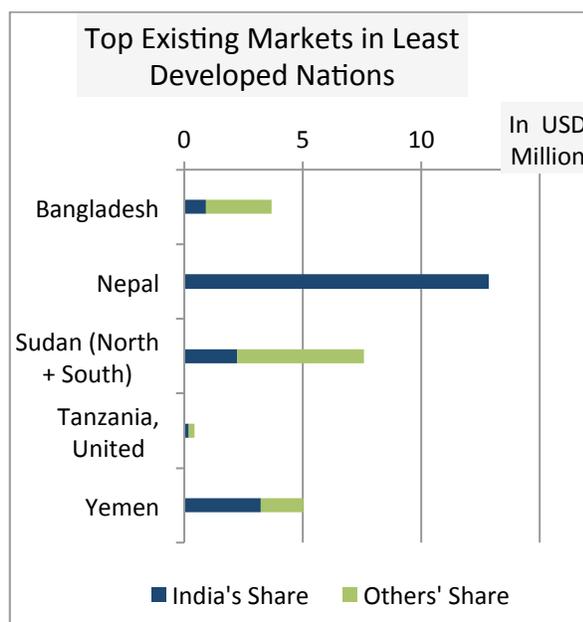
Spices (nes)

Product Description HS 091099: Spices nes

The total global imports of Spices (nes) during the year 2015 was USD 754.55 million in 2015, according to the data released by ITC. India poses 18% share in the total global imports of Spices (nes) with the export value of USD 135.33 million. The top importers of Spices (nes) in the world were Saudi Arabia, United States of America, Germany, United Kingdom and Vietnam during 2015. India exported Spices (nes) primarily to United States of America, Vietnam, Nepal, United Kingdom and United Arab Emirates.



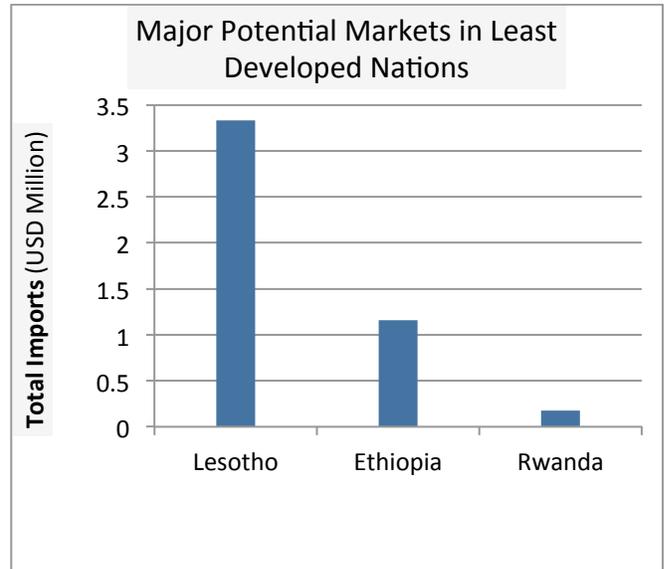
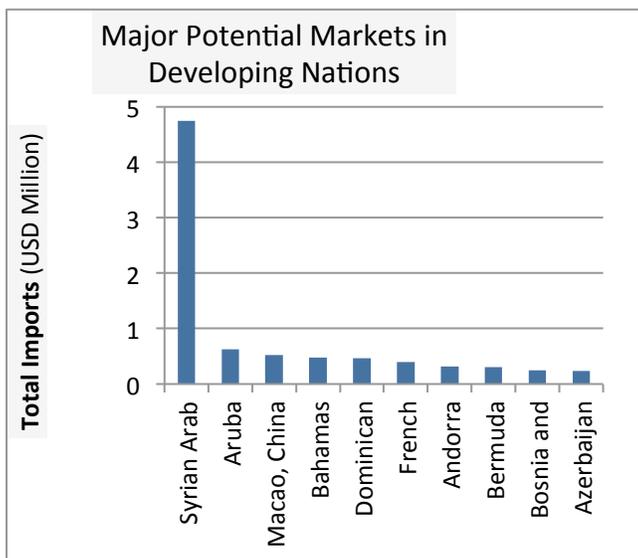
India's top existing market for Spices (nes) in developing nations and LDC's are as follow:



Spices nes

In developing nations, India majorly exported to Vietnam, United Arab Emirates, Saudi Arabia, South Africa and Qatar, and in Least Developed Nations (LDC's) India exported Spices (nes) to Bangladesh, Nepal, Sudan Tanzania and Yemen during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Although the Spices (nes) and the product hereafter falls in the Priority list two, means the RCA is greater than one, total global import value is greater than USD 200 million but the share is in between 10% to 20%. Here, our shares are better than the other products listed earlier, but we can spread our presence further by promoting the exports by various strategies

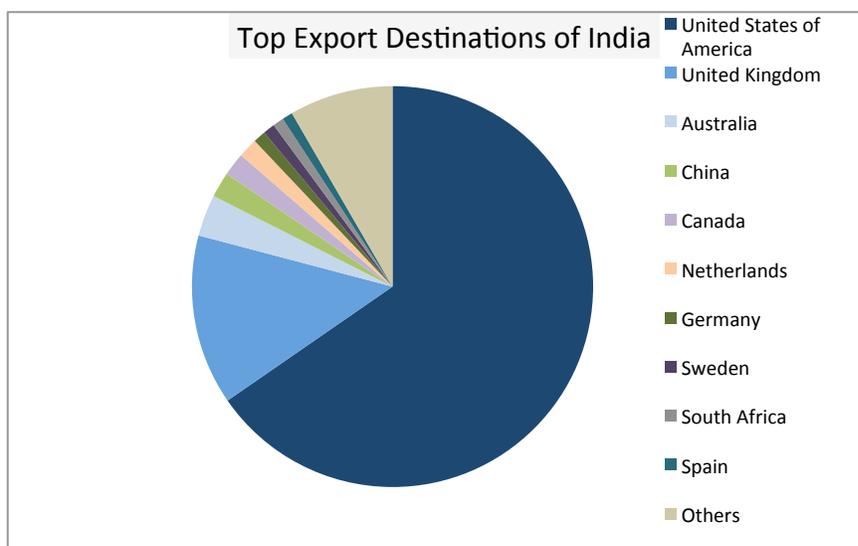
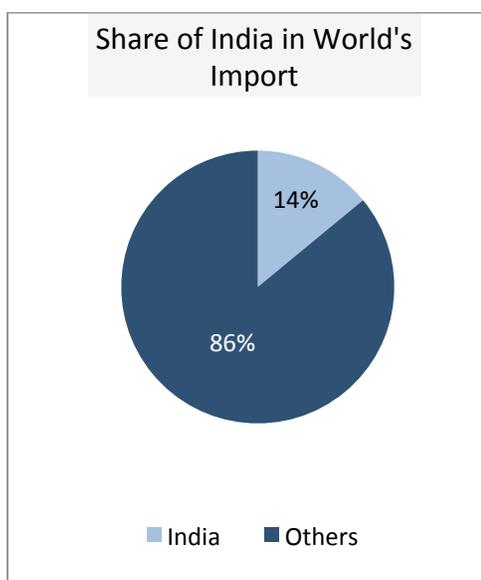
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Spices (nes) by USD 1.3 million, which is 1% of the total exports value of Spices (nes) currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC's in long run, it may bring us to the additional export orders of USD 3.3 millions, which is around 2.4% of the total exports value of Spices (nes) currently.

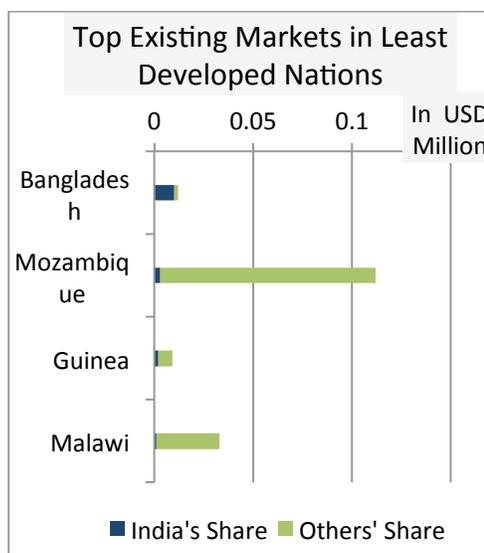
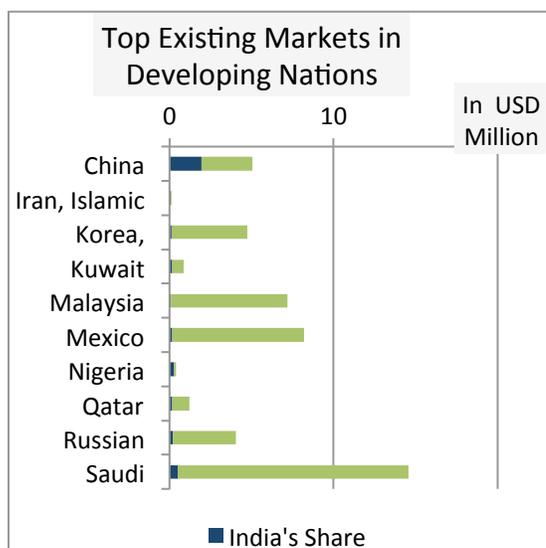
Pepper (crushed or ground)

Product Description HS 090412: Pepper of the genus Piper, except cubeb pepper, crushed or ground

The total global imports of Processed Pepper or Crushed or Ground Pepper during the year 2015 was USD 683 million in 2015, according to the data released by ITC. India possesses 14% share in the total global imports of Pepper (crushed or ground) with the export value of USD 95.72 million. The top importers of Pepper (crushed or ground) in the world were United States of America, United Kingdom, Japan, Netherlands and Canada during 2015. India exported Pepper (crushed or ground) primarily to United States of America, United Kingdom, Australia, China and Canada.



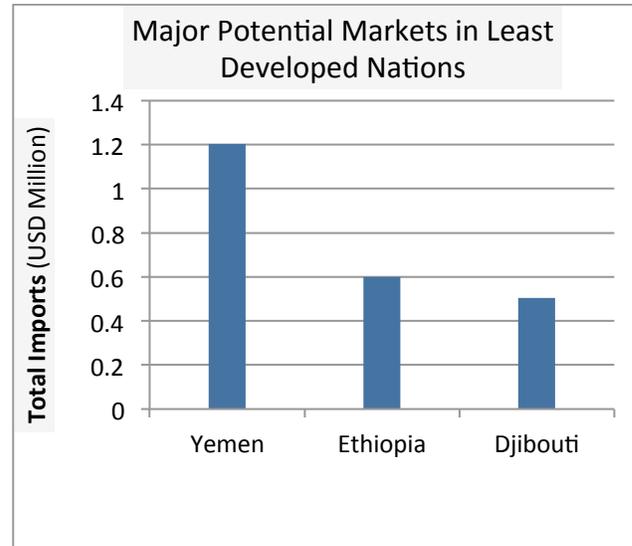
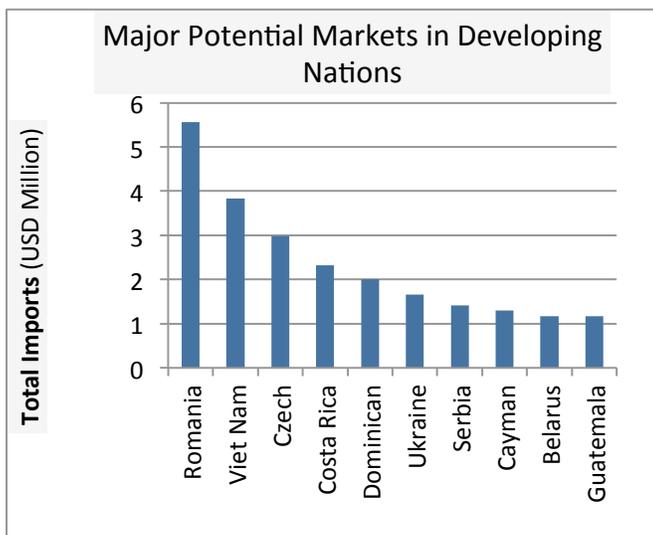
India's top existing market for Pepper (crushed or ground) in developing nations and LDC's are as follow:



Pepper (crushed or ground)

In developing nations, India majorly exported to China, Iran, Korea, Kuwait and Malaysia in Least Developed Nations (LDC’s) India exported Pepper (crushed or ground) to Bangladesh, Mozambique, Guinea, Malawi during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Again the Pepper (crushed or ground) falls in the Priority list two, means the RCA is greater than one, total global import value is greater than USD 200 million but the share is in between 10% to 20% and we need to channelize our exports in the way that it capture the maximum portion of the market.

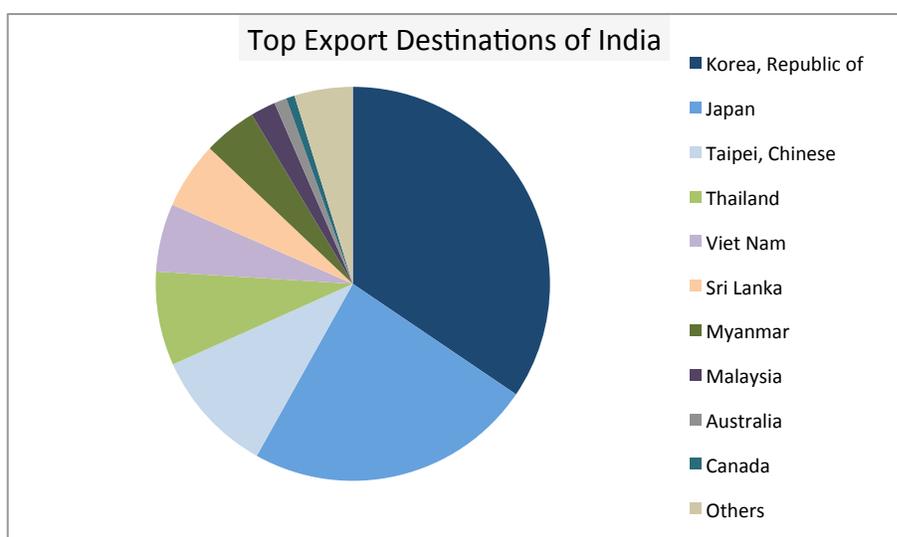
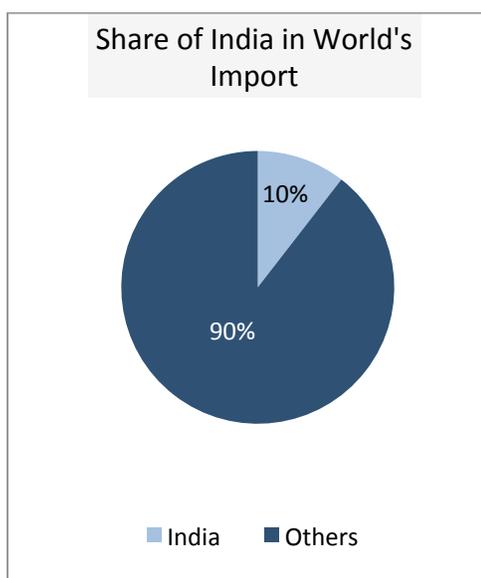
If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Pepper (crushed or ground) by USD 2.6 million, which is 2.7% of the total exports value of Pepper (crushed or ground) currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 6.4 millions, which is around 6.7% of the total exports value of Pepper (crushed or ground) currently.

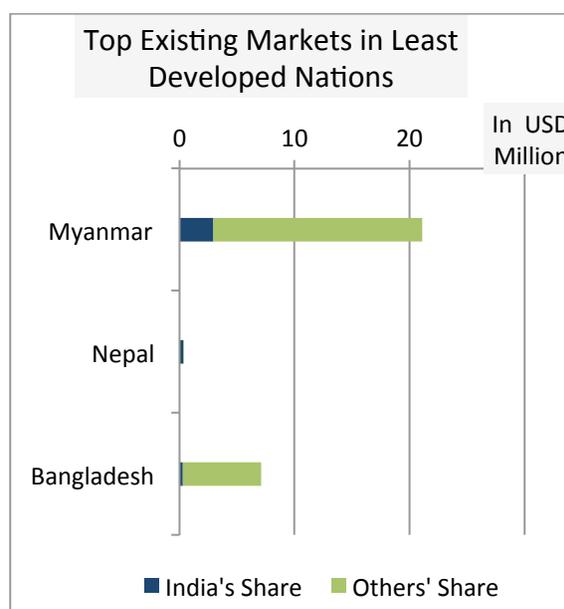
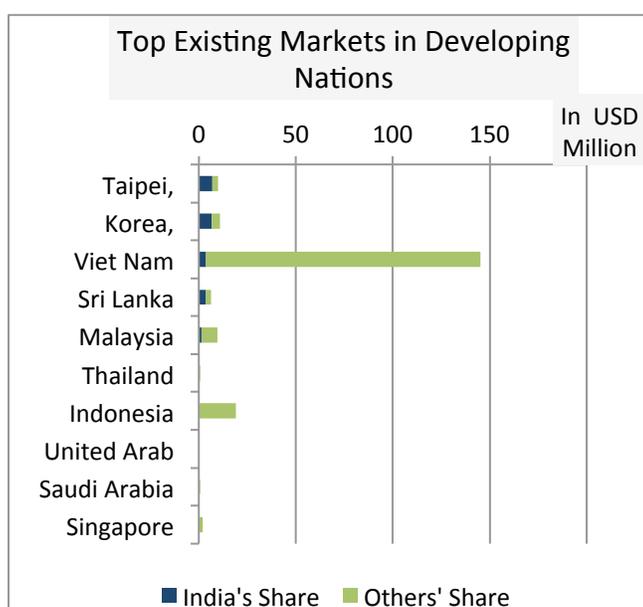
Soya Bean Flour & Meal

Product Description HS 120810: Soya bean flour and meals

The total global imports of Soya bean Flour & Meal during the year 2015 was USD 644.24 million in 2015, according to the data released by ITC. India possesses only 10% share in the total global imports of Soya bean Flour & Meal with the export value of USD 67.60 million. The top importers of Soya bean Flour & Meal in the world were Vietnam, Dominican Republic, Belgium, Peru and United States of America during 2015. India exported Soya bean Flour & Meal primarily to Korea, Japan, Taipei, Thailand and Vietnam.



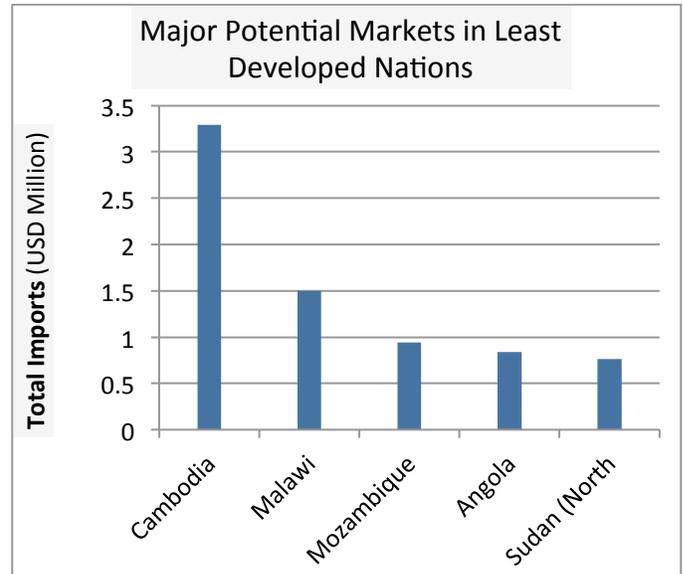
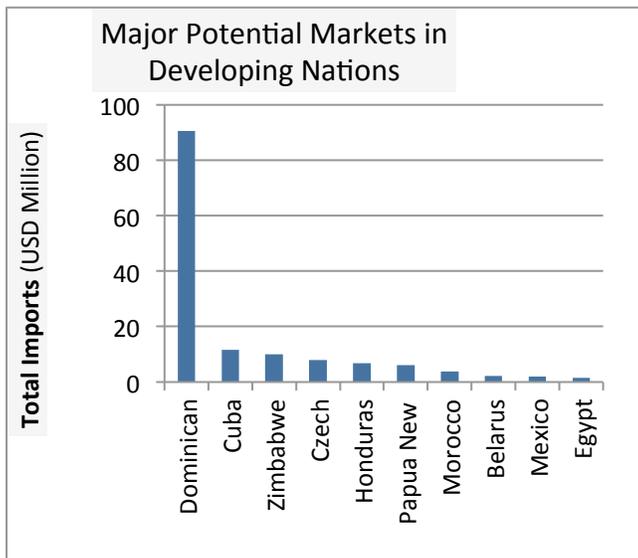
India's top existing market for Soya bean Flour & Meal in developing nations and LDC's are as follow:



Soya Bean Flour & Meal

In developing nations, India majorly exported to Taipei, Korea, Vietnam, Sri-Lanka and Malaysia and in Least Developed Nations (LDC’s) India exported Soya bean Flour & Meal to Myanmar, Nepal and Bangladesh during 2015.

The developing and least developed countries to which India does not export in general are as follow:



Like other products listed in the priority list 2, Soya bean flour and meal would be treated as the product needed to be promoted primarily in the developing and least developed nations.

If we try to capture the 10% of the export share in the potential market in each of developing nations and the least developed nations listed above in the next couple of years, we would be able to increase the export values Soya bean Flour & Meal by USD 14.8 million, which is 22% of the total exports value of Soya bean Flour & Meal currently.

Similarly if we target to capture 25% of the share in each of the developing nations and the LDC’s in long run, it may bring us to the additional export orders of USD 37.1 millions, which is around 55% of the total exports value of Soya bean Flour & Meal currently.

Conclusion

In this study, we came to know about the three facts broadly. The first fact is that significant value of monetary resources are being out flowed in the overall development and export promotion of the Processed Agricultural food and Allied Products. The second fact which ahs clear from the study is that we are lagging in the exports, despite our competitiveness and besides the availability of the ample global demand. The last fact was the existence of export potential for India in the developing and least developed nations, which if utilized properly can bring a remarkable growth in the export values.

If we try to capture just 10% of the market in the developing nation and least developing nation where India don't export in general, India can increase the export values by around USD 145 million in short to medium term. Similarly, if we try to capture the 25% of the market in developing and least developed nations, in long term, we could increase the export value by around USD 335 million.

So, it is very clear that there is a demand but our export performance is not up to mark. And for this our export promotion strategies have to be revamped in order to spread our presence all across the world.