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INDIA–JAPAN Comprehensive Economic Partnership Agreement

Impact analysis for Indian Food and Beverages sector

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India-Japan Comprehensive Economic Partnership Agreement: Impact analysis for Indian Food & Beverages sector

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1. Background

The Comprehensive Economic Partnership Agreement (CEPA) between India and Japan came into force in August 2011. The Agreement aimed to eliminate tariffs on 90 percent of Japanese exports to India, and 97 percent of imports from India, including agricultural and fisheries products by 2021. The Agreement proposed to gradually reduce tariffs for over 4500 tariff lines or products at the six-digit level by 2021 on both sides. With the signing of the Agreement, it was anticipated that India–Japan trade would reach US$ 24 billion by March 2013 (Nataraj and Ashwani, 2014).

The CEPA is a comprehensive agreement covering trade in goods, trade in services, investment and economic cooperation. It is also deep in terms of levels of liberalisation, in comparison with many FTAs signed by India.

This paper looks at trade flows between India and Japan in the food and beverages sector and how these were impacted with the implementation of the Agreement. Specifically, the focus of the paper is to analyse India's exports in food and beverages (F&B) sector to Japan in the period before and after the implementation of the IJCEPA. The paper makes an analysis of the trends in exports at the disaggregated level for specific commodities of India's trade interest.

2. Existing literature on the impact of IJCEPA on India-Japan trade

A number of studies have looked at the impact of the CEPA in enhancing trade between India and Japan. Even before the Agreement was signed, Ahmed (2010) found welfare gains only for Japan, not for India. One of the main results of the paper was that Japan would not reduce its heavy reliance on the Chinese market, though India will. In general, India, compared to Japan, would gain more, if CEPA materialized by 2020. Further, Japan too will have welfare gains in spite of opening up the agriculture sector with 100 percent tariff reduction by 2020. Both countries needed to accelerate structural reforms to remove the border barriers in addition to reducing tariffs, in order to reap maximum benefit of their economic partnership.

Mukhopadhyay and Bhattacharyay (2011) evaluated the economy-wide impact of the trade integration between Japan and India using Global Trade Analysis Project (GTAP) based Computable General Equilibrium (CGE) analysis. It was found that the output will increase marginally for both India and Japan in 2020 after tariff reduction compared to Business As Usual (BAU). With successful implementation of the IJCEPA, the results expected a marginal export growth, and trade creation and improvement in the welfare of both the countries by 2020.

Bhattacharyay and Mukhopadhyay (2015) examined the benefits and challenges of the CEPA between India and Japan, to maximize gains from their complementary economies, trade and Foreign Direct Investment (FDI) relations. The study conducted an analysis of the trade intensity indices and showed that the bilateral trade flow is small considering the other country's importance in world trade, suggesting the existence of significant potential for improving trade relations. The CGE analysis of the economy wide impact of the IJCEPA suggested that tariff reductions would create a marginal increase in output growth for both India and Japan compared to the business as usual scenario. It was projected that, in terms of the effect on exports, India's exports to Japan would increase more than those of Japan to India, while positive net welfare gains are expected for both countries as a result of trade liberalization.

A few studies have been undertaken to gauge the impact of non-tariff measures (NTMs) specifically in the context of the IJCEPA. Specifically, in case of food and agricultural sector,

Mouzam (2021) identified a list of potential agricultural products in which India was likely to gain from increased exports and a list of commodities where India needs to adopt a defensive strategy in trading with Japan. It covered ten years from 2007-08 to 2017-18, and the same was divided into two sub-periods: the pre-FTA period (2007-08 to 2010-11) and the post-FTA period (2011-12 to 2017-18). Seventeen agricultural products such as chickpeas, frozen pacific salmon, ground-nut oil-cake, cottonseed oil-cake, frozen livers and roes, fennel seeds, opium sap, wheat, and meslin were identified as potential products in which India could gain from increasing its exports to Japan. Eight agricultural products were identified as sensitive products; of which five were kept under the Exclusion category by India under the IJCEPA. The study concluded that technical and financial assistance to the traders and producers of these products wold help them to match the requirements imposed by Japan of non-tariff measures and increase their exports. The authors suggested that the Government should also provide clear directives and necessary assistance to the domestic producers or processors to counter the competition from Japanese exporters.

Under the specific context of the India-Japan CEPA, Kallummal and Mouzam (2021) analysed the issue of market access and the incidence of NTMs (SPS and TBT) by India and Japan. The study used data from the web portal of the Indian Institute of Foreign Trade (IIFT); and from the World Integrated Trade Solution (WITS) and Tariff Analysis Online (TAO) database of the WTO. Dividing the study period (2007–2015) into the pre-FTA period (2007-2010) and the post-FTA period (2011–2015), the authors averaged the Most Favoured Nation (MFN) rates and import duties by both countries in the pre- and post-FTA periods for the bilaterally traded products under the tariff categories. The authors calculated the frequency index and coverage ratio by the presence of NTMs imposed on HS 4-digit product lines at HS 2-digit (Chapter) level.[1]Taking the average of MFN rates from 2007 to 2010 as the average pre-FTA tariffs and the average of 'preferential duties' committed by both countries in the trade agreement, the authors covered all agricultural and allied tariff lines under the CEPA - 788 (at HS 6-digit level) for India and 772 for Japan. The study concluded that both India and Japan committed to reduce or eliminate tariffs on products in agricultural products such as Chapters 8, 9, 12, 13, 14, 15, 20 and 21 but the coverage ratio and frequency index of both their NTMs was 100 percent. Their study confirmed the finding of Thilmany and Barrett (1997) that NTMs offered import-competing firms *de facto* protection and the IJCEPA did not reduce the incidence of NTMs between the partner countries during the study period (Kallummal and Mouzam, 2021). The authors concluded that India's exports increased, but the gains were limited only to fishery products.

[1] The Inventory approach for quantification of NTMs by the United Nations Conference on Trade and Development (UNCTAD) uses an inventory approach to quantify the impact of non-tariff barriers (NTBs) on trade; it comprises two measures, the frequency index (FI) and the coverage ratio (CR). The FI is the percentage of tariff lines (products) in a significant product group subject to one or more non-tariff measure (or non-tariff barrier). The CR is the percentage of the value of imported commodities in major product groups subject to one or more NTM.

3. Indian Food and Beverages Sector

In India, the food and beverages sector contributes to around 14 percent of country's manufacturing output and 13 percent of India's exports. USA is the top export destination for Indian processed food products and other major export destinations include Saudi Arabia, United Arab Emirates (UAE), Vietnam, and Iran.

The India food and beverage packaging market was valued at US$ 33.22 billion in 2020, and it is expected to reach US$ 156.25 billion by 2026, registering a Cumulative Average Growth Rate (CAGR) of 29.88 percent during the forecast period (2021-2026).[2] India is the largest milk producer in the world and second largest producer of fruits and vegetables, rice and wheat. India holds a comparative advantage in production as well as exports of a large number of food products.[3]

Some of the top food products exported from India are cereals followed by animal products, fresh fruits and vegetables, other processed fruits and vegetables. Among processed food products, basmati rice is the top most item exported from India, followed by non-basmati rice, guargum, wheat, other cereals etc. Among these products India's share in the world exports of wheat and other cereals is less than two percent. India is the largest exporter of guargum in the world accounting for around three-fourth share in the world export.

4. India-Japan trade in Food and Beverage products

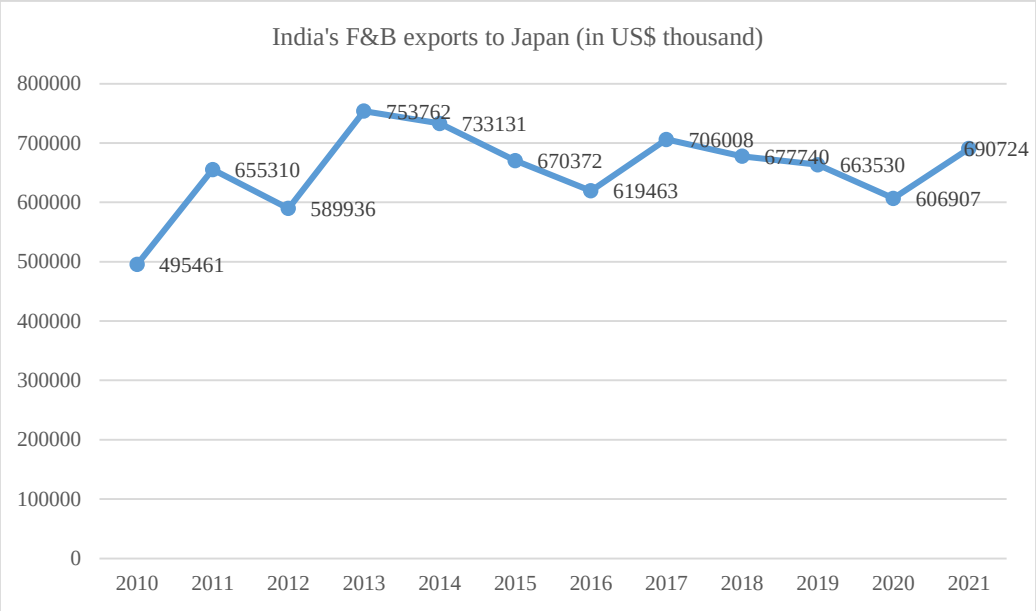
Figure 1 reveals the trends in India's F&B sector exports to Japan in value terms. India's exports to Japan increased from US$ 495.4 million in 2010 (before implementation of the CEPA) to US$ 690.7 million in 2021. During this period, the CAGR of exports was recorded at 3.07 percent. In 2021, the top three importing countries from India in F&B products were the United States of America (USA) (US$ 5512.3 million), Bangladesh (US$ 344.2 million) and China (US$ 3083 million). Japan was only the 16th largest importing country for India in these products, accounting for US$ 690.7 million worth of imports in 2021. It must be noted that Japan's low position as an importing country has been nearly same for the last few years (Table 1).

Table 2 gives the values of top 10 F&B products exported from India to the world in 2021. 'Cereals' (HS 10), 'Fish and crustaceans, molluscs and other acquatic invertebrates' (HS 03) and 'Sugars and sugar confectionary' (HS 17) constitute the top three export categories from India to the world. The next two product categories of importance for India's exports are 'Coffee, tea, matt and spices' (HS 09) and 'Meat and edible meat offal' (HS 02). In these categories of India's export interest, we look at the top three supplying countries based on Japan's import statistics for the last five years. Table 3 shows the import values for India and highlights the gap which can be closed by increasing India's exports to Japan in these categories.

[2] Mordor Intelligence, https://www.mordorintelligence.com/industry-reports/india-food-and-beverage-packaging-market#:~:text=The%20India%20food%20and%20beverage,period%20(2021%2D2026)

[3] This has been analysed in a number studies. For instance, see Jagdambe (2016); Singh et al. (2020) and; Kannan and Kumar (2022), among others.

Figure 1: India's F&B sector exports to Japan (2009-21) (in thousand US$)



Source: ITC Trade Map

Table 1: Top 20 importing markets for F&B product groups exported by India (Values in thousand US$)

Importers	2017	2018	2019	2020	2021
World	33024729	32438037	32220023	33768498	42869004
USA	4518724	4448428	4484888	4393202	5512373
Bangladesh	684354	712703	610370	1140234	3444256
China	744398	1238384	2444309	2454734	3083026
United Arab Emirates	1976213	1880137	1624657	1719395	2366152
Indonesia	509883	825706	714168	950723	1832901
Viet Nam	4887202	3548958	1923787	993380	1671150
Saudi Arabia	1433056	1535589	1639090	1616827	1537951
Malaysia	861668	846437	838804	1122868	1429328
Nepal	671408	736893	738361	983876	1199968
Iran, Islamic Rep. of	1143133	1466169	2099757	1509846	936922
Iraq	694225	653201	706273	813369	888408
Egypt	388914	255790	496401	423265	845661
Netherlands	786091	765026	814439	704976	817297
United Kingdom	799238	665173	690377	716489	772349
Sri Lanka	529361	438830	383905	462948	719332
Japan	706008	677740	663530	606907	690724
Thailand	533698	577101	576030	507103	628837
Russian Federation	525363	549446	584751	503192	594866
Sudan	235949	256811	356131	399877	507626
Canada	405820	425115	402459	475900	505593

Source: ITC Trade Map

Table 2: Top 10 export products of F&B sector from India to the world in 2021 (Values in '000 US$)

HS Code	Product Description	Gross Exports
10	Cereals	12350067
3	Fish and crustaceans, molluscs and other aquatic invertebrates	6618029
17	Sugars and sugar confectionery	4310232
9	Coffee, tea, matT and spices	4066066
2	Meat and edible meat offal	3384031
12	Oil seeds and oleaginous fruits;	1780539
15	Animal or vegetable fats and oils	1652355
8	Edible fruit and nuts; peel of citrus fruits or melons	1526831
7	Edible vegetables and certain roots	1397720
21	Miscellaneous edible preparations	1070247

Source: WITS UN Comtrade database

Table 3: Comparison of top three supplying countries (on average) in Japan's top F&B imports in 2021 (values in '000 US$)

HS 10	HS 03	HS 17	HS 09	HS 02
USA (4582612)	Chile (1263922)	Australia (429231)	Brazil (407454)	USA (3588511)
Brazil (678160)	USA (1178993)	Thailand (99760)	Colombia (208424)	Australia (1831009)
Canada (667738)	Russia (1251240)	USA (72662)	China (226299)	Canada (150174)
India (7277)	India (461428)	India (229)	India (53966)	India (0)

Source: WITS UN Comtrade database

Table 4 shows the existing and potential products of trade between India and Japan at 2-digit level. It shows India's exports to Japan at 2-digit level for the last three years and each category's share in Japan's imports from the world. Some of the categories where India's exports have been low and there clearly exists a potential to increase trade from the Indian side include the processed food categories (broadly under HS 16-22) as well as beverages (Coffee, tea, Mate and spices - HS 09). Table 5 presents India's top exported products in F&B sector at 6-digit level.

Table 4: India's F&B exports to Japan and Japan's imports from the world (2019-21) (Values in thousand US$)

Code	Description	India's exports to Japan			Japan's imports from world			Japan imports from India as a percentage of Japan's total imports in 2021
		2019	2020	2021	2019	2020	2021	
	All products	4815593	4043285	6077163	720964445	634678167	772678811	0.79
	F&B	663530	606907	690724	63703198	60072434	65940028	1.05
'02	Meat and edible meat offal	0	0	0	10843065	10284531	10987909	4.09
'03	Fish and crustaceans, molluscs and other aquatic invertebrates	419048	379874	444525	11540850	9940357	10871182	1.71
'04	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included	5145	3203	4001	1920424	1859869	1819972	3.04
'07	Edible vegetables and certain roots and tubers	4696	4492	4572	2470309	2311986	2421743	2.56
'08	Edible fruit and nuts; peel of citrus fruit or melons	69009	57133	60993	3465396	3522657	3567483	8.60
'09	Coffee, tea, maté and spices	44125	41059	46993	1754427	1649452	1837678	0.23
'10	Cereals	5441	5933	7621	5978123	5773348	7532006	0.23
'11	Products of the milling industry; malt; starches; inulin; wheat gluten	2527	3314	3695	520389	491164	499886	0.47
'12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal	10102	11249	13194	4758576	4599699	5731732	0.10
'13	Lac; gums, resins and other vegetable saps and extracts	24262	26168	27958	357740	356068	325014	0.19
'14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	8372	6110	3589	170690	219722	329975	0.07
'15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats	43881	42787	50443	1429120	1400601	1658500	0.22
'16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	6327	7837	4423	6607176	6102839	6208796	0.74
'17	Sugars and sugar confectionery	92	113	113	709206	699641	869499	1.09
'18	Cocoa and cocoa preparations	22	32	88	1002280	947584	1036883	0.08
'19	Preparations of cereals, flour, starch or milk; pastrycooks' products	1040	869	1163	1306786	1372893	1422439	0.02
'20	Preparations of vegetables, fruit, nuts or other parts of plants	9236	8429	8467	3532825	3553939	3629464	0.01
'21	Miscellaneous edible preparations	9248	7380	8138	1674111	1639964	1731674	0.01
'22	Beverages, spirits and vinegar	957	925	748	3661705	3346120	3458193	0

Source: ITC Trade Map

Table 5: Existing and potential trade between India and Japan at 6-digit level – India's top exports products in F&B sector (in thousand US$)

Code	Product label	India's exports to Japan			Japan's imports from world			India's exports to world		
		2019	2020	2021	2019	2020	2021	2019	2020	2021
	Total F&B	663530	606908	690716	63703191	60072434	65940016	32220013	33768479	42869011
'030617	Frozen shrimps and prawns, even smoked, whether in shell or not, including shrimps and prawns	333134	307899	351452	1442958	1324693	1464914	4554389	3793319	5148765
'030499	Frozen fish meat n.e.s. (excluding fillets)	76565	65311	84677	548899	444920	463187	223780	199509	250646
'080132	Fresh or dried cashew nuts, shelled	67309	55731	59332	93083	90280	102635	564571	404228	432499
'151530	Castor oil and fractions thereof, whether or not refined, but not chemically modified	27564	18239	28648	28448	19237	28453	856943	798956	1050251
'090240	Black fermented tea and partly fermented tea, whether or not flavoured, in immediate packings	21000	16614	17505	108705	91736	92648	720547	580745	565531
'130219	Vegetable saps and extracts (excluding liquorice, hops and opium)	16580	16832	17109	155803	160958	129028	321711	351777	392236
'151620	Vegetable fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified	11436	8201	13780	55686	46397	58185	88657	75433	101218
'121190	Plants, parts of plants, incl. seeds and fruits, used primarily in perfumery, in pharmacy	5251	6224	8543	203506	216054	225318	285779	347313	414425
'091030	"Turmeric ""curcuma""	6365	6847	7074	10360	9321	8496	194348	232381	225536
'130232	Mucilages and thickeners, derived from locust beans, locust bean seeds or guar seeds	5759	5689	6955	47079	46735	57942	531215	261049	339415
'151590	Fixed vegetable fats and oils and their fractions, whether or not refined, but not chemically	560	14543	6735	95220	105358	108695	66139	75993	61099
'090931	Cumin seeds, neither crushed nor ground	4612	4218	6569	13535	11712	8662	450079	504935	448845
'030743	Cuttle fish and squid, frozen, with or without shell	4878	4942	5946	584882	534098	488675	605179	467575	600464
'200799	Jams, jellies, marmalades, purées or pastes of fruit, obtained by cooking	6173	5151	5446	30352	31531	40785	161021	136695	200983
'210120	Extracts, essences and concentrates, of tea or mate, and preparations	6176	4480	3746	32226	25467	25081	58050	54463	62767
'160420	Prepared or preserved fish (excluding whole or in pieces)	5226	7273	3639	115181	115546	93624	43177	48681	58352
'091099	Spices (excluding pepper of the genus Piper, fruit of the genus Capsicum or of the genus Pimenta	2119	3044	3548	21617	17817	20584	86852	122670	138754
'120991	Vegetable seeds, for sowing	3585	3784	3500	171583	153060	154359	93475	97491	92764
'130190	Lac; natural gums, resins, gum-resins, balsams and other natural oleoresins	1861	3359	3239	3823	3995	5277	83011	103026	124141
'140420	Cotton linters	7994	5803	3076	18683	12423	9132	16258	9999	20061

Source: ITC Trade Map

4.1 Analysis of India's F&B exports and imports before and after the implementation of IJCEPA

In order to analyse India-Japan F&B trade post the IJCEPA, we further make an analysis of quantities exported from India to Japan under three timelines. These timelines are segregated into: first, before the implementation of the CEPA (2010-11 and 2011-12); second, after the implementation of the CEPA (2014-15 and 2015-16) and third, the most recent years, i.e. nearing the completion of timelines under CEPA (2020-21 and 2021-22). Tables 6-8 show the top 10 export quantities exported from India to Japan and show how the product mix of trade has changed over the years.[4]

It can be seen that sea food products (such as fish, shrimps and prawns, among others), castor oil and cashew nuts have remained the top products of export to Japan throughout this period (before and after implementation of the IJCEPA), certain product categories such as 'Flours and meals of soya beans' (HS 120810), 'Cotton linters' (HS 140420), 'Cashew nuts fresh/dried shelled', 'Vegetable fats and oils and their fractions' (HS 151620), and some cereals have begun to be exported from India to Japan in recent years.

Table 6: Top F&B exports to Japan – Quantities (in thousands) (2010-11 and 2011-12)

	HS Code	Commodity	2010-11	2011-12
1	230400	Oil-Cake and other solid residue W/N Ground/in pellets form obtained from soyabean oil extraction	11,91,395	11,94,782
2	30613	*Shrimps and prawns - frozen	32,435	37,686
3	30499	Other in fish fillets and other fish meat	2,076	18,235
4	151530	Castor oil and its fractions	13,527	15,059
5	230649	Other residues of rape or colza seeds	6,816	11,096
6	150710	Soya bean crude oil w/n degummed		8,000
7	80132	Cashew nuts fresh/dried shelled	5,878	7,054
8	50610	Ossein and bones treated with acid	5,102	6,207
9	100590	Other maize (corn)	5,237	6,126
10	160420	Other prepared or preserved fish	5,500	5,908
11	30429	Fish fillets and other fish meat	6,394	5,336
12	160300	Extracts and juices of meat fish crustaceans molluscs/other aquatic invertebrates	6,160	5,146

Source: Export Import Data Bank, Department of Commerce

[4] The analysis shows that HS 230120 (Flours meals and pellets of fish crustaceans molluscs/other aquatic invertebrates), HS 230400 (Oil-cake and other solid residue w/n ground/in pellets form obtained from soya-bean oil extraction) and HS 230690 (Oil-cake and other residues resulting from extraction of other oil-seed and olegns fruits) figure among the top export categories during these years. These are not edible food products but by-products of the food sector. These categories have also been shown under Tables 7-9 and point towards this interesting insight.

Table 7: Top F&B exports to Japan – Quantities (in thousands) (2014-15 and 2015-16)

	HS Code	Commodity	2014-15	2015-16
1	30499	Other in fish fillets and other fish meat	36,613	35,588
2	30617	Other shrimps and prawns : frozen	30,608	34,515
3	230400	Oil-cake and other solid residue w/n ground/in pellets form obtained from soya-bean oil extraction	43,007	30,677
4	230690	Oil-cake and other residues resulting from extraction of other oil-seed and olegns fruits	17,412	16,989
5	151530	Castor oil and its fractions	16,432	16,967
6	120810	Flours and meals of soya beans	45,159	16,737
7	140420	Cotton linters	9,053	11,431
8	80132	Cashew nuts fresh/dried shelled	7,412	7,826
9	151620	Vegetable fats and oils and their fractions	5,523	5,805
10	100590	Other maize (corn)	4,929	5,519
11	130232	Mucilages and thickeners w/n modified derived from locust beans locust bean seeds/guar seeds	5,237	4,661
12	50610	Ossein and bones treated with acid	6,349	4,595

Source: Export Import Data Bank, Department of Commerce

Table 8: Top F&B exports to Japan – Quantities (in thousands) (2020-21 and 2021-22)

	HS Code	Commodity	2020-21	2021-22
1	230400	Oil-cake and other solid residue w/n ground/in pellets form obtained from soya-bean oil extraction	47,784	41,906
2	30499	Other	39,709	41,583
3	30617	Other shrimps and prawns : frozen	39,586	39,868
4	151530	Castor oil and its fractions	16,787	17,863
5	230690	Oil-cake and other residues resulting from extraction of other oil-seed and olegns fruits	19,382	16,261
6	140420	Cotton linters	6,871	8,285
7	151620	Vegetable fats and oils and their fractions	6,339	7,948
8	230120	Flours meals and pellets of fish crustaceans molluscs/other aquatic invertebrates	2,427	7,680
9	80132	Cashew nuts fresh/dried shelled	6,089	7,046
10	100590	Other maize (corn)	5,605	6,290
11	110423	Hulled, pearled, sliced/kibbled maize (corn)	4,472	4,342
12	100890	Other cereals :	4,132	4,041
13	200799	Jams, Fruit jellies, marmalades and cooked purees or pastes	2,778	3,719

Source: Export Import Data Bank, Department of Commerce

Table 9 shows gross F&B exports from India to Japan in the pre and post-CEPA years in value terms. As depicted in the last row of this Table, Japan's F&B imports from India as a percentage of Japan's total imports from the world accounted for just 1.05 percent in 2021. This was only a slight increase from 0.68 percent share in 2009 and a decline from 1.16 percent share recorded in 2015. These figures indicate that the India-Japan CEPA has been insignificant in increasing India's exports to Japan in the F&B sector in the last more than one decade.

'Fish, crustaceans, molluscs and other aquatic invertebrates' (HS 03), 'Edible fruit and nuts; peel of citrus fruits or melons' (HS 08), 'Animal or vegetable fats and oils' (HS 15), 'Coffee, tea, mate and spices' (HS 09), and 'Lac; gums, resins and other vegetables' (HS 13) were among the top exported products throughout this period in value terms.

Table 9: Gross F&B exports from India to Japan (pre and post-CEPA years) (Values in thousand US$)

Code	Description	2009	2010	2015	2016	2020	2021	CAGR (2021 over 2009)
02	Meat and edible meat offal	0	48	-	-	-	-	
03	Fish, crustaceans, molluscs and other aquatic invertebrates	187778	299953	387432	381314	379564	443742	7.4
04	Dairy produce; birds' eggs; natural	3728	2526	12437	4876	3203	4001	0.6
07	Edible vegetables and certain roots	484	675	1650	2702	4492	4572	20.6
08	Edible fruit and nuts; peel of citrus fruits or melons	36768	39340	67291	57545	57133	60993	4.3
09	Coffee, tea, mate and spices	30669	43427	42836	42561	41059	46993	3.6
10	Cereals	1531	2109	5688	4490	5933	7621	14.3
11	Products of the milling industry;	532	525	1799	1780	3314	3695	17.5
12	Oil seeds and oleaginous fruits;	11293	5380	27091	20340	11249	13194	1.3
13	Lac; gums, resins and other vegetables	15875	21602	41838	32626	26168	27958	4.8
14	Vegetable plaiting materials	2192	4433	9264	7732	6110	3589	4.2
15	Animal or vegetable fats and oils	37756	36781	46651	38132	42787	50443	2.4
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	14357	30256	4161	5116	8147	5206	-8.1
17	Sugars and sugar confectionery	11	18	27	18	113	113	21.4
18	Cocoa and cocoa preparations	176		1	0	32	88	-5.6
19	Preparations of cereals, flour, starch or milk	333	281	599	910	869	1163	11.0
20	Preparations of vegetables, fruit,	2816	2453	12182	9678	8429	8467	9.6
21	Miscellaneous edible preparations	5717	5145	8608	8491	7380	8138	3.0
22	Beverages, spirits and vinegar	313	509	1089	1227	925	748	7.5
	India’s total F&B exports to Japan	352329	495461	670644	619538	606907	690724	
	Japan’s total F&B imports from world	51937148	57955377	57759606	57670823	60077956	65905667	
	Japan imports from India as a % of Japan's total imports	0.68	0.85	1.16	1.07	1.01	1.05	

Source: WITS, UN Comtrade

As for imports, among India's top F&B imports from Japan are 'Oil seeds and oleaginous fruits' (HS 12), 'Miscellaneous edible preparations' (HS 21) and 'Beverages, spirits and vinegar' (HS 22). The share of F&B imports from Japan as a proportion of India's F&B imports from the world was low at around 0.0008 percent in 2021, and did not increase much from the level in 2009 (0.0004 percent) (Table 10).

In 2021, some of India's top imported products from Japan in value terms included 'Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal' (HS 12) (US$ 11.6 million), 'Miscellaneous edible preparations' (HS 21) (US$ 2.7 million), 'Beverages, spirits and vinegar' (HS 22) (US$ 2.3 million), and 'Fish and crustaceans, molluscs and other aquatic invertebrates' (HS 03) (US$ 1.9 million). Imports in other food categories were not significant in value terms.

For various HS codes at 2 digit level, Table 11 shows India's imports from Japan as a percentage of India's imports from the world and the corresponding values for Japan's exports to the world.

Table 10: India's F&B gross imports from Japan (pre and post-CEPA years)

Code	Description	Trade Value (in thousand US$)					
		2009	2010	2015	2016	2020	2021
3	Fish and crustaceans, molluscs and other acquatic invertebrates	448	615	774	729	1151	1978
4	Dairy produce; birds' eggs; natural	0	77	-	2	1	-
7	Edible vegetables and certain roots	21	15	4	2	-	45
8	Edible fruit and nuts; peel of citrus	0	23	-	-	214	172
9	Coffee, tea, matT and spices	7	51	76	102	479	559
10	Cereals	21	-	-	-	7	-
11	Products of the milling industry	67	89	31	39	163	57
12	Oil seeds and oleaginous fruits	2112	1915	1414	1515	10031	11637
13	Lac; gums, resins and other vegetables	200	354	311	858	1610	409
14	Vegetable plaiting materials	0	-	-	-	67	1
15	Animal or vegetable fats and oils	69	289	1250	660	140	430
16	Preparations of meat, of fish	5	1	3		22	173
17	Sugars and sugar confectionery	587	394	175	258	250	307
18	Cocoa and cocoa preparations	1	35	369	313	335	1186
19	Preparations of cereals, flour	148	169	159	152	116	184
20	Preparations of vegetables, fruit,	217	296	453	439	191	102
21	Miscellaneous edible preparations	508	800	1138	880	2298	2746
22	Beverages, spirits and vinegar	84	413	298	455	1786	2357
	India's total F&B imports from Japan	4495	5536	6455	6404	18861	22343
	India's F&B imports from the world	10196295	12194704	20453091	21490152	19789625	27624361
	India's imports from India as a percentage of Japan's total imports in 2021	0.0004	0.0003	0.0003	0.0003	0.0009	0.0008

Source: WITS UN Comtrade database

Table 11: India's F&B sector imports from Japan (Values in 2021) (in '000 US$)

Product Code	Product Description	India's imports from Japan	Japan's exports to world	India's imports from world	India's imports from Japan as a % of India's imports from the world
'Total	All products	14412239	757460945	570402004	2.53
	F&B	22343	9203074	27624361	0.08
'12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal	11637	165865	829590	1.40
'21	Miscellaneous edible preparations	2746	2035625	241632	1.14
'22	Beverages, spirits and vinegar	2357	1453575	808049	0.29
'03	Fish and crustaceans, molluscs and other aquatic invertebrates	1989	1848271	143960	1.38
'18	Cocoa and cocoa preparations	1186	107282	331447	0.36
'09	Coffee, tea, maté and spices	559	244976	900606	0.06
'15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats;	430	293054	17458998	0.00
'13	Lac; gums, resins and other vegetable saps and extracts	409	42662	277637	0.15
'17	Sugars and sugar confectionery	307	165398	317715	0.10
'19	Preparations of cereals, flour, starch or milk; pastrycooks' products	184	896851	141103	0.13
'08	Edible fruit and nuts; peel of citrus fruit or melons	172	290783	3657870	0.00
'16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	162	612826	13154	1.23
'20	Preparations of vegetables, fruit, nuts or other parts of plants	102	186706	124438	0.08
'11	Products of the milling industry; malt; starches; inulin; wheat gluten	57	99424	71663	0.08
'07	Edible vegetables and certain roots and tubers	45	68782	2128192	0.00
'14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	1	2001	103001	0.00
'02	Meat and edible meat offal	0	519815	3562	0.00
'04	Dairy produce; birds' eggs; natural honey; edible products of animal origin	0	105512	30484	0.00
'10	Cereals	0	63666	41260	0.00

Source: ITC Trade Map Statistics

5. Incidence of SPS measures imposed by Japan

Among developed countries, Japan maintains strict SPS measures for horticultural products. As per an analysis by Kallummal and Mouzam (2021), between 1995 and 2021, Japan imposed 1575 NTMs while India imposed just 409 of them. Japan notified four times as many SPS to the WTO as India in the pre-FTA period and 2.5 times as many in the post-FTA period. Both India and Japan raised their SPS notifications during the period, but Japan continued raising its notifications until 2019. The category of 'Food Safety' constituted most of the SPS measures (71 percent by India and 79 percent by Japan).

Kallummal and Gurung (2020) provide summary results of 33 agricultural products based on the count of Maximum Residue Limit (MRL)[5] standards under three broad categories, MRL standards which are equal to Codex; higher than Codex and lower than Codex MRL standards. Their analysis shows that developed countries had a higher number of products with much higher restrictions on pesticides residuals. Table 12 shows the active ingredients and MRL standards for agricultural Products of 10 countries as compiled by Kallummal and Gurung (2020). The data shows that Japan imposes one of the most stringent norms and standards for agricultural products in agricultural products. The level of stringency is only next to USA, European Union (EU) and Mexico. Table 13 shows that in countries such as the EU and the USA, 33 agricultural products belonged to higher than the Codex category, followed by Japan with 32 and Australia with 28 products.

Table 12: Agricultural Products and Active Ingredients – MRL Standards of 10 countries

Countries **(1)**	**Total Active Ingredients (Number of MRLs)** **(2)**	**Number of Agricultural Products** **(3)**	**Deviation from Codex (Number of MRL standards on AIs)** **(4)**	**Deviation from Codex (Number of agricultural products)** **(5)**	**Average MRL standard per product (%)** **(6) = (3)/(2)**
Brazil	11370	470	719	6	24
Canada	15361	536	4710	72	29
EU	32408	534	21757	70	61
USA	33304	616	22653	152	54
Chile	12,342	473	1,691	9	26
India	11,068	474	417	10	23
Malaysia	10,530	474	-121	10	22
Mexico	33,304	616	22,653	152	54
Japan	22,152	454	11,501	-10	49
Australia	13,365	597	2,714	133	22
Average	19,520	524	-	-	-
Codex	10,651	464	-	0	23

Source: Kallummal and Gurung (2020), based on Global MRL Database

[5] As per the Food and Agriculture Organization of the United Nations, a maximum residue limit (MRL) is the highest level of a pesticide residue that is legally tolerated in or on food or feed when pesticides are applied correctly in accordance with Good Agricultural Practices (GAP). Here, Good Agricultural Practices (GAP) refer to a "collection of principles to apply for on-farm production and postproduction processes, resulting in safe and healthy food and non-food agriculture products, while taking into account economic, social and environmental sustainability".

Table 13: Average Deviations from Codex Alimentarius (Various countries)

Count of MRL Standards on 33 products	Canada	EU	USA	Japan	Australia	Brazil	Chile	India	Malaysia
Equal Codex	1	-	-	-	-	10	18	11	13
More than Codex	22	33	33	32	28	12	14	15	13
Less than Codex	10	-	-	1	5	11	1	7	7
Agricultural Products	33	33	33	33	33	33	33	33	33

Source: Kallummal and Gurung (2020), based on Global MRL Database

For reporting of product rejections, developed economies such as the EU, US, Australia and Japan have established a robust system of reporting the reasons for interception/rejection/withholding of consignments from exporting countries. Table 14 shows the number of SPS rejections of Indian food imports in Japan between the years 2014 and 2019. The number of rejections have decreased slightly over the years but remain high.

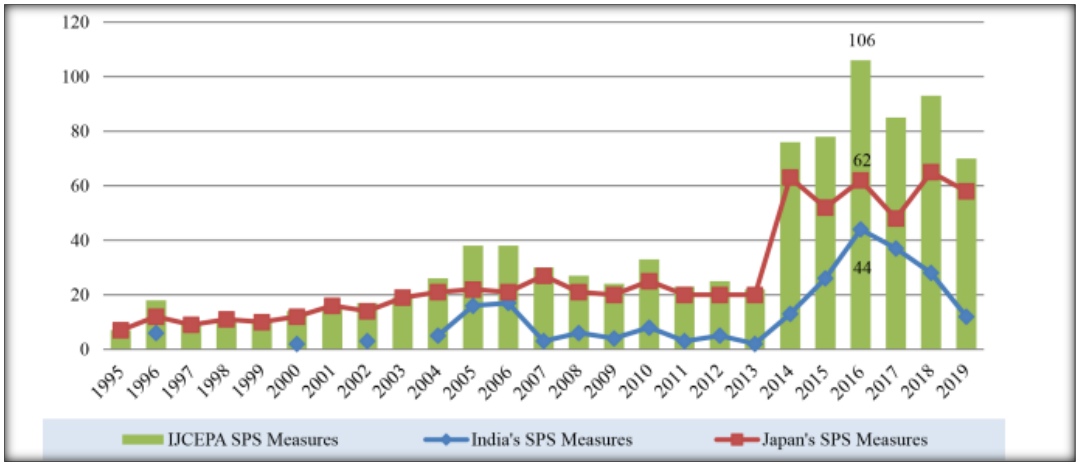
Table 14: Number of SPS Rejections of Indian food imports in Japan (2014-19)

Year	Japan
2019	21 (January-June)
2018	22
2017	30
2016	24
2015	34
2014	30

Source: Author's estimates based on Japan's Ministry of Health, Labour and Welfare's Statistics
https://www.mhlw.go.jp/english/topics/importedfoods/

As per data compiled by Kallummal and Mouzam (2021), Figure 2 shows the number of SPS measures imposed by India and Japan separately between 1995 and 2019 and during the IJCEPA implementation period. There has been a clear increase in the imposition of SPS measures right after the implementation of the IJCEPA after the year 2013. Additionally, SPS measures imposed by India are significantly lower than those imposed by Japan for these years.

Figure 2: India-Japan CEPA – SPS Measures (1995 to 2019) – Number



Source: Kallummal and Mouzam (2021)

The United States Trade Representative (USTR) publishes its National Trade Estimate Reports on Foreign Trade Barriers, recognizing important foreign barriers affecting U.S. exports of goods and services, including agricultural commodities every year. As per the USTR (2022) report, Japan has historically maintained inconvenient application requirements for pesticide Maximum Residue Level (MRL) approvals. Japan classifies fungicides applied pre-harvest as pesticides and classifies fungicides applied post-harvest as food additives. Japan's requirement that post-harvest fungicides be classified as food additives does not have a significant impact on domestic producers, as Japanese farmers do not generally apply fungicides after harvest. Japan requires products treated with a post-harvest fungicide to be labeled at the point of sale with a list of fungicides used in the production process. This can disadvantage exported products vaguely indicating to the consumers in Japan that competing domestically produced items have not been treated with fungicides. Japanese authorities' lengthy review process to register new, safe pesticides and establish science-based MRLs significantly delays the ability of exporting countries' growers to use newer crop-protection products on exports to Japan. Thus, Japan's procedures for enforcement of MRLs result in uncertainty for shippers.

In addition, Japan regulates and loosely defines its "health food" subcategory of foodstuffs. Japan's Consumer Affairs Agency establishes three categories for both domestic and imported products under the Food with Health Claims system: Food with Function Claims (FFC); Foods for Specified Health Uses (FOSHU); and Foods with Nutrient Function Claims (FNFC). FOSHU's costly and time-consuming approval process and FNFC's standards and specifications limit the range of nutritional ingredients such as vitamins and minerals that can qualify, making it difficult for the exporting nutritional supplement products to obtain either FOSHU approval or FNFC designation. The regulations on health food and dietary supplements are not in line with global best practices, and there is a need for science-based risk assessments, alignment of classification and labeling systems, cost-benefit analyses, and opportunities for stakeholder consultation in regulation development.

6. Coverage of the sector and commitments for tariff reduction under IJCEPA for tariff reduction

Overall, under the CEPA, duties were proposed to be brought down to zero in 10 years on 66.32 percent of all the products traded between the signatory countries. Under the categories HS 02-22 of the food and beverages sector, the exclusion list of Japan (where no duty concessions were proposed) mainly consisted of products such as rice, wheat, oil, milk and sugar products. On the other hand, India agreed not to reduce duties on certain categories of products under dairy products, meat, vegetables, edible oils and alcohol, among others. Table 15, Column 3, shows the coverage of India's top export categories of F&B products in the Schedule of Japan of the IJCEPA.

To assess and make a similar comparison of Japan's commitments for tariff reduction with other countries, we look at the Japan-Australia Economic Partnership Agreement (JAEPA) entered into force in January 2015. Since Australia is a country with a comparative advantage in the export of agricultural commodities, it is identified for a comparison as a similar trading partner as India for Japan. The JAEPA is considered to be one of the most liberalising trade agreements signed by Japan. Column 4 under Table 15 shows the commitments on tariff reduction made by Japan under the JAEPA in product lines of India's export interest. We have highlighted certain categories of products, marked 'X' which were excluded under the IJCEPA but were allowed access under the JAEPA. These include 'Lac; gums, resins and other vegetable saps and extracts' (HS 130219), 'Mucilages and thickeners' (HS 130232), 'Other fixed vegetable fats and oils and their fractions' (HS 151590), 'Other Jams, jellies, marmalades, purées or pastes of fruit, obtained by cooking, containing added sugar' (HS 200799), 'Extracts, essences and concentrates, of tea or mate, and preparations with a basis of tea or maté' (HS 210120) and 'Prepared or preserved fish, of *Nishin* or *Tara*' (HS 160420). India should particularly seek commitment for tariff reduction from Japan under these product lines in its future negotiations.

Table 15: Status of India's top exported products in Japan's Schedule of Commitments under IJCEPA and JAEPA

Product Code (1)	Product Description (2)	IJCEPA (3)	JAEPA (4)
'030617	Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns	X	A
'030499	Frozen fish meat n.e.s. (excluding fillets)	X, B7, B10	X, A, R
'080132	Fresh or dried cashew nuts, shelled	A	A
'151530	Castor oil and fractions thereof, whether or not refined, but not chemically modified	A	A, B10
'090240	Black fermented tea and partly fermented tea, whether or not flavoured	B10	A, B10
'130219	Vegetable saps and extracts (excluding liquorice, hops and opium)	B10, A, X	B7, B15, A
'151620	Vegetable fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified	A	A
'121190	Plants, parts of plants, incl. seeds and fruits	A	A
'091030	"Turmeric ""curcuma"	A	A
'130232	Mucilages and thickeners, derived from locust beans, locust bean seeds or guar seeds	X	A
'151590	Other fixed vegetable fats and oils and their fractions, whether or not refined, but not chemically	A, X	A
'090931	Cumin seeds, neither crushed nor ground	A	A
'030743	Cuttle fish and squid, frozen, with or without shell	X	X
'200799	Other Jams, jellies, marmalades, purées or pastes of fruit, obtained by cooking, containing added sugar	X	B
'210120	Extracts, essences and concentrates, of tea or mate, and preparations	A, B10, X	A
'160420	Prepared or preserved fish (excluding whole or in pieces)	X, B10	A
'091099	Spices (excluding pepper of the genus Piper, fruit of the genus Capsicum or of the genus Pimenta)	B10, A	A
'120991	Vegetable seeds, for sowing	A	A
'130190	Lac; natural gums, resins, gum-resins, balsams and other natural oleoresins	A	A
'140420	Cotton linters	A	A
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	X	X
'090111	Coffee (excluding roasted and decaffeinated)	A	A

Note: (a) A - Originating goods to be free of customs duty on the date of entry into force of the Agreement;
(b) B - Originating goods provided for in the items in staging category "B" shall be eliminated entirely and such goods shall be free of customs duty on the date of entry into force of this Agreement;
(c) B7 - Originating goods whose tariff was scheduled to be eliminated in eight equal annual instalments from the Base Rate to free;
(d) B10 - Goods whose tariff was scheduled to be eliminated, from Base Rate to free, in 11 equal annual instalments;
(e) B15 - Goods whose tariff was scheduled to be eliminated, from Base Rate to free, in 16 equal annual instalments;
(f) X - Goods excluded from any commitment of reduction or elimination of customs duties;
(g) R - Goods to be excluded from any tariff commitment, and the customs duties on those originating goods to be subject to negotiation between the signatory parties in the fifth year following entry into force of the Agreement

Source: Author's compilation based on, 'Full Text of JAEPA', available at Department of Foreign Affairs and Trade, Australia, https://www.dfat.gov.au/trade/agreements/in-force/jaepa/full-text/Pages/full-text-of-jaepa; and Schedules of Commitments, Ministry of Foreign Affairs of Japan, https://www.mofa.go.jp/region/asia-paci/india/epa201102/pdfs/ijcepa_x01_e.pdf

7. Conclusion

The CEPA is a comprehensive agreement covering trade in goods, trade in services, investment and economic cooperation. It is also fairly deep in terms of levels of liberalisation, at least in comparison with many FTAs signed by India. In the agricultural and allied sector (inclusive of fisheries), India excluded 36 percent of its products and Japan 50 percent.

The analysis made in this paper shows that, overall, Japan's F&B imports from India as a percentage of Japan's total imports from the world accounted for just 1.05 percent in 2021. This is only a slight increase from 0.68 percent share in 2009 and a decline from 1.16 percent share in 2015. The share of F&B imports from Japan as a proportion of India's F&B imports from the world also remains low at around 0.0008 percent (2021), which has again not increased much from the level in 2009 (0.0004 percent). The trade trends indicate that the India-Japan CEPA has been insignificant in increasing India's exports to Japan in the F&B sector in the last more than one decade.

Sea food products (such as fish, shrimps and prawns, among others), castor oil and cashew nuts have remained the top products of export to Japan throughout the 12 year study period considered in this paper (before and after implementation of the IJCEPA). Certain product categories such as 'Flours and meals of soya beans' (HS 120810), 'Cotton linters' (HS 140420), 'Cashew nuts fresh/dried shelled', 'Vegetable fats and oils and their fractions' (HS 151620), and some cereals have begun to be exported from India to Japan in recent years.

In the upcoming trade negotiations with Japan, India should seek to achieve 'Equivalence' in NTM (SPS) issues[6] at the time of reviewing the IJCEPA in future. India should explore the scope for regulatory collaboration to achieve equivalence in SPS measures with Japan. In addition, India should ask Japan for tariff reduction commitments under categories such as 'Lac; gums, resins and other vegetable saps and extracts' (HS 130219), 'Other fixed vegetable fats and oils and their fractions' (HS 151590), and processed food categories such as 'Mucilages and thickeners' (HS 130232), 'Other Jams, jellies, marmalades, purées or pastes of fruit, obtained by cooking, containing added sugar' (HS 200799), 'Extracts, essences and concentrates, of tea or mate, and preparations with a basis of tea or maté' (HS 210120) and 'Prepared or preserved fish, of *Nishin* or *Tara*' (HS 160420).

Globally, India is at the lower end of the agricultural export value chains. In agricultural products, India lacks in terms of uniformity and standardisation and the ability to move up the value chain. There are also issues related to lack of traceability of products and several infrastructural bottlenecks in the sector. For instance, the country lacks an end-to-end cold chain network which is considered important in reducing the post-harvest and distribution losses. India should work to enhance its export competitiveness, knowledge of its exporters and creating a sustainable food supply chain with proper traceability. Emphasis should be laid on quality and on meeting the importing country requirements. More investment needs to take place in food processing machinery, grading and packaging. In addition, India needs to invest in capacity building programmes throughout the value chain in agriculture sector and encourage increased application of globally accepted Good Agricultural Practices (GAP).

[6] 'Equivalence' as defined in Article 4 of the 'WTO Agreement on the Application of Sanitary and Phytosanitary Measures (SPS Agreement)'. The Article states that 'Members shall accept the sanitary or phytosanitary measures of other Members as equivalent, even if these measures differ from their own or from those used by other Members trading in the same product, if the exporting Member objectively demonstrates to the importing Member that its measures achieve the importing Member's appropriate level of sanitary or phytosanitary protection.' For details, see Text of the SPS Agreement, https://www.wto.org/english/tratop_e/sps_e/spsagr_e.htm

India's exporters and industry associations should make efforts to promote marketing of Indian products with their international partners through trade shows and other activities. As a leading trade and investment promotion organization, the Trade Promotion Council of India (TPCI) has been working towards facilitating the growth of Indian industry with global investment and trade opportunities. In partnership with various stakeholders, TPCI provides strategies for expanding business internationally, by organizing specialized business events and conducting marketing events to showcase Indian products to many countries, including Japan.

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