



Department of MSME & Export Promotion, Uttar Pradesh

**Draft District Export Action Plan, Bareilly,
Uttar Pradesh**

Knowledge Partner



विदेश व्यापार महानिदेशालय
DIRECTORATE GENERAL OF
FOREIGN TRADE

Districts
as Export Hubs

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Building a better
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Preface

This district export plan for Bareilly District is being prepared as a part of Developing District as Export Hub under the District Export Hub Scheme initiated by the Ministry of Commerce & Industry, Govt of India, and state Government of Uttar Pradesh. Hon'ble Prime Minister in his Independence Day Speech on 15th August 2019, had, inter- alia observed that each of our district has a diverse identity and potential for targeting global markets and there is a need for converting each district into potential export hubs. In order to implement Hon'ble PM's vision for each district, Department of Commerce has mandated the Directorate General of Foreign Trade to work with State Government and District Level authorities to promote the Agra district as an export hub. In view of above, a District Level Export Promotion Committee has been formed by the office of DIC, Bareilly under the chairmanship of District Magistrate. With the said objective, 'District Export Action Plan' has been prepared and being presented to concerned stakeholders.

The report encompasses in-depth information on Bareilly district's geographic, and demographic, along with key statistics of prominent exporting products of district, gaps identified basis diagnostic survey, recommendations proposed to mitigate the gaps and action plans required to implement those recommendations.

The report provides insights into exports from the cluster, via analysing exports over the last five years from India and UP for the respective product. The report also shares insights on availability of raw material, technology upgradation, infrastructure, designing, packaging, access to finance, skill development etc. Besides the detailed action plans, the timeline and responsibility matrix has also been defined with implementation schedule to give implementation roadmap of the product.

For this desired purpose, an extensive primary and secondary research was conducted. The report has been prepared in co-ordination with the Office of DGFT, Kanpur and Uttar Pradesh Export promotion Bureau (UPEPB). The data has been sourced from multiple avenues, including but not limited to data provided by office of DGFT, Kanpur, UAM data (2019), DICs, 2011 Census of India, Diagnostic Study Reports, stakeholder consultation and several other secondary resources.

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1. Vision of Districts as Export Hubs

“Each district of our country has a potential equal to that of one country, each of our districts has the capacity equal to a small country in the world. why should each district not think of becoming an export hub? . . Each of our districts has a diverse identity and potential for global market”

- *Honourable Prime Minister of India, Shri Narendra Modi*

Foreign trade from India constitutes of 45% of its GDP. Until 2019, only the central government was engaged in the decision making of foreign trade, without any participation or involvement of state and/or district stakeholders. However, now, understanding that there are diverse elements that contribute towards an enabling and conducive foreign trade environment; the central government has identified that with policy & strategy, active support of the state governments and district administrations are also equally required.

Thus, to decentralize the existing activities, to boost local production & its exports and to ensure active participation of state & district stakeholders, vision of district as export hubs was put to action. Department of Commerce, through Directorate General of Foreign Trade (DGFT) is working with the State / UT Governments to achieve this objective.

DGFT and UPEPB have aimed at synergising their efforts to identify the key products, export trends and challenges. Further in order to minimize the challenges, quantify the exports and outline export strategy; a detailed district-wise Export Action Plan has been made for all 75 districts of UP.

2. District Profile

Bareilly is a city in the northern Indian state of Uttar Pradesh, located near Ramganga. It is a commissionerate district and falls under geographical region Rohilkhand. The city is 252 kilometres (157 mi) north of the state capital, Lucknow, and 250 kilometres (155 mi) east of the national capital, New Delhi. It is the seventh-largest metropolis of Uttar Pradesh and the 50th-largest city of India. Bareilly also figured among the ambitious 100 Smart City project in India. The city is also known by the name Nath Nagri (known for the four Shiva temples located in four corners of the region – Dhopeswar Nath, Madni Nath, Alakha Nath and Trivati Nath), Bareilly Sharif (AlaHazrat, ShahSharafat Miyan and KhankaheNiyazia (derived the famous Muslim Mausoleum)), Zari nagari and historically as Sanjashya (where the Buddha descended from Tushita to earth). The city is a center of furniture manufacturing and trade in cotton, cereal and sugar. Its status grew with its inclusion in the “Counter Magnets” list of the National Capital Region (NCR). The city is also known as Bans-Bareilly.¹

2.1 Geography

The Bareilly district is lying between 78.23° longitude East and 28.10° latitude North. It covers an area of 4120 sq.km. The district is bounded on the North by the Nanital district of Uttranchal, on the South by Badaun district, on the East by Pilibhit & Shahjahanpur districts and on the West by Rampur district. The Ramganga River makes the natural boundaries with Badaun district. Situated on the national highway 24. It is well connected by Railways & Roadways. Ramganga is the main river of the district and Bahgul, Shankh, Devrania, Nakatia, Kailasi are some other rivers flowing through the district.²

¹ bareilly.nic.in/about-district

² bareilly.nic.in/about-district

2.2 Connectivity

- ▶ **Air:** Bareilly Airport located 6km north of the city is well equipped to carry air traffic. Regular flights to Delhi, Mumbai and Bengaluru are operating from Bareilly.
- ▶ **Rail:** Bareilly is a major rail junction connecting the northern and north-east lines. Trains from the north (including Jammu Tawi and Amritsar) and Delhi running east and northeast (to Gorakhpur, Barauni, Howrah, Guwahati and Dibrugarh) pass through Bareilly, and the city is also on the route from Uttarakhand to Agra and Mathura via Budaun. Many trains to railway stations in Uttarakhand pass through Bareilly.
- ▶ **Road:** Bareilly is well-connected through the railways and road network. The city lies on the National Highway 30 (NH 30 - according to the new National Highway system in India). Bareilly is on the Moradabad-Lucknow route.

2.3 Topography & Agriculture

Bareilly district occupies a part of Ram Ganga sub-basin of Ganga basin being close to the complex watershed of the main Himalayas. In the last few decades, with the rapid urbanisation, expanding industrialisation and increase in agricultural activities in the district, the demand of water has increased manifold. Since the ground water is the most dynamic natural resource for a dependable urban / rural water supply and assured irrigation.³

3. Industrial profile of the district

Bareilly is a metro city in the northern Indian state of Uttar Pradesh. Standing on the Ramganga river, it is the headquarters of Bareilly Division and is a centre for the manufacture of furniture and zari. Geographically it forms the outer gateway to enter Uttarakhand State. Bareilly is the 4th city of Uttar Pradesh which has CNG fuel stations, after Lucknow, Kanpur, and Agra. Bareilly is the 7th largest metropolitan city of Uttar Pradesh and 50th largest metropolitan city of India. This fast-growing city is also known as Bans-Bareilly, due to its big bamboo market. Bareilly is also known as the counter-magnet city because it is equidistant from New Delhi and Lucknow and has a lot of potential for setting up industries to attract people to settle.

The most prominent MSME sectors in the district are: Agro-based, cotton textile, woollen, silk, artificial thread-based clothes, ready-made garments, embroidery, wooden, wood-based paper and paper-based product.

The industrial Landscape of the district is as follows

Table 1: Industries details⁴

Industry	Functional Units	Employment (Nos)	Investment (Rs. Cr)
Readymade garments & embroidery - Zari-zardozi	3158	15312	70
Agro based	1607	21,500	9.37
Leather based	21	350	3
Jute & jute based	8	40	0.40

The most prominent sector is the readymade garments & embroidery - Zari-zardozi with around 3158 units employing 15312 with an investment of INR 70 Crs. This is followed by the wood and wood based and Agro based industry.

³ http://cgwb.gov.in/District_Profile/UP/Bareilly.pdf

⁴ District Industrial Profile(FY 2011-2012) - MSME-DI Institute, Agra; DIC, Bareilly

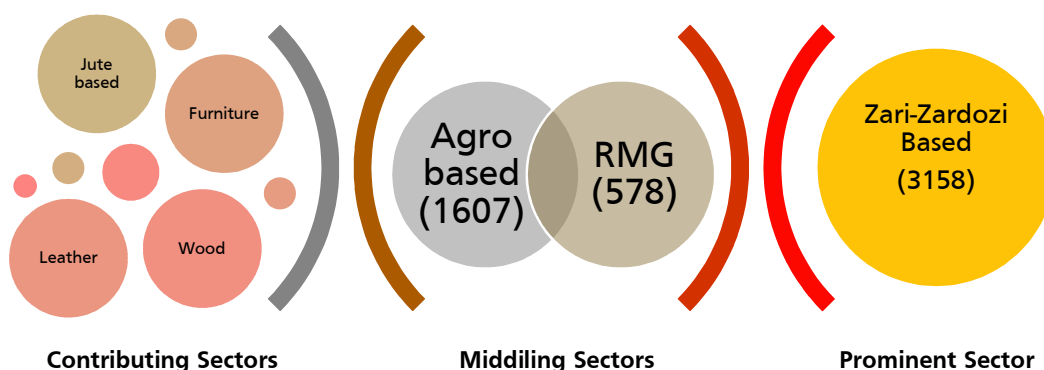


Figure 1: MSME landscape of the district

Out of total population of 4448359 (2011 census), 1401971 are working population. Out of total working population, ~50% are cultivators and agricultural labourers. This indicates that agriculture is the main source of income in the district.

Table 2: Occupational Distribution of Main Workers⁵

S. No.	Particulars	Bareilly	%
1	Cultivators	365985	26.1%
2	Agriculture Laborer's	326376	23.3%
3	Household Industry Workers	131699	9.4%
4	Others	577911	41.2%

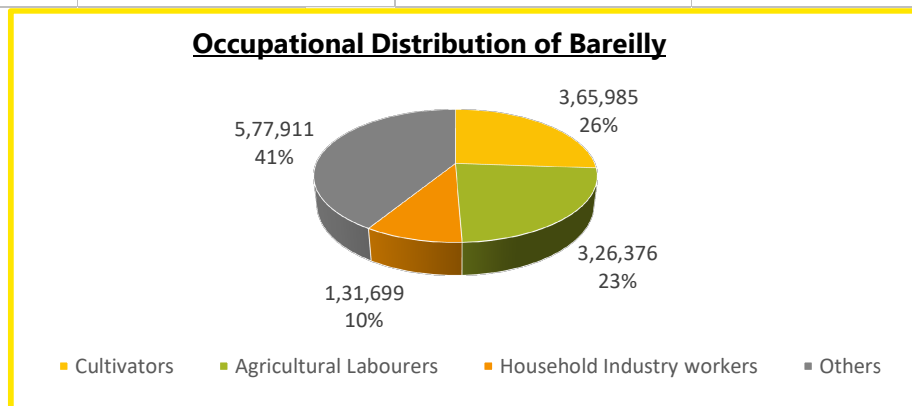


Figure 2: Occupational distribution of Bareilly

3.1 Major Exportable Product from Bareilly

The total export from Bareilly is approximately INR 742.33 Crore for the period September 2020 to November 2021. The following table depicts the value of export of major products from Bareilly

⁵District census handbook 2011 - Bareilly

Table 3: Major exportable product

S. No	Product	Export value (in INR) ⁶ from September 2020 to November, 2021
1	Frozen boneless buffalo meat	228.87 Cr
2	Menthol	301.65 Cr
3	Zari Zardozi	Indirect Export from the district
4	Rice	Indirect Export from the district
Total Export from Bareilly		532.52 Cr ⁶



4. Product 1: Zari-Zardozi

4.1 Cluster Overview

The art of zari has been associated with the aristocratic & royal persona of India for a long time. It is one of the most famous & elaborative techniques of metal embroidery. The craft of zari embroidery has been undertaken in various districts of UP since ages.

The main craft centric areas of the state are Bareilly, Lucknow, Unnao, Shahjahanpur, Chandauli and Varanasi. The craft survived at these pockets on hereditary basis and spread to nearby districts. The craft flourished in Bareilly city and nearby area and become major economic activity. Now a days, Bareilly is known as ZARI-NAGRI.

Key Facts

- 
INR 1960 Crores Approximate turnover of the cluster
- 
170000 Artisans directly or indirectly associated

4.2 Product profile

Listed below are different kinds of zari work in the region:

- | | |
|----------------|-------------------------|
| 1. Zardozi | 5. Mukaish |
| 2. Kamdani | 6. Tilla or Marori Work |
| 3. Mina Work | 7. Gota Work |
| 4. Kataoki Bel | 8. Kinari Work |

4.2.1 Product Portfolio

The following are the key products manufactured in the cluster:

Zardozi

Zardozi is a heavy and elaborate embroidery work which uses a variety of gold threads, beads, seed pearls and gota. Zardozi work is mainly done on fabrics like heavy silk, velvet and satin. It is used to embellish wedding outfits, heavy coats and other products. Zardozi embroidery is a beautiful metal embroidery, which was once used to embellish the attire of the Kings and the royals in India. It was also used to adorn walls of the royal tents, scabbards, wall hangings and the paraphernalia of regal elephants and horses.

Kamdani

Kamdani is light needle work, which is done on lighter materials like scarves, caps etc. using flattened wire. Ordinary thread is used, and the wire is pressed down to produce satin stitch effect. This effect produced is glittering and it is called hazara butti. In Kamdani, the wire is attached to a small length of thread is pulled

⁶ DGFT- District wise report for the period September 2020 to November 2021

through the fabric with a needle, beautifully working into motifs. This is also referred to as 'fancy kaam'. Kamdani is becoming a rarity and most of the craftsmen are elderly men.

Gota Work

Traditionally, gota ribbons were woven with a warp of flattened gold and silver wire and a weft of silk/ cotton threads and used as a functional trim on garments and textiles. While most believe that gota patti is the forte of Rajasthan alone, some also claim that it is, in fact, a form of Pakistani embroidery that originated in Punjab before spreading in popularity to neighbouring states. The handcraft is actually centuries-old and was traditionally the domain of the royal family & members of the court. Today, it's a must-have in festive and bridal wardrobes.

Kataoki Bel

This is a border pattern made of stiff canvas and the whole surface is filled with sequins edging . A variation of this border technique is lace made on net and filled with zari stitches & spangles. Zari or Jari, is an even thread made of fine gold or silver, used to make traditional Indian or Pakistani embroidered fabrics, through an intricate art of weaving threads. Started during the Mughal era, Zari was associated with the grand attires of Gods, Kings and literary figures in literary sources.

Mukaish

This is one of the oldest styles and is done with silver wire or badla. The wire itself serves as a needle, piercing the material to complete the stitches. A variety of designs are produced in this manner. The craft of mukaish is easily identified as a dotted pattern in silver or gold metal, embedded in the body of lightweight fabric. Today, contemporary modifications of the traditional metal work can be seen both on fashion week runways and in sought-after ethnic ensembles.

Tilla or Marori Work

Also known as Abha work and Kashmiri Tilla work. Made with golden/ silver/ antique zari thread (Kasab/ Tilla). This is the kind of embroidery where gold thread is stitched on to the surface with a needle.

Kinari Work

Also known as Gota Patti Work, Gota-Kinari work or Lappe ka Kaam. It is a type of metal embroidery that originated in Rajasthan, India. The cities of Jaipur, Bikaner, Ajmer, Udaipur, and Kota are the epicentre of uniquely styled Gota work. Elaborate patterns are created with metals like gold, silver, copper etc. A small variation is kinari work where the embellishments are done only at the edges in the form of tassels. This is done mainly by men and women of the muslim community. It is applied on to the edges of a fabric to create fancy patterns and is popularly used in edging bridal sarees and lehengas. In Rajasthan, gota work is extensively done on Dupattas and Ghagras. Outfits adorned with gota work are popularly worn at auspicious functions.

Mina Work

Mina work resembles enamel work and makes use of gold threads.

4.2.2 Status of GI Tag

The Geographical Indication Registry (GIR) has accorded the Geographical Indication (GI) registration to the intricate needle handicraft- Lucknow Zardozi and it was registered under the brand of 'Lucknow Zardozi' in the year 2013. The registration has been secured by Kalatmak Handicrafts Self Help Group Foundation, Lucknow. Bareilly District comes under geographical Identified area, but no significant progress is seen in Post G.I. Initiative in Bareilly.⁷

⁷ DGFT

4.3 Cluster Stakeholders

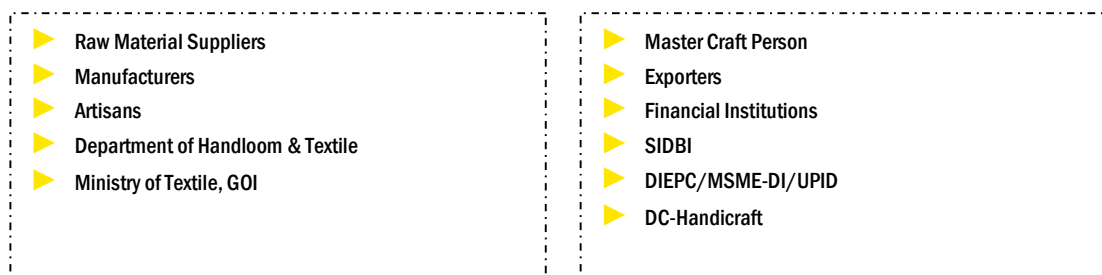


Figure 3: Cluster Stakeholders

4.3.1 Industry Associations

Following are principal Industry Associations/SPVs that are working for the development of Zari-Zardozi in Bareilly:

- ▶ Indian Institute of Fashion Technology (IIFT)
- ▶ Sahu Ram Swaroop Mahila Mahavidyalaya (SRSM)

4.4 Export Scenario

4.4.1 HS code

HS codes under which the product is exported from the district:

Table 4: HS codes for Zari-Zardozi

HS codes	Description
581092	Embroidery of man-made fibres on a textile fabric base, in the piece, in strips or in motifs.

Current Scenario

The export scenario of India and Uttar Pradesh have been analysed basis the export statistics of HS code mentioned above under which Zari-Zardozi products are exported. Alongside are the key facts⁸ pertaining to the analysed product codes.

Based on our analysis, we have identified key synergies that should be developed to expand our current reach and potential; These synergies are divided into immediate and long term. The immediate synergies include countries with Signed FTA's, high growth potential, and one is catered by India and not UP. Whereas the long-term synergies include countries with untapped market potential which can only be fulfilled if UP's exporters comply and raise the quality of the product to the highest standards, freight rates are more subsidized and major efforts is required in marketing which will require time to accommodate the same.

Key Fact of Export⁸

822,496 (USD Thousand)

Value of world exports in 2020

36,712 (USD Thousand)

Total Exports from India in 2020

9000 (USD Thousand)

Total export from UP in 2020

~24.6%

Share of UP in India's exports

⁸ <https://www.trademap.org/>

4.5 Export Potential

- ▶ The total exports of Zari-Zardozi products from Bareilly district was approx. INR 25 Lakhs in year 2018-19.⁹
- ▶ Other prominent products exported from Bareilly District are Rice and processed Meat.
- ▶ There are more than 10 HSN Codes which may be used for Exports of Zari-Zardozi but here analysis of one prominent HSN code has been done.
- ▶ The cluster has tremendous export potential, but owing to lack of proper market assessment mechanism, changing design patterns, specific demand preferences the export is very less.
- ▶ Hence, it was pointed out that the proper study of the foreign market, region specific demand patterns to be ascertained. Along with that, a common platform to be created where there can be an integration between the exporters and importers, thereby making the export ecosystem robust and effective.
- ▶ Zardozi products do not have specific HSN codes. Based on stakeholder consultations, following HSN codes were mentioned for the product.

Product: 581092: Embroidery of man-made fibres on a textile fabric base, in the piece, in strips or in motifs.

India's exports represent 4.1% of world exports for this product, its ranking in world exports is 4, behind China, Turkey, and Hongkong. The value of India's exports over the last 5 years have

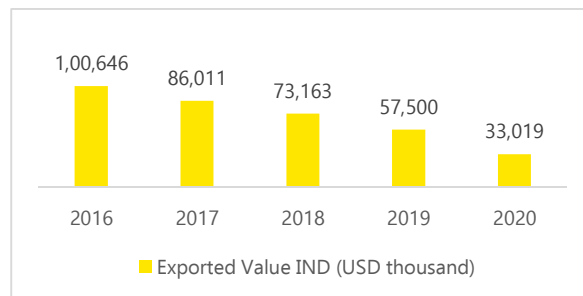


Figure 4: Exported value of India for HSN-581092

Uttar Pradesh exports this product to **UAE, Italy, Saudi Arabia, China, USA, Turkey, Hong Kong, Japan, Thailand, Nepal, and Morocco**. Below figure shows the top importers for this product (581092) in the world:

⁹ DGFT

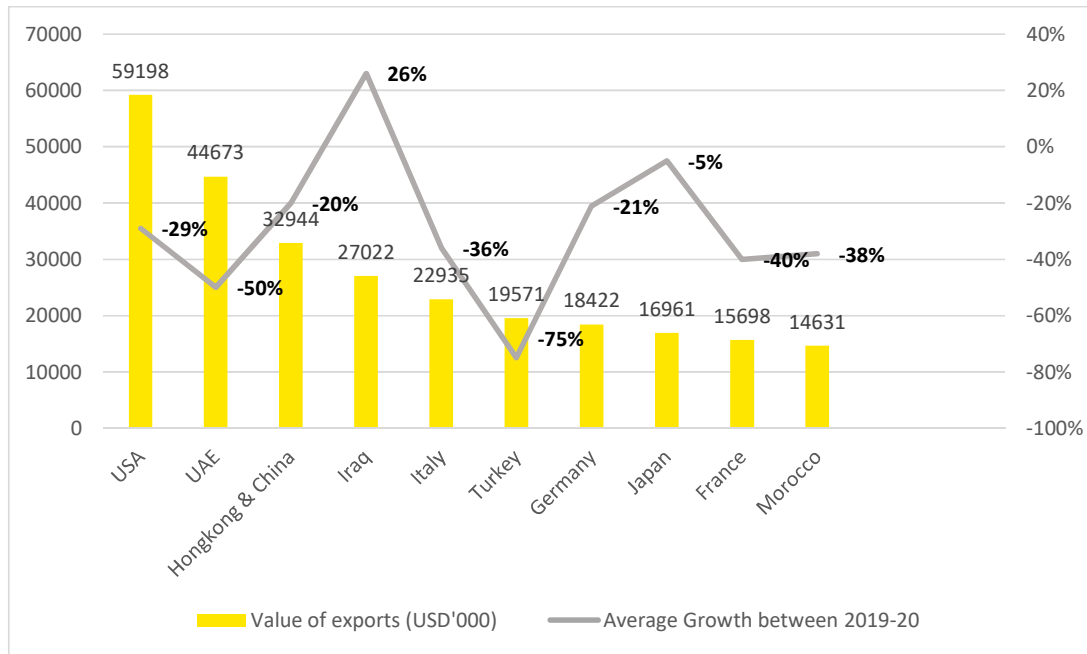


Figure 5: Top importers for this product (581092) in the world

Prominent Import Countries to whom India export this product are

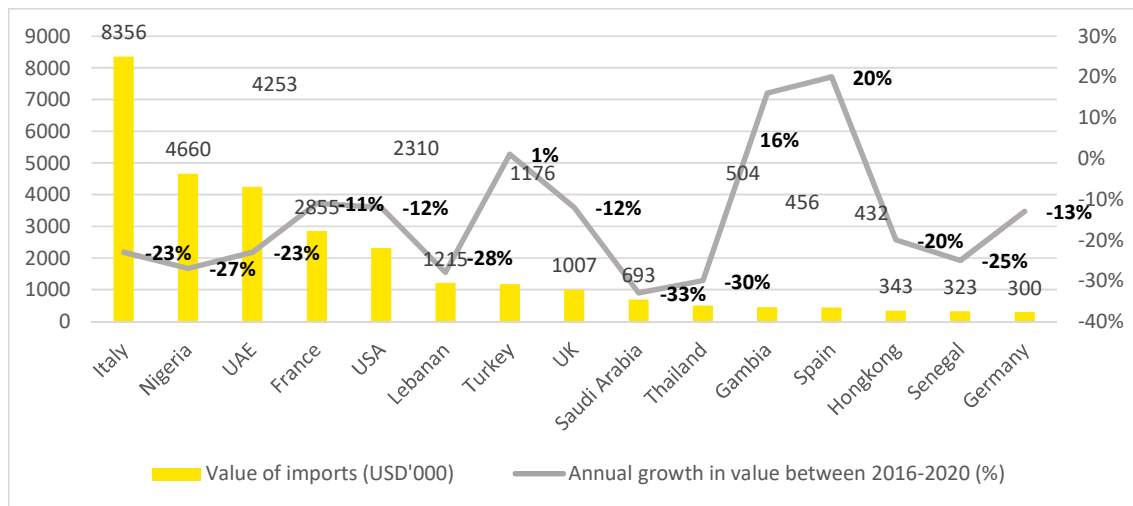


Figure 6: Top importing countries from India for HSN-581092



Figure 7: Markets for export potential

4.6 Potential Areas for Value Added Product

Product Diversification is one of the most crucial product uplifting strategies which in turn is an important part of a product's export. This plays a vital role in any products exports as it is a product uplifting strategy. Most artisans are not bothered about changing their product range and they fail to understand that it is an integral part of comprehensive marketing. Diversification can be brought in the cluster by:

1. Development of a new products:

During the product diversification new product line like Purses, Langar/Ghagra, Churidar, Punjabi, Curtains, Other dress materials like Scarf etc needs to be promoted. Additionally creation of a new product range like *zari-work* that can be laminated and attached to wooden doors, frames, wall paintings etc. They can also create gift bags, curtains with intricate *zari work*.

2. Modifications of Existing Products

It has also been found that most of the artisans use no strategy for making modifications to the existing products in the light of design and fusion. The artisans can make fusion products by blending *zari work*

with **madhubani or block prints**. They can also expand in terms of the materials they use for making the products by introducing cotton and jute into their product range.

4.7 SWOT analysis

Table 5: SWOT Analysis

Strengths	Weakness
<ul style="list-style-type: none"> ▶ Easy availability of skilled workforce particularly artisans ▶ Large potential for diversifying on variety of apparels ▶ Easy availability of raw material for mass production ▶ Availability of various government interventions for fostering the cluster 	<ul style="list-style-type: none"> ▶ Minimal technological upgradation and long production time ▶ Existence of large number of intermediaries between artisans and entrepreneurs ▶ Limited design innovation ▶ In light of competition the focus has shift from quality to quantity ▶ Lack of individuals with technical qualifications ▶ Lack of focus on increasing export
Opportunities	Threats
<ul style="list-style-type: none"> ▶ Huge scope of market expansion- domestic and foreign ▶ Scope for development of new products and modifying existing range ▶ Potential collaborations with renowned designers and design institutes for improving existing designs ▶ Increase participation in marketing events- International and domestic 	<ul style="list-style-type: none"> ▶ Tough competition with cheaper, printed & machine embroidered items ▶ Industrialization causing artisans to move to metropolitan cities in search of better paying jobs

4.8 Challenges and interventions

Parameter	Challenges	Intervention
Raw Material	<ul style="list-style-type: none"> ▶ The cost of raw materials available locally is twice in comparison to material available outside the city. ▶ Majority of the raw material is procured from Gujarat, Delhi, Maharashtra, which is indirectly procured from China due to lower costs (ranging between INR 150 – 500 / Mtr) ▶ Lack of storage facility in the cluster leading to spoilage of fabrics being used for manufacturing 	<ul style="list-style-type: none"> ▶ Establishment of a Raw Material Bank within the CFC: <ul style="list-style-type: none"> ○ Reduction in selling price at the RMB: The material can be provided with upto 10% discount ranging between INR 120 – 400 / Mtr. ▶ Creating awareness amongst daily wage artisans to leverage working capital loan from banks to procure raw material
Design	<ul style="list-style-type: none"> ▶ Technology used for designing is a 	<ul style="list-style-type: none"> ▶ Establishment of Digital Design bank and display centre within the CFC and usage of

	<p>challenge as they follow the traditional methodology. And, about 90% of the artisans manually design their products</p> <ul style="list-style-type: none"> ▶ The artisans are unaware of software which can simplify the designing process ▶ Most artisans are oblivious about of latest trends and fashion 	<p>latest software for designing the products.</p>
Technology	<ul style="list-style-type: none"> ▶ Advanced stitching and sewing machines are not available ▶ Most artisans are unaware of latest technology in the market ▶ Stringent to hold methodologies and complete neglect for information and communication technology ▶ Currently most artisans in the cluster use no machines whatsoever in the entire manufacturing process 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Establishment of a technology led common production centre with latest machinery (knitting, machines, sewing machines and washing machines) <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Onboarding renowned designers ▶ In case any CFC comes up with designing facility, it shall be prudent on its part to maintain confidentiality of the designs and its process until it is given away to the assigning unit.
Marketing	<ul style="list-style-type: none"> ▶ Lack of infrastructure for marketing and trading of the product in domestic and international markets ▶ Decreasing demand in domestic market ▶ Unavoidable dependency on wholesalers and traders ▶ Offline marketing is broadly used ▶ Lack of long-term contracts to sell the product 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Establishment of a Marketing centre within the CFC <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Awareness and outreach for participating in international fairs and exhibitions. ▶ Encourage to leverage ODOP MDA scheme for financial assistance. ▶ Organize state and national level exhibitions ▶ Collaboration with major industries, private organizations, and government bodies ▶ Collaboration with E-commerce companies ▶ Exposure visits to Kanpur, Chennai, and Italy clusters to study the best practises and understand their modus operandi and value chain. ▶ DIC and FIEO can play a pro-active role in this regard. 10% increase in every year in the number of units taking part in the trade fairs organised by FIEO and other organizations may be proposed as a target under this segment ▶ The DGFT/FIEO can set targets for participating in events per year. Example: Participation in at least 3

		international events for this sector every year to create foreign linkages and increase.
Branding	<ul style="list-style-type: none"> ▶ The zari-zardozi products are losing its charm in the domestic market with the change of trends and with no proper outreach to the masses 	<p>Soft Intervention</p> <ul style="list-style-type: none"> ▶ A documentary Film Should be developed to highlight the history and craft of Zari Zardozi work in Bareilly ▶ The Zari-zardozi products manufactured within the districts of UP can be branded as 'Nazakat-e-UP' owing to its fine work intricacies. This can be then promoted widely within and outside the country.
Packaging	<ul style="list-style-type: none"> ▶ There are no proper packaging facilities in the cluster ▶ No checks and balances are made on the quality of the product which hampers the sales and potential to export 	<p>Soft Intervention</p> <ul style="list-style-type: none"> ▶ Collaboration with Indian Institute of Packaging (IIP) will help with innovative packaging techniques customized as per the product. When, the weavers will adopt the latest techniques, it will help enthrall new customers thus, increasing the overall sales.
Quality Control	<ul style="list-style-type: none"> ▶ Unaware of global standards and quality ratings ▶ No checks and balances made for quality certification/maintenance ▶ Only exporters of the cluster try to maintain the quality standard of global market ▶ Advance testing is often outsourced 	<p>Soft Intervention</p> <ul style="list-style-type: none"> ▶ Collaboration with National institutes to support artisans in improving quality of products and helping them understand the importance of maintaining these standards. ▶ Special focus should be given on creating Brand labels with uniform quality standards. ▶ Collaboration with Quality Council of India (QCI) will help in setting the quality standard of these products, to increase the sales in international markets, and they can be exported across the globe with brand logo which ensures its authenticity.
Infrastructure	<ul style="list-style-type: none"> ▶ Artisans are mostly from poor background thus, do not have enough money to own and run looms. ▶ They live in non-cemented houses. ▶ They are also deprived of basic amenities like water and electricity. ▶ Due to constant power cuts, these weavers have installed generators in their houses which increases the production costs ▶ Lack of proper infrastructure affects the productivity of the cluster and its overall sales and growth 	<ul style="list-style-type: none"> ▶ Industrial upgradation with establishment of proper lighting, ETP, RCC drains etc. will improve the productivity of the weavers and resolve their day-to-day issues.

	<ul style="list-style-type: none"> ▶ Lack of proper lighting in the industrial area reduces the productivity of the units after the dusk. It also attracts anti-social elements. 	
Access to finance	<ul style="list-style-type: none"> ▶ Difficulty in receiving financial support ▶ Tedious paperwork and long waiting time of banks usually persuade artisans from not taking financial support from banks ▶ Insufficient working capital 	<ul style="list-style-type: none"> ▶ Interest Subvention to provide a reimbursement of five percentage points on the interest charged by the lending agency for the purpose of modernization, working capital requirement and technology up-gradation related to product manufacturing ▶ 'Revolving Working Capital Assistance' to micro units/ Weavers towards procuring raw materials and meet operating expenditure. This can be introduced through existing CFCs or DIC ▶ Collaboration with nationalized banks to facilitate quick loan approval and disbursement through digital lending. (eg. SIDBI and BoB) ▶ Awareness and outreach program for raising consciousness about existing schemes ▶ Sensitisation of banks/financial institutions to understand the product value chain while fixing WC/CC limits
Skilled manpower	<ul style="list-style-type: none"> ▶ There is no institute in the cluster which imparts training in the manufacturing process of the product ▶ Majority of the labour force engaged has gained the required skills through traditional learning ▶ The low acceptance of formal skill training and negligible recognition to trained and certified worker in terms of wages 	<ul style="list-style-type: none"> ▶ Establishment of Training centre will help facilitate training programs along with certificates to individuals about the manufacturing process of the product and thus help taking forward the age-old art <p>Soft Intervention</p> <ul style="list-style-type: none"> ▶ Cluster centric skill development programme shall be introduced and Government may allow the students to have apprentices from the age of 16 to 18 years. ▶ ODOP Skill Development Scheme could be leveraged to provide training/skill-upgradation to the artisans and toolkit distribution. ▶ Entrepreneurship and Skill Development Programme (ESDP) scheme may be leveraged.
Taxation & Subsidies	<ul style="list-style-type: none"> ▶ Higher GST on inputs leading to blockage of funds: <ul style="list-style-type: none"> ❖ GST on raw material used for Zari products (viz. 18% and 12%) is higher than the finished products (viz. 18% and 5%) ▶ High turnaround time of production cycle of Zari 	<ul style="list-style-type: none"> ▶ Abatement or Exemption of GST rates on Zari zardozi products (or MSME units) given high turnaround time of production cycle

	products leading to blockage of funds due to GST input tax	
Business Environment	<ul style="list-style-type: none"> ▶ Delay in resolutions of industrial disputes among industry stakeholders. ▶ Industrialists faces various audits (like fire, electrical safety, environment, etc.) related challenges done by various government agencies. ▶ Lack of financial and social security among the sector entrepreneur in case of contingency. ▶ Protection to the local cottage Industry from low priced dumping material by foreign manufacturers like china, Vietnam, etc. 	<ul style="list-style-type: none"> ▶ Divisional commissioner may be empowered and directed to resolve the disputes faced by industry stakeholders in time bound manner. ▶ A certain part of the revenue collection from the industry must be deployed back by creating development fund.
Exporter's issue	<ul style="list-style-type: none"> ▶ No focal point to address exporters ongoing issues. 	DIEPC to act as a focal point for all exporters issues. Deputy Commissioner Industries may be given this responsibility to monitor the cell in consultation with DGFT.
Cost Structure	<ul style="list-style-type: none"> ▶ U.P. is a land-locked state hence this increases the transportation cost which in turn adds to the overall production expenses <ul style="list-style-type: none"> ○ Since the start of Covid 19 Pandemic, the availability of containers and the Freight Charges by the Shipping lines has been main concern of the industry 	<ul style="list-style-type: none"> ▶ The DIC office should organize workshops for exporters to apprise them about Foreign Trade Policy benefits viz. Duty Exemption Scheme / Advance Authorization Scheme / Duty Free Import Authorization Scheme. ▶ The CONCOR rates are to be made available at regular intervals to the DIC office for updation of the same at the district website. ▶ The formation of the sub-committee comprising the representative of CONCOR and Deputy Commissioner Industries to understand the issue and suggest ways to help Industry. Ease of Logistics portal of FIEO has been developed to provide information about container availability and issues relating to it. The industry may be informed of this portal.
Health related challenges faced by artisans	<ul style="list-style-type: none"> ▶ No periodic health check-ups of workers in MSME and larger enterprises. ▶ Widespread addiction of alcoholism among workers. ▶ Tuberculosis is one of the major threats found among artisans/labourers ▶ Pathetic and unhygienic living conditions of artisans in different clusters across 	<p>Hard Intervention</p> <ul style="list-style-type: none"> ▶ The Government may consider about rehabilitation of the small units out of city and relocate them to some ideal place of working. <p>Soft Intervention</p> <ul style="list-style-type: none"> ▶ Ministry of Labour and Employment, GoI, MSME GoUP and/or MSME GoI may join hands with ESI Hospitals to get the medical check-ups of all the workers of the units periodically carried out. ▶ Removal of wine/liquor shops nearby artisan's locality.

	district.	
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4.9 Future Outcomes

Annual Turnover

Cluster turnover shall increase by **2 times** i.e. from **INR 1000 Cr. to INR 2000 Cr** over the span of 5 years

Cluster exports

Direct Exports from cluster shall increase upto **INR 10 Cr.** over the span of 5 years

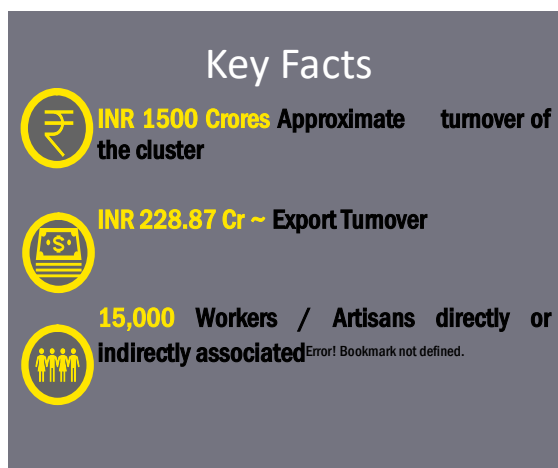
5. Product 2: Boneless meat and other edible offal of bovine animals

5.1 Cluster Overview

Bareilly is famous for processed meat. Export of processed meat from Bareilly holds a prominent place in the Indian economy. There are two slaughterhouses in Bareilly employing around 3000 workers. Buffalo meat premium and offals cuts is the main source of meat production and export.

Some of major names include Marya Frozen Agro Food Products Pvt. Ltd., Nagar Nigam Slaughterhouse Effluent Treatment Plant ETP. These units contribute for major export of processed meat from the district.

The cluster's annual turnover in 2020-21 was around INR 4,500 Cr¹⁰. The export turnover from September 2020 to November 2021 was INR 228.87 Cr¹¹. Total employment in the cluster is around 15,000.¹²



5.2 Product Profile

1. Boneless Meat of Bovine Animals
2. Other Edible Offal of Bovine Animals

5.2.1 Product Portfolio

- ▶ Chilled Boneless Buffalo Meat
- ▶ Chilled Boneless Buffalo Offal
- ▶ Frozen Boneless Buffalo Meat
- ▶ Frozen Boneless Buffalo Offal

5.3 Cluster Stakeholders

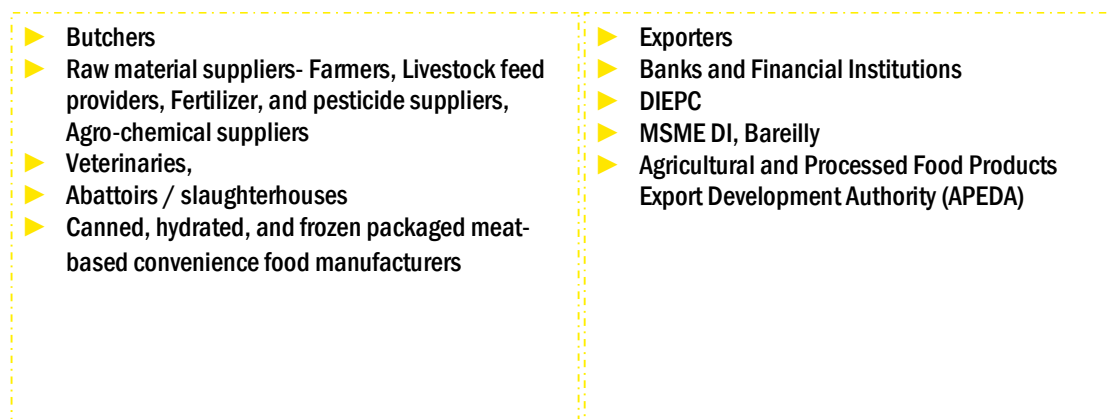


Figure 8: Cluster Stakeholders

¹⁰ Stakeholder Consultation

¹¹ DGFT Kanpur

¹² Stakeholder Consultation

Raw material supplier

The primary raw material suppliers are farmers who directly supply the disease-free animals to the slaughterhouse.

Unit owners & Workers

There are 2 slaughterhouses involved in processing and export of meat. More than 3000 workers are working in these units and are residing in Bareilly, Pilibhit and nearby areas of Bareilly cluster.

Machinery Supplier

Most of the units are having modern abattoir cum meat processing plant with most of segments are fully automated.

5.4 Export Scenario

5.4.1 HS Code

HS codes under which the product is exported from the district

Table 6: HS code

HS Code	Description	Value of exports (in INR)
020230	BONELESS MEAT OF BOVINE ANIMALS, FROZEN	228.87 Crs (From Sept. 2020 to Nov. 2021)

Current Scenario

The export scenario of World and India have been analysed basis the export statistics of HS codes 020230 & 020629 under which meat is exported. Alongside are the key facts pertaining to the analysed product code.¹³

5.4.2 Industry Associations

Following are principal industry associations that are working for the development of Meat products:

- ▶ **Indian Veterinary Research Institute (IVRI):** Indian Veterinary Research Institute (IVRI) was established on 9th December 1889 as Imperial Bacteriological Laboratory at Pune (Maharashtra) and was later shifted to

Key Fact of Export

24,712,215 (USD Thousand)

Value of world exports in 2020

2,762,444 (USD Thousand)

Total Exports from India in 2020

1,670,500 (USD Thousand)

Total Exports from UP in 2020

60.47%

Share of UP in India Exports in 2020

¹³ www.trademap.org

Mukteswar in 1893. Subsequently, for large-scale production of serum and vaccines, Izatnagar, Bareilly (UP) campus was established in 1913. The Institute was gradually expanded to the present size with its headquarters at Izatnagar (UP) and campuses at Mukteswar, Bengaluru, and regional stations at Palampur, Kolkata and Pune. Research conducted in the Institute in the areas of animal health and production with multidisciplinary approach has paid rich dividends.

- ▶ **Indian Institute of Technology, Kanpur:** It has a separate consultancy department catering to needs of SMEs created for providing services in Energy conservation methods, Market & Finance, Innovative Product Design, Packaging, IT applications, Application of Multimedia
- ▶ **Nagar Nigam Bareilly:** Nagar Nigam Bareilly has established a modern slaughterhouse at revenue village Mohanpur Thiria under tehsil Bareilly. The Modern Slaughterhouse Project has the major objective: to provide wholesome hygienic meat to the citizens of district.
- ▶ **MSME- Development Institute (MSME- DI), Agra:** MSME-DIs are the subordinate offices of Development Commissioner, MSME. These offices are responsible for assisting MSMEs financially through schemes and improving their technical skills through skill upgradation / training programmes.

5.5 Export Potential

- ▶ The total exports of boneless meat from the district as per HS code 020230 is around INR 228.87 crores from September 2020 to November 2021.¹⁴
- ▶ India's exports represent 11% of world exports for this product, its ranking in world exports is 3 under HS code 020230 and 4 under HS Code 020629.
- ▶ Other prominent products exported from Bareilly District are Zari & Rice.

Product 020230: Frozen, boneless meat of bovine animals

As per trade indicators, India's exports represent 11.2% for this product code ranking in 3rd in world exports, behind Brazil and Australia. The value exported in 2020 is USD 2,762,444 Thousand.¹⁵

However, the value of India's exports over the last 5 years have decreased by CAGR 8%. And, as per data FY 2018-19 to 2020-21 for exports from the state of UP, it is observed that there has been a decrease in the CAGR by 6.02%.

India exported this product to **Hongkong, China, Vietnam, Malaysia, Egypt, Indonesia, Iraq, Saudi Arabia,**

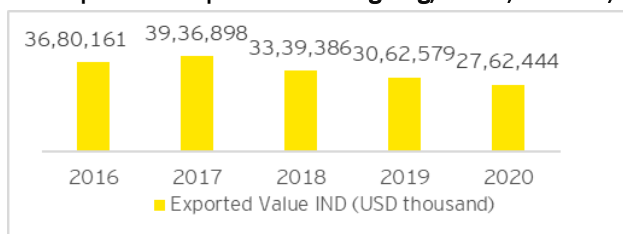


Figure 10: Exported value of India for HSN-020230

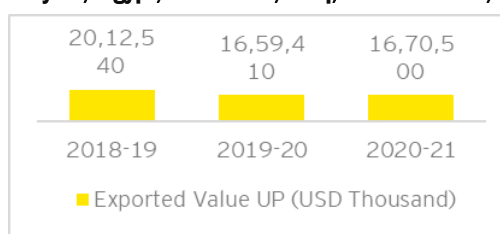


Figure 9: Exported value of UP for HSN-020230

Philippines, UAE etc.

Importers of the product:

The following figure highlights the top importers of the world along with their value of exports (2020) and annual growth in value:

¹⁴ DGFT, Kanpur

¹⁵ www.trademap.org

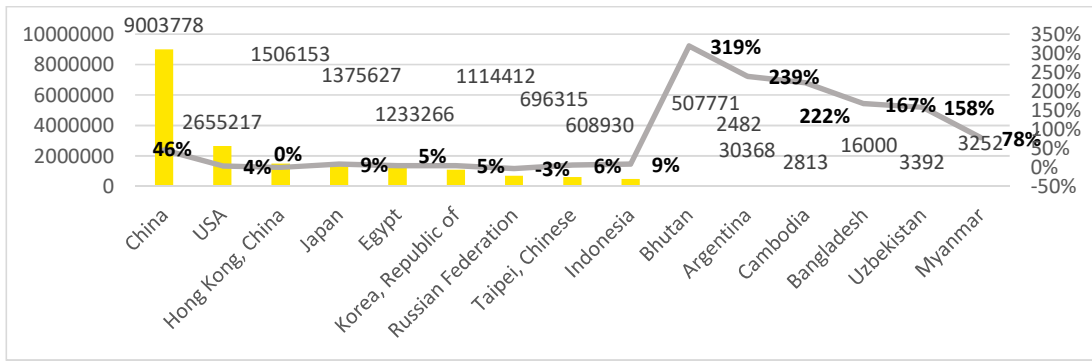


Figure 11: The top importers for this product in the world for HSN-020230

The following figure highlights the top 15 countries importing from India along with their value of exports (2020) and annual growth in value

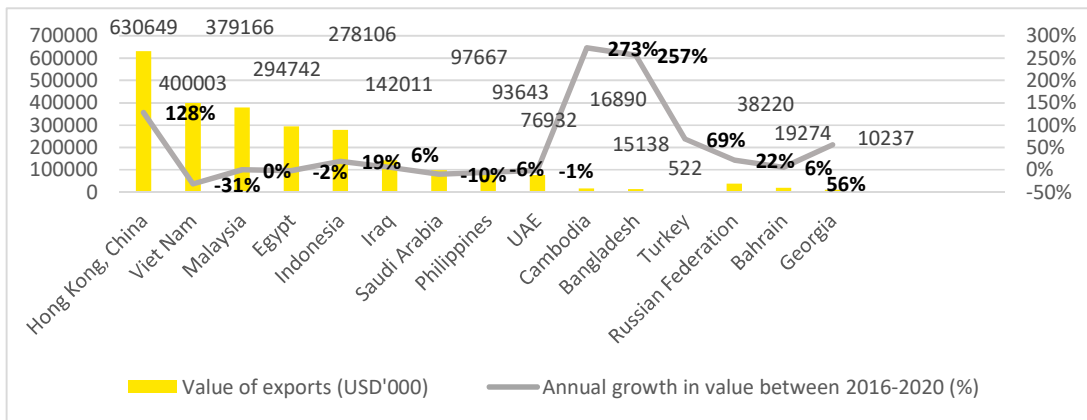


Figure 12: Prominent Import Countries to whom India export of HSN -020230

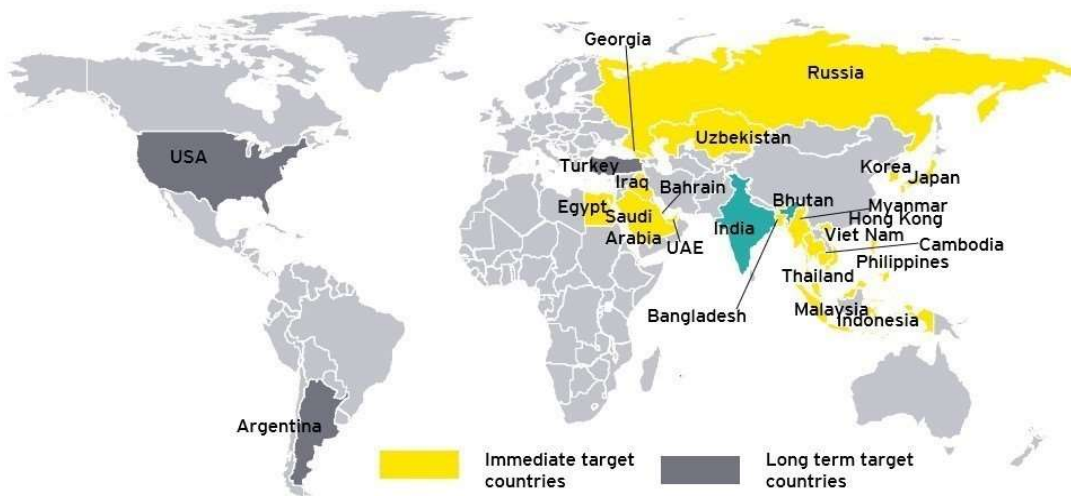


Figure 13: Markets for export potential

In the financial year 2020-21, UP exported 16,70,500 USD Thousand to **Hongkong, Vietnam, Egypt, Indonesia, Malaysia, Iraq, Saudi Arab, UAE, Philippines, Oman, Algeria, Jordan, Myanmar, Cambodia, Bahrain.** ¹⁶

5.6 SWOT Analysis

Table 7: SWOT Analysis for Frozen, boneless meat of bovine animals

Strengths	Weaknesses
<ul style="list-style-type: none"> ▶ Rich experience in meat processing ▶ Institutional Support ▶ Low-cost manpower ▶ Leadership position in export of boneless meat ▶ Favourable trade policies 	<ul style="list-style-type: none"> ▶ Inadequate Environmental compliance by smaller units ▶ Suboptimal backward integration of supply chain ▶ Lack of quality testing facility ▶ Cost of running CETP is very high ▶ Lack of awareness of govt. schemes
Opportunities	Threats
<ul style="list-style-type: none"> ▶ National & International Exhibition ▶ Increasing demand for buffalo meat in global market ▶ Exposure to new markets through fairs 	<ul style="list-style-type: none"> ▶ Strict environment compliance laws ▶ Polluting Industry ▶ International Competition ▶ Temporary or permanent closure of slaughterhouses

5.7 Challenges and interventions

Parameter	Challenges	Intervention
Technological Upgradation	<ul style="list-style-type: none"> ▶ In Bareilly, slaughterhouses and the units involved in production of meat employ traditional skilled workers who are mostly illiterate but follow the process after learning from the seniors in their units. They are not aware of the technological advancements taking place in the international industry. 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Establishment of fleshing machine and lime splitting machine in the units will resolve the issue of solid waste management and this will reduce the operating cost and ensure working capital for the unit. The solid waste can be used as by-product for other use.
Environmental Issues	<ul style="list-style-type: none"> ▶ Challenges faced by slaughterhouses/ industries in complying pollution control norms regarding treatment of effluents and TDS levels of discharge. ▶ There is lack of awareness of global environmental and social norms. 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Setting up modern technology based CETPs would ensure in reduction of effluents in TDS levels of liquid discharge. <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Awareness and outreach program for raising consciousness about environment issues due to the

¹⁶ http://www.dgcisanalytics.in/dgcis/EXIM-Analytics#/home?_g=0

Parameter	Challenges	Intervention
	<ul style="list-style-type: none"> ▶ Smaller units find it difficult to bear the operational cost of CETP. 	<p>pollutants.</p> <ul style="list-style-type: none"> ▶ Use of codes of conduct (COC) for assessment of suppliers on social and environmental compliance.
Marketing & Branding	<ul style="list-style-type: none"> ▶ Offline marketing is broadly used over online marketing. ▶ Increasing the participation in International Trade fairs ▶ Limited Market diversification ▶ Lack of knowledge of existing schemes and govt. initiatives ▶ Lack of participation in national and international events related to the sector 	<ul style="list-style-type: none"> ▶ Collaboration with retail brands like Licious, Big Basket etc. ▶ DIC and FIEO can play a pro-active role in this regard. 10% increase in every year in the number of units taking part in the trade fairs organized by FIEO and other organizations may be proposed as a target under this segment ▶ Conduct awareness workshops at block level to create awareness about schemes like International Cooperation (IC), Market Assistance Scheme (MAS) etc. which provides assistance to individuals/associations wishing to participate in marketing events ▶ The DGFT/FIEO can set targets for participating in events per year. Example: Participation in at least 3 international events for this sector every year to create foreign linkages and increase
Packaging	<ul style="list-style-type: none"> ▶ Larger units are using standard packaging material for packaging of the products, but many of the smaller units are not aware of innovative packaging. 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Common Packaging Center can be established for better and innovative packaging. ▶ Packaging materials like trays made of polystyrene, LDPE, shrink films PVC should be used for improved packaging. <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Workshops/seminars or training program for manufacturers can be organized using the MoU signed between ODOP and Indian Institute of Packaging (IIP), to upgrade their packaging techniques.
Testing and Quality Certification	<ul style="list-style-type: none"> ▶ Unaware of global standards and quality ratings. ▶ Only exporters of the cluster try to maintain the quality standard of global market. 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ A state-of-the-art Testing laboratory can be established for ensuring production of certified quality products. <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Setting the quality standard of these products using the MoU between ODOP and Quality Council of India (QCI), to increase the sales in international markets.
Exporter's issue	<ul style="list-style-type: none"> ▶ No focal point to address exporters issues. 	<ul style="list-style-type: none"> ▶ DIEPC to act as a focal point for all exporters issues. Deputy Commissioner Industries may be given this responsibility to monitor the cell in consultation with

Parameter	Challenges	Intervention
		DGFT.
Cost Structure	<ul style="list-style-type: none"> ▶ U.P. is a land-locked state. India's cost of logistics is one of the highest in the world. ▶ Since the start of Covid 19 Pandemic, the availability of containers and the Freight Charges by the Shipping lines has been the main concern of the industry 	<ul style="list-style-type: none"> ▶ The DIC office should organize workshops for exporters to apprise them about Foreign Trade Policy benefits viz. Duty Exemption Scheme / Advance Authorization Scheme / Duty Free Import Authorization Scheme. ▶ The CONCOR rates are to be made available at regular intervals to the DIC office for updation of the same at the district website. ▶ The formation of the Sub-committee comprising the representative of CONCOR and Deputy Commissioner Industries to understand the issue and suggest ways to help Industry. Ease of Logistics portal of FIEO has been developed to provide information about container availability and issues relating to it. The industry may be informed of this portal.

5.8 Future Outcomes

Annual Turnover
Increase in annual turnover from INR 1500 Crore in 2020-21 to 3500 Crore by 2025 ¹⁷

Cluster exports
The increase in export of the product from INR 228.87 Crore during the September 2020 to November 2021 to 300 Crore by 2025 ¹⁷

6. Product 3: Mentha Oil




6.1 Cluster Overview

Bareilly is also famous for mentha oil production. Export of processed product from Bareilly holds a prominent place in the Indian economy. There are five major manufactures in Bareilly registered as Kelvin Natural Mint Pvt. Ltd., B. D. Aromatics Private Limited., Agrovax Naturals Pvt Ltd., M/s Essence India, Atri Aromatics. These units are employing around 1500 workers and contribute for major export from the district.

The cluster's annual turnover in 2020-21 was around INR 450 Cr¹⁸. The export turnover from September

¹⁷ Basis Stakeholder Consultation

Key Facts

-  **INR 450 Crores** Approximate turnover of the cluster
-  **INR 301.65 Cr** ~ Export Turnover¹¹
-  **1500 Workers / Artisans** directly or indirectly associated

2020 to November 2021 was INR 301.65 Cr¹⁹. Total employment in the cluster is around 15,000.²⁰

6.2 Product Profile

Mentha Oil

6.2.1 Product Portfolio

- ▶ Menthol
- ▶ Oils of peppermint
- ▶ Oils of mint

6.3 Cluster Stakeholders

Raw material supplier

The primary raw material suppliers are farmers who directly supply the raw material to the manufacturer.

Unit owners & Workers

There are 5 manufacturers cum suppliers involved in production and export of the products. More than 1500 workers are working in these units and are residing in Bareilly and nearby areas of Bareilly cluster.

6.3.1 Industry Associations

Following are principal industry associations that are working for the development of menth products:

- ▶ **MSME- Development Institute (MSME- DI), Agra:** MSME-DIs are the subordinate offices of Development Commissioner, MSME. These offices are responsible for assisting MSMEs financially through schemes and improving their technical skills through skill upgradation / training programmes.
- ▶ **Krishi Vigyan Kendra, Bareilly:** KVK places a special emphasis on training and education of farmers, entrepreneurs, farm women, rural youth, financial institutions extension functionaries as well as voluntary organizations. The centre plays a First Line Extension role. A linkage between research and the field in augmenting the socioeconomic conditions of farmers, famwomen and livestock owners since 1985 – 86

6.4 Export Scenario

6.4.1 HS Code

HS codes under which the product is exported from the district

Table 8: HS Code

HS Code	Description	Exported Value During Sep 20 – Nov 21 ²¹
290611	MENTHOL	126.52 Cr
330124	OILS OF PEPPERMINT	31.28 Cr

¹⁸ Stakeholder Consultation

¹⁹ DGFT Kanpur

²⁰ Stakeholder Consultation

²¹ DGFT Kanpur

330125	OILS OF MINTS	143.85 Cr
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Current Scenario

The export scenario of World and India have been analysed basis the export statistics of HS codes 290611, 330124 & 330125 under which meat is exported. Alongside are the key facts pertaining to the analysed product code.²²

Key Fact of Export¹³

13,75,379 (USD Thousand)
Value of world exports in 2020

6,01,299 (USD Thousand)
Total Exports from India in 2020

43%
Share of India in exports

6.5 Export Potential

- ▶ The total exports of Mentha oil and products from the district as per HS codes 290611, 330124 & 330125 is around INR 3,01,64,93,310 crores from September 2020 to November 2021.²³
- ▶ India's exports represent 43% of world exports for this product, its ranking in world exports is 1 under HS codes 330125, 290611 & 2 under HS code 330124.²⁴

Product 290611: India exported this product to China, USA, Singapore, Netherlands, Japan, France, Philippines, Germany, Italy, Indonesia etc. Below figure shows the top importers for this product are:

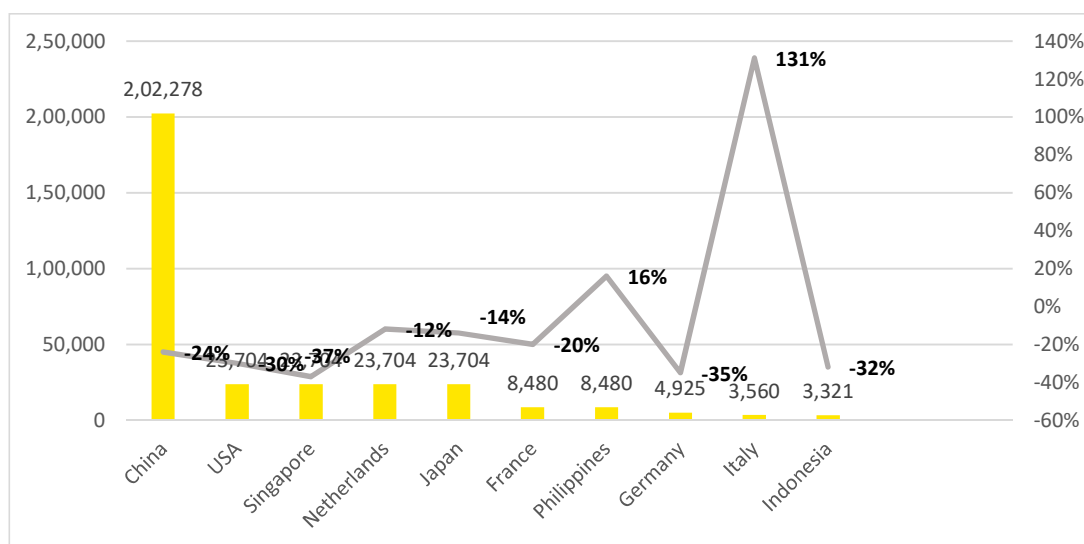


Figure 14: Top importers for this product (290611) in the world¹³

Product 330124: India exported this product to USA, China, Germany, UK, France, Indonesia, Spain, Netherlands, Canada, Australia etc. Below figure shows the top importers for this product are:

²² www.trademap.org

²³ DGFT, Kanpur

²⁴ www.trademap.org

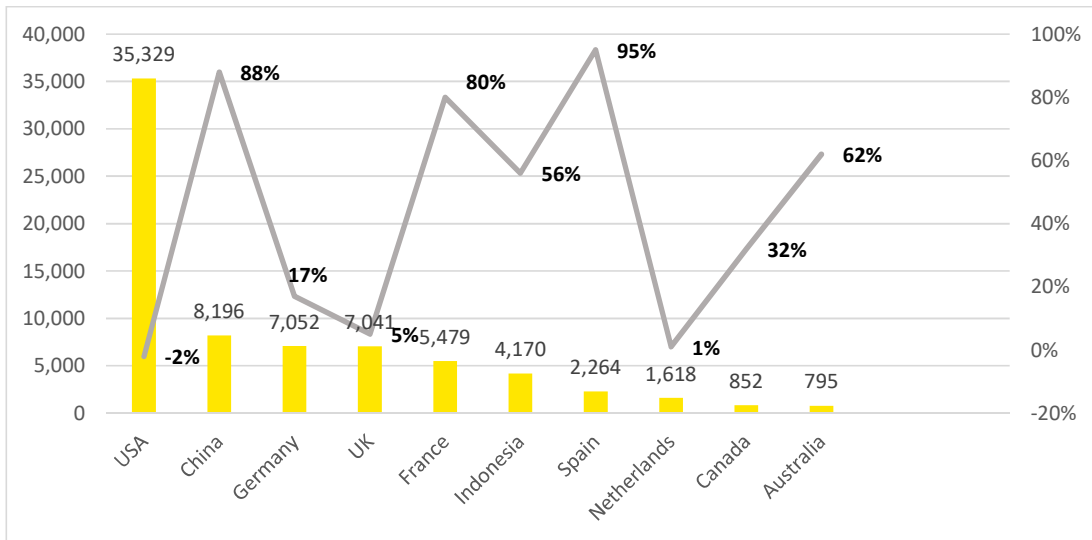


Figure 15: Top importers for this product (330124) in the world¹³

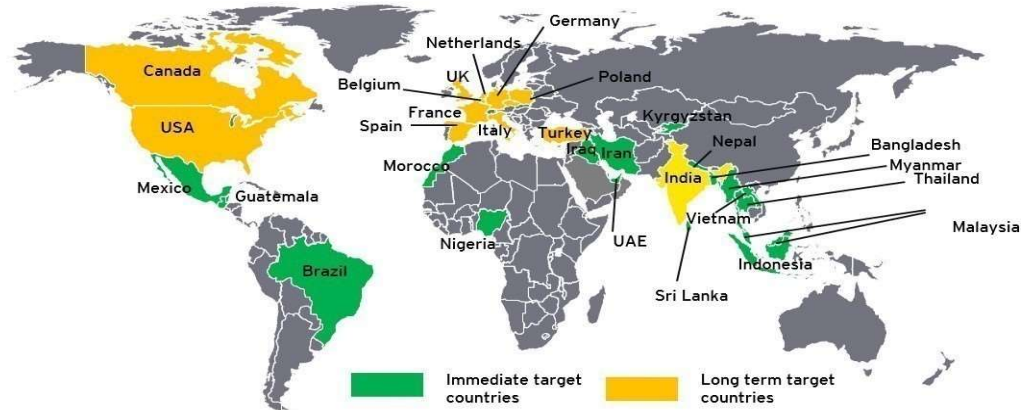


Figure 16: Markets for export potential

Product 330125: India exported this product to China, USA, Singapore, Germany, France, Japan, Brazil, Netherlands, UK, Spain etc. Below figure shows the top importers for this product are:

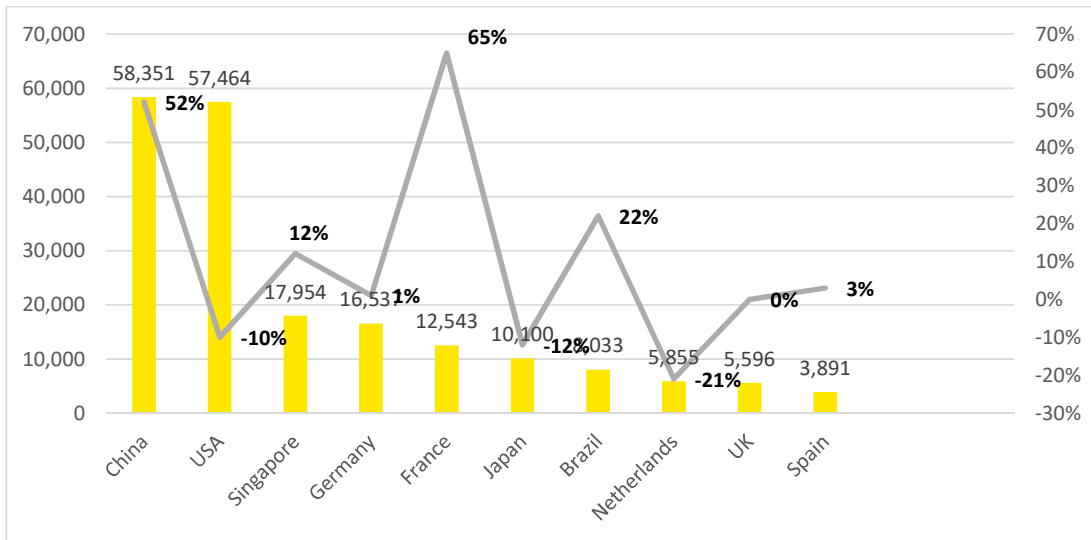


Figure 17: Top importers for this product (330124) in the world¹³



Figure 18: Markets for export potential

6.6 SWOT Analysis

Table 9: SWOT Analysis for Mentha

Strengths	Weaknesses
<ul style="list-style-type: none"> ▶ High demand in the global market ▶ India being the largest producer and exporter of mentha oil in the world having a share of 80- 85% ▶ Availability of raw material ▶ Low-cost manpower ▶ Rising demand from the regional markets like North America, Europe & Asia-Pacific 	<ul style="list-style-type: none"> ▶ Lack of advance technology and infrastructure ▶ Lack of quality testing ▶ Lack of advance packaging ▶ Suboptimal backward integration of supply chain ▶ Use of natural resources and environmental problem

Opportunities	Threats
<ul style="list-style-type: none"> ▶ National & International Exhibition ▶ Favourable trade policies ▶ Exposure to new markets through fairs ▶ Growing demand for organic and natural fragrances 	<ul style="list-style-type: none"> ▶ Strict environment compliance laws ▶ inadequate harvesting ▶ Quality and longevity issues ▶ competitor countries like China, Brazil, the US, and Japan to keep and secure its position in the global market ▶ Cost and Returns Competition

6.7 Challenges and interventions

Parameter	Challenges	Intervention
Technological Upgradation	<ul style="list-style-type: none"> ▶ Inadequate Agricultural practices ▶ Lack of large-scale organic cultivation ▶ Lack of standardization in products, Process and services ▶ Lack of Research and Development Labs ▶ Lack of advance packaging and testing lab 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Establishment of advance technology enabled common facility centre ▶ Creation of a warehouse with modern storage facilities with controlled atmosphere
Marketing & Branding	<ul style="list-style-type: none"> ▶ Offline marketing is broadly used over online marketing. ▶ Increasing the participation in International Trade fairs ▶ Limited Market diversification ▶ Lack of knowledge of existing schemes and govt. initiatives ▶ Lack of participation in national and international events related to the sector 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Setting up modern technology based CETPs would ensure in reduction of effluents in TDS levels of liquid discharge. <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Collaboration with E-commerce companies focusing on vegetables and fruit sale like Big Basket, Natures Basket etc. ▶ DIC and FIEO can play a pro-active role in this regard. 10% increase in every year in the number of units taking part in the trade fairs organised by FIEO and other organizations may be proposed as a

Parameter	Challenges	Intervention
		<p>target under this segment</p> <ul style="list-style-type: none"> ▶ Conduct awareness workshops at block level to create awareness about schemes like International Cooperation (IC), Market Assistance Scheme (MAS) etc. which provides assistance to individuals/ associations wishing to participate in marketing events ▶ The DGFT/FIEO can set targets for participating in events per year. Example: Participation in at least 3 international events for this sector every year to create foreign linkages and increase
Packaging	<ul style="list-style-type: none"> ▶ Larger units are using standard packaging material for packaging of the products, but many of the smaller units are not aware of innovative packaging. 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ Common Packaging Centre can be established for better and innovative packaging. ▶ Packaging materials like trays made of polystyrene, LDPE, shrink films PVC should be used for improved packaging. <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Workshops/seminars or training program can be organized using the MoU signed between ODOP and Indian Institute of Packaging (IIP), to upgrade their packaging techniques.
Testing and Quality Certification	<ul style="list-style-type: none"> ▶ Unaware of global standards and quality ratings. ▶ Only exporters of the cluster try to maintain the quality standard of global market. 	<p>Hard Intervention:</p> <ul style="list-style-type: none"> ▶ A state-of-the-art Testing laboratory can be established for ensuring production of certified quality products. <p>Soft Intervention:</p> <ul style="list-style-type: none"> ▶ Setting the quality standard of these products using the MoU between ODOP and Quality Council of India (QCI), to increase the sales in international markets.
FPO model approach	<ul style="list-style-type: none"> ▶ Challenges in adopting FPO model and cluster-based approach 	<ul style="list-style-type: none"> ▶ It is suggested that on the lines of State Agri Export Policy, FPO model and cluster-based approach be adopted.
Cost Structure	<ul style="list-style-type: none"> ▶ U.P. is a land-locked state. India's cost of logistics is one of the highest in the world. ▶ Since the start of Covid-19 Pandemic, the availability of containers and the Freight Charges by the Shipping lines has been the main concern of the industry 	<ul style="list-style-type: none"> ▶ The DIC office should organize workshops for exporters to apprise them about Foreign Trade Policy benefits viz. Duty Exemption Scheme / Advance Authorization Scheme / Duty Free Import Authorization Scheme. ▶ The CONCOR rates are to be made available at regular intervals to the DIC office for updating of the same at the district website. ▶ The formation of the Sub-committee comprising the representative of CONCOR and Deputy Commissioner Industries to

Parameter	Challenges	Intervention
		understand the issue and suggest ways to help Industry. Ease of Logistics portal of FIEO has been developed to provide information about container availability and issues relating to it. The industry may be informed of this portal.
Post GI Initiative	<ul style="list-style-type: none"> ▶ Lack of promotion of product after being recognised as a GI product 	<ul style="list-style-type: none"> ▶ Target to make 100 authorised users to become IEC holder in a year. (DIC) to identify such stakeholders. ▶ Organise one seminar within two months to apprise the stakeholders about the importance of Geographical Indication (GI) for increasing authorised users. (This can be done by DGFT /APEDA/FIEO/ MSME with the help of DIC)
Organic Product	<ul style="list-style-type: none"> ▶ Unawareness about Export of Organic Products 	<ul style="list-style-type: none"> ▶ APEDA may be asked to apprise the stakeholders about benefits under NPOP
SPS/TBT Standards	<ul style="list-style-type: none"> ▶ Lack of Knowledge about SPS/TBT standards 	<ul style="list-style-type: none"> ▶ Awareness program by the DGFT/ APEDA
Cost Structure	<ul style="list-style-type: none"> ▶ U.P. is a land-locked state. India's cost of logistics is one of the highest in the world. ▶ Since the start of Covid-19 Pandemic, the availability of containers and the Freight Charges by the Shipping lines has been the main concern of the industry 	<ul style="list-style-type: none"> ▶ The DIC office should organize workshops for exporters to apprise them about Foreign Trade Policy benefits viz. Duty Exemption Scheme / Advance Authorization Scheme / Duty Free Import Authorization Scheme. ▶ The CONCOR rates are to be made available at regular intervals to the DIC office for updating of the same at the district website. ▶ The formation of the Sub-committee comprising the representative of CONCOR and Deputy Commissioner Industries to understand the issue and suggest ways to help Industry. Ease of Logistics portal of FIEO has been developed to provide information about container availability and issues relating to it. The industry may be informed of this portal.
Exporter's issue	<ul style="list-style-type: none"> ▶ No focal point to address exporters issues. 	<ul style="list-style-type: none"> ▶ DIEPC to act as a focal point for all exporter's issues. Deputy Commissioner Industries may be given this responsibility to monitor the cell in consultation with DGFT.

6.8 Future Outcomes

Annual Turnover

Cluster exports

Increase in annual turnover from **INR 450 Crore** in 2020-21 to **900 Crore by 2025**²⁵

The increase in export of the product from **INR 306.65 Crore** during the September 2020 to November 2021 to **600 Crore by 2025**¹⁷

7. Product 4: Rice

7.1 Cluster Overview

The cluster is a leading producer in agriculture products like rice, wheat, sugarcane etc. The economy of the cluster is heavily dependent on agriculture products. Approximate Export turnover of the Rice, is INR 400 Cr. The major cluster of rice is located near Dhaura Tanda Village. There are around 350 units available in the district.

The cluster's annual turnover in 2020-21 was around INR 950 Cr²⁶. The export turnover from September 2020 to November 2021 was INR 400 Cr²⁷. Total employment in the cluster is around 9000.²⁸

7.2 Product Profile

Rice

7.2.1 Product Portfolio

- ▶ Basmati Rice1121
- ▶ Basmati Rice1509
- ▶ Basmati Rice1401
- ▶ Pusa Basmati
- ▶ Sugandha Basmati
- ▶ Swarnamasoori
- ▶ Sharbati

7.3 Cluster Stakeholders

Raw material supplier

The primary raw material suppliers are farmers who directly supply the raw material to the manufacturer.

²⁵ Basis Stakeholder Consultation

²⁶ Stakeholder Consultation

²⁷ Stakeholder Consultation

²⁸ Stakeholder Consultation

Key Facts



INR 950 Crores Approximate turnover of the cluster



9000 Workers / Artisans directly or indirectly associated

Unit owners & Workers

There are around 350 manufacturers cum suppliers involved in production and export of the products. More than 9000 workers are working in these units and are residing in Bareilly and nearby areas of Bareilly cluster.

7.3.1 Industry Associations

Following are principal industry associations that are working for the development of rice products:

- ▶ **MSME- Development Institute (MSME- DI), Agra:** MSME-DIs are the subordinate offices of Development Commissioner, MSME. These offices are responsible for assisting MSMEs financially through schemes and improving their technical skills through skill upgradation / training programmes.
- ▶ **Krishi Vigyan Kendra, Bareilly:** KVK places a special emphasis on training and education of farmers, entrepreneurs, farm women, rural youth, financial institutions extension functionaries as well as voluntary organizations. The center plays a First Line Extension role. A linkage between research and the field in augmenting the socioeconomic conditions of farmers, famwomen and livestock owners since 1985 – 86
- ▶ **Indian Council of Agricultural Research (ICAR):** Bareilly in 1985 under the aegis of ICAR-Indian Veterinary Institute, Izatnagar, Bareilly (U.P.), a Deemed University. ICAR-Indian Veterinary Institute, Izatnagar, Bareilly is a 130 years old pioneer research institute in the field of livestock production and veterinary sciences, which has 6 sub-stations such as Palampur, Mukteshwar, Kolkata, Bangalore, Pune and Shrinagar with the headquarter in Bareilly district.

7.4 Export Scenario

7.4.1 HS Code

HS codes under which the product is exported from the district

Table 10: HS Code

HS Code	Description
100630	Semi-milled or wholly milled rice, whether polished or glazed

Current Scenario

The export scenario of World and India have been analysed basis the export statistics of HS codes 100630 under which rice is exported. Alongside are the key facts pertaining to the analysed product code.²⁹

7.5 Export Potential

- ▶ There is no direct export in cluster based on the stakeholder consultation indirect export value of the cluster is around 900 crores.³⁰
- ▶ The total exports of Mentha oil and products from the district as per HS codes 100630 is around INR 3500 crores from September 2020 to November 2021.³¹

Key Fact of Export

20,631,291 (USD Thousand)

Value of world exports in 2020

7,484,136 (USD Thousand)

Total Exports from India in 2020

36.3%

Share of India in exports

²⁹ www.trademap.org

³⁰ Stakeholder Consultation

³¹ Stakeholder Consultation

- ▶ India's exports represent 36.3% of world exports for this product, its ranking in world exports is 1 under HS code 100630.³²

Product 100630: India exported this product to Saudi Arabia, Iran, Iraq, UAE, Benin, Yemen, Togo, USA, Nepal, Guinea etc. Below figure shows the top importers for this product are:

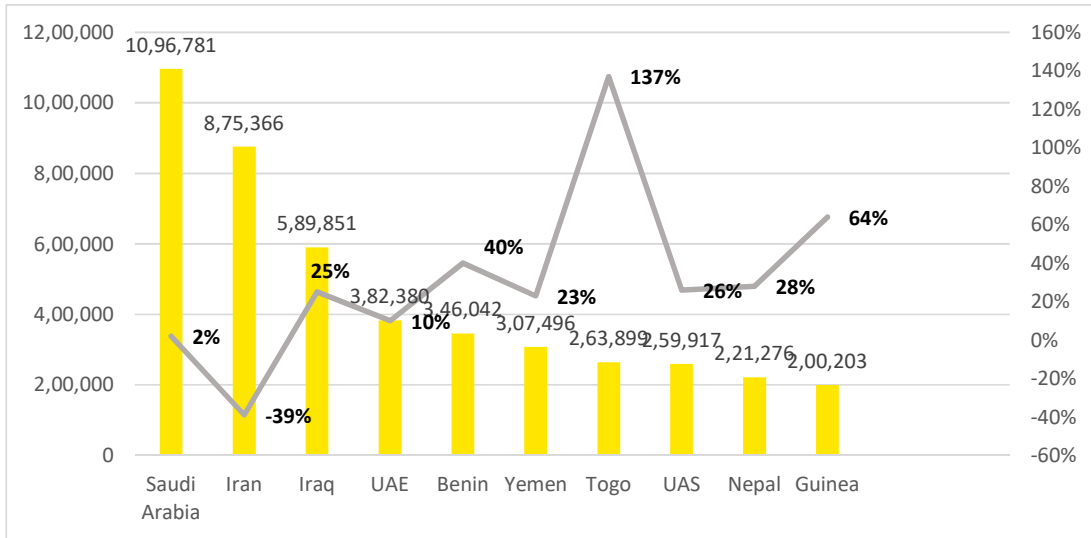


Figure 19: Top importers for this product (100630) in the world¹³



Figure 20: Markets for export potential

7.6 SWOT Analysis

Table 11: SWOT Analysis for Rice

Strengths	Weaknesses
▶ Units of the cluster are in the business for	▶ Lack of modern technology for processing

³² www.trademap.org

<ul style="list-style-type: none"> ▶ many decades ▶ Availability of skilled and cheap workforce ▶ Potential nationwide as well as globally huge market ▶ Easy availability of raw material ▶ Financial capability of the owners is sound to invest more in case of new units ▶ Increasing domestic market having demand for both low-end and high-end 	<ul style="list-style-type: none"> ▶ Workers are not getting scope to upgrade their skill ▶ Lack of direct marketing channel ▶ Units have to incur the infrastructural cost i.e. cost of transformation, poll etc for electric connection
Opportunities	Threats
<ul style="list-style-type: none"> ▶ Increased demand for the product with growing population ▶ Scope of introducing advance technology ▶ Scope of manufacturing fortified rice for new sectors by value addition to the product to go for high end market 	<ul style="list-style-type: none"> ▶ Active Involvement of middlemen ▶ Lack of vision among the unitholders

7.7 Challenges and interventions

Parameter	Challenges	Intervention
Focus on high Yielding Export Quality Rice	<ul style="list-style-type: none"> ▶ Challenges in developing high yielding export quality rice (Non-Basmati, Long grain rice) 	<p>Breeding programme may be initiated to develop high yielding export quality rice (Non-Basmati, Long Grain Rice, etc.) to enable the exporters to sustain their exports in future. Proper arrangements may be made for production of pure quality seeds and making them available to the farmers at subsidized rates/ reasonable rates.</p>
Cluster based approach	<ul style="list-style-type: none"> ▶ Challenges in Setting up of export quality belts/zones 	<ul style="list-style-type: none"> ▶ To identify export quality belts/zones for production of rice to meet the requirement of exports. As per Agriculture Export Policy of Uttar Pradesh, 2019, the cluster facilitation cell under the chairmanship of District Magistrate is responsible for defining the area of Cluster and number of Farmers/FPOs/FPCs in the cluster as per suitability and goals of export promotion. ▶ It will also be responsible for monitoring the cluster development work, promotion to increase the area under cultivation of exportable items and facilitate cluster level coordination among key departments and various stakeholders. <p>Deputy Commissioner Industries and representative of State Agricultural Department may examine the proposal for setting up at least one clusters for Rice (Non-Basmati), sugar and wheat in the district and submit the same to the state level Export Monitoring</p>

Parameter	Challenges	Intervention
		Committee.
Promotion of export of organic produce	<ul style="list-style-type: none"> ▶ Unawareness about promoting organic products 	<ul style="list-style-type: none"> ▶ It is suggested that special efforts should be made to promote the export of organic product such as Rice and sugar from this district.
Training programme to educate the cultivators	<ul style="list-style-type: none"> ▶ Unawareness about technical standards in international market 	<ul style="list-style-type: none"> ▶ Training programme to educate the cultivators about various SPS/ Technical standards in international markets ▶ The District Industry Centre in consultation with regional DGFT officer & APEDA may chalk out the programme on quarterly basis to train and education cultivators and other stake holders about SPS/ technical standards in international markets.
Distribution of Certified seeds	<ul style="list-style-type: none"> ▶ Challenges in distribution of certified seeds 	<ul style="list-style-type: none"> ▶ Distribution of Certified seeds to farmers partially through Krishi Vigyan Kendra (KVK) of Moradabad and Farmer Producers Organisation
Use of Modern technologies	<ul style="list-style-type: none"> ▶ Unawareness about use of modern technology to reduce costs and increase production 	<ul style="list-style-type: none"> ▶ Low-cost production technology may be developed (use best practices) to bring down the cost of production to enable the exporters to compete with competing countries in the international markets. State Agriculture department may take the help of State Agriculture Universities / other technical institutes of repute.
Use of Modernized Rice Mills	<ul style="list-style-type: none"> ▶ Many rice mill owners are not using modernized rice mills for better recovery and reducing the percentage of broken rice. 	<ul style="list-style-type: none"> ▶ Rice mills have not been fully modernized to ensure high milling recovery and reduce the percentage of broken rice. The conventional rice mills are having Rubber Roll Sheller in which percentage of broken rice is more than the modern rice mills that are having under Runner Sheller. Hence, head rice obtained from milling of conventional mills becomes costly due to recovery of higher percentage of broken rice. Therefore, conventional mills are required to be modernized to get recovery of higher percentage of head rice suitable for export.
Marketing & Promotion of products	<ul style="list-style-type: none"> ▶ Offline marketing is broadly used over online marketing. ▶ Increasing the participation in International Trade fairs ▶ Limited Market diversification ▶ Lack of knowledge of existing schemes and govt. initiatives ▶ Lack of participation in national and international events related to the sector 	<ul style="list-style-type: none"> ▶ Collaboration with E-commerce companies focusing on vegetables and fruit sale like Big Basket, Natures Basket etc. ▶ DIC and FIEO can play a pro-active role in this regard. 10% increase in every year in the number of units taking part in the trade fairs organised by FIEO and other organizations may be proposed as a target under this segment ▶ Conduct awareness workshops at block level to create awareness about schemes like International Cooperation (IC), Market

Parameter	Challenges	Intervention
		<p>Assistance Scheme (MAS) etc. which provides assistance to individuals/associations wishing to participate in marketing events</p> <ul style="list-style-type: none"> ▶ The DGFT/FIEO can set targets for participating in events per year. Example: Participation in at least 3 international events for this sector every year to create foreign linkages and increase
Access to Finance	<ul style="list-style-type: none"> ▶ Shortage of working capital to farmers given long cultivation cycle of Agri products ▶ The linkages with banks and financial institution in the cluster are not well established ▶ High quality, genetically modified seeds are often expensive, and farmers do not have enough capital/ credit to purchase those directly 	<ul style="list-style-type: none"> ▶ Tie up with the banks/financial institutions for better interest rates, enhanced working capital limits etc. ▶ Introducing the Kisan credit card scheme in the cluster ▶ Handholding of units in the cluster to create awareness about financing schemes viz. ODOP Margin Money scheme ▶ Introduction of revolving working capital within the cluster to help farmers procure high quality seeds and fertilizers and undertake production without hinderances
Exporter's issue	<ul style="list-style-type: none"> ▶ No focal point to address exporters issues. 	<ul style="list-style-type: none"> ▶ DIEPC to act as a focal point for all exporter's issues. Deputy Commissioner Industries may be given this responsibility to monitor the cell in consultation with DGFT.

7.8 Future Outcomes

Annual Turnover	Cluster exports
Increase in annual turnover from INR 950 Crore in 2020-21 to 1250 Crore by 2025 ³³	The increase in export of the product from INR 400 Crore during the September 2020 to November 2021 to 800 Crore by 2025 ¹⁷

8. Various Schemes being run by Export Promotion Bureau, Uttar Pradesh

A) Marketing Development Scheme (MDA)

S.No	Incentives offered	Amount of incentive against total expenditure
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³³ Basis Stakeholder Consultation

1	Participation in foreign fairs/exhibitions (total three fairs / annum) a. Stall charges b. Air fare (economy class)	a. 60% of stall charges (max 01 lac / fair) b. 50% (max 0.5lac for one person / fair)
2	Publicity, advertisement, development of website	60 % (max 0.60 lac/annum)
3	Sending of samples to foreign buyers	75 % (max 0.50 lac/annum)
4	ISO /BSO certification	50 % (max 0.75 lac/annum)

B) Gateway Port Scheme

Particulars	Details
Brief Description	Assistance is given to all manufacturing exporting units on expenses incurred on the rail transport of their goods from ICD/CFS to Gateway ports.
Eligible units	Micro, small & medium enterprises.
Incentives Offered against actual expenditure	25% of the total expenditure or Rs 6000 (20 ft' container) & Rs 12000 (40 ft' container) (whichever is less)
Maximum limit	Rs 12 lacs /unit /year
Empowered committee	District Users Committee under the chairmanship of district magistrate.

C) Air Freight Rationalization Scheme

Particulars	Details
Incentive offered	20% of the actual expenditure or Rs 50 / kg (whichever is less)
Eligible Units	Manufacturer & merchant exporter
Maximum limit	Rs 2 lacs /unit /year
Recognized Cargo Complexes	Varanasi & Lucknow

9. Action Plan

Quantifiable activity/ intervention	Responsible authority	Timeline for implementation ³⁴
Increasing the overall exports from the state		
<p>Sensitization and facilitation in availing Import/ export documents: Majority of the cluster actors though interested and sensitized on exports are unaware of Import-Export Code which is crucial for participating in global trade. While some of them are aware, they face challenges in applying. Thus, at district level, a camp should be set in every three months to help the individuals interested in trade to understand about the requisite documents required for undertaking import/ export and provide support in availing them</p>	ODOP cell, DIEPC, UPEPB and DGFT	Continuous initiative
<p>Creation of an event calendar comprising of events to be conducted in a Financial Year with a focus on international marketing events. Further, DGFT and FIEO can finalize a target to participate in at least 3 international events in a year per product category/industry (food, engineering & auto components, handicrafts, textile& apparel etc.) by utilizing schemes like IC and MAS</p>	ODOP cell, DIEPC, UPEPB and DGFT	Continuous initiative
<p>Sensitization of cluster actors:</p> <ol style="list-style-type: none"> a. The individuals of a cluster should be sensitized on the plethora of schemes³⁵ available for them for maximizing the potential of exports. Merchandise Exports from India Scheme, Service Export from India Scheme etc. provides various exemptions for facilitating exports. Further, schemes like Advance Authorization Scheme (AAS), Duty Free Import Authorization (DFIA Scheme) ensure procurement of imported duty-free raw materials b. Currently, majority of the exporters and traders focus on selling their goods to USA, UK and European countries without correctly analyzing the demand market. Thus, these cluster actors should be sensitized on target countries identified through export analysis mentioned in DAPs and EAP 	ODOP cell, DIEPC, UPEPB and DGFT	Continuous initiative
<p>DIC and FIEO can play a pro-active role in this regard. 10% increase in every year in the number of units taking part in the trade fairs organized by FIEO and other organizations may be proposed as a target</p>	DIC, UPEBP and FIEO	Intermediate

³⁴ Short term: Should be initiated within 6 months, Intermediate: to be initiated between 6- 12 months, long terms after 12 months

³⁵ List of available schemes facilitating exports: <https://cdn.s3waas.gov.in/s3555d6702c950ecb729a966504af0a635/uploads/2020/12/2020120965.pdf> and <https://www.ibef.org/blogs/indian-export-incentive-schemes>:

under this segment		
Common Facility centers (under CFC scheme of ODOP Program, TIES and NAVY scheme) to increase export	UPEPB/ODOP Cell/DIEPC	Continuous initiative
Common interventions across sectors/ clusters		
Collaboration with e-commerce companies like Amazon, ebay, Flipkart etc.	UPEPB/DIEPC/ODOP cell	Short term
MoU with QCI for defining quality standards of the products	UPEPB/DIEPC/ODOP Cell	Short term
Collaboration with IIP to define cluster-wise packing standards	UPEPB/DIEPC/ODOP cell	Short term
Sensitization of banks and bankers to help them understand the niche sectors of MSME and their specific requirements which shall help banks evaluate projects better while lending credit	UPEPB/DIEPC/ODOP Cell and banks	Short term
Introduction of revolving working capital within the cluster to help MSMEs procure raw materials and undertake production without hinderances	UPEPB/DIEPC and banks	Intermediate
Tie up with the banks/financial institutions (SIDBI, BoB etc.) for better interest rates, enhanced working capital limits etc.	UPEPB/DIEPC/ODOP Cell and banks	Intermediate
Handholding of MSMEs for increasing their awareness on schemes of state & centre and the procedure to apply to avail financial assistance	UPEPB/DIEPC	Intermediate
Sensitization of cluster actors from this sector on Make in India initiative and PLI for leveraging the assistance provided to the sector to enhance productivity and expand exports	DIEPC / UPEPB	Short term
DIEPC to act as a focal point for all exporter's issues. Deputy Commissioner Industries may be given this responsibility to monitor the cell in consultation with DGFT.	DIEPC/DGFT/UPEPB	Long term
Cost Structure: a. The DIC office should organize workshops for exporters to apprise them about Foreign Trade Policy benefits viz. Duty Exemption Scheme / Advance Authorization Scheme / Duty Free Import Authorization Scheme. b. The CONCOR rates are to be made available at regular intervals to the DIC office for updating of	DIEPC/UPEPB	Long term

the same at the district website.	DIEPC/UPEPB	Long term
c. The formation of the Sub-committee comprising the representative of CONCOR and Deputy Commissioner Industries to understand the issue and suggest ways to help Industry. Ease of Logistics portal of FIEO has been developed to provide information about container availability and issues relating to it. The industry may be informed of this portal.	DIEPC/UPEPB/FIEO	Short term
Product 1: Zari-Zardozi		
Establishment of Common Facility Centre with: a. Raw Material Bank b. Technology enabled Common Production cum Processing Center c. Design and display center with CAD/CAM facilities and space to showcase products to undertake sale d. Marketing centre for undertaking marketing events e. Training Centre	DIEPC, DGFT and ODOP Cell	Long term
Application to Directorate General of Foreign trade for a unique HSN Code for Zari-Zardozi	UPEPB/ODOP Cell / DGFT	Intermediate term
Collaboration with NIFT and NID for design inputs and support in branding initiatives	UPEPB/ODOP Cell	Long term
Promotion of post GI initiative: f. DIC to identify 100 authorized users to become IEC holder in a year g. Organize one seminar within two months to apprise the stakeholders about the importance of Geographical Indication (GI) and for increasing the authorized users	DIEPC/UPEPB/ODOP Cell	Intermediate term
Product 2: Boneless Meat and other edible offal of bovine animals		
Establishment of fleshing machine and lime splitting machine in CFC.	UPEPB/DIEPC	Long term
Setting of modern technology based CETPs	UPEPB/DIEPC/District Administration	Long term
Collaboration with E-commerce companies like Big Basket, Nature Basket etc.	UPEPB and DIEPC	Short term
Product 3: Mentha Oil		

FPO model approach: It is suggested that on the lines of State Agri Export Policy, FPO model and cluster-based approach be adopted.	UPEPB, DIEPC and Dept of Food Processing & Horticulture	Long term
Establishment of a warehouse with modern storage facilities leveraging schemes like MSE-CDP, PM FME etc.	UPEPB, DIEPC/ DHOs and Dept of Food Processing & Horticulture	Long term
Promotion of post GI initiative: a. DIC to identify 100 authorized users to become IEC holder in a year Organize one seminar within two months to apprise the stakeholders about the importance of Geographical Indication (GI) and for increasing the authorized users	DIEPC/UPEPB	Long term
Collaboration with E-commerce companies focusing on vegetables and fruit sale like Big Basket, Natures Basket etc.	Big Basket/Natures Basket and UPEPB and DIEPC	Short term
APEDA may be asked to apprise the stakeholders about benefits under NPOP scheme	APEDA/UPEPB/DIEPC	Ongoing
Introducing the Kisan credit card in the cluster	DIEPC and banks	Short term
Training programme to educate the cultivators: a. Training programme to educate the cultivators about various SPS/ Technical standards in international markets The District Industry Centre in consultation with regional DGFT officer & APEDA may chalk out the programme on quarterly basis to train and education cultivators and other stake holders about SPS/ technical standards in international markets.	DIEPC/DGFT/APEDA/DGFT	Ongoing
Product 4: Rice		
Focus on high Yielding Export Quality Rice -Breeding programme may be initiated to develop high yielding export quality rice (Non-Basmati, Long Grain Rice, etc.) to enable the exporters to sustain their exports in future.	Research Institutes/Agriculture Department/DIEPC/ APEDA	Mid term
To identify export quality belts/zones for production of rice to meet the requirement of exports.	Agriculture Department/District Administration/District Level Export	Long term

	Promotion Committee	
It is suggested that special efforts should be made to promote the export of organic product such as Rice and sugar from this district.	DIEPC/APEDA/UPEPB	Short term
Distribution of Certified seeds to farmers partially through Krishi Vigyan Kendra (KVK) of Moradabad and Farmer Producers Organization	KVK/ DIEPC/ FPO	Ongoing as per Implementation schedule
a. Modernized Rice and sugar mills to ensure high milling recovery and reduce the percentage of broken rice. This rice will be suitable for export. Sugar mill owner make use of Government schemes for upgradation of their mills.	UPEPB/DIEPC/State Agriculture Department	Long term
Training programme to educate the cultivators: a. Training programme to educate the cultivators about various SPS/ Technical standards in international markets The District Industry Centre in consultation with regional DGFT officer & APEDA may chalk out the programme on quarterly basis to train and education cultivators and other stake holders about SPS/ technical standards in international markets.	DIEPC/DGFT/APEDA/DGFT	Ongoing
Focus on upgradation of technology used in production by establishing a CPC utilizing PM FME scheme	UPEPB, DIEPC/ DHOs and Dept of Food Processing & Horticulture	Long term
Introducing the Kisan credit card in the cluster	DIEPC and banks	Short term
Collaboration with E-commerce companies focusing on vegetables and fruit sale like Big Basket, Natures Basket etc.	Big Basket/Natures Basket and UPEPB and DIEPC	Short term

10. Annexure -1

Abbreviations

AA	Advance Authorization
BoB	Bank of Baroda
CAD	Computer-Aided Design
CAM	Computer Aided Manufacturing
CETP	Common Effluent Treatment Plant
CFC	Common Facility Center
CONCOR	Container Corporation of India
CPC	Common Production Center
DEH	District as Export Hub
DEPC	District Export Promotion Committee
DFIA	Duty Free Import Authorization
DGFT	Directorate General of Foreign Trade
DIEPC	District Industry and Enterprise Promotion Center
DSR	Diagnostic Study Report
EO	Export Obligation
EPB	Export Promotion Bureau
EPCG	Export Promotion Capital Goods
EY	Ernst and Young
FIEO	The Federation of India Export Organization
FOB	Free on Board
FTA	Free Trade Agreement
FTP	Free Trade Partners
GI	Geographical Indication
GIR	Geographical Indication Registry
GoI	Government of India

GoUP	Government of Uttar Pradesh
HS Code	Harmonized System Code
IC	International Cooperation
ICD	Inland Container Depot
IEC	Import Export Code
IIP	Indian Institute of Packaging
IISTEM	International Institute of Saddlery Technology & Export Management
IIT	Indian Institute of Technology
ISW	Industrial Solid Waste
BZC	Bareilly Zari Cluster
MAI	Market Assistant Initiative
MDA	Market development Assistant
MEIS	Merchandise Export from India Scheme
MoU	Memorandum of Understanding
MSME	Micro Small and Medium Enterprises
MYSY	Mukhyamantri Yuva Swarajgar Yojana
NGO	Non-Government Organization
NID	National Institute of Design
NIFT	National Institute of Fashion Technology
NSDC	National Skill Development Cooperation
ODOP	One District One Product
PMEGP	Prime Minister's Employment Generation Program
PMFME	Pradhan Mantri Formalisation of Micro food Processing Enterprises
PMKVY	Pradhan Mantri Kaushal Vikash Yojana
QCI	Quality Council of India
SEIS	Service Export from India Scheme
SIDBI	Small Industries Development Bank of India

SPV	Special Purpose Vehicle
SWOT	Strength, Weakness, Opportunities, Threats
TDS	Total Dissolved Solids
TEE	Towns of export excellence
ToR	Term of Reference
UAE	United Arab Emirates
UK	United Kingdom
UNIDO	United Nations Industrial Development Organization
UP	Uttar Pradesh
UPECE	Uttar Pradesh Export Promotion Council
UPEPB	Uttar Pradesh Export Promotion Bureau
UPICO	UP Industrial Consultancy Organisation
UPSIDC	Uttar Pradesh State Industrial Development Corporation
USA	United States of America



विदेश व्यापार महानिदेशालय
DIRECTORATE GENERAL OF
FOREIGN TRADE

सत्यमेव जयते

Districts
AS Export Hubs

Knowledge Partner



Building a better
working world