



Department of MSME and Export Promotion Government of Uttar Pradesh



Draft District Export Action Plan, Bulandshahr, Uttar Pradesh



Knowledge Partner



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Preface

This district export plan for Bulandshahr 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 Bulandshahr district as an export hub. In view of above, a District Level Export Promotion Committee has been formed by the office of DIPEDC, Bulandshahr 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 Bulandshahr Meerut district's geographic, demographic, and administrative profile, 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), DIPEDCs, 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%¹ 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 administration 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 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, where EY has contributed as Knowledge Partner.

2. District Profile

The history of Bulandshahr begins even before 1200 B.C. This region is nearer to the capital of Pandavas – Indraprasth and Hastinapur. After decline of Hastinapur, Ahar which is situated in the north east of district Bulandshahr became an important place for Pandavas. With passes of time the king Parma made a fort on this part of region and a king named Ahibaran laid the foundation of a tower called Baran (Bulandshahr). Since it was perched on a highland it came to be known as high city which was translated into passion language as Bulandshahr.

Bulandshahr is one of the minority concentrated districts of India, as per Census-2011, GOI. Indian ceramic industries can be broadly divided into two major groups, whiteware pottery and red clay pottery (including terracotta), which are both produced in India. Pottery industries are labour as well as energy intensive. Khurja is a small town in Bulandshahr district of western Uttar Pradesh, with the progress of civilization khurja becomes the largest ceramic cluster in India. It is also known as a ceramic city. In local language “Khurja” means waste land. The ceramic industry at Khurja has grown significantly and this cluster is fulfilling domestic requirements as well as contributing toward employment generation and earnings on export for the growth of the nation. At present there are 494 ceramic units in Khurja.

Global ceramics market is expected to grow at a CAGR of 6.91% during the period 2017-2021. In the next five to 10 years, Indian ceramic industry has the potential to become the number one in the world. The industry is looking to almost double its turnover by 2021, driven by rising domestic consumption and exports to the Middle East, Europe and other newer destinations². Other than ceramic/ pottery products, Bulandshahr also manufactures of steel pipes, chemicals, rice and dairy products etc.

¹ DGFT Report Jan 2021 – Developing Districts as Export Hubs

² Global Ceramics Market Size, Share & Trends Analysis Report

2.1 Geography

Bulandshahr district comes under Meerut division & it is situated between 28.40 to 28.00 north latitude and between 77.00 to 78.00 longitude. The District is about 84 km in length and 62 km is breadth. It has an average elevation of 237.44 meters above sea level. The river Ganga separates this District from Amroha and Sambhal district from east and in the west river Yamuna separates the district from Haryana state and Delhi. In the north of district is Hapur and in south east are the borders of Aligarh district. Gautam Buddha Nagar is situated in the southwest of Bulandshahr.

The geographical area of the district is 4312 sq. km which is about 1.48 percent of the total Uttar Pradesh area. The urban area of the district is 122.8 sq. km and rural area as 4230.2 sq. km. Bulandshahr is near to Delhi and is in national capital region. The nuclear atomic power plant is located at Narora town of the district. National level satellite earth station is located near Sikandrabad town.

2.2 Topography & Agriculture

Bulandshahr, one of the important districts of western Uttar Pradesh, located in upper Ganga –Yamuna Doab. Ganga East and Yamuna West and most of the catchment area covered by Madhya Ganga Canal. The district has 7 tehsils, 16 blocks, and covers an area of 4353 square kilometres with a population of 3,498,507 in 2011. The north to south length of the district is 84 kilometres while east to west width is 62 kilometres. Wheat, rice, sugarcane, maize and potato are the major crops which are grown in plenty.

3. Industrial profile of the district

As given in the following table, MSME industries across the sectors of food/agro-based industries, Ceramic, repair & servicing, other manufacturing, wood, metal, apparel, paper, electrical and other transport, chemical, leather and engineering are key economy drivers in the district.

Table 1: MSME Profile of Bulandshahr

Sl. No.	Industry	Total Units	Total Employment	Total Investment (INR in Cr.)
1	Food/Agriculture Based	894	4470	482.3
2	Mining and Other related activities	0	0	0
3	Ceramic/Pottery	405	25,000	450
4	Cotton Textile	3	15	1.65
5	Readymade Garments	278	1395	150.1
6	Wood and Wooden products of wood	333	1660	179.85
7	Paper & Paper Products	49	251	26.45
8	Chemical and Chemical Products	43	277	22.21
9	Lather Based	44	219	23.78
10	Rubber, Plastic & petro based	49	250	26.48
11	Metal, Fabricated metal products	184	915	99.36
12	Engineering based	34	173	18.36
13	Electrical machinery and transport equipment	102	512	55.08
14	Repair and installation of machinery and Equipments	2363	11820	1276.05
15	Others manufacturing	1189	6352	688.52

Ceramic/ Pottery, Food/Agro based, Repair and installation of machinery and Equipment and Wood and Wooden products of wood contribute most in terms of employment and revenue. Ceramic/ Pottery based industry in the district is the most prominent sector of the district contributing most to the economy by being the largest

employer and being at the top in terms of investments as well. It is followed by Agro-based industry, wooden & Readymade Garments respectively.

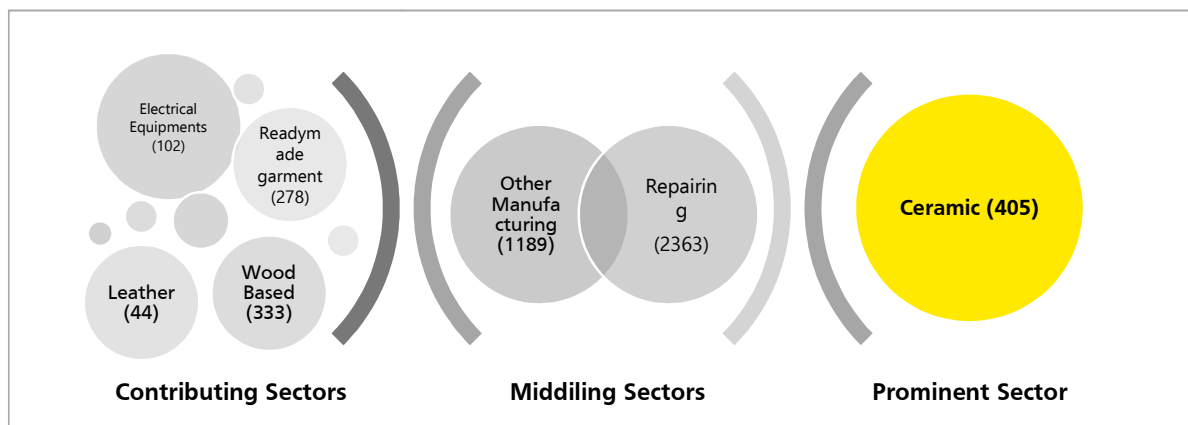


Figure 1: MSME landscape of the district³

As per table 1, the distribution of occupation in the district varies as per industrial clusters. Around 46% of MSME workers are employed in Ceramics pottery industry, around 22% engaged in machine/ equipment and repairs, and around 11% engaged in other manufacturing sector.

3.1 Major Exportable Product from Bulandshahr

The total export from Bulandshahr is approximately INR 1597.85 Crore for the period September 2020 to November 2021.

The following table depicts the value of export of major products from Meerut:

Table 2: Major exportable product

S. No	Product	Export value (in INR) ⁴ from Sep'20 to Nov'21
1	Ceramic/Pottery (ODOP)	NA
2	Tubes, pipes, and hollow profile of iron or steel	552.08 Cr
3	Basmati Rice	145.61 Cr
4	Boneless Meat of Bovine Animals, Frozen	5.80 Cr
Total Export from Bulandshahr		1,597.85 Cr⁴

The total export from Bulandshahr district during Sep 2020-Nov 2021 stands at 1,597.85 crore which includes export value of products i.e., ceramic/pottery, steel tube pipes sports goods, boneless meat of bovine animals, sugar, radial tyres, Para hydroxy dense salt, craft paper and paper board and others.

³

⁴ DGFT- District wise report for the period September 2020 to November 2021



4. Product 1: Ceramic/Pottery Products

4.1 Cluster Overview

Bulandshahr has around 500 ceramic units out of which almost 100 units are independent who have their own facilities to process raw materials and kilns to fire the products and the rest are dependent units who utilize the processing and firing facilities of other units on chargeable basis.

During the Last Decade, Khurja Industries had undergone a phenomenal change. Most of the coal fired down draft kilns have been replaced by oil fired shuttle kilns and tunnel kilns to reduce the cost of production. Many useful products like stone ware crockery, sanitary ware, H.T. & L.T. Insulators, hospital ware, chemical porcelain, electro ceramics, kiln furniture, special ceramics, decorative wares, toys, figurines and bone china are produced in large quantities every day.

Turnover of the cluster is 400 cr with approximate export turnover of 35 cr⁵. Cluster provide the employment of 25,000 people direct or indirect.⁶

4.2 Product Profile

Many useful products like stone ware crockery, sanitary ware, H.T. & L.T. Insulators, hospital ware, chemical porcelain, electro ceramics, kiln furniture, special ceramics, decorative wares, toys, figurines and bone china are produced in large quantities every day in Khurja of Bulandshahr, which is highly demand in local as well as globally.

4.2.1 Product Portfolio

Multiple varieties of Ceramic/Pottery exist including clay, technical ceramic, High alumina Ceramic, cutting tools and structural ceramic varieties.

4.3 Cluster Stakeholders

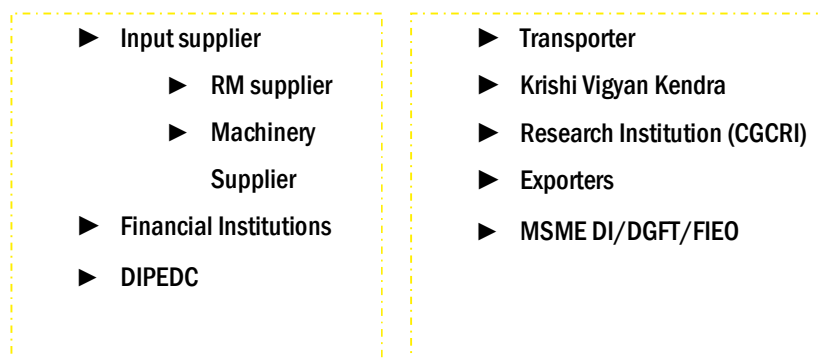


Figure 3: Cluster Stakeholders

4.4 Industry Associations

Following are principal Industry Associations that are working for the development of Ceramic/Pottery:

- ▶ **Khurja Pottery Manufacturers Association (KPMA):** Khurja Pottery Manufacturers Association (KPMA) was established in 1977 in the campus of Government Pottery Centre, G.T. Road, Khurja. The founders of the association were Padam Shree Late Shri T.N. Sharma as a Patron, Shri Harnam Singh, President, Late Shri J.S. Minhas, Secretary and members as Shri R.K. Poddar, Shri Gurcharan Singh, Late Shri H.M.S. Chhatwal, Shri Sohan Lal Sharma & Shri Shiv Narayan Kaushik. Some well-known & eminent personalities of the nation like Shri Dharam Singh, Speaker of the Govt. of U.P., Shri Ashok Pradhan, State Minister of Communication and Information Technology, Govt. of India, Shree Ravindra Raghav, MLA, Shri Sarver

⁵ DSR, Pottery product, Bulandshahr

⁶ DSR, Pottery product, Bulandshahr

Hussein Khan, State Minister of Food & Civil Supplies, Govt. of India, have chaired the association time to time. Presently, the strength of KPMA member's is 436. The main aims for setting up the association were as follows

- To provide technical assistance, new establishments of industries and all-around developments etc. to the SME's
 - To create friendly atmosphere between the association and entrepreneurs to organize seminars/workshops/technical lectures/exhibitions etc. for the benefit of the SMEs.
 - To collect commercial economy & technical data and provide to the SMEs for the betterment of the cluster.
 - To establish a library for enhancing the technical knowledge of the entrepreneurs.
 - To control the prices of the finished goods and to provide possible facilities for the marketing of the finished goods.
 - To solve the problems related to the excise duty, trade tax, electricity etc
- ▶ **Kuteer Avam Hastshilp Potters Association (KHPA):** The KHPA has been formed very recently in May 2000, to voice the concerns of the unorganized dependent potters in Khurja. Presently, KHPA has about 38 members registered with it.
 - ▶ **Khurja Pottery Raw Material Association:** The KPRMA was formed in 1998 for solving the payment, tax related matters there are 25 members of the association.
 - ▶ Indian Industries Association, Bulandshahr
 - ▶ Laghu Udyog Bharti, Bulandshahr

4.5 Export Scenario

4.6 HS Code

HS codes under which the product is exported from the district.⁷

HS Code	Description
691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain of china
691490	Ceramic articles, n.e.s. (excluding of porcelain or china)

4.7 Ceramic/Pottery

Current Scenario

The export scenario of World and India have been analysed basis the export statistics of HS code 691200 (Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain of china) under which Ceramic products is exported from Bulandshahr district. Major focus of the industry is on domestic consumption with limited export focus through tie-ups with exporters based in Delhi and Moradabad⁸.

⁷ DGFT, Kanpur

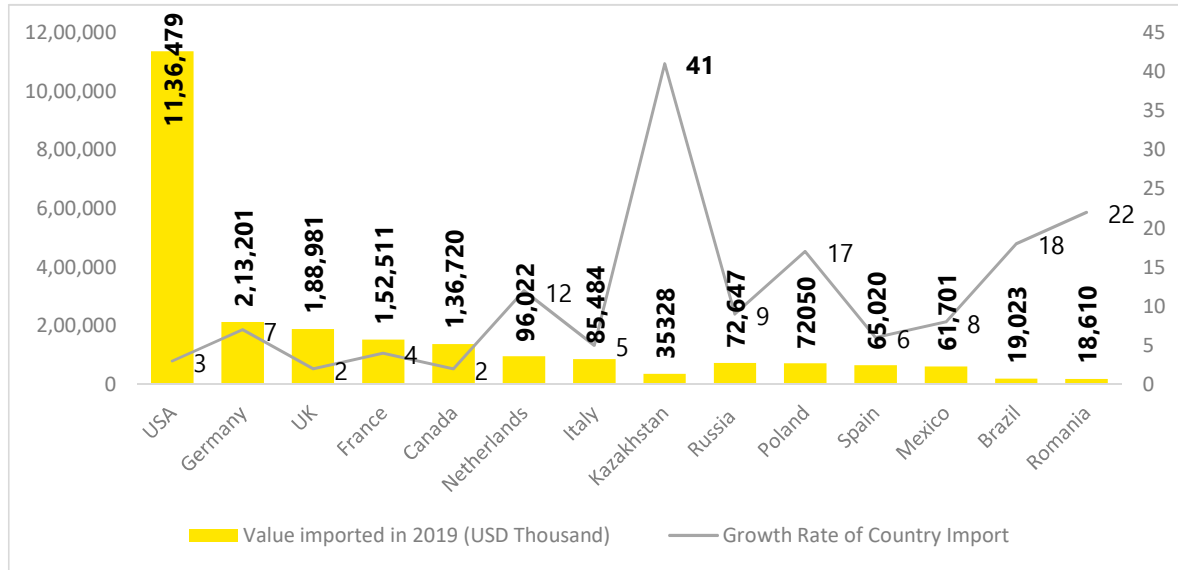
Key Fact of Export (HS Code-691200)
19,77,636 (USD Thousand)
Value of world exports in 2020
16,744 (USD Thousand)
Total Exports from India in 2020
4,560 (USD Thousand)
Total export from UP in 2020
27.23%
Share of UP in India's exports

Alongside are the key facts pertaining to the analysed product code.⁹

4.8 Export Potential

691200: Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain of china

India's exports represent 0.9% of world exports for this product, ranking it number 24, behind China, Portugal, UK, Thailand and Germany amongst other countries. The value of India's exports has gradually increased by CAGR 48.22% from 2015 to 2018, showing a steep increase in 2018. India exported this product to Iran, Indonesia, Malaysia, Bangladesh, Yemen, China, Saudi Arabia, Sri Lanka, USA, Nepal etc.



Below figure shows the top importers for this product (691200) in the world:

Figure 2: Top importers for this product (691200) in the world

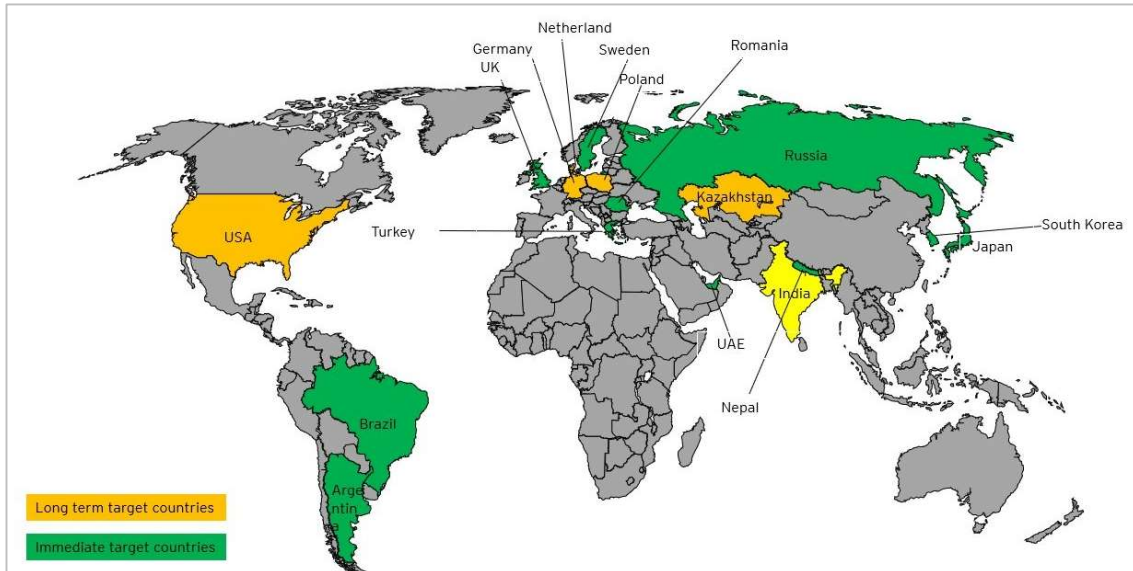


Figure 3: Markets for export potential

⁸ Bulandshahr export Action plan, 2021, DGFT

⁹ www.trademap.org



4.9 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. Currently, only the limited products with traditional designs are being sold directly in the market. Knowing the health/technological/economic benefits of the product an initiative can be made for product diversification to manufacture value added products such as insulator, electrical plates, medical instruments, or high end ceramic products.

4.10 SWOT Analysis

Table 3: SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ▶ Strong market- national and international. ▶ High levels of awareness among entrepreneurs ▶ Large, diversified, and potential domestic and global market. ▶ Availability of skilled artisans to make variety of products ▶ Diversified product range that service different market. ▶ Young talent showing interest to enter into the craft business ▶ Cheap labor rates ▶ Need low capital investment. ▶ There is production flexibility. 	<ul style="list-style-type: none"> ▶ Large amounts of wastage of finished goods dumped within the cluster ▶ Absence of warehouses for raw materials and waste dumping grounds. ▶ Limited design related interventions. ▶ Lack of infrastructure to make products at competitive price. ▶ Lack of co-ordination between government agencies and entrepreneurs ▶ High transportation cost for export of the product ▶ Shortage of Shipping Containers ▶ Low barriers of new entry.
Opportunities	Threats
<ul style="list-style-type: none"> ▶ The industrial area has been provided an industrial feeder. ▶ Proactive industry association is already working for interventions ▶ Rising demand for handmade products ▶ Scope for development of new product range for fashion industry ▶ Development of sectors like Retail, Real Estate that offers great requirements of handicrafts products. ▶ Development of domestic and international tourism sector. ▶ E-Commerce and Internet to market cluster products. 	<ul style="list-style-type: none"> ▶ Absence of credit related links. ▶ Competition within the cluster ▶ Quality and cheap products produced by competing countries like China, Vietnam ▶ Low barriers of new entry.

4.11 Challenges and interventions

Parameter	Challenges	Intervention
Raw Material	<ul style="list-style-type: none"> ▶ Comparatively high procurement cost due to sourcing of raw material from 	<ul style="list-style-type: none"> ▶ Establishment of a Raw Material Bank within the CFC (CFC Scheme of ODOP program) ensuring easy availability of all

Parameter	Challenges	Intervention
	unregulated sources (local market). & Unavailability of raw material on time	types of high-quality material at discounted rates.
Institution strengthening	<ul style="list-style-type: none"> ▶ CGCRI, Khurja was established in year 1981 & it provides R&D support to the ceramic industry, technical assistance, and providing skilled manpower through training to MSME sector in the region specially ceramic/Pottery sector. But with change of time, it is not upgraded & its facility is very limited. 	<ul style="list-style-type: none"> ▶ Establishment of modern art of facility testing centre for all Ceramic/Pottery products with emphasis on different product lines.
Technological upgradation	<ul style="list-style-type: none"> ▶ SMEs still use traditional tools and techniques to manufacture ceramic/ Pottery. However, new technology is available in the market <ol style="list-style-type: none"> 1. Fully Automated Machines 2. Semi-Automated Tunnel Kiln 3. De-Ageing Pug mills 	<ul style="list-style-type: none"> ▶ Establishment of a Common facility center along with multiple automatic machines in the CFC for technology upgradation and productivity enhancement
Packaging	<ul style="list-style-type: none"> ▶ There are no proper/Latest techniques use in packaging which lead to quality degradation / rejection from the buyer end. It also harms the seller image in the market & less price as compare to the competitors. 	<ul style="list-style-type: none"> ▶ Vacuum packaging facility: This can be provided in common facility centre, as it can retain the quality of Ceramic products for a longer duration. Packaging should be such that it highlights the benefits of equipment & durability to attract buyers across the world. ▶ Smart packaging facility: This can be provided in common facility centre, RFID (radio-frequency identification) codes, which are printed either directly on to packaging or integrated in it. RFID technology sends identifying signals to a reading device, which could be a regular smartphone, enabling automatic, contactless communication with the package so retailers can determine the current status of their product. It will help in export also.
Environmental	<ul style="list-style-type: none"> ▶ High energy consuming ball mill ▶ Dumping of broken/rejected pieces of fired crockery/Pottery without segregation in open ground 	<ul style="list-style-type: none"> ▶ Nagar Nigam should collect waste from the different ceramic manufacturers and deposit it at a Ceramic waste dumping cum disposal center which is compliant with all the environmental norms. ▶ Initially Quartz and Feldspar stone was supplied in lumps or grit form for which ball mills were used to crush however, the stone is now supplied in powder for which

Parameter	Challenges	Intervention
		<p>grinding is not required. An initiative has to start for this to change the grinding system.</p> <ul style="list-style-type: none"> ▶ Sensitisation camps should be organised to educate the enterprises/ artisans in the benefits of Waste minimisation
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. ▶ 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 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
Access to Finance	<ul style="list-style-type: none"> ▶ Difficulty in receiving financial support ▶ Tedious paperwork and long waiting time 	<ul style="list-style-type: none"> ▶ Tie up with the banks/financial institutions for better interest rates, enhanced working capital limits etc. ▶ Handholding of units in the cluster to create awareness about financing schemes viz. ODOP Margin Money scheme ▶ 'Revolving Working Capital Assistance' to micro units towards procuring raw materials and meeting operating expenditure. This can be introduced through existing CFCs or DIPEDC
Exporter's issue	<ul style="list-style-type: none"> ▶ DEPC to act as a focal point for all exporters issue 	<ul style="list-style-type: none"> ▶ Deputy Commissioner Industries may be given this responsibility to monitor the cell.
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 DIC office should organize workshops for exporters to apprise about Export Promotion Scheme of the Department of MSME & Export Promotion, UP such as Market Development Assistant (MDA), Financial Assistance for Foreign fairs/exhibition, Financial Assistance for sending samples to foreign buyers, Subsidy

Parameter	Challenges	Intervention
		<p>on freight charges upto gate way port Air Freight Rationalisation Scheme etc.</p> <ul style="list-style-type: none"> ▶ 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.

4.12 Future Outcomes

Annual Turnover	Cluster exports
Increase in annual turnover by 10% annually from existing with the help of financial outreach of government programmes and other interventions.	Double the export by 2024 as per State Agriculture Export Policy, 2019

5. Product 2: Basmati Rice

5.1 Cluster Overview

The state 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 145.61 Cr.¹⁰

5.2 Product Profile

Rice: Any rice other than Basmati Rice is named as non-Basmati rice. In the world it has been reported that there are over 10,000 varieties of rice and out of which the maximum number are in India.

5.3 Product Portfolio

Rice: Multiple varieties of rice exist including short-grain, medium-grain, and long-grain varieties.

¹⁰ DGFT, Kanpur

5.4 Cluster Stakeholders (Basmati Rice)



Figure 4: Cluster Stakeholders

5.5 Industry Associations

Following are principal Industry Associations that are working for the development of Rice:

- ▶ Agriculture and Processed Food Products Export Development Authority (APEDA)
- ▶ Indian Council of Agricultural Research (ICAR)
- ▶ Indian Institute of Sugarcane Research (IISR)
- ▶ National Sugar Institute, Kanpur
- ▶ Agriculture Department
- ▶ Krishi Vigyan Kendra (KVK)
- ▶ Indian Industries Association (IIA)
- ▶ Rice Export Promotion Forum (REPF)
- ▶ Participatory Rural Development Foundation (PRDF) - PRDF is a Gorakhpur based philanthropic organisation founded Dr. Ram Chet Chaudhary, a leading Agri-scientist working for the benefit of farming community of North India
- ▶ International Rice Research Institute (IRRI) - world's premier research organization dedicated to reducing poverty and hunger through rice science; improving the health and welfare of rice farmers and consumers; and protecting the rice-growing environment for future generations
- ▶ National Rice Research Institute, Cuttack (NRI) - The National Rice Research Institute is located in Cuttack in Odisha state. The basic objective of institute is to conduct basic, applied, and adaptive research on crop improvement and resource management for increasing and stabilizing rice productivity in different rice ecosystems with special emphasis on rainfed ecosystems and the related abiotic stresses
- ▶ U.P. Council of Agricultural Research (UPCAR) - The UPCAR is an autonomous apex state organisation registered as a society, which plans, co-ordinates and promotes research, education, training, and transfer of technology for advancement of agriculture and allied sciences. The UPCAR was established on June 14, 1989, with its headquarters at Lucknow.

5.6 Export Scenario

5.7 HS Code

HS codes under which the product is exported from the district.¹¹

HS Code	Description
100630	Semi-milled or wholly milled rice, whether or not polished or glazed

¹¹ DGFT, Kanpur

100199	Wheat and meslin (excluding seed for sowing, and durum wheat)
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5.8 Basmati Rice

Current Scenario

The export scenario of World and India have been analysed basis the export statistics of HS code 100630 (Semi-milled or wholly milled rice, whether or not polished or glazed) under which Basmati rice is exported from Bulandshahr district. Alongside are the key facts pertaining to the analysed product code.¹²

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

412,280 (USD Thousand)

Total export from UP in 2020

5.51%

Share of UP in India's exports

5.9 Export Potential

1. Rice: HS Code 100630 (Semi-milled or wholly milled rice, whether or not polished or glazed)

- ▶ The total exports of product from Bulandshahr district as per HS code 10063020 are around INR 145.61 crores in the period September 20 to November 2021.¹³
- ▶ India's exports represent 36.28% of world exports for this product, its ranking in world exports is 1.
- ▶ India exported this product to Iran, Indonesia, Malaysia, Bangladesh, Yemen, China, Saudi Arabia, Sri Lanka, USA, Nepal etc.

Below figure shows the top importers for this product (100630) in the world:

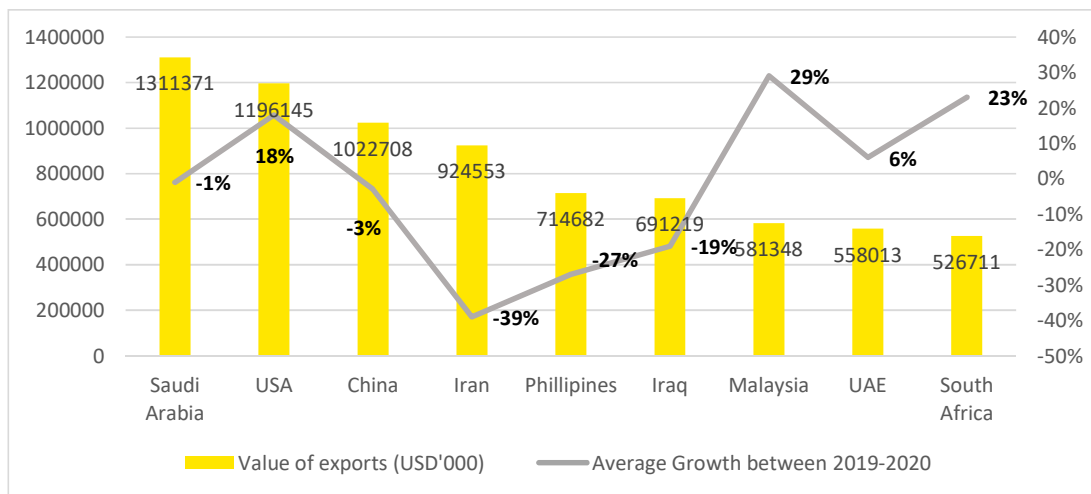


Figure 5: Top importers for this product (100630) in the world

¹² www.trademap.org

¹³ DGFT, Kanpur



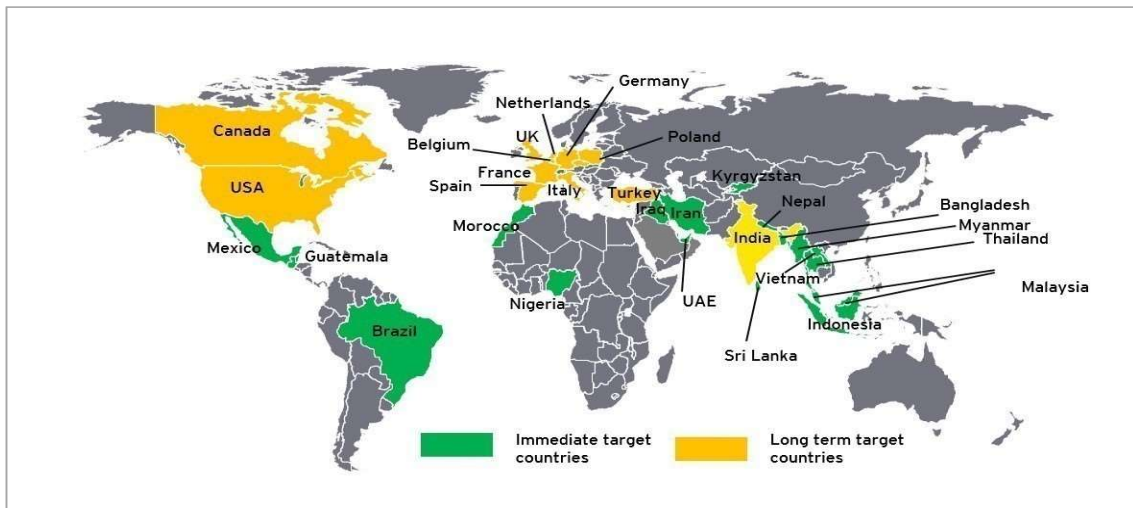


Figure 6: Markets for export potential

5.10 Potential Areas for Value Added Product

Rice: Product Diversification is one of the most crucial product uplifting strategies which in turn is an important part of a product's export. Currently, only the grains of rice are being sold directly in the market. Knowing the health benefits of the product an initiative can be made for product diversification to manufacture value added products such as chiwda, *poha*, *brown rice*, *rice noodles*, *idli & dosa batter*.

The broken rice can be used to **create flour**. Rice flour is gluten-free; therefore, it is an alternative for producing gluten-free products. Rice flour is also hypoallergenic. Thus, it can be utilized for producing baby food, puddings, and other food products. Due to the decreased risk for people with sensitivities, food companies prefer rice flour to other varieties of flour. Thus, it is economically justifiable to grind broken rice to produce flour for such applications.

With adequate upgradation of technology in the cluster the farmers/ millers can sell by-products and generate additional income by manufacturing by-products from Rice Husks, Brans and Straws; the following are their uses:

- Rice Husk Use**
- ▶ Fuel
 - ▶ Gaseous Fuel
 - ▶ Husk Briquette
 - ▶ Husk Board
 - ▶ Furfural

- Rice Bran Use**
- ▶ Edible grade oil
 - ▶ Industrial grade crude oil
 - ▶ Free fatty acid manufacture
 - ▶ Plasticizers
 - ▶ Tocopherol
 - ▶ Rice bran wax

5.11 SWOT Analysis

Table 4: SWOT Analysis

Strengths	Weaknesses
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<ul style="list-style-type: none"> ▶ Improving and enhancing rural economy ▶ Bulandshahr, lying in the Gangetic plains provides fertile land suitable for farming ▶ Availability of cheap and skilled labor for farming ▶ Availability of various financial and non-financial assistances from state and central government pertaining to agriculture 	<ul style="list-style-type: none"> ▶ Lack of proper infrastructure facilities for storage and manufacture of additional products ▶ Rice and Sugar mills have not been fully modernized ▶ Due to lack of timely upgradation of rice mills, a large percentage of the produce is often discarded as it is termed as broken rice which is not suitable for sale ▶ High transportation cost for export of the product ▶ Shortage of Shipping Containers
Opportunities	Threats
<ul style="list-style-type: none"> ▶ Large scope for expanding sales network-globally and locally ▶ Scope for product diversification for generating additional revenue ▶ Potential for Organic farming, Contract farming and Zero Budget Natural Farming (ZBNF) for reducing risk and increased production & revenue 	<ul style="list-style-type: none"> ▶ Cost of production in exporting countries like Thailand, Vietnam and Pakistan is low as compared to India ▶ Fear of damage from calamities and insect attack as it is perishable item

5.12 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 . 	<ul style="list-style-type: none"> ▶ Breeding programme may be initiated to develop high yielding export quality rice 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
Cluster based approach	<ul style="list-style-type: none"> ▶ 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. ▶ 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

Parameter	Challenges	Intervention
		<p>district and submit the same to the state level Export Monitoring Committee.</p> <ul style="list-style-type: none"> ▶ Liaising amongst Industry department, Agriculture department, APEDA, FIEO, DGFT, NABARD, EXIM Bank, FPOs, cooperatives etc. may be developed for farmer friendly policy formation
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 the district.
Training program to educate the cultivators	<ul style="list-style-type: none"> ▶ Unawareness about technical standards in international market 	<ul style="list-style-type: none"> ▶ Training on efficient use of Soil Health Card in line with the recommendations given by the authorized testing laboratories like ICAR-IISR lab Lucknow for soil, water, and plant analysis. ▶ The District Industry Centre in consultation with regional DGFT officer & APEDA may chalk out the program on quarterly basis to train and education cultivators and other stake holders about SPS/ technical standards in international markets. ▶ Quarterly/Half-yearly workshop may be organized with FPOs, farmers, sugar industries etc. to update about emerging practices and technologies in sugar sector as per the Sugar Technology division of NSI, Kanpur.
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 Bulandshahr 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 & Sugar 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. ▶ Similarly, many of the sugar mill owners are not using modern machinery due to higher cost of machinery 	<ul style="list-style-type: none"> ▶ Rice and sugar 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.

Parameter	Challenges	Intervention
		<ul style="list-style-type: none"> ▶ Sugar mill owners make use of Government schemes for upgradation of their mills.
Marketing & of Promotion 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 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
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"> ▶ DEPC to act as a focal point for all exporters issue 	<ul style="list-style-type: none"> ▶ Deputy Commissioner Industries may be given this responsibility to monitor the cell.
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 DIC office should organize workshops for exporters to apprise about Export Promotion Scheme of the Department of MSME & Export Promotion, UP such as Market Development Assistant (MDA), Financial Assistance for Foreign fairs/exhibition, Financial Assistance for sending samples to foreign buyers, Subsidy on freight charges upto gate way port Air Freight Rationalisation Scheme etc.

Parameter	Challenges	Intervention
		<ul style="list-style-type: none"> ▶ 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.

5.13 Future Outcomes

Annual Turnover
Increase in annual turnover by 10% annually from existing with the help of financial outreach of government programmes and other interventions.

Cluster exports
Double the export by 2024 as per State Agriculture Export Policy, 2019

6. Product 3: Chemical Products

6.1 Export of Chemical Industry

Chemical Industry is an important industry and place's significant role in total exports from India. The sector wise export from India under Chemical Sector is mentioned below:



the

Table 5: Export from India under Chemical Sector

Sl. No.	Product Name	ITC HS Code	Exports from India Billion USD
1	Dyes	32	2.34
2	Dye Intermediates	29	0.145
3	Inorganic Chemicals	28	1.054
4	Organic Chemicals	29	7.63
5	Agro Chemicals	38	3.5
6	Cosmetics	33	1.61
7	Essential Oils	33	0.234
8	Castor Oil	15	0.917
Total			17.43 USD Billion



Chemical Industry in Bulandshahr: The Chemical Industry in Bulandshahr specializes in Agro Chemical Manufacturing. The industry has diversified into manufacturing herbicide & fungicide and active pharmaceuticals ingredients (APIs) and value-added variants. The industries primarily relate to organized sector.

Gayatri Pesticides Limited, Sikandrabad, Bulandshahr is leading chemical manufactures in India operating globally. They are among top five manufacturers globally for several Technicals both in Fungicides and Herbicides. Because of their niche and quality products portfolio, they are strategic supplier for USA, Australia, Europe, Africa, South America, and Asia.¹⁴

The total export of chemical sector from Bulandshahr is as under:

Table 6: Export of Chemical sector from Bulandshahr¹⁵

SI. No.	ITC HS	Item description	Total Export in CR from Sep 2020 to Nov 2021
1	39181090	OTHER POLYMERS OF VENYL CHLORIDE	3.70 Cr

6.2 SWOT Analysis

Table 7: SWOT Analysis of Chemical products

Strengths	Weaknesses
<ul style="list-style-type: none"> ▶ The industry has been successful in maintaining long-term relationships with its foreign buyers ▶ Low attrition rate due to industry being in Uttar Pradesh ▶ Availability of qualified individuals to undertake testing and/or scientific experiments in Bulandshahr due to presence of several CSIR laboratories. ▶ Existing players are experienced and well established with strong management team and sales network 	<ul style="list-style-type: none"> ▶ Strict Environmental Norms and process of evaluating Environmental Impact to be followed while undertaking production and/or research of chemicals ▶ The industry must comply with the applicable regulations of the international markets where it exports its products as well as obtain registrations from international agencies through customers to enable exports of products to other jurisdictions ▶ The industry trends, technological advancements and customer preferences keep changing at a rapid pace whereas the local industry is not equipped with information to meet the rapid changing demand of the industry. ▶ Shortages of Shipping Containers specifically for transportation of Chemicals
Opportunities	Threats
<ul style="list-style-type: none"> ▶ Strong R&D and product development capabilities- with well-equipped R&D laboratories, registered with the DSIR 	<ul style="list-style-type: none"> ▶ Stiff competition from other agro-chemical producing countries. ▶ Growing consumption of bio-pesticides globally and in India. The use and adoption of bio-pesticides by customers may affect competitive position and thereby have adverse effect on business, results of operations, and financial

¹⁴ <http://www.indiapesticideslimited.com/index.php>

¹⁵ DGFT

	condition
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6.3 Challenges and interventions

Parameter	Challenges	Intervention
Market demand	Insufficient information about changing requirements of global market	DGFT/DIC may develop a web portal with the help of NIC so that timely information about the global trends is available to the industry.
Multiple compliances	Multiple compliance procedures to be followed to undertake production or research and sale	A subcommittee may be formed to understand the requirement of Industry and the committee may give necessary suggestions.
Increased alternatives in market	Growing use of alternative products	The industry may be encouraged to upgrade and innovate as per the changing customer requirement.
Marketing and branding	Minimal branding of the products manufactured	Since the products developed by the industry is for the limited area of use and hence it should focus on marketing and branding of the product. The necessary help and support from CHEMEXI may be obtained.
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 	<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 DIC office should organize workshops for exporters to apprise about Export Promotion Scheme of the Department of MSME & Export Promotion, UP such as Market Development Assistant (MDA), Financial Assistance for Foreign fairs/exhibition, Financial Assistance for sending samples to foreign buyers, Subsidy on freight charges upto gate way port Air Freight Rationalisation Scheme etc. ▶ 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.

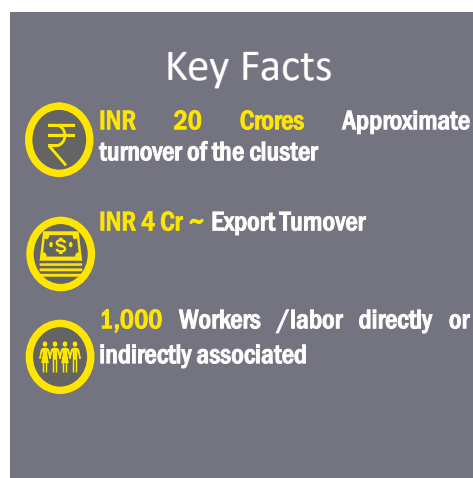
7. Product 4: Boneless Meat and Other Edible Offal of Bovine Animals, Frozen

7.1 Cluster Overview

Bulandshahr district is well known for its processed meat cluster. The export of processed meat from district holds a prominent place in the Indian economy. There are two APEDA registered integrated abattoirs cum meat processing plants in the district employing around 1,000 workers. The two slaughterhouses in Meerut's area deal in chilled boneless buffalo meat, chilled boneless buffalo offals, frozen boneless buffalo meat, frozen boneless buffalo offals which is primarily exported to Gulf countries.

M/s. AL Saqib Exports Pvt. Ltd. and M/s. Tanya Marketing Private limited these are two units which is registered from APEDA & contribute for major export of processed meat from the district.

The cluster's annual turnover in 2020-21¹⁶ was around INR 20 Cr and the export value was 4 Cr.



7.2 Product Profile

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

7.2.1 Product Portfolio

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

7.3 Cluster Stakeholders

Raw material supplier

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

Unit owners & Workers

There are 2 slaughterhouses involved in processing and export of meat. More than 5,000 workers are working in these units and are residing in Meerut, Ghaziabad, GB Nagar, Hapur and nearby areas of Meerut.

Machinery Supplier

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

7.3.1 Industry Associations

Following are principal industry associations that are working for the development of processed meat industry:

¹⁶ Basic Stakeholder Consultation

- ▶ **National Food Laboratory (Food Research and Standardization Laboratory (FRSL)), Ahinsa Khand-II, Indirapuram Ghaziabad** - FSSAI Notified Referral Laboratory under section 43 (2) of FSS Act, 2006.
- ▶ **Association of Meat Scientists and Technologists:** Association of Meat Scientists and Technologists” with the headquarters at the Department of Meat Science and Technology, Madras Veterinary College, Chennai - 600 007 has been established with the Objectives :
 - To protect the professional needs; maintain the honour and interests of professionals of the meat industry.
 - To conduct the training programmes, workshops, seminars and conferences to suitably train personnel to resolve problems faced by the industry.
 - To promote the interests of the industry by liaising with line departments of the government, and trade bodies.
- ▶ **MSME-Development Institute (MSME-DI), Okhla:** 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.
- ▶ **Indian Industries Association, Bulandshahr (IIA)**
- ▶ **All India Meat and Livestock Exporters Association**

7.4 Export Scenario

7.4.1 HS Code

HS codes under which the product is exported from the district

HS Code	Description
020230	BONELESS MEAT OF BOVINE ANIMALS, FROZEN

Current Scenario

The export scenario of World and India have been analysed basis the export statistics of HS codes 020230 under which meat is exported. Alongside are the key facts pertaining to the analysed product code.¹⁷

7.5 Export Potential

- ▶ The total exports of boneless meat from the district as per HS code 020230 is around INR 5.80 crores from September 2020 to November 2021.¹⁸
- ▶ India's exports represent 11.2% of world exports for this product, its ranking in world exports is 3 under HS code 020230 and 4¹⁹.

Product 020230: Uttar Pradesh exported this product to Hongkong, China, Vietnam, Malaysia, Egypt, Indonesia, Iraq, Saudi Arabia, Philippines, UAE etc. Below figure shows the top importers for this product from India area:

Key Fact of Export (HS Code-020230)	
24,712,215 (USD Thousand)	Value of world exports in 2020
27,62,444 (USD Thousand)	Total Exports from India in 2020
16,70,500 (USD Thousand)	Total Exports from UP in 2020-21
60.47%	Share of UP India in exports

¹⁷ www.trademap.org

¹⁸ DGFT, Kanpur

¹⁹ Trademap.org data for the year 2020

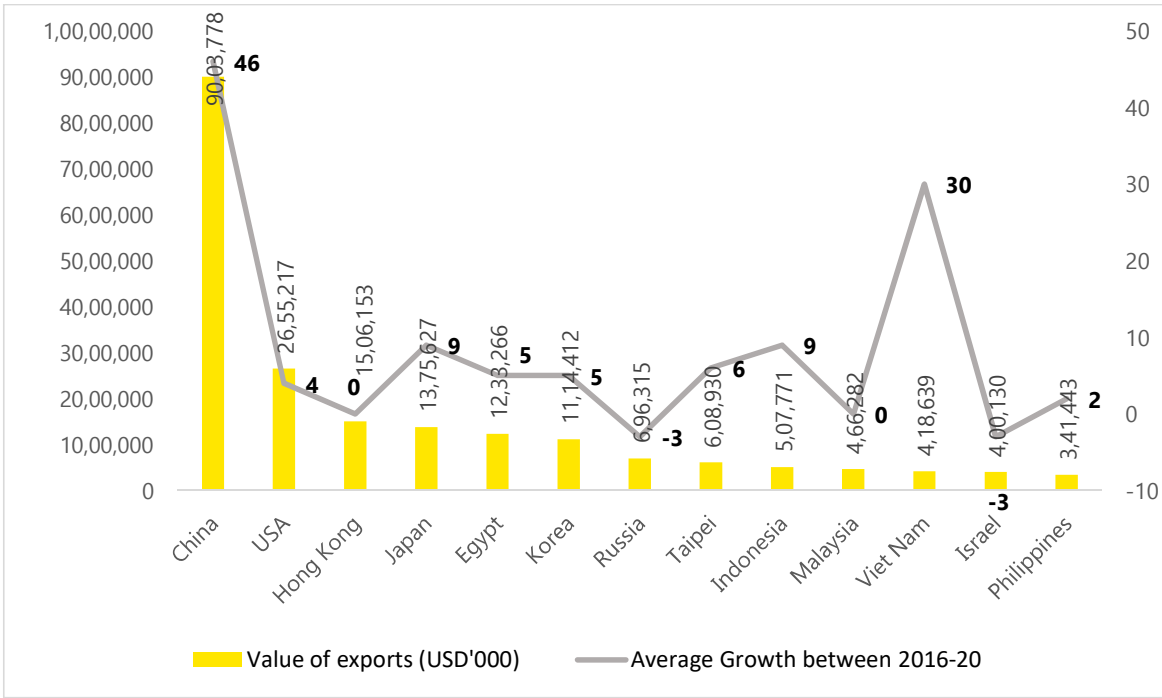


Figure 7: Top importers for this product (020230) in the world¹⁷ from India

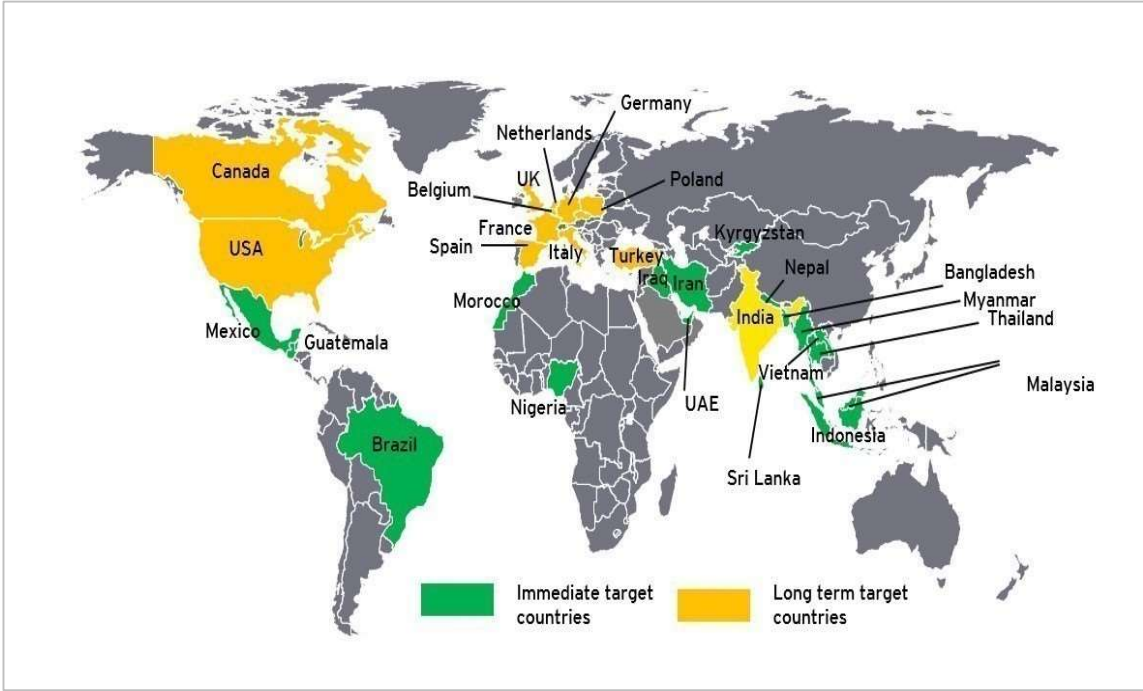


Figure 7: Markets for export potential



7.6 SWOT Analysis

Table 8: SWOT Analysis for Boneless meat and other edible offal 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 ▶ Located in NCR/NGT ▶ International Competition ▶ Temporary or permanent closure of slaughterhouses

7.7 Challenges and interventions

Table 9: Challenges & Interventions

Parameter	Challenges	Intervention
Technological Upgradation	<ul style="list-style-type: none"> ▶ Lack of technological advancements at par with international industry ▶ Lack of technological solutions for waste management 	<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. ▶ Lack of awareness for global environmental and social norms ▶ Smaller units find it difficult to bear the operational cost of CETP. 	<ul style="list-style-type: none"> ▶ Setting up modern technology based CETPs would ensure in reduction of effluents in TDS levels of liquid discharge. ▶ Awareness and outreach program for raising consciousness about environment issues due to the pollutants. ▶ Use of codes of conduct (COC) for assessment of suppliers on social and environmental compliance.

Parameter	Challenges	Intervention
Marketing & Branding	<ul style="list-style-type: none"> ▶ Lack of online marketing practices ▶ Increasing participation in the 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. ▶ DIPEDC 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 ▶ Collaboration with Indian Meat Science Association located at National Research Center on Meat, Hyderabad.
Packaging	<ul style="list-style-type: none"> ▶ Only Large units are using standard material for packaging; the smaller units are not aware of innovative packaging 	<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 ▶ 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 	<ul style="list-style-type: none"> ▶ A Testing laboratory can be established for ensuring production of certified quality products ▶ Units must follow Food Quality Standards 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"> ▶ DIPEDC 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. 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 DIPEDC 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 DIPEDC office for updating 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

Parameter	Challenges	Intervention
		and issues relating to it. The industry may be informed of this portal.

7.8 Future Outcomes

Annual Turnover	Cluster exports
Increase in annual turnover from INR 20 Crore in 2020-21 to 25 Crore by 2026 ²⁰	The increase in export of the product from INR 5.80 Crore during the September 2020 to November 2021 to 6.0 Crore by 2026 ²⁰

8. Product 5: Steel Pipes




8.1 Cluster Overview

Bulandshahr district is known for hollow steel pipes or iron pipes. Sikandrabad industrial area of Bulandshahr has lots of industries of steel pipes and they export on large scale. There are more than 40 large and small micro units of steel pipes and their ancillary units in the cluster. It provides employment of more than 2,000 workers directly or indirectly.

M/s. APL Apollo, Hi-tech pipes limited, M/s. MSPL and M/s. Vishal Pipes are leading units which contribute for major export of steel pipes from the district.

The cluster's annual turnover in 2020-21²¹ was around INR 1200 Cr and the export value was 368 Cr.

Key Facts

-  **INR 1,200 Crores** Approximate turnover of the cluster
-  **INR 368 Cr ~ Export Turnover**
-  **2,000 Workers /labor** directly or indirectly associated

8.2 Product Profile

- ▶ Structural ERW
- ▶ Non-Structural ERW
- ▶ Structural ERW Non-Structural ERW HSAW LSAW Seamless Ductile Iron pipes (HSAW)
- ▶ Longitudinal Submerged Arc Welded (LSAW)
- ▶ Seamless
- ▶ Ductile Iron pipes

8.2.1 Product Portfolio

- ▶ Other, welded, of circular cross-section, made up of non-ally steel tube/pipes
- ▶ Of square or rectangular cross-section:

²⁰ Basis Stakeholder Consultation

²¹ Basic Stakeholder Consultation

- ▶ ERW precision other tubes made up of other

8.3 Cluster Stakeholders

Raw material supplier

The primary raw material suppliers are Iron and steel industries who supply the error free materials to the units established in Bulandshahr.

Unit owners & Workers

There are 40 micro, small and large units involved in processing and export of steel pipes. More than 2,000 workers are working in these units and are residing in Bulandshahr, Meerut, Ghaziabad, GB Nagar, Hapur and nearby areas of Bulandshahr.

Machinery Supplier

Large units having modern machineries in their plant with most of segments are semi-automated.

8.3.1 Industry Associations

The cluster comprises of support institutions that can be broadly classified into three categories – trade and industry association, educational and training institutions, and other institutions. The trade and industry associations assist industries in the cluster in getting clearances and approvals, solving issues regarding industrial infrastructure, providing information on latest government schemes etc. Educational and training institute provide training to labours and assist in addressing availability of skilled labour. Other institutions comprise banks and logistics service providers.

Following are main Industry Associations that are working for the development of steel pipes sector:

- ▶ Indian Industries Association (IIA)
- ▶ Engineering Export Promotion Council (EEPC)
- ▶ All India Manufacturers' Organization (AIMO)
- ▶ Exporters Association
- ▶ Industrial Area Manufacturers' Association (AIMA)
- ▶ The Associated Chambers of Commerce and Industry of India (ASSOCHAM)
- ▶ Confederation of Indian Industry (CII)
- ▶ Federation of Indian Chambers of Commerce & Industry (FICCI)

8.4 Export Scenario

8.4.1 HS Code

HS codes under which the product is exported from the district

HS Code	Description
73063090	Other, welded, of circular cross-section, made up of non-ally steel tube/pipes
73066100	Of square or rectangular cross-section
73069019	ERW precision other tubes made up of other

Current Scenario

The export scenario of World and India have been analysed basis the export statistics of HS codes 73063090 under which steel pipes is exported. Alongside are the key facts pertaining to the analysed product code.²²

8.5 Export Potential

- ▶ The total exports of boneless meat from the district as per HS code 73063090 is around INR 55.21 crores from September 2020 to November 2021.²³
- ▶ India's exports represent 3.4% of world exports for this product, its ranking in world exports is 9 under HS code 730630²⁴.

Product 730630: Uttar Pradesh exported this product to UK, Nepal, Trinidad, Belgium, Australia, Qatar, Hongkong, USA, Germany, Cyprus, Saudi Arabia, Philippines, UAE etc. Below figure shows the top importers for this product from India area:

Key Fact of Export
(HS Code-730630)

61,04,240 (USD Thousand)
Value of world exports in 2020

2,08,032 (USD Thousand)
Total Exports from India in 2020

19,020 (USD Thousand)
Total Exports from UP in 2020-21

9.14%
Share of UP India in exports

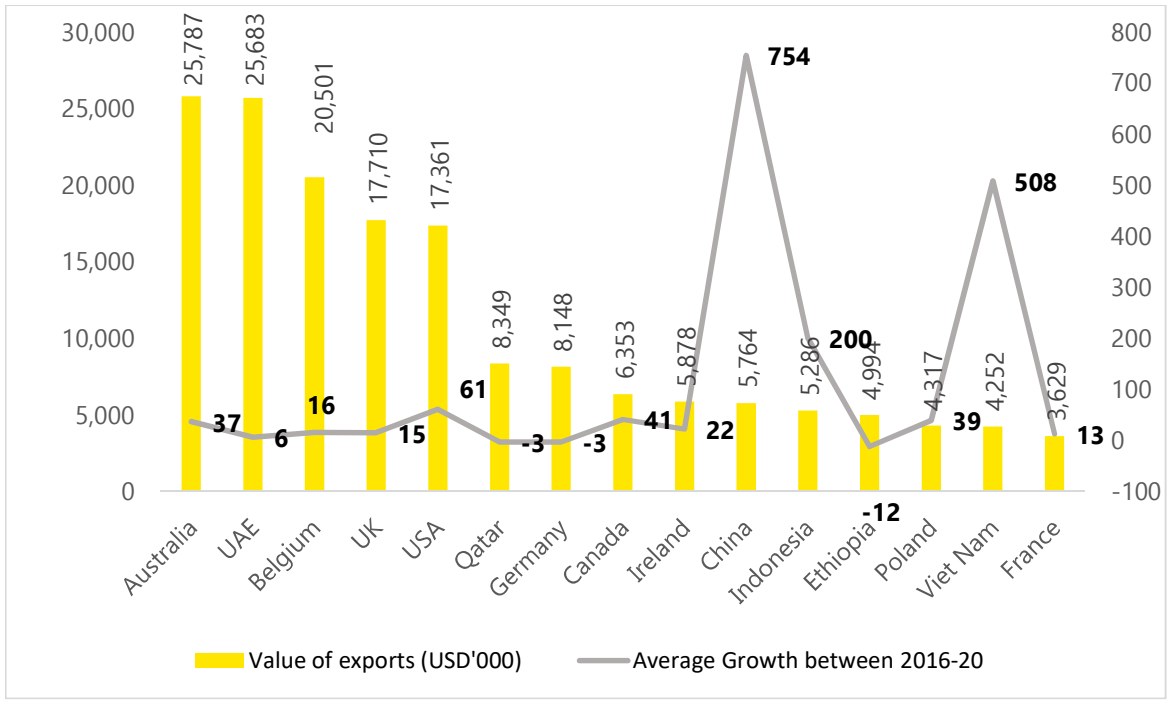


Figure 8: Top importers for this product (730630) in the world¹⁷ from India

²² www.trademap.org

²³ DGFT, Kanpur

²⁴ Trademap.org data for the year 2020



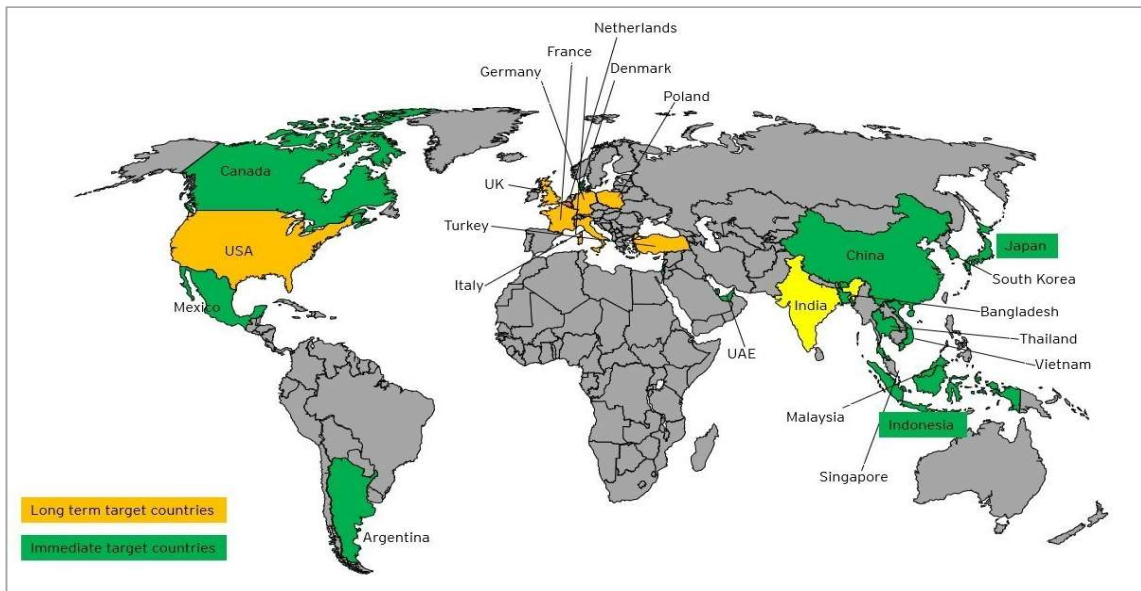


Figure 7: Markets for export potential

8.6 SWOT Analysis

Table 10: SWOT Analysis for steel pipes

Strengths	Weaknesses
<ul style="list-style-type: none"> ▶ Connectivity through Road ▶ Low-cost manpower ▶ Leadership position in export of steel pipes ▶ Favourable trade policies 	<ul style="list-style-type: none"> ▶ Inadequate Environmental compliance by smaller units ▶ Suboptimal backward integration of supply chain ▶ Location on dry port ▶ Lack of quality testing facility ▶ Cost of setting new unit is high ▶ Lack of awareness of govt. schemes
Opportunities	Threats
<ul style="list-style-type: none"> ▶ National & International Exhibition ▶ Increasing demand for steel pipes in global market ▶ Exposure to new markets through fairs 	<ul style="list-style-type: none"> ▶ Strict environment compliance laws as it's comes under NCR region ▶ Located in NCR/NGT ▶ International Competition ▶ Low-cost material from china and Vietnam ▶ Global political situation

8.7 Challenges and interventions

Table 11: Challenges & Interventions



Parameter	Challenges	Intervention
Technological Upgradation	<ul style="list-style-type: none"> ▶ Lack of modern technological & capital inputs and weak infrastructural facilities leads to a process of steel pipes making which is more time consuming, expensive and yields inferior variety of goods. 	<ul style="list-style-type: none"> ▶ Establishment of better infrastructure with modern technological CPC for better result with increased output.
Capital investment	<ul style="list-style-type: none"> ▶ This industry requires huge capital investment which everyone cannot afford. 	<ul style="list-style-type: none"> ▶ DIPEDC to act as a focal point for those who are interested in setting plant and lead the drive in getting desired statutory permissions. Deputy Commissioner Industries may be given responsibility to monitor the cell in consultation with central govt.
Low Productivity	<ul style="list-style-type: none"> ▶ The per capita labour productivity in India is at 90-100 tonnes which is one of the lowest in the world²⁵. ▶ It is due to low skilled person and less trained employee productivity is very low. 	<ul style="list-style-type: none"> ▶ There is an urgent need to increase the productivity which requires retraining and redevelopment of the labour force. ▶ Exposers visit of existing workforce to the high productivity units globally. ▶ DIPEDC 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
Exporter's issue	<ul style="list-style-type: none"> ▶ No focal point to address exporters issues 	<ul style="list-style-type: none"> ▶ DIPEDC 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. 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 DIPEDC 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 DIPEDC office for updating 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.

²⁵ <https://www.yourarticlelibrary.com/industries/8-major-problems-faced-by-indian-iron-and-steel-industry/19691>

8.8 Future Outcomes

Annual Turnover	Cluster exports
Increase in annual turnover from INR 1,200 Crore in 2020-21 to 1,440 Crore by 2026 ²⁶	The increase in export of the product from INR 55.21 Crore during the September 2020 to November 2021 to 66.30 Crore by 2026 ²⁰

9. Scheme under Uttar Pradesh Export Promotion Bureau

Various schemes being run by Export Promotion Bureau to apprise the exporters are as follows:

A. Marketing Development Scheme (MDA)

S. No	Incentive Offered	Amount of incentive against total expenditure
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 lakh / fair) b. 50% (max 0.5 lakh 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

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 12,000 (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

Incentive offered	20% of the actual expenditure or Rs 50 / kg (whichever is less)
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²⁶ Basis Stakeholder Consultation

Eligible Units	Manufacturer & merchant exporter
Maximum limit	Rs 2 lacs /unit /year
Recognized Cargo Complexes	Varanasi & Lucknow

10. Action Plan

Quantifiable activity/ intervention	Responsible authority	Timeline for implementation ²⁷
Increasing the overall exports from the state		
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	ODOP cell, DIPEDC, UPEPB and DGFT	Continuous initiative
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	ODOP cell, DIPEDC, UPEPB and DGFT	Continuous initiative
Sensitization of cluster actors: a. The individuals of a cluster should be sensitized on the plethora of schemes²⁸ 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, DIPEDC, UPEPB and DGFT	Continuous initiative
DIPEDC 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	DIPEDC, UPEPB and FIEO	Intermediate
Common Facility centers (under CFC scheme of ODOP Program, TIES and NAVY scheme) to increase export	UPEPB/ODOP Cell/DIPEDC	Continuous initiative

²⁷ Short term: Should be initiated within 6 months, Intermediate: to be initiated between 6- 12 months, long terms after 12 months

²⁸ 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>:

Common interventions across sectors/ clusters		
Collaboration with e-commerce companies like Amazon, ebay, Flipkart etc.	UPEPB/DIPEDC/OD OP cell	Short term
MoU with QCI for defining quality standards of the products	UPEPB/DIPEDC/OD OP Cell	Short term
Collaboration with IIP to define cluster-wise packing standards	UPEPB/DIPEDC/OD OP 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/DIPEDC/OD OP 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/DIPEDC and banks	Intermediate
Tie up with the banks/financial institutions (SIDBI, BoB etc.) for better interest rates, enhanced working capital limits etc.	UPEPB/DIPEDC/OD OP 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/DIPEDC	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	DIPEDC / UPEPB	Short term
DIPEDC 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.	DIPEDC/DGFT/UPEP B	Long term
Cost Structure:		
a. The DIPEDC 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.	DIPEDC/UPEPB	Long term
b. The CONCOR rates are to be made available at regular intervals to the DIPEDC office for updation of the same at the district website.	DIPEDC/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.	DIPEDC/UPEPB/FIE O	Short term

Product 1: Ceramic/Pottery products		
Establishment of Common Facility Centre with: <ol style="list-style-type: none"> Raw Material Bank Common Production Center Design and display center with CAD/CAM facilities and space to showcase products to undertake sale Marketing centre for undertaking marketing events 	DIPEDC, DGFT and ODOP Cell	Long term
Collaboration with NIFT and NID for design inputs and support in branding initiatives	UPEPB/ODOP Cell	Long term
Product 2: Rice		
Focus on high Yielding Export Quality Rice -Breeding programme may be initiated to develop high yielding export quality rice 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 Promotion Committee	Long term
Liaising amongst Industry department, Agriculture department, APEDA, FIEO, DGFT, NABARD, EXIM Bank, FPOs, cooperatives etc. may be developed for farmer friendly policy formation	Agriculture Department/District Administration/District Level Export Promotion Committee / DGFT / FIEO / NABARD/EXIM Bank/DIEPC/FPOs etc.	Intermediate
It is suggested that special efforts should be made to promote the export of organic rice product	DIEPC/APEDA/UPEPB	Short term
Distribution of Certified seeds to farmers partially through Krishi Vigyan Kendra (KVK) of Bulandshahr and Farmer Producers Organization	KVK/ DIEPC/ FPO	Ongoing as per Implementation schedule
Training programme to educate the cultivators: <ol 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	DIEPC/DGFT/APEDA /DGFT	Ongoing

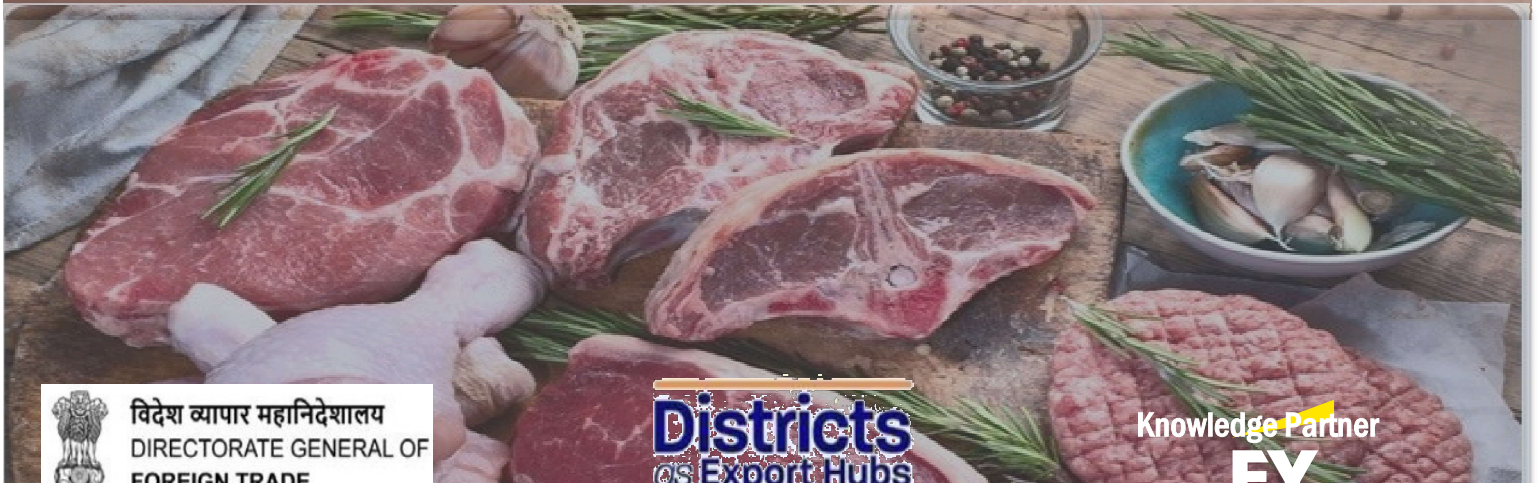
international markets.		
Focus on upgradation of technology used in production by establishing a CPC utilizing PM FME scheme	UPEPB, DIEPC/ DHOs and Dept of Food Processing & Horticulture	Long term
Introducing the Kisan credit card in the cluster	DIEPC and banks	Short term
Collaboration with E-commerce companies focusing on vegetables and fruit sale like Big Basket, Natures Basket etc.	Big Basket/Natures Basket and UPEPB and DIEPC	Short term
Product 3: Chemicals		
DGFT/DIC may develop a web portal with the help of NIC so that timely information about the global trends is available to the industry.	DGFT and NIC	Intermediate term
A subcommittee may be formed to understand the requirement of Industry and the committee may give necessary suggestions.	District Administration, DIEPC and DGFT	Intermediate term
Since the products developed by the industry is for the limited area of use and hence it should focus on marketing and branding of the product. The necessary help and support from CHEMEXI may be obtained.	Sector expert, IAs, DIEPC and UPEPB	Long term
Product 4: Boneless Meat and other edible offal of bovine animals		
Establishment of fleshing machine and lime splitting machine in CFC.	UPEPB/DIPEDC	Long term
Setting of modern technology based CETPs	UPEPB/DIPEDC/Dist rict Administration	Long term
Collaboration with E-commerce companies like Big Basket, Nature Basket etc.	UPEPB and DIPEDC	Short term
Product 5: Steel Pipes		
Establishment of CPC for technology upgradation demonstration	UPEPB/DIPEDC/Dist rict Administration	Long term
A subcommittee may be formed to understand the requirement of Industry and the committee may give necessary suggestions for Capital investment	UPEPB and DIPEDC	Short term

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
DIPEDC	District Industry Promotion and Entrepreneur development 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
IIT	Indian Institute of Technology
ISW	Industrial Solid Waste
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



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DIRECTORATE GENERAL OF
FOREIGN TRADE

Districts
as Export Hubs

Knowledge Partner
EY