

Knowledge Partner



विदेश व्यापार महानिदेशालय
DIRECTORATE GENERAL OF
FOREIGN TRADE

Districts
as Export Hubs



Preface

This district export plan for Meerut 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 Kannauj district as an export hub. In view of above, a District Level Export Promotion Committee has been formed by the office of DIPEDC, Meerut 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 each 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% 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, where EY has contributed as Knowledge Partner.

2. District Profile

Meerut is an ancient city with prestigious mark in the Indian history. In 1857, the first revolt for the freedom of India was started here by great son of this soil Mangal Pandey, a well-known freedom fighter. In ancient India, Hastinapur known for the capital of Kauravs & Pandavas and Parichitgarh, the capital of King Parichit were both found in Meerut. The name of the city may have derived from 'Mayarashtra' (Sanskrit: मयराष्ट्र), the capital of the kingdom of Mayasura, Mandodari's father and Ravana's father-in-law. This name may have mutated to Mairashtra, Mai-dant-ka-khera, Mairaath and eventually Meerut¹.

Meerut was originally located on one of the pillars erected by the Mauryan emperor Ashoka in the 3rd century BCE before it was moved to Delhi in the mid-14th century by Firuz Shah Tughluq. After the archaeological excavations at Vidura-ka-tila, a collection of several mounds named after Vidura, in 1950-52, a site 37 km (23 miles) north-east of Meerut, it was concluded to be remains of the ancient city of Hastinapur, the capital of Kauravas and Pandavas of Mahabharata, which was washed away by Ganges floods².

¹ Jagdish Kumar Pundir (1998). *Banking, Bureaucracy, and Social Networks: Scheduled Castes in the Process of Development*. Sarup & Sons. pp. 49-50

² *The Imperial Gazetteer 1909*, p. 254

Meerut also contained a Harappan settlement known as Alamgirpur. It was also the easternmost settlement of the Indus valley civilisation. Meerut had been a centre of Buddhism in the period of Mauryan Emperor Ashoka (r. 273 BC to 232 BC.), and remains of Buddhist structures were found near the Jama Masjid in the present-day city. The Ashoka Pillar, at Delhi ridge, next to the 'Bara Hindu Rao Hospital', near Delhi University, was carried to Delhi from Meerut, by Firuz Shah Tughluq (r. 1351–1388); it was later damaged in a 1713 explosion and restored in 1867. The British built a large cantonment (military installation) here in the early 19th century. In May 1857, that the initial uprising of the Indian Mutiny (1857–58) occurred when Indian troops employed by the British attacked and killed their British officers and then marched on Delhi.

After India partition some of the family which was initially engage in sports goods manufacturing come up from Pakistan and settle their business in Meerut. Govt ha build a refugee camp in Victoria park in Meerut where people from Pakistan settle their business & now it is one of the major sports goods' product cluster in Meerut.



The cover of the book Sangeet Puranmal Ka (lit. Music of Puranmal) by Ram Lal. The book was published in 1879 from Meerut

The British built a large cantonment (military installation) here in the early 19th century. In May 1857, that the initial uprising of the Indian Mutiny (1857–58) occurred when Indian troops employed by the British attacked and killed their British officers and then marched on Delhi. Meerut is one of the important industrial towns of western Uttar Pradesh due to its geographical location. It is located at the junction of several roads and rail lines. It is a trade centre for agricultural products and has a considerable amount of industry, including manufacturing, smelting, handicrafts, and the milling of sugar, cotton, flour, and oilseeds. It is traditionally known for handloom works, scissors, ornaments & jewellery. The gold market of Meerut is one of Asia's largest gold markets. It employs over 25,000 skilled craftsmen and around 60 kilograms³ of the precious metal is processed here every day. Meerut was one of the first cities in northern India where publishing was set up during the 19th century. It was a major center for commercial publishing during the 1860s and 1870s.

Meerut is famous for sports goods manufacturing as well as manufacturing of scissors, glass & wooden beads, embroidery, artificial Jewellery & electrical transformers.

2.1 Geography

The Meerut district is located between 77°. 00' & 78°. 00' longitude East and 28°. 54' & 29°. 15' latitude North. The district is bounded on the north by Muzaffarnagar district, on the South by Ghaziabad & Hapur districts and on the East by Bijnor & Amroha districts and on the West by Baghpat district.

³ Compiled Thesis-Meerut Sports cluster report-chapter 4 p.80

2.2 Topography & Agriculture

The whole district is a vast level plain. Ganga & Hindon Rivers draws the Eastern & Western boundaries of the district. Meerut is divided into 3 sub-divisions and 12 development blocks. No minerals are available in the district and total forest area in the district is 21,314 hectares. Agro Ecological Sub Region of Meerut is Northern Plain (And Central Highlands) Including Aravallis, Hot Semi-Arid Eco-Region and Agro-Climatic Zone (Planning Commission) is Upper Gangetic Plain Region (V) .

3. Industrial profile of the district

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

| Sl. No. | Industry | Total Units | Total Employment | Total Investment (INR in Cr.) |
|---------|---|--------------|------------------|-------------------------------|
| 1 | Food/Agriculture Based | 1575 | 6300 | 333.04 |
| 2 | Mining and Other related activities | 0 | 0 | 0 |
| 3 | Sports Goods Manufacturing | 9878 | 202170 | 780.95 |
| 4 | Wearing Apparel except Sports Apparels | 1208 | 4832 | 106.44 |
| 5 | Leather and related products except sports goods | 424 | 1908 | 92.13 |
| 6 | Wood and Wooden products of wood except sports goods Equipments | 512 | 2560 | 133.24 |
| 7 | Paper & Paper Products | 132 | 192 | 67.39 |
| 8 | Chemical and Chemical Products | 475 | 2375 | 71.37 |
| 9 | Gems and jewelry | 1500 | 7500 | 89.90 |
| 10 | Metal, Fabricated metal products | 492 | 2460 | 57.12 |
| 11 | Machinery and Equipments NEC | 980 | 4900 | 101.30 |
| 12 | Electrical and Other Transports Equipment | 187 | 935 | 39.42 |
| 13 | Repair and installation of machinery and Equipments | 415 | 1245 | 5.45 |
| 14 | Others manufacturing | 17422 | 78399 | 613.45 |
| | Total | 35200 | 315776 | 2491.20 |

Sports goods and Gems & Jewellery contribute most in terms of employment and revenue, which is approximately 28% and 5% respectively.

Sports goods 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, gems & jewellery and Readymade Garments respectively.

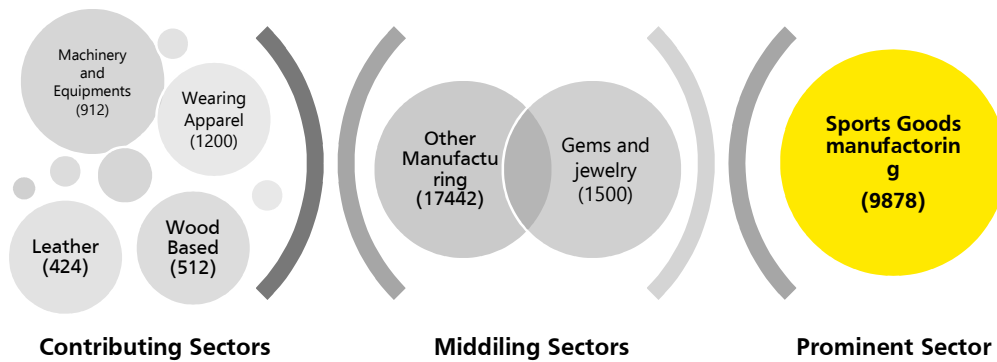


Figure 1: MSME landscape of the district

Out of total population of 34,43,689 (2011 census), 1,124,744 are working population. Out of total working population, 70% are cultivators and agricultural labourers. This indicates that agriculture is the main source of income in the district.

Table 1: Occupational Distribution of Main Workers⁴

| S. No. | Particulars | Meerut | % |
|--------|----------------------------|----------|-------|
| 1 | Cultivators | 1,96,068 | 18.00 |
| 2 | Agriculture Laborer's | 1,53,995 | 14.10 |
| 3 | Household Industry Workers | 63,096 | 5.80 |
| 4 | Others | 6,77,380 | 62.10 |

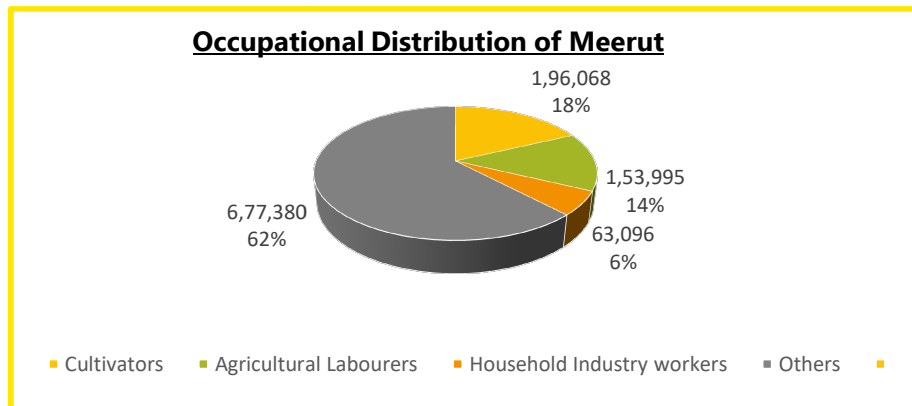


Figure 2: Occupational distribution of Meerut

⁴ District census handbook 2011 - Meerut

3.1 Major Exportable Product from Meerut

The total export from Meerut is approximately INR 3012 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) ⁵ from September 2020 to November, 2021 |
|--------------------------|---|--|
| 1 | Sports Goods (ODOP) | 308 Cr |
| 2 | Boneless Meat of Bovine Animals, Frozen | 481 Cr |
| Total Export from Meerut | | 3,012 Cr ⁵ |




4. Product 1: Sports Goods

4.1 Cluster Overview

Meerut district sports goods cluster is spread across a radius of approximate 10 km. The cluster produces a large range of sports goods and about 60 percent of the total production is being exported to Australia, South Africa, England, America, West-Indies, New Zealand, Zimbabwe and Bangladesh etc., and the remaining products are sold in the domestic market. Improved infrastructure, facilities and work environment in the sports city of Meerut have resulted into different sub-clusters specializing in the production of various sports goods as under.

Table 3: Sports Goods Manufacturing Sub Cluster/Pockets of Meerut

Key Facts

-  **INR 1,500 Crores** Approximate turnover of the cluster
-  **INR 775 Crores** ~ Export Turnover
-  **1,89,789** Artisans directly or indirectly associated

⁵ DGFT- District wise report for the period September 2020 to November 2021

| S. No | Sub-Clusters/ Pockets | Sports Items Manufactured |
|-------|------------------------------|---|
| 1 | Surajkund and Around | Shuttle Cock, Tennis ball, Racquet, Football, Carom Board etc. |
| 2 | Phool Bagh Colony and around | Shuttle Cock, Tennis ball, Racquet, Football, Carom Board Hockey Sticks etc. |
| 3 | Victoria Park and around | Shuttle Cock, Cricket ball, other balls, Carom Board. Track suit, etc |
| 4 | Abdullahpur and around | Batting gloves, Keeping Gloves. Helmet, Wickets etc. |
| 5 | Jangethi | Batting gloves, Keeping Gloves. Helmet, athletics and all types of nets etc. |
| 6 | Shobhapur | Batting gloves, keeping gloves, helmet, wickets etc. |
| 7 | Maliana | Leather work. Foot kits. Boxing gloves and other protective equipment. |
| 8 | Sports complex | About 45 units are manufacturing all types of sports goods and other accessories, |

4.2 Product profile

Sports goods and equipment is a general term for any object used for sport or exercise and based on its utility sports Goods is broadly classified into different categories which are listed below manufactured in the region:

Table 4: Product Portfolio of sports Goods

| S. No. | Categories | Products |
|--------|--------------------------|---|
| 1 | Inflatable balls | Cricket balls, Tennis balls, Volleyballs, Mini balls, Hand balls Basketballs, Rugby balls, Football, hockey ball etc |
| 2 | Exercise Equipments | Exercise and gymnastic Equipments, Health and fitness Equipments, Club equipment, playground equipment |
| 3 | Footwear | Sports shoes, Boxing boots |
| 4 | Outdoor games Equipments | Flying discs, Sticks, Bats and clubs, Badminton, Tennis & Squash rackets, cricket Equipments, Hockey Equipments, Lawn Tennis Equipments, Rolling skates |
| 5 | Indoor Game equipment | Table tennis Equipments, weightlifting equipment, Carom boards, chess board, Marbals, snake & ladder, Ludo |
| 6 | Protective equipment | Leg guards, Head guard, Chest guard, Shin guard, Helmets Protective equipment arm boxing gloves, Hand gloves |
| 7 | Vehicles | Bicycles, Racing bikes and racing motor cars |
| 8 | Others | Metal trophies and medals shirts, Trousers, Tracksuit, Tie, Bags and badges, Inflating pumps/Needles |

4.2.1 Status of GI Tag

The fame of unique handicrafts, aromatic agricultural products and natural goods from Uttar Pradesh has crossed borders, for 36 items have been GI tagged to the state, in a bid to preserve and promote their uniqueness. When marked on a map, the items on this list cover the length and breadth of UP in a manner that truly reflects its artistic legacy and agricultural ingenuity. Meerut district has one GI tagged product i.e Meerut Scissors.

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 sports Goods in Meerut:

▶ **MSME-Technology Development Centre (PPDC)**

It is a Government of India Non-profit Autonomous organization under Ministry of MSME, was established in the year 1986. The Management of affairs of the Centre is governed by its Governing Council constituted by Government of India. The Additional Secretary and Development Commissioner (MSME), Government of India is the Chairman of the Governing Council.

The Centre is engaged in testing, inspection & consultancy of international standards to meet qualitative product/merchandise requirement of the industry and also has state of art facilities for both physical and chemical testing of various products such as Sports Footwear, Leather, Plastics, Rubbers, Packaging materials, Textiles, Safety footwear, and Sports Goods as per national & international methods such as IS, ISO, SATRA, AATCC, DIN etc.

Contact Name: Mr.Sunil Gupta (Principal Director)

Contact No.: 0121-2404991, 2511779

Email: pd@ppdcmeerut.com, tcmeerut@dcmsme.gov.in

Address: Sports Goods Complex, Delhi Road, Meerut -250002

▶ **Tamil Nadu Physical Education and Sports University, Chennai**

The Tamil Nadu Physical Education and Sports University established by an Act of the Government of Tamil Nadu in 2004, is unique and the first of its kind in India as an affiliatory University, exclusively for Physical Education and Sports. After obtaining the accent from his Excellency the president of India on 5th August 2005, the said act came into force with effect from 15th September 2005.

The Department of Advanced Training and coaching are aimed at graduates aspiring to become coaches and trainers in various Sports disciplines. The courses will provide a clear understanding of the scientific techniques, strategies and specific knowledge in the chosen disciplines to the students. The rigorousness of such programmes will help the prospective coaches to sharpen and tone up the technical skills of the players under their control. The graduates can become trainers / Coaches in Schools, Colleges, Sports Academies and Centre of Excellence in Government / Private Sectors. We can tie up with them for the development of sports goods manufacturing machinery mechanisation.

Contact Name: Dr. R. Ramakrishnan (Professor and Head of the Departments)

Contact No.: 9444048854

Email: ramkin@yahoo.com

Address: Melakottaiyur, Chennai - 600127, India.

▶ **Chamber of Commerce & Ind UP**

The Associated Chambers of Commerce and Industry of U. P., also known as 'ASSOCHAMUP', is a State level, premier Chamber of Trade, Commerce and Industry, representing large, medium and small units in private, co-operative and public sectors. It was established in the year 1994 with a view to create an environment in which the trade and industry could grow and prosper, besides ensuring welfare of the member – units.

Contact Name: Shri Yogesh Dubey

Contact No: +91 512-2563930, +91 512-2563935

Email: info@rakeshin.com,

Address: 25, Azad Nagar, Kanpur 208002

▶ **Sports Goods Export Promotion Council (SGEPC)**

Sports Goods Export Promotion Council (SGEPC), a Government of India sponsored organization is working for the promotion of India's exports of sports goods and toys. Founded in 1958, SGEPC represents all the leading manufacturers and exporters of sports goods and toys in India.

Contact Name: Mr. Manish Mahajan, Chairman

Contact No.: +91-11-23516183,23525695

E-Mail: mail@sgepc.in

Address: 1-E/6, Swami Ram Tirth Nagar, Jhandewalan Extn, New Delhi - 110055 (INDIA)

▶ **Sports Goods Manufacturers and exporters association (SGMEA)**

The Sports Goods Manufacturers and exporters association, popularly known as SGMEA, established in 1973 as a Non-Profit Organization is a duly registered Association to represent the leading manufacturers and exporters of Sports Goods. SGMEA, governed by an elected Chairman & nominated executive body, contribute to about 70% of India's exports and over 50% of domestic market.

Contact Name: Mr. Ajaya Mahajan

Contact No.- 0181-4632516

E-Mail: sgmea@sgmea.org

Address: 201 Shakti Nagar, Jalandhar - 144001, Punjab, India

▶ Indian Industry Association (IIA), Meerut

▶ Laghu Udyog Bharti, Meerut

4.4 Export Scenario

4.4.1 HS code

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

Table 5: HS codes for Sports Goods

| HS codes | Description | Export From the district from Sep'20-Nov'21 ⁶ |
|----------|--|--|
| 95069990 | Articles and equipment for sport and outdoor games | 278.31 Cr. |
| 95064000 | Articles and equipment for table-tennis | 30.17 Cr. |

Current Scenario

⁶ DGFT, Kanpur

The export scenario of India and Uttar Pradesh have been analysed basis the export statistics of HS code mentioned above under which sports goods Equipments products are exported. Alongside are the key facts⁷ pertaining to the analysed product codes.

4.5 Export Potential

- ▶ The total exports of sports Goods products from Meerut district were approx. INR 775 Cr. in year 2020-21.⁸
- ▶ Other prominent products exported from Meerut District is Processed Meat.
- ▶ There are more than 40 HSN Codes which is used in Exports of Sports goods 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.

Key Fact of Export

(HSN Code-950699)

68,83,862 (USD Thousand)

Value of world exports in 2020

81,286 (USD Thousand)

Total Exports from India In 2020

---- (USD Thousand)

Total export from UP in 2020

~--%

Share of UP in India's exports

Product 950699: 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 (950699) in the world from India:

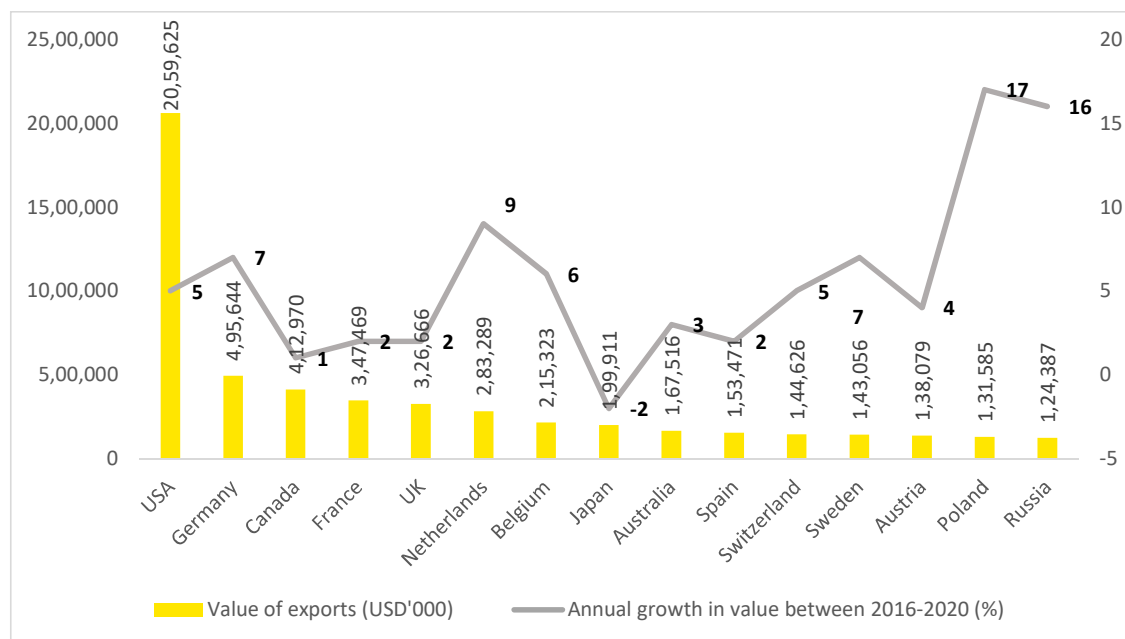


Figure 4: Top importers for this product (950699) in the world from India

⁷ <https://www.trademap.org/>

⁸ DIPEDC, Meerut

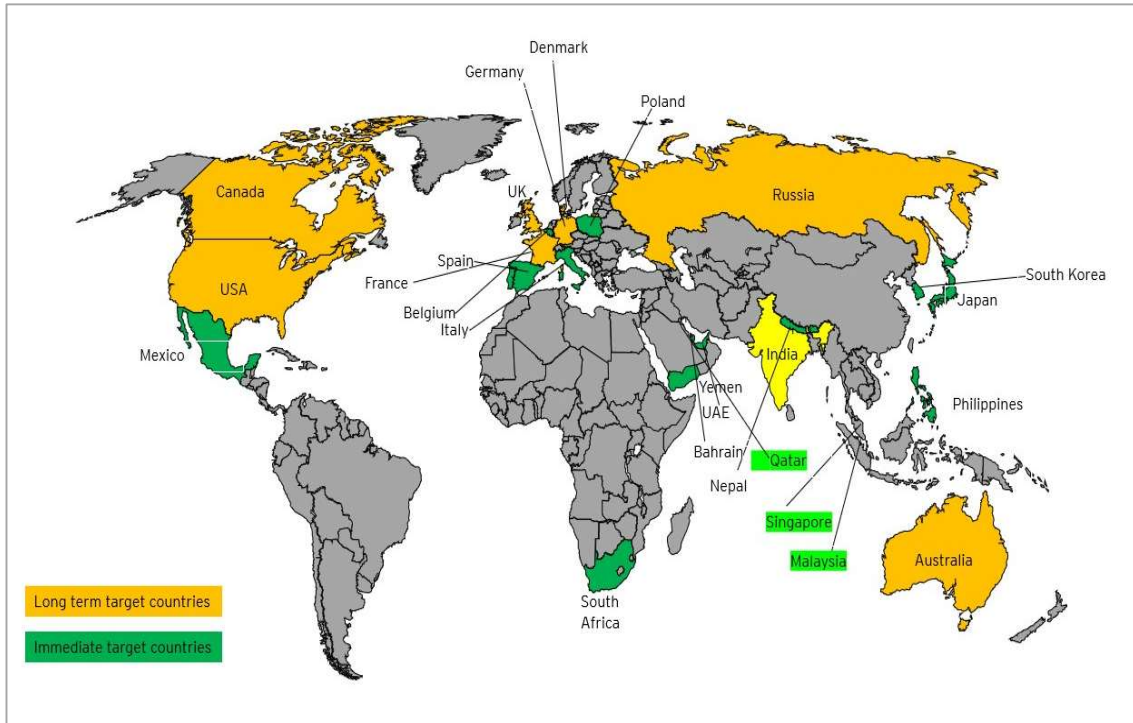


Figure 5: Markets for export potential

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 of the small and micro manufacturers 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 low wait sports goods like bat,wicket for indore games, change in woods used for local sports equipments, etc needs to be promoted.

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 of different materials with plastic sports goods equipment. They can also expand in terms of the materials they use for making the products by introducing low cost wood into their product range.

4.7 SWOT analysis

Table 6: SWOT Analysis

| Strengths | Weakness |
|--|-------------------------------------|
| ▶ Cluster Location and Infrastructure | ▶ Unorganized Structure |
| ▶ Government Initiative | ▶ Scarcity of Raw material |
| ▶ Capability of Imparting Quality within Limited Resources | ▶ Fragmented Structure/sub cluster |
| ▶ Higher demand inn global Market | ▶ Conventional Manufacturing System |
| | ▶ Low Automation |

| | |
|---|--|
| ▶ High Workmanship | ▶ Lack of Product Development ▶ Dependence on Import of Quality Raw Material ▶ Low Inclination Towards International Quality Standards ▶ Lack of Indigenous Brands and Marketing Strategies |
| Opportunities | Threats |
| ▶ Increase in Product Demand both domestic & global markets ▶ Productivity enhancement ▶ Effect of Mega Events on Sports Goods Cluster of Meerut ▶ Employability Enhancement ▶ Different financial Assistance schemes ▶ Health awareness in Middle income population | ▶ Trade Competitiveness ▶ Penetration of Global Brands ▶ Piracy ▶ Price Hike in Industrial Land ▶ Poor Quality System |

4.8 Challenges and interventions

| Parameter | Challenges | Intervention |
|----------------------------------|--|---|
| Raw Material | ▶ Raw Material Bank: <ul style="list-style-type: none"> ○ Sourcing of Raw Material ○ Lack of storage facility in the cluster leading to quality variation and price fluctuations | ▶ Establishment of a Raw Material Bank within the CFC (CFC Scheme of ODOP program) ensuring easy availability of all types of quality checked materials at discounted rates. ▶ Major raw material should be in depo; Willow, Bamboo Cane, Polishing Materials and Virgin plastics. |
| Technological upgradation | ▶ In sports goods manufacturing, approximately 80% of the work is being done manually rest 20 % is done automated. ▶ Usage of outdated technology in football stitching/padding, Manual press for cutting of wood, binding of metal sheet for racquet manufacturing & wood seasoning. ▶ Natural Wood seasoning took 3-4 months for drying. ▶ Higher production cost due to low scale of production and manual working | ▶ Dedicated production centre: It is recommended to have a dedicated state of art common production centre which can be established under ODOP CFC Scheme for football stitching/padding, Manual press for cutting of wood, binding of metal sheet for racquet manufacturing & wood seasoning. ▶ An information center should be established by the Government under Cluster Development Programme where all the latest information relating to technology, innovation, current supplier of technology & user should be available. |
| | Testing is one of the basic requirements for sports goods | ▶ Establishment of Sports goods Testing laboratory |

| | | |
|---|---|--|
| <p>Testing certification and</p> | <p>export. Exporters approached Private Organization like Intertek, URS Testing lab, SGS etc. based out Delhi or NCR. Reach compliance testing charged very high by the private testing labs. Major tests are</p> <ul style="list-style-type: none"> ▶ Testing for regulatory compliance (e.g. REACH, RoHS) ▶ Performance evaluation (e.g. Durability /lifecycle, fitness for use) ▶ Product certification (e.g., CE mark, GS mark, etc.) | <p>with collaboration with international certification Agency under CFC Scheme of ODOP program.</p> |
| <p>Marketing branding &</p> | <ul style="list-style-type: none"> ▶ Lack of infrastructure for marketing and trading of the product in domestic and international markets ▶ Offline marketing is broadly used over online marketing ▶ Creation of brand name for the meerut made sports goods products. ▶ Minimal use of Govt of India's e-commerce portal: India Handmade Bazaar – Seller Registration for maximizing sale ▶ 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"> ▶ Establishment of a Marketing centre within the CFC (CFC Scheme of ODOP program) in Meerut to facilitate marketing events. ▶ Collaboration with E-commerce companies like Flipkart, Amazon, Ebay for maximizing sales. ▶ Increase the usage of the portal as this portal facilitates the Small and micro manufacturers to provide information about their handmade products for easy understanding of exporters. ▶ 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 ▶ Suggesting measures to the UPEPB for State Export Promotion Policy towards enhancing export of sports goods products. |
| <p>Packaging</p> | <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 sports goods 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. |
| Institution strengthening | <ul style="list-style-type: none"> ▶ PPDC was established in year 1986 & it provides R&D support to the sports good industry, technical assistance, and providing skilled manpower through training to MSME sector in the region specially sports goods sector. But with change of time it is not upgraded & its facility is very limited and testing charges are also high. | <ul style="list-style-type: none"> ▶ Dedicated research and development centre must be established. ▶ Establishment of modern art of facility testing centre for all sports goods industry with emphasis on the product line at PPDC. |
| 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"> ▶ 'Revolving Working Capital Assistance' to micro units towards procuring raw materials and meeting operating expenditure. This can be introduced through existing CFCs or DIPEDC ▶ Collaboration with nationalized banks to facilitate quick loan approval and disbursement through digital lending. (ex. SIDBI and BoB) ▶ Banks may support in enhancing financial literacy of industries to avail the benefits ▶ Sensitization of banks/financial institutions to understand the product value chain while fixing WC/CC limits. |
| Infrastructure of industrial area | <ul style="list-style-type: none"> ▶ Infrastructure of industrial area is not good and sewage/drainage system is improper. Due to waterlogging roads are also collapse. | <ul style="list-style-type: none"> ▶ There is a requirement of World class infrastructure for sports goods manufacturer or a separate sports manufacturing zone with proper drainage and firefighting system. It will attract new industrialist which lead to enhance the export of sports goods. Also, for getting some international certification better working condition & basic hygiene is required. |
| Exporter's issue | <ul style="list-style-type: none"> ▶ No focal point to address exporters ongoing 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 hence this increases the transportation cost which in turn adds to the overall production expenses ▶ Since the start of Covid 19 Pandemic, the availability of containers and the Freight Charges by the Shipping lines | <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 updation of the same at the district website. ▶ The formation of the sub-committee comprising |

| | | |
|--|---------------------------------------|--|
| | has been main concern of the industry | 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. |
|--|---------------------------------------|--|

4.9 Future Outcomes

| Annual Turnover |
|--|
| Increase in annual turnover from existing INR 1,500 Cr. to 2,000 Cr. by 2026 ⁹ |

| Cluster exports |
|---|
| Substantial targeted growth in cluster exports expected to be approx. INR 1,000 cr. by 2026 (over a span of 5 years). ⁹ |

⁹ Basis stakeholder consultation

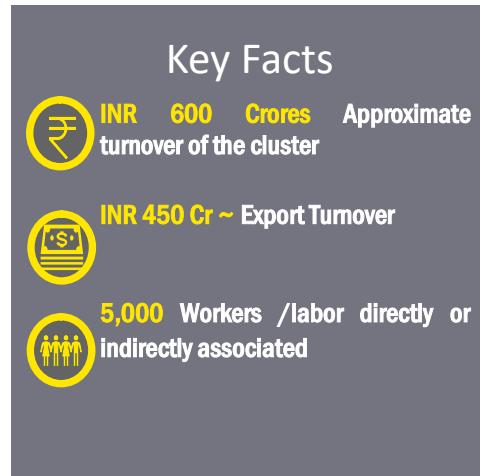
5. Product 2: Boneless Meat and Other Edible Offal of Bovine Animals, Frozen

5.1 Cluster Overview

Meerut 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 5,000 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 2020-21¹⁰ was around INR 600 Cr and the export value was 450 Cr.



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

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.

¹⁰ Basic Stakeholder Consultation

5.3.1 Industry Associations

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

- ▶ **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
- ▶ **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, Ghaziabad (IIA)**

5.4 Export Scenario

5.4.1 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.¹¹

5.5 Export Potential

- ▶ The total exports of boneless meat from the district as per HS code 020230 is around INR 481 crores from September 2020 to November 2021.¹²
- ▶ India's exports represent 11.2% of world exports for this product, its ranking in world exports is 3 under HS code 020230 and 4¹³.
- ▶ Other prominent product exported from Meerut district is sports goods.

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 are:

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

¹¹ www.trademap.org

¹² DGFT, Kanpur

¹³ Trademap.org data for the year 2020

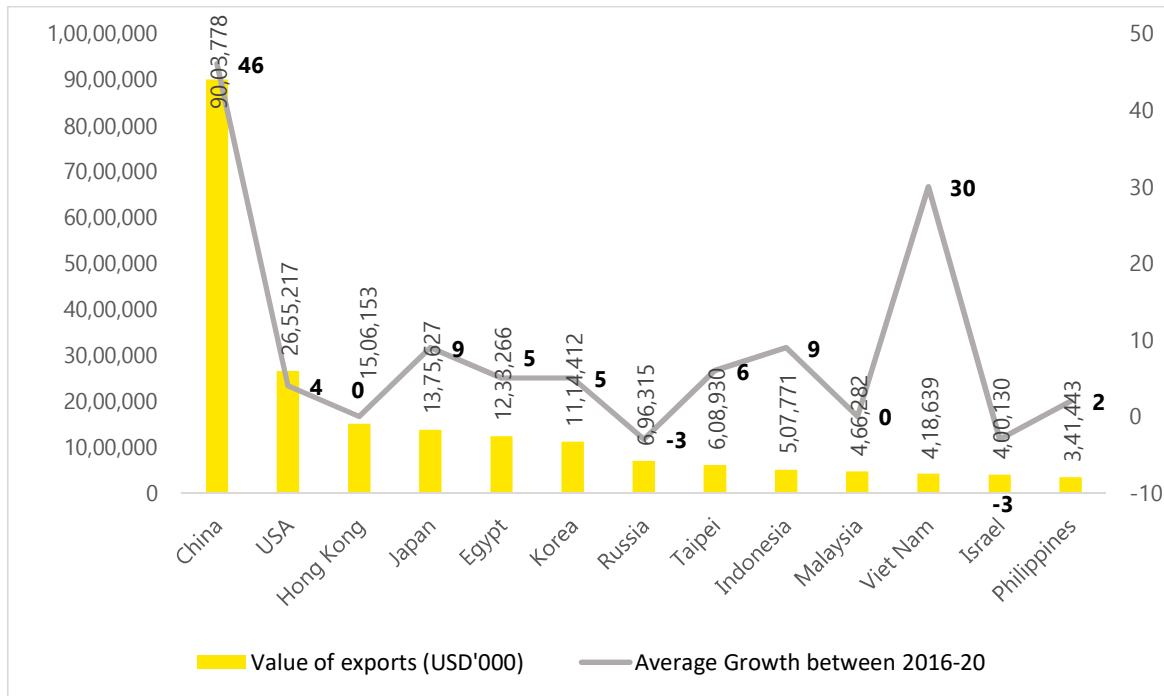


Figure 6: Top importers for this product (020230) in the world¹¹ from India

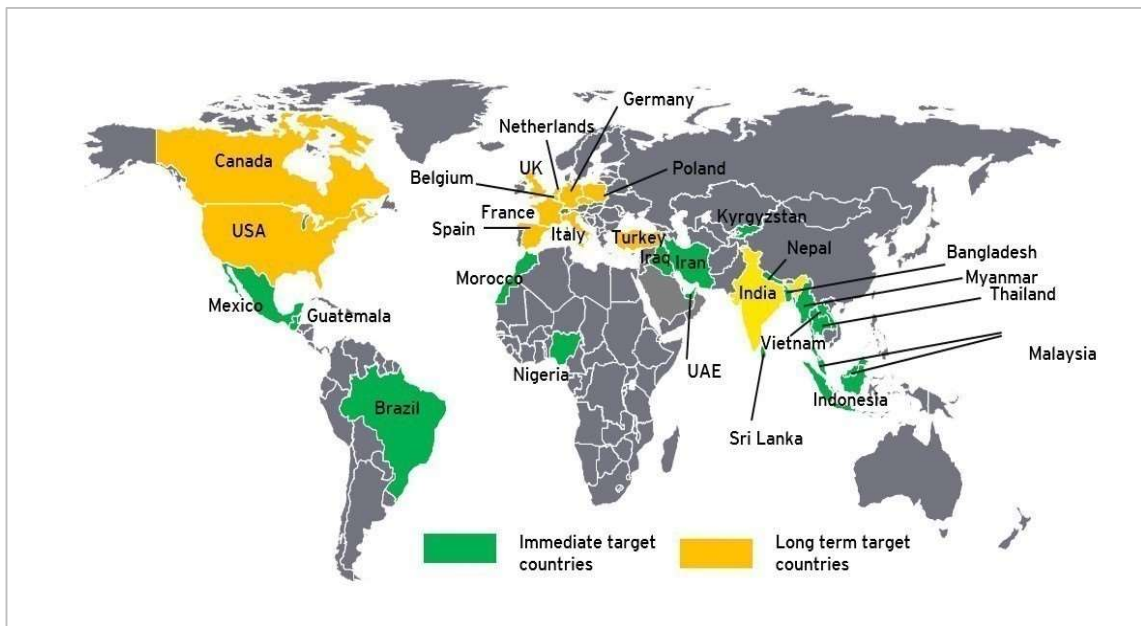


Figure 7: Markets for export potential

5.6 SWOT Analysis

Table 7: SWOT Analysis for Boneless meat and other edible offal of bovine animals

| Strengths | Weaknesses |
|--------------------------------------|--|
| ▶ Rich experience in meat processing | ▶ Inadequate Environmental compliance by |

| | |
|---|---|
| <ul style="list-style-type: none"> ▶ Institutional Support ▶ Low-cost manpower ▶ Leadership position in export of boneless meat ▶ Favourable trade policies | <ul style="list-style-type: none"> ▶ 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 |

5.7 Challenges and 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. |
| Marketing & Branding | <ul style="list-style-type: none"> ▶ Lack of online marketing practices ▶ Increasing participation in the International Trade fairs ▶ Limited Market diversification | <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 |

| Parameter | Challenges | Intervention |
|--|--|--|
| | <ul style="list-style-type: none"> ▶ Lack of knowledge of existing schemes and govt. initiatives ▶ Lack of participation in national and international events related to the sector | <p>FIEO and other organizations may be proposed as a 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"> ▶ 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 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 600 Crore in 2020-21 to 900 Crore by 2026¹⁴

Cluster exports

The increase in export of the product from INR 481 Crore during the September 2020 to November 2021 to 650 Crore by 2026¹⁴

¹⁴ Basis Stakeholder Consultation

6. 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) |
| Eligible Units | Manufacturer & merchant exporter |
| Maximum limit | Rs 2 lacs /unit /year |
| Recognized Cargo Complexes | Varanasi & Lucknow |

7. Action Plan

| Quantifiable activity/ intervention | Responsible authority | Timeline for implementation ¹⁵ |
|---|-----------------------|---|
| Increasing the overall exports from the state | | |

¹⁵ Short term: Should be initiated within 6 months, Intermediate: to be initiated between 6- 12 months, long terms after 12 months

| | | |
|--|-----------------------------------|-----------------------|
| 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 schemes¹⁶ 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 |
| 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 |

¹⁶ 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>:

| | | |
|---|--------------------------------------|--------------|
| 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: Sports Goods | | |
| Establishment of Common Facility Centre with: a. Raw Material Bank b. Common Production Center c. Design and display center with CAD/CAM facilities | DIPEDC, DGFT and ODOP Cell | Long term |

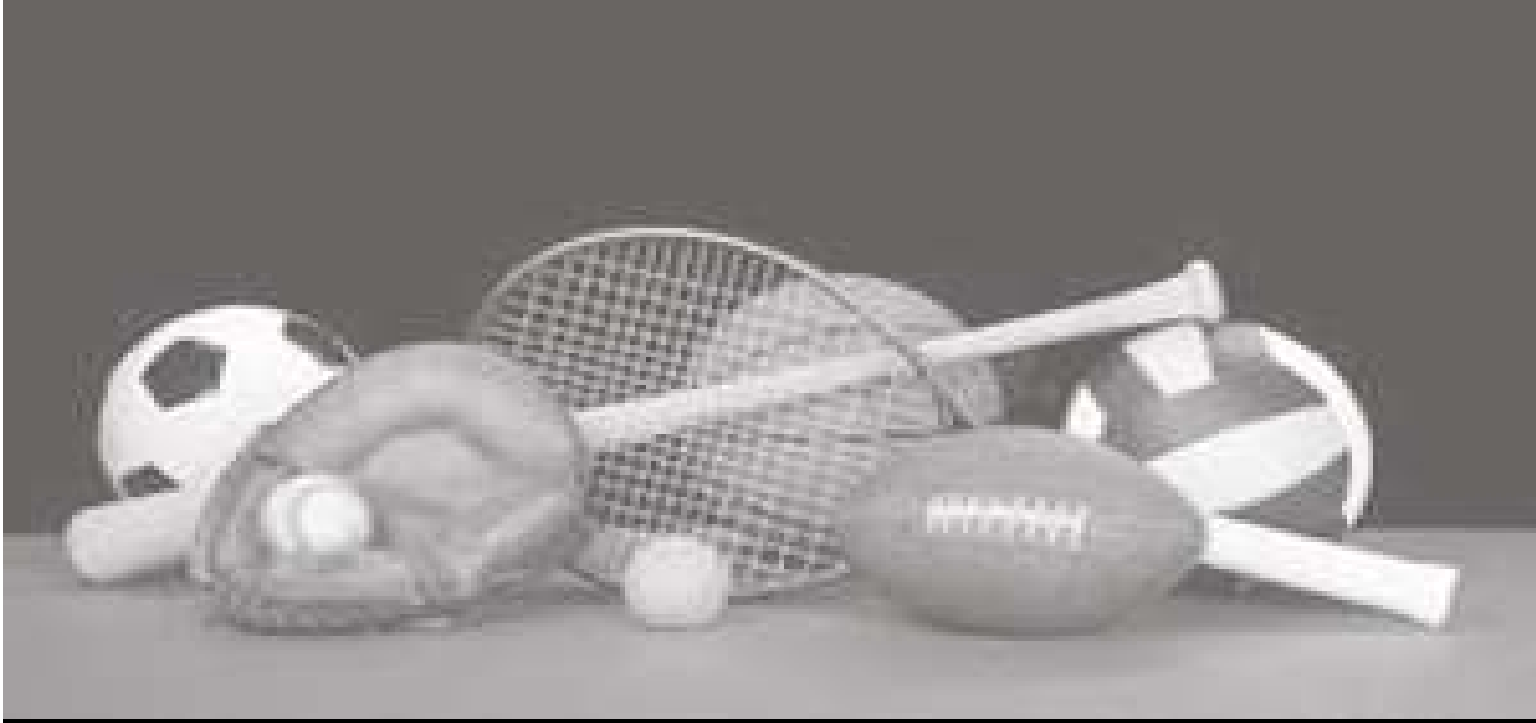
| | | |
|--|--------------------------------------|------------|
| and space to showcase products to undertake sale d. Marketing centre for undertaking marketing events | | |
| Collaboration with NIFT and NID for design inputs and support in branding initiatives | UPEPB/ODOP Cell | Long term |
| Product 2: 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/District Administration | Long term |
| Collaboration with E-commerce companies like Big Basket, Nature Basket etc. | 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 |



विदेश व्यापार महानिदेशालय
DIRECTORATE GENERAL OF
FOREIGN TRADE

Districts
as Export Hubs

Knowledge Partner

