

COVID-19

Challenges, Opportunity & Threat for Indian Handicraft Exports

Home Decore

Submitted by:



**Indian Institute of Foreign Trade
Deemed University under Ministry of Commerce
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CHAPTER 1 BACKGROUND

NEED ASSESSMENT

The Covid-19 pandemic is taking a hard toll on the global economy and India is no exception to this. Handicraft industry, the largest second largest employer in the country after agriculture, which is largely informal, is severely affected witnessed by cancellations of existing export orders wherein around 30% of orders of labour-intensive sectors have got cancelled., default payments and lowering down the future business prospects in near future due to cancellation of few promising trade fairs including the 49th edition of IHGF – Delhi Fair Spring-2020 hampering the exports from major craft clusters like Moradabad, Saharanpur, Jodhpur, Jaipur, Agra, Narsapur, Firozabad, North-eastern region. Cancellation of key trade fairs in the US, Hong Kong and Jaipur has impacted the jewelry business.

A lockdown in India's major export destinations such as China and Europe is also impacting India's handicraft export earnings. India's exports contracted 1.5% to \$292.9 billion in the 11 months to February 2020. The decline is likely to be much sharper going ahead. The country's labour-intensive export sectors such as leather, textiles, gems and jewelry, carpets and handicrafts have borne the brunt of the Covid-19 pandemic. About ₹7,600 crore of leather export orders have been cancelled, ₹2,000 crore carpet orders are stuck and handicraft sector losses are seen at ₹8,000 crore.



India will be the 10th most impacted economy due to supply chain disruptions in China, with agriculture, handicrafts, textiles and apparel at the forefront of the disruption.

Looking for trade opportunities beyond traditional markets of the USA and EU for Indian handicraft exports post COVID does make business sense due to the fact that while on one hand COVID crises seem to have brought forward obvious challenges for Indian exporters due to issues in these export markets, on the other hand appreciating the fact that the COVID crises have hit global markets, many of which have been competing suppliers for India in prime importing countries for Indian handicrafts, this current crises also seem to open newer prospects for Indian handicraft exports.

COVID crises in India's major export destinations such as China, USA and Europe has impacted India's handicraft export earnings. This entails the need for an immediate hunting and trade diversion towards newer destinations with relatively lesser COVID impact.

Assuming the fact that China being the epicenter of the COVID-19 crises; would bring a psychological shift in global procurement priorities from China to alternate sources.

COVID-19: EXPECTED ADVANTAGE FOR INDIAN HANDICRAFTS

As a result of the global COVID crises, it is witnessed that the western economies are badly battered while countries like India, Indonesia, etc. are not so battered. Emotional and Economic backlash against China is expected. Already, countries and companies are working on strategy to pivot away from China as part of their supply chains. Japan Govt has announced packages for its companies bringing back manufacturing home.

Consumer behavioral shift post COVID Impact on Indian handicraft exports	
For individuals, health and safety will become a priority area of consumer spending	Handicraft products like khadi mask, organic clothing, cotton textile wears etc. would gain edge
The ticket size of spending will drop for a while. People will spend on cheaper goods than on expensive goods, or delay spending for a while	Gift items and other high priced handicraft products would face a setback.
Extreme acceleration in digital economy	EPCH members needs to be promoted to have their own websites and look for rigorous E-commerce marketing. Councils needs to plan virtual trade fair
People will be less loyal towards brands as other aspects will take over. People will switch brands faster due to various other concerns like safety, etc.	Shift in brand loyalty would mean opportunity for MSMEs against bigger brands. Except for the fact that price competitiveness and design innovation will be most important focus. It's time for survival of the fittest.

Businesses need to keep this in mind and work accordingly. As a result of this, there is an expected shift in consumer behavior post COVID which might impact the purchasing behavior towards handicrafts. Indian businesses therefore need to try to become the contract manufacturer of the world, just like China is. India needs to make use of this opportunity smartly.

COVID impact is quite visible in shift of consumer preference

Opportunity For India

Global buyers of textiles, homeware, lifestyle goods, ceramic tiles looking for Indian products

Replacement buying enquiries from US, EU

THE CONSTRAINTS

Leather footwear cos dependent on Chinese components

Supply chain disruptions to hit India

Global buyers are turning to India to source ceramics, homeware, fashion and lifestyle goods, textiles and furniture from the country as China grapples with the deadly coronavirus outbreak.

Cevisama 2020 ceramics fair in Spain, some 55 Indian companies have drummed up greater interest from buyers owing to muted competition from China.

Clients in the US and the EU have also set their sights on India for labour-intensive products such as garments.

C Indian exporters have received enquiries above Rs. 10 crore from the EU and US.

CHAPTER 2

INDIAN HANDICRAFTS EXPORTS: PRE-COVID STATUS

INDIAN HANDICRAFT SECTOR: SNAPSHOT

The handicrafts sector is of importance to the Indian economy as it is one of the largest employment generators and account for a significant share in the country's export. The state and regional clusters contribute significantly to handicrafts export. The Indian handicrafts industry is fragmented with more than seven million regional artisans and over 67,000 exporters/export houses promoting regional art and craftsmanship in the domestic and global markets. Exports from the sector aggregated to Rs 24,500 crore. Handicrafts embody the rich cultural heritage and traditions of India. There are a total of 744 handicraft clusters in India engaging nearly 2,12,000 artisans, offering more than 35,000 products. The major clusters are in Surat, Bareilly, Varanasi, Agra, Hyderabad, Lucknow, Chennai, Ranipet, Mumbai, Kanpur, Farrukabad, Saharanpur, Etikoppaka, Jaipur, Asharikandi, etc. The table below shows the handicraft categories produced in India:



ARTWARE

Brass Metalware, Bidri work, Dhokra, Bell Metal, Bells & Chimes, Candle Holders, Candle Sconces, Fireplace, Flower Vases, Jewelry boxes, Utensils etc.



WOODWARE

Almirah, Beds, Cabinets, Chairs, Home Temples, Mirror Frames, Side Boards, Sofa sets, Stools, Tables etc.



EMBROIDERY & CROCHET GOODS

Zardozi, Parsi work, Kashmiri Crewel Embroidery work, Phulkari work, Kasuti, Chikankari, Crocheted work, Kantha Embroidery, Mirror Work



HANDPAINTED TEXTILES & SCARVES

Kalamkari, Tie and Dye, Block Printing, Bed covers, Carpets, Coverlets, Curtains, Cushion covers, Duvets, Kitchen Towels, Quilts, Rugs & Mats, Sofa



IMITATION JEWELLERY

Anklets, Armllets, Bangles, Bracelets, Brooches, Chokers, Cufflinks, Earrings, Necklaces, Pearls, Pendants, Rings, Toe Rings etc.

Out of these traditional production strengths, main handicraft items exported by India include house-ware, home textiles, furniture, glassware, bamboo goods, fashion jewelry and lamp and lighting.

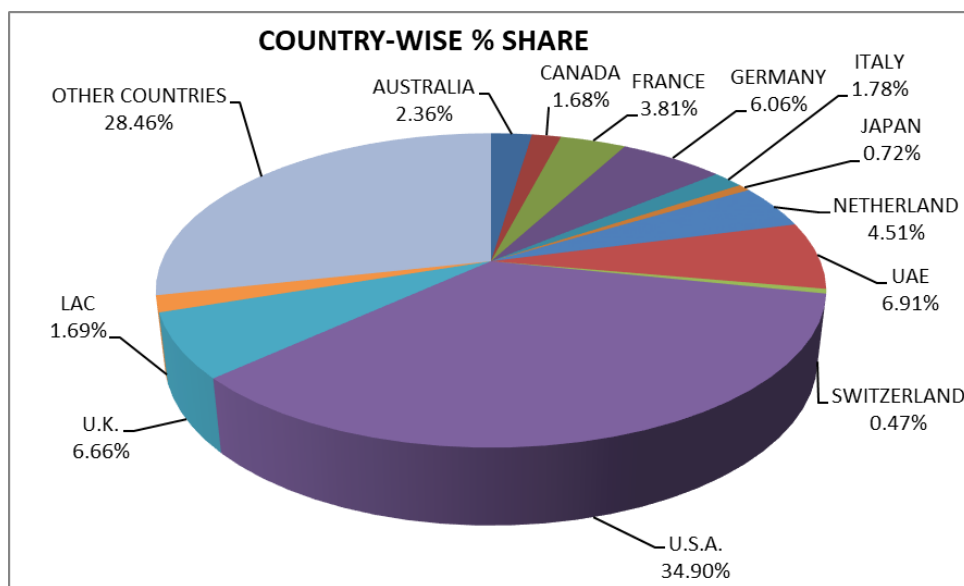


Annexure I details out the entire list of 167 HS code divided into five categories:

- Lifestyle
- Fashion
- Home
- Textiles
- Furniture

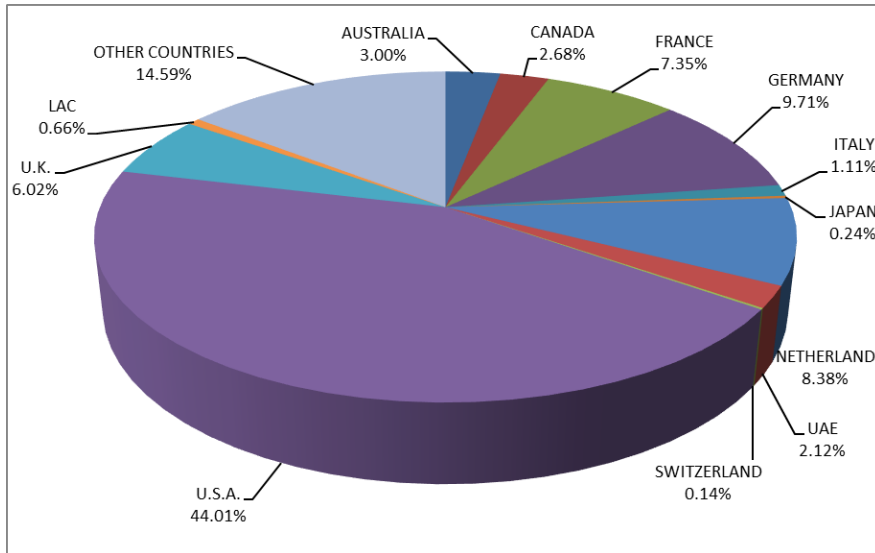
Major export destinations for domestic handicrafts items include the US, Europe, South America, Africa and China. Other markets include UAE, Australia, Canada and Japan. The US and Europe together account for about 60 per cent of the country's total handicraft exports.

INDIAN HANDICRAFTS: COUNTRY WISE EXPORT SHARE



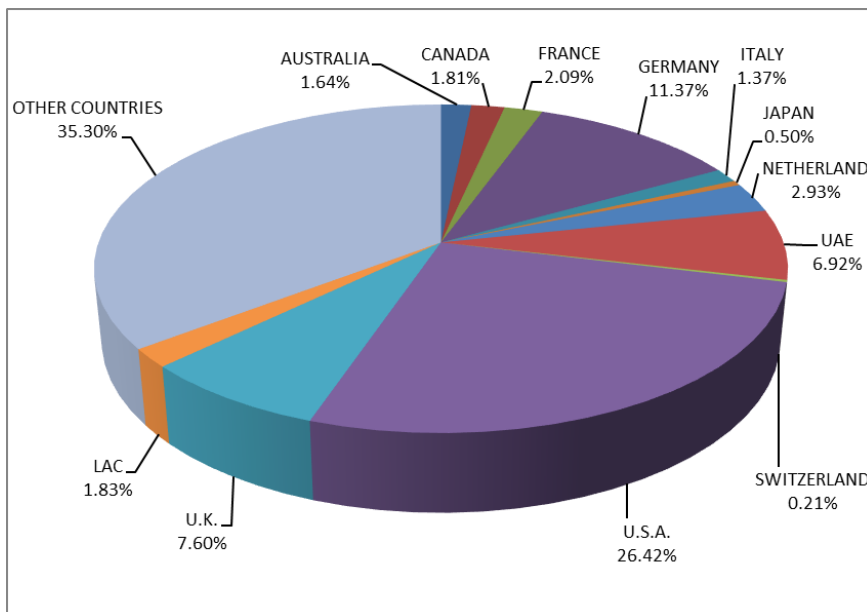
USA was the highest in importing of handicrafts among all the importing countries of the world, which was 34.90 percent share of the total export. Further, followed by UAE, UK, Germany, Netherland and France were having the percentage share of 6.91, 6.66, 6.06, 4.51 and 3.81 respectively in the import of handicrafts during the year. These five countries have more demand for the handicraft products produced by India, which was more than 64 percent of the total export during this year.

Export Markets for Woodenware



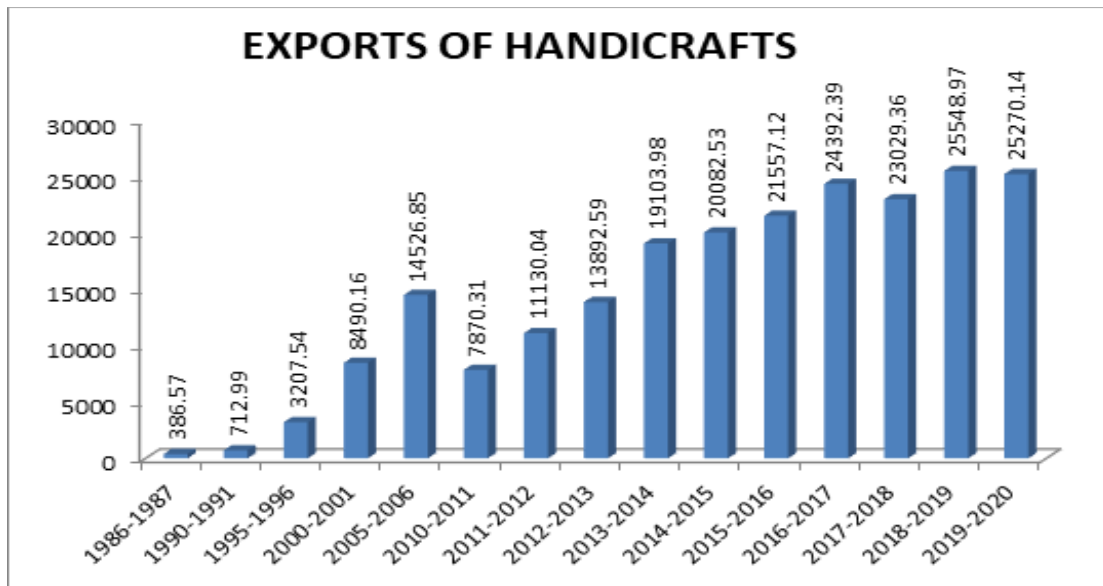
Some of the centers for these crafts are in Saharanpur, Nagina, Hoshiarpur, Srinagar, Amritsar, Jaipur, Jodhpur, Jagdalpur, Bangalore, Mysore, Chennapatna, Madras, Kerala & Berhampur (WB). The USA was the highest importer with Rs 2418.50 Crore which was 44.01% of the total export from India and the second country was Germany.

Export Markets for Metal Artware



India is the largest brass metal ware producer in the world. The major cluster of brassware is Moradabad, Murshidabad, Madurai, Salem, Cuttack, and Haryana. USA was the highest importer of metalware followed by the Germany. Which was 26.42% and 11.37 % respectively of the total export. People of these countries have a great fascination for the Indian metal ware.

Trend in Indian Handicraft exports (1986-2020)



Source: DGCIS, 2020

Handlooms and Handicrafts Sector craved for growth since quite a few years, which has now actually turned prolific. No doubt, India has an edge against its competitors like China, Philippines, Thailand, Taiwan and Korea who generally produce machine-made products. Indian handmade products have a niche market all over the world creating a distinct impact through exclusive designs, workmanship, finesse, colors and raw material.

“India is failing to raise its share in the global market, beyond 2% for a long time. confronting challenges due to increased competition from machine-made products of China.”

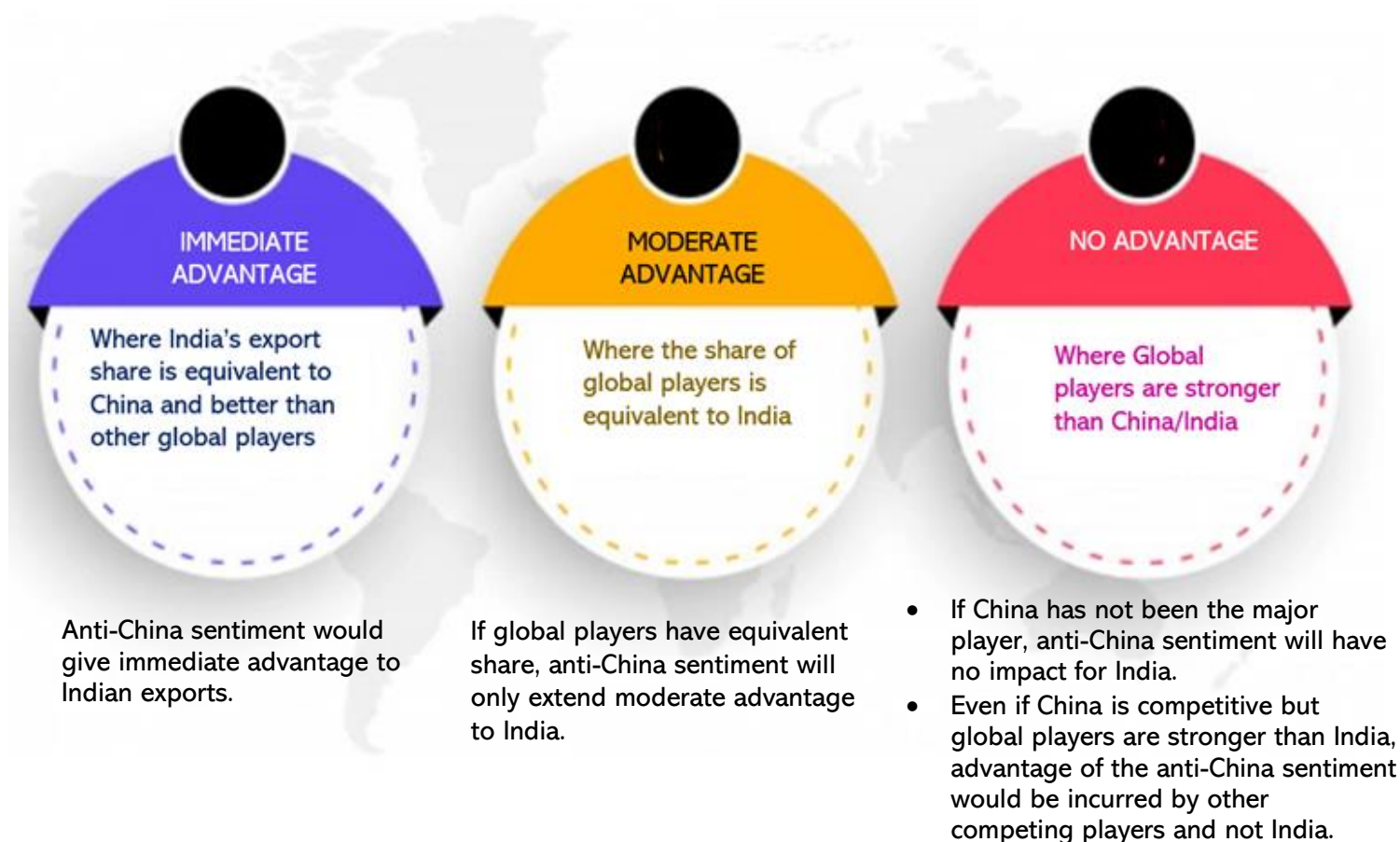
However, despite these promising trends, India is failing to raise its share in the global market, which has remained at around 2% for a long time. Globalization has involved changes in economic structure, relative prices, consumption possibilities and pattern, which in turn affects the growth of the sector. The handicraft industry is confronting challenges due to the intervention of new technology and also increased competition from different countries and especially, from machine-made products. Indian products are now facing challenges of price competitiveness from other countries like China which have mixed craft with the latest technology.

India is still to introduce such innovative technologies in the handicraft sector. Appreciating the fact that the world handicraft market would be worth \$ 1091.2 billion by 2024, expanding at 11%, annually compounded, during 2019-2024; it is worth exploring the status of India versus other global players especially China in each of the 167 HS codes carrying huge production strength for India.

WILL ANTI- CHINA SENTIMENTS GIVE ANY TRADE ADVANTAGE TO INDIAN HANDICRAFTS?

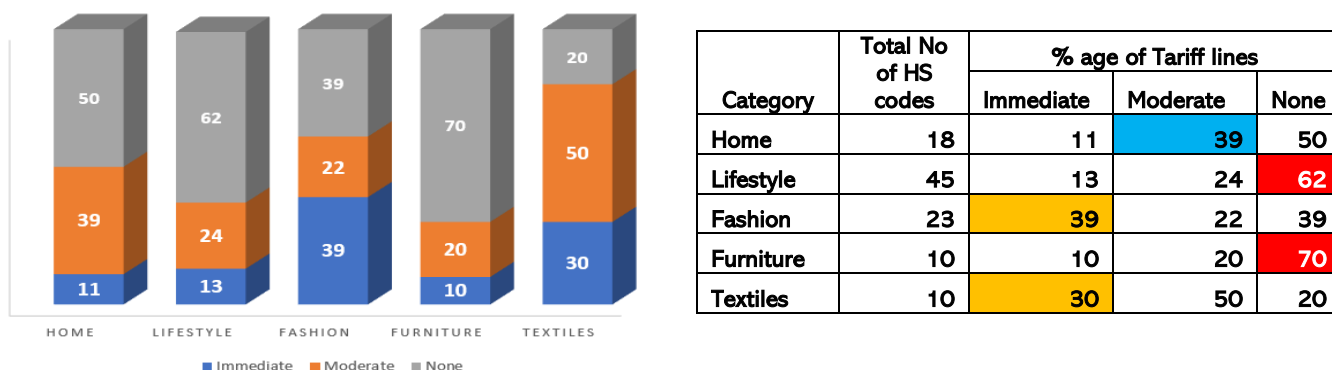
As analyzed, China have been losing its market share in countries like USA, EU, Latin America, GCC etc. which have been traditional export markets for Indian handicraft exports. Also, the products where it has lost market in handicraft category includes furniture, textiles and apparel and its accessories, iron and steel articles (wrought iron handicraft products), footwear, toys and games. Most of these product categories seem to be having great export potential across various handicraft clusters of India.

The section below therefore analyses the impact of all 167 HS codes of export interest to EPCH and compares India's export share with that of China versus other global exporters. The HS codes are then divided into three categories:



As seen in the table below, immediate advantage goes to products in fashion (39%) and textiles (30%) categories, while moderate opportunity goes to handicraft products in home. (39%). Lifestyle and furniture category products are expected to have minimum opportunity.

TRADE OPPORTUNITY FOR INDIAN HANDICRAFTS: IMPACT ANALYSIS



Source: Author's estimation as per ITC, 2021

Annexure II details out the analysis depicted in the table below. Many products including aggarbatti, table, kitchen and household articles captured a decent market share in the world just next to China and hence the fall of China is expected to shift the focus of global sourcing towards India. Similarly, in category of lifestyle products where Indian exporters should focus includes extracted oleoresins, wallets, purses, key-pouches, cigarette-cases, tobacco-pouches, handmade paper and worked vegetable or mineral carving material.

China's fall: India's Advantage? HS code wise analysis (Annexure III)

Category	Immediate	Moderate	None
Home	330741, 741810	442191, 700992, 701349, 741999 830630, 960310, 960899	691110, 691190, 691200, 701328 701333, 701337, 701341, 970400 970500
Lifestyle	330190, 420231, 460199, 480210, 960200, 961400	340600, 420229, 441400, 441919, 460219, 482390, 702000, 761510, 830610, 830621, 940550	330749, 392310, 420239, 442010, 460129, 482370, 660200, 691310, 691390, 701391, 701890, 830629, 920290, 920590, 920600, 940510,

			940530, 950300, 950510, 950590, 960622, 970110, 970190, 970200, 970300, 970400, 970500, 970600
Fashion	560500, 580900, 581010, 611710, 630790, 681599, 711311, 960190, 960200	580810, 581092, 701810, 711719, 711790	581100, 610431, 640320, 650400, 650500, 670100, 711711, 830890, 960110
Furniture	442090	940360, 940389	460211, 460212, 940330, 940350, 940390, 950300, '940382
Textiles	580430, 580500, 940490	581100, 630411, 630491, 630790, 640610	580410, 670290

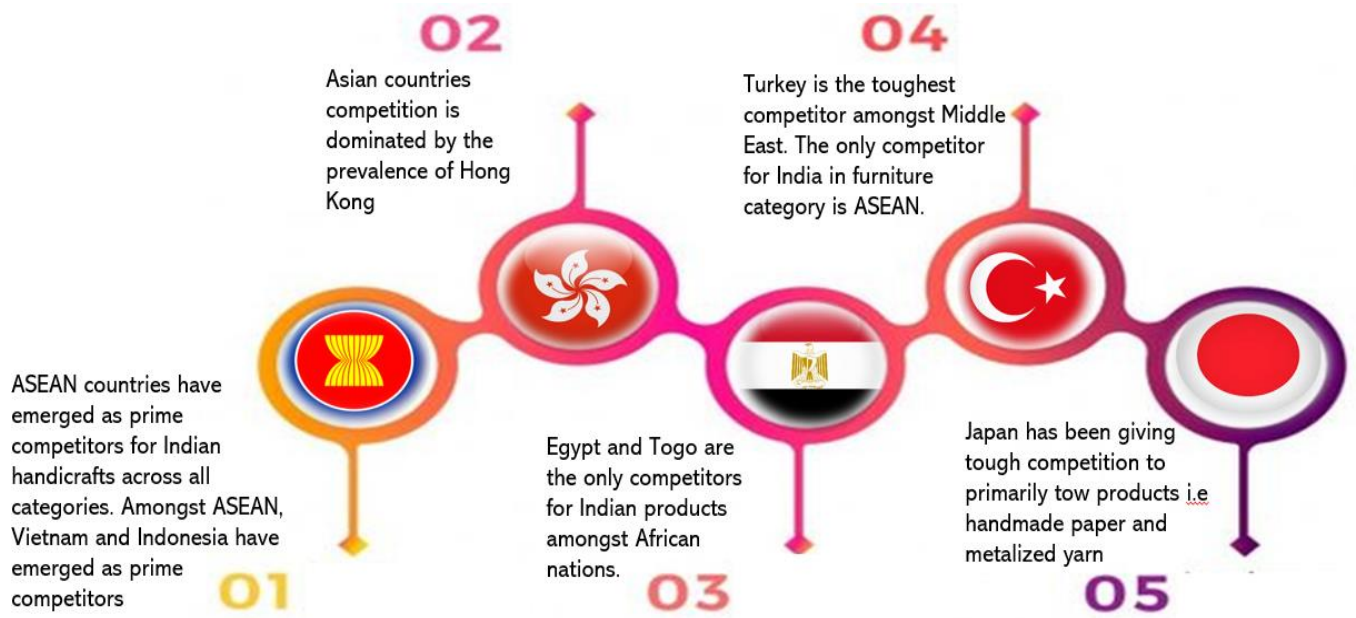
Source: Author's estimation as per ITC, 2021

Products amongst fashion category where Indian exporters have immediate advantage includes; metallized yarn, woven fabrics of metal thread, embroidery on a textile fabric ground without visible ground, articles of stone, articles of jewelry and worked bone and tortoiseshell. Indian doesn't have any major advantage in furniture products where the only product worth considering includes wood marquetry and inlaid wood; caskets and cases for jewelry or cutlery. Textile sector carries maximum advantage amongst all the handicraft categories where products carrying utmost opportunity includes handmade laces, tapestries handmade, mattress support and bedding material.

GLOBAL COMPETITION FACED BY INDIAN HANDICRAFTS: APART FROM CHINA

The reason for product having either moderate or no advantage of the fall of China was attributed to strong presence of global competing players. While European nations were predominant competitors across almost all the product categories; even emerging markets of ASEAN, Asian Pacific including Korea and Japan and South Asian countries including Srilanka and Pakistan were found to be better market players as compared to India in most of the products. Hence if Indian government or Indian exporters intend to make their presence in the said products, they would need to cater to strong competition arising from these countries apart from China.

Figure below summarized from the data in the table below highlights the status of global competition faced by Indian exporters across different handicraft categories. Annexure I details it our further.



GLOBAL COMPETITORS (APART FROM EU) IN CATEGORY: HOME

ASEAN/SA			Asia Pacific			UAE		Africa		
HS code	Product	Country	HS code	Product	Country	HS code	Product	HS code	Product	Country
330741	Aggarbatti	Vietnam	741999	Copper Articles	Korea	330741	Aggarbatti	701337	Drinking glasses (excluding ceramics/ lead)	Turkey
442191	Bamboo	Indonesia	830630	Metal frames	HongKong	691110	Table and Kitchenware, of porcelain	701333	Drinking glasses of lead crystal (excluding stemware)	Egypt
691200	Ceramics kitchenware	Thailand	960899	Parts of pen	Japan	691190	Household articles, of porcelain	701349	Glassware for kitchen purposes	Turkey
700992	Glass mirror	Vietnam								
960310	Brooms and brushes	Srilanka, Indonesia								

CHAPTER 3

SURVIVAL STRATEGY FOR INDIAN HANDICRAFTS

COMPARATIVE QUADRANT ANALYSIS FOR IDENTIFIED CATEGORIES

Based on the above rationale and category-wise analysis; corresponding policy suggestions are listed in the subsequent section. Graphs below illustrates the status of all the products across different categories, which have been organized as per their performance on the two parameters indicated above. Bubble graph on world imports in each of the categories; depicts status of individual products across four quadrants based on the above two parameters:

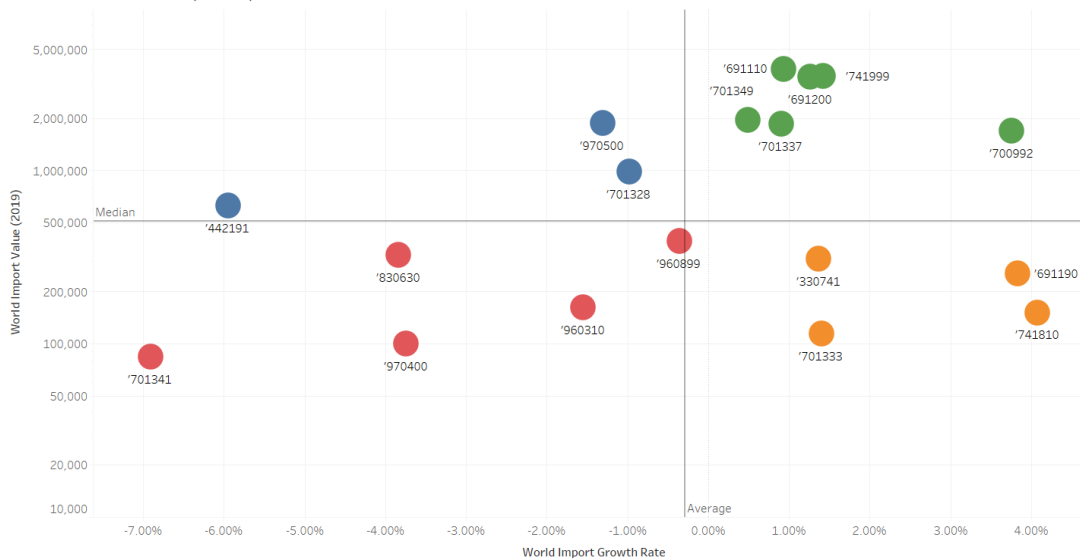
Color Coding	Growth 2014-20	Absolute value 2020
	High	High
	High	Low
	Low	High
	Low	Low

Once the HS codes in each category is distributed across 4 quadrants based on their status in world imports, the same products are then mapped across another 4 quadrants based on their status in India's exports. Finally; the policy recommendations HS code-wise is suggested as per the above-mentioned rationale

CATEGORY: HOME

WORLD IMPORTS VALUE VERSUS GROWTH

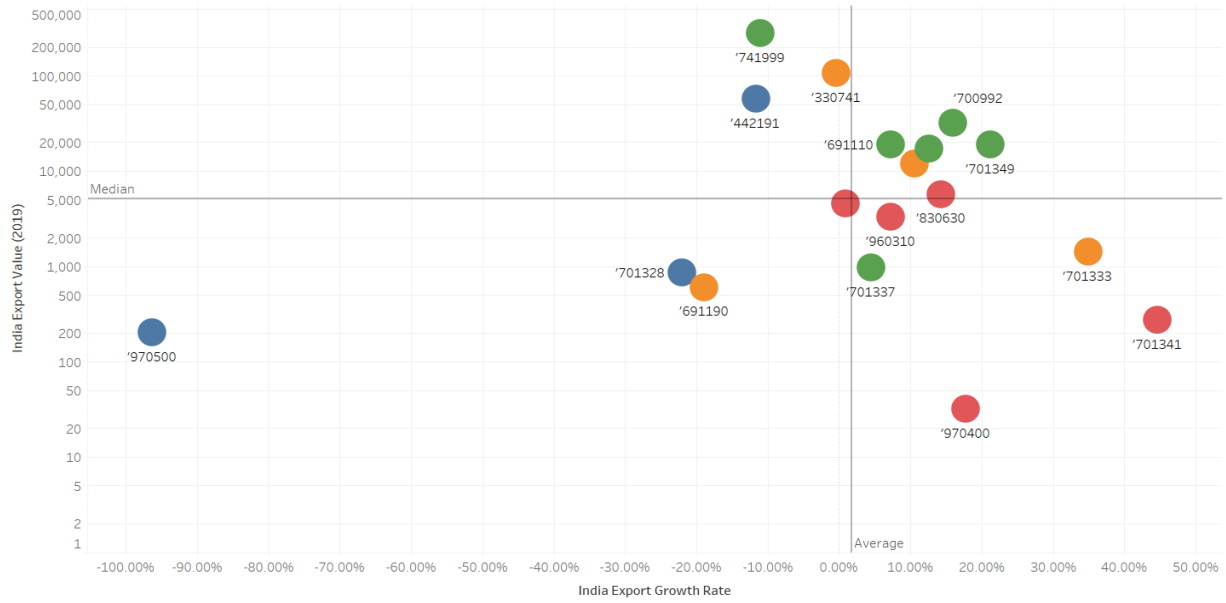
WI Value vs Growth (Home)



Sum of World Import Growth Rate vs. sum of World Import Value (2019). Color shows details about Quadrant Color. The marks are labeled by Code1. The data is filtered on Category1, which keeps Home.

INDIAS EXPORT VALUE VERSUS GROWTH

INDEXP Value vs Growth (Home)



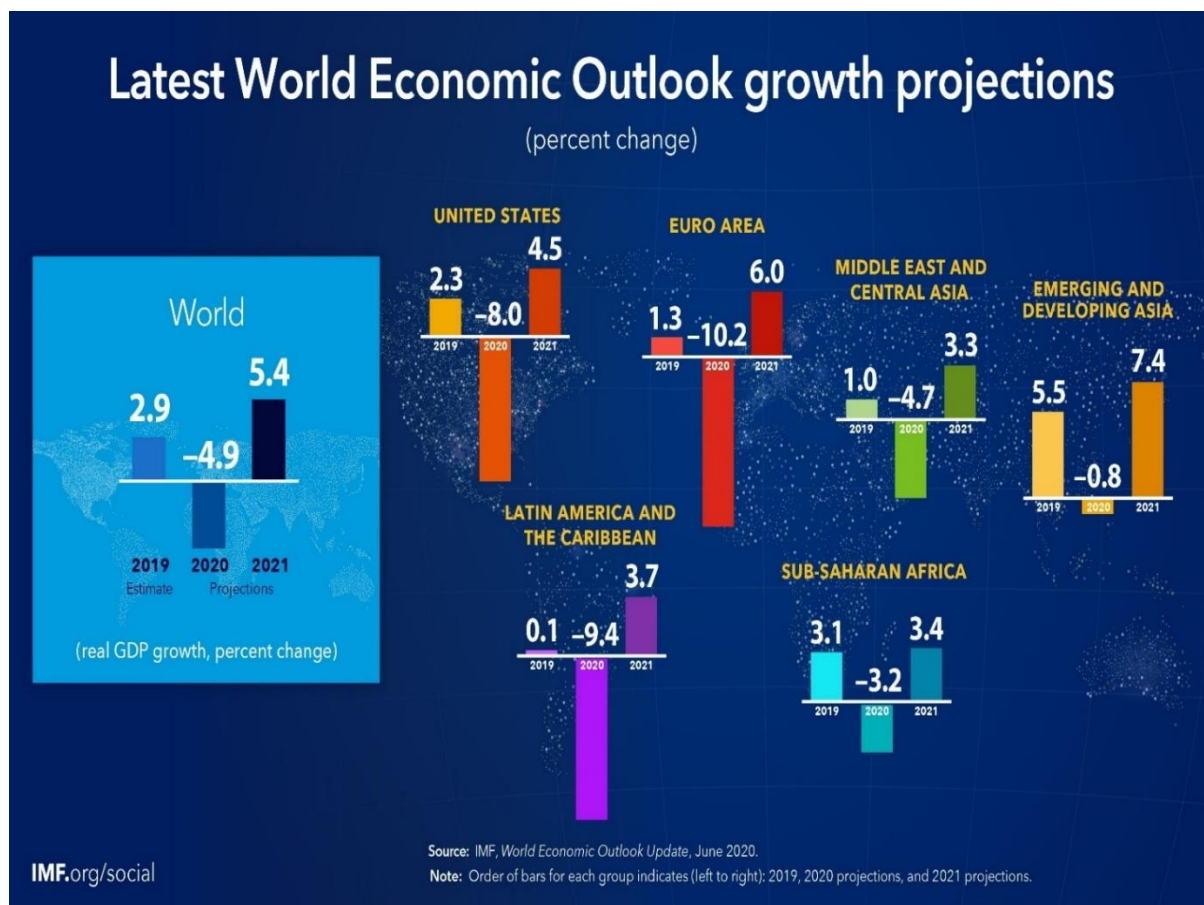
Sum of India Export Growth Rate vs. sum of India Export Value (2019). Color shows details about Quadrant Color. The marks are labeled by Code1. The data is filtered on Category1, which keeps Home.

CHAPTER 4

EXPORT PROMOTION FOCUS POST COVID

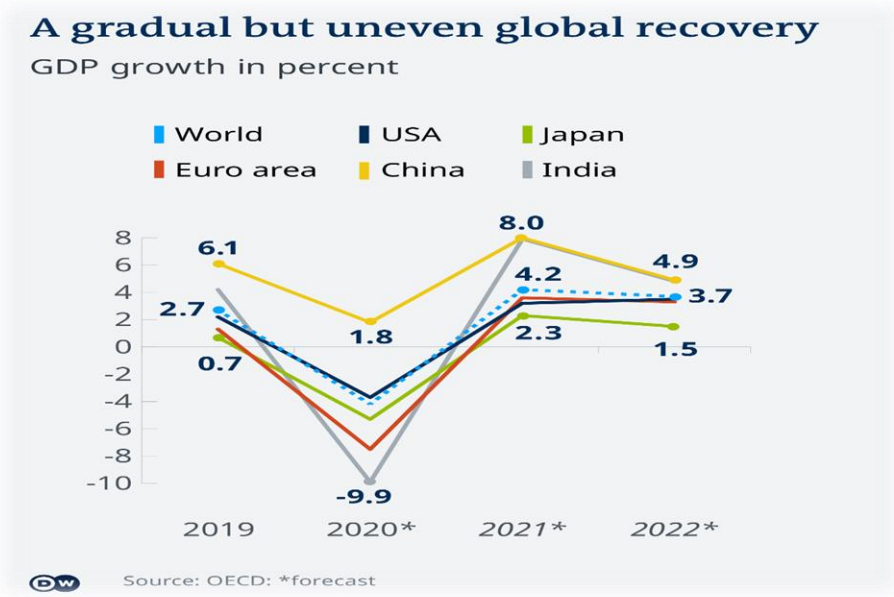
POST COVID DEMAND ANALYSIS: FORECAST 2025

Since the COVID-19 crisis began, global GDP has fallen by 4.2%. Although the pandemic has had a devastating economic effect around the world, it is expected to return to pre-pandemic levels by the end of 2021. This revival of economy post covid would vary from one region to another. Europe is expected to see GDP growth of 5.2% in 2021, while for the United States, that figure is just 3.1%.



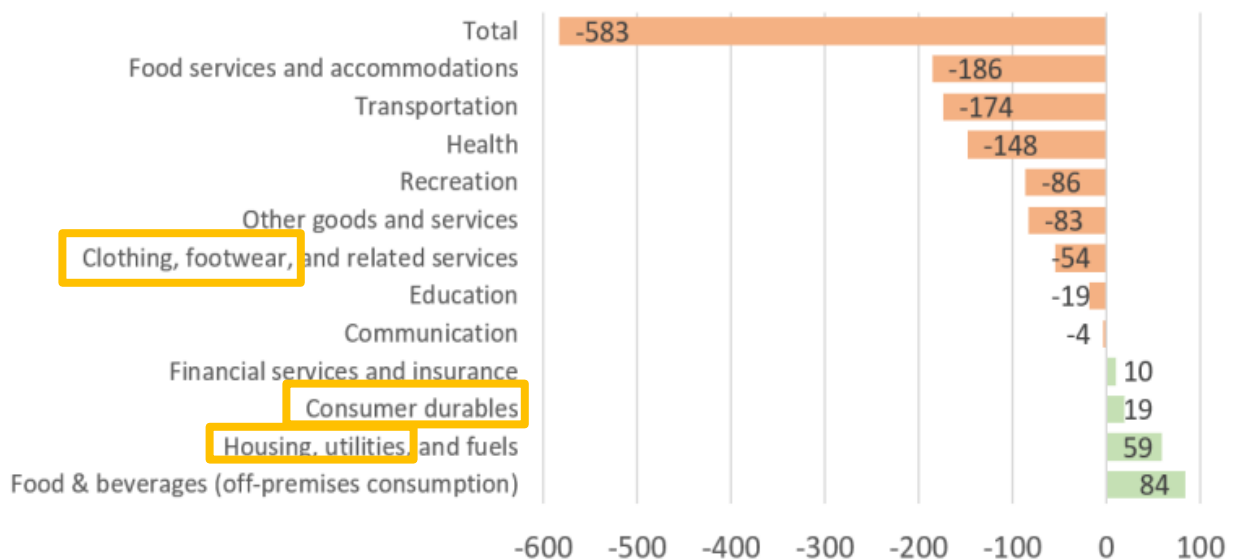
Asian countries, in contrast have recovered much faster and are projected to see GDP growth of 8% this year – in particular, China, which experienced only a moderate dip in 2020 and which the International Monetary Fund (IMF) predicts will

see 8.2% in real GDP growth in 2021. The output in many other countries is projected to remain around 5% below pre-crisis expectations in 2022. OECD has projected global GDP to rise by around 4.2% in 2021 and by a further 3.7% in 2022.



According to the Organization for Economic Development (OECD), while global GDP should rise by around 4¼% by the end of 2021, national bounce-back could be uneven. This would change the consumer spending across different countries.

In 2020, American consumers shifted their spend from services to retail goods, with groceries and consumer durables like home appliances outpacing restaurants and travel as consumer spending held steady over the summer months.

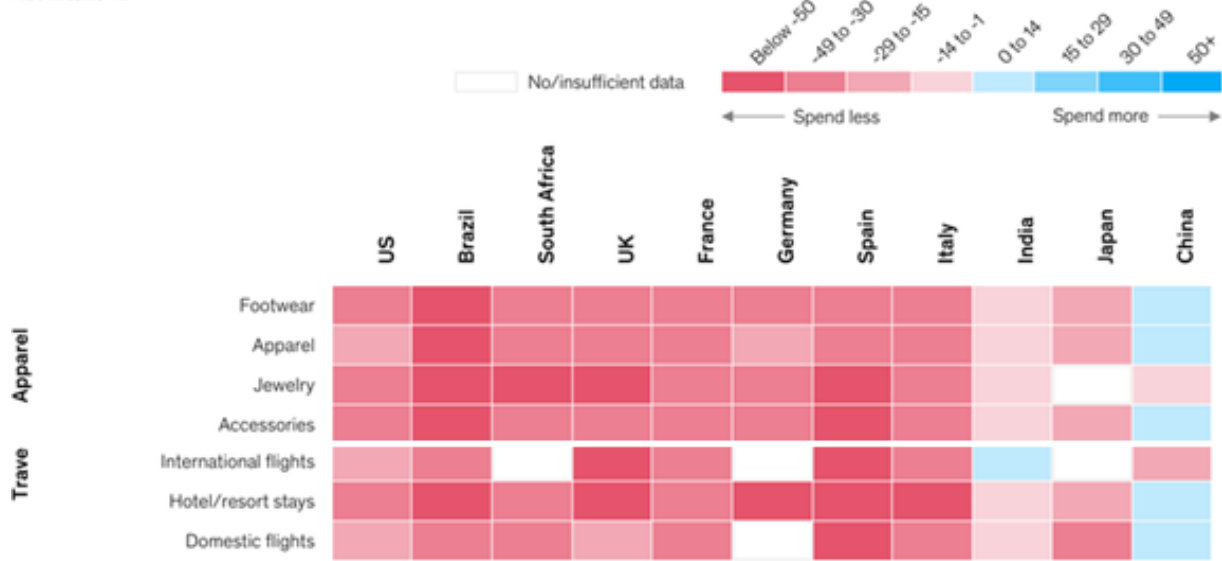


But in Asian countries with greater optimism around a COVID-19 recovery, spending is higher on items such as clothing, cars and hotels, and consumers are more likely to shop differently to the way they did before the pandemic.

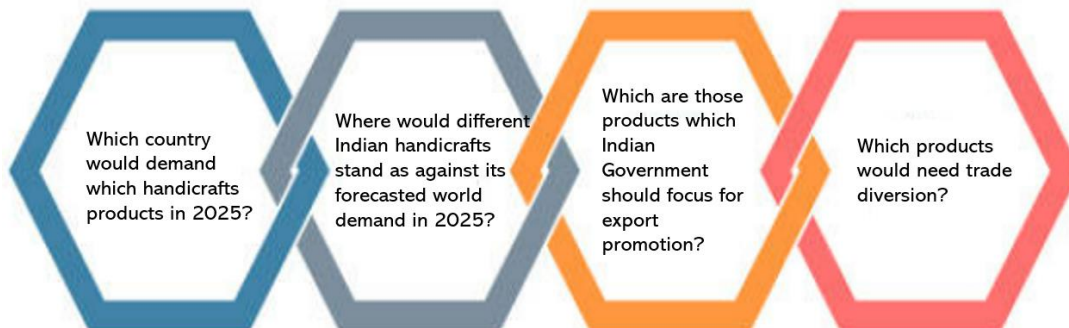
Outside of China and India, global consumers anticipate pulling back on spending.

Expected spending per category over the next two weeks compared to usual¹

Net intent %²



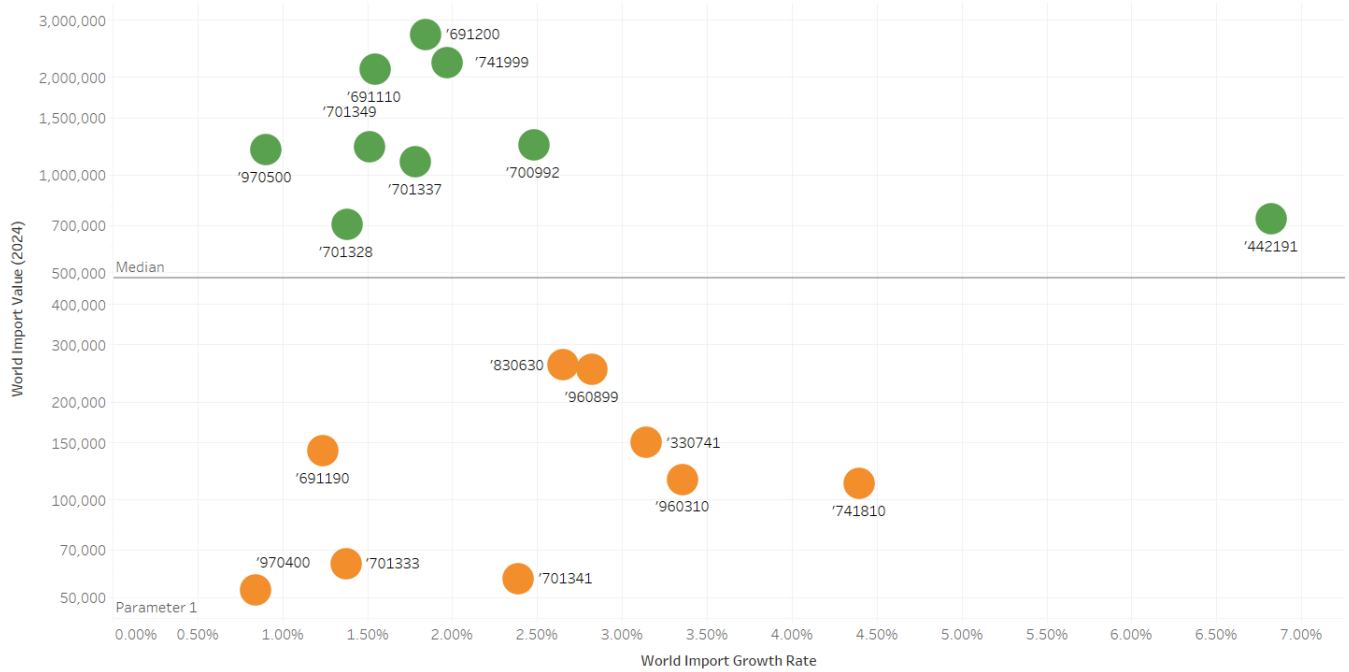
The above data highlights the fact that while global GDP should rise by around 4¼% by the end of 2021, national bounce-back could be uneven. This would change the consumer spending differently across different products and nations. This section therefore analyses the world import demand for handicraft products forecasted for 2025 across different categories. Analysis further dwells into an interesting comparison of the status of India’s exports in 2025 as against that of the world. This would highlight the fact about:



CATEGORY: HOME

WORLD IMPORT VALUE VS GROWTH

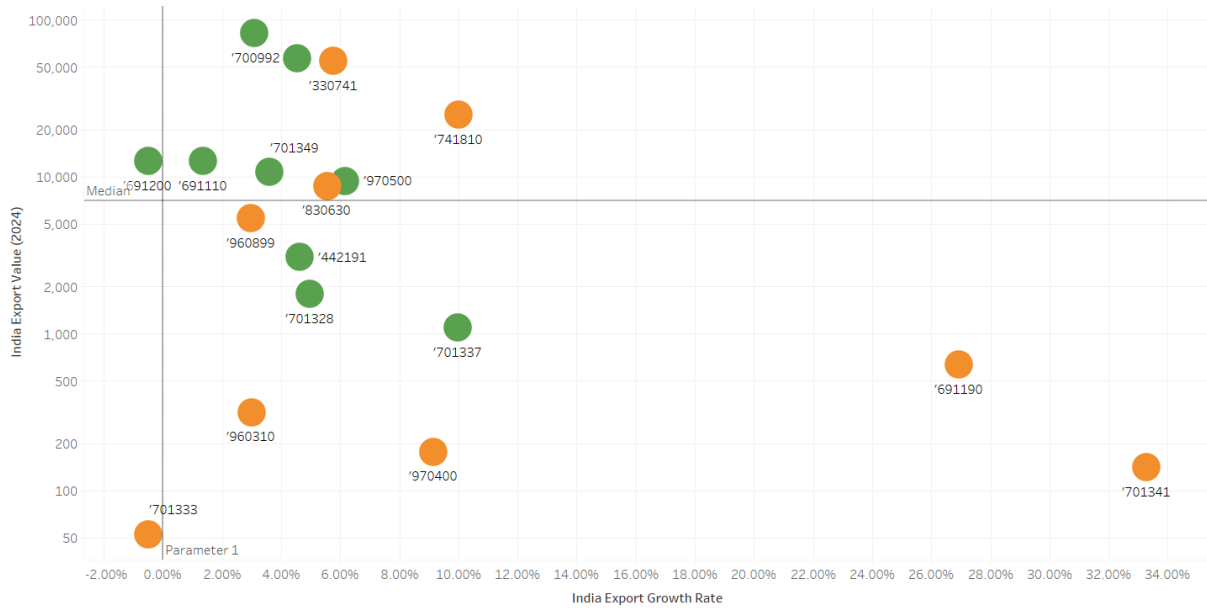
WI Value vs Growth (Home)



Sum of World Import Growth Rate vs. sum of World Import Value (2024). Color shows details about Quadrant Color. The marks are labeled by Code1. The data is filtered on Category1, which keeps Home.

INDIAN EXPORT VALUES VS GROWTH

INDEXP Value vs Growth (Home)



Sum of India Export Growth Rate vs. sum of India Export Value (2024). Color shows details about Quadrant Color. The marks are labeled by Code1. The data is filtered on Category1, which keeps Home.

Inference

- Based on the forecasting of the global demand in 2025, HS codes which would be high in demand in next five years would include HS 700992 (Mirrored Framed - 70099200), 970500 (Animal Figures – 97050010), 701349 (GLASSWARE – 70134900), 691110 (Tableware-Porcelain – 69111011), 691200 (Terracotta – 69120010). Since Indian exports are also forecasted to be doing good in these products, policy initiatives taken now can be sustained.
- However, for products including HS 701328 (Glass for Tables – 70132800), 442191 (Household Products-Decorative – 44219160), 701337 (Glass For Tables – 70133700), it is seen that world import demand would be high in 2025, but India's export volumes seem to be lower and hence Indian government needs to work on strengthening the supply side capacity and extend suitable production level support to the artisans and MSMEs to enhance the export volumes. Export consortium and focused product approach in the form of OTOP in South East Asia or ODOP as in the state of UP should be promoted in these products.
- For HS codes 691190 (Toiletries – 69119010), 701341 (Glass-Decorative – 70134100), 960310 (Brooms and Brushes – 96031000), 970400 (Philat – 97040090) And 701333 (Bar Accessories – 70133300) world import growth is high but volumes would not pick up even in next 5 years. Out of these products, for HS code 701341 (Glass-Decorative – 70134100), 691190 (Toiletries – 69119010), 970400 (Philat – 97040090), India's export growth would remain high but with lower volumes indicating that exports from clusters with lower volumes can also be promoted.

PRODUCT SELECTION OF UTMOST IMPORTANCE CATEGORYWISE ANALYSIS

All Products								
World imp..	RCA India..	RCA	India R..	China fall im..				
High	High	Rising	More	Moderate	741999			
			Less	Moderate	441990			
		Fluctuating	More	Immediate	960190			
				Moderate	482390			
Moderate	High	Fluctuating	More	Immediate	711311	420231		
				Moderate	701810	640610		
		Less	Moderate	711790	700992			
			Immediate	581010				
		Fluctuating	More	Immediate	960200	442090	741810	580430
				Moderate	830610			
Moderate	High	Rising	More	Immediate	560500	580500		
				Moderate	580810	830630	830621	
		Fluctuating	More	Immediate	580900			
				Moderate	960310	960899	340600	
	Less	Moderate	460219					

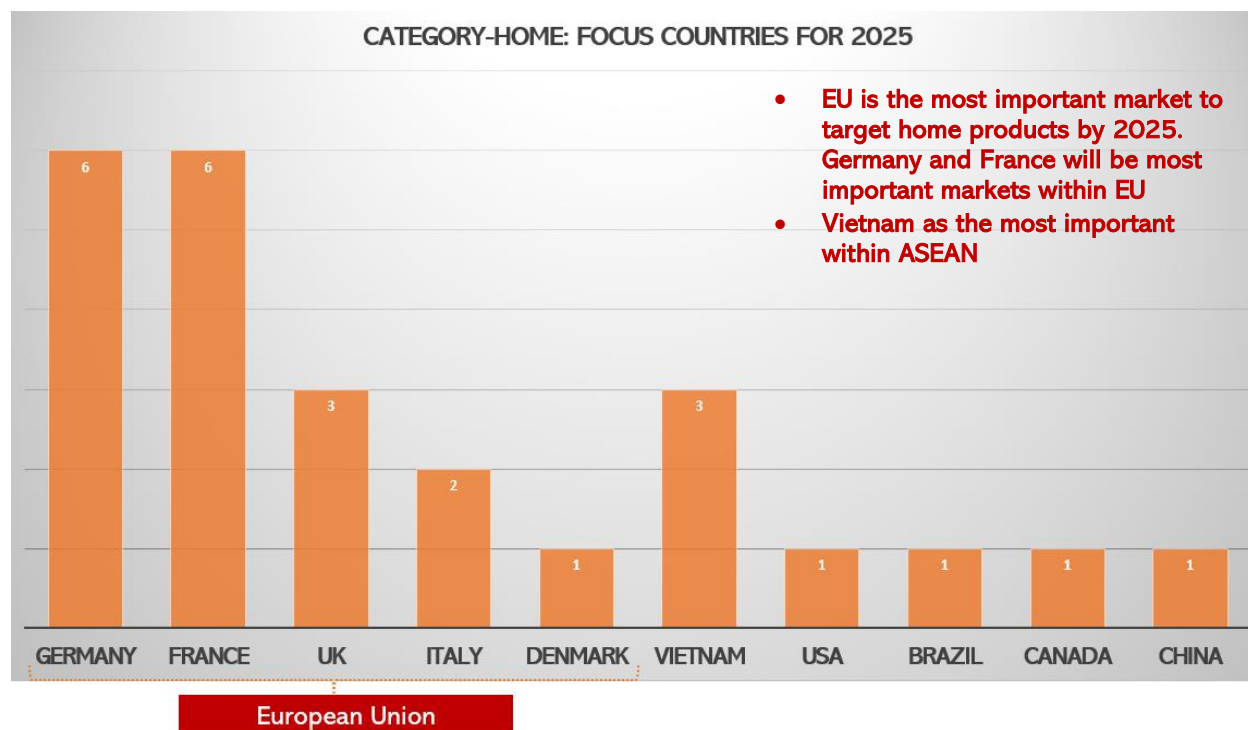
Above 27 HS codes are of utmost important and deserve a focused policy focus towards sustaining the market share. All these identified commodities fair quite well across all the parameters wherein Indian handicraft exporters as well as the Government can be assured of sustainable import demand in the global market by the end of 2025 with India having a great comparative advantage and expected to have a decent share of exports in global market. Other Important HS code

Home	
Order of selection	Product
330741	INCENSE STICKS & GIFT SETS - 33074100
442191	HOUSEHOLD PRODUCTS-DECORATIVE - 44219160
701333	BAR ACCESSORIES - 70133300
701349	GLASSWARE - 70134900
970500	ANIMAL FIGURES - 97050010

691190	TOILETRIES - 69119010
691200	TERRACOTTA - 69120010
701328	GLASS FOR TABLES - 70132800
701337	GLASS FOR TABLES - 70133700
970400	PHILAT - 97040090
701341	GLASS-DECORATIVE - 70134100
691110	TABLEWARE-PORCELAIN - 69111011

MOVING BEYOND TRADITIONAL MARKETS: COUNTRY-CATEGORYWISE ANALYSIS

One of the reasons for poor comparative advantage or declining RCA values for past few years could be due to mismatch between India's prime export markets versus global markets where import demand is increasing. Hence a shift from old traditional destinations to newer emerging markets could help Indian exporters pick up the products in this category. Suggestions towards new possible markets product wise is listed below:



COUNTRY-HS CODEWISE ANALYSIS

Reality Check: Indian export markets versus Prime global importers (HS code wise analysis)

Category: Home

HS code	Product	India's export destination not so promising	Top Global importers
691110	TABLEWARE-PORCELAIN - 69111011	Brazil, UK, Germany, USA	Vietnam, USA, Germany, Iraq
691190	TOILETRIES - 69119010	USA, Nepal, UK, Germany	Italy, UK, Saudi Arabia, USA
691200	TERRACOTTA - 69120010	Brazil, USA, UK, UAE	USA, Germany, France, UK
701328	GLASS FOR TABLES - 70132800	Nepal, Korea, USA, Japan, Netherlands	USA, Germany, Netherlands, France, UK
701337	GLASS FOR TABLES - 70133700	USA, Bangladesh, Nepal, Maldives, Bhutan	USA, Germany, Vietnam, UK, France
701341	GLASS-DECORATIVE - 70134100	Curacao, Germany, Hong Kong, Malaysia	UK, USA, Brazil, France, Italy
701349	GLASSWARE - 70134900	USA, Brazil, UK, Kenya, Sri Lanka	USA, Germany, Russia, France, Canada, Vietnam
970400	PHILAT - 97040090	USA, Bahrain, Zambia, South Africa	Switzerland, Germany, USA, Denmark, China
970500	ANIMAL FIGURES - 97050010	Bahrain, USA, Canada, UK, Belgium	USA, UK, France, Germany, Belgium

CHAPTER 5

INDIA'S TRADE AGREEMENT EX-POST ANALYSIS & WAY FORWARD FOR INDIAN HANDICRAFTS

RTA ANALYSIS IN PRIME IMPORTING COUNTRIES

Appreciating the fact that trade agreements aim at reducing the import duty rates and hence are expected to make country's export more price competitive as against other competing suppliers in the importing country. This section hence compiles a comparative chart between the prime export markets for India versus the top 5 prime global importers in the same HS code. This would give us a reality check of India's future course of policy focus from old traditional destinations to new destination as emerging markets.

Reality Check: Indian export markets versus Prime global importers (HS code wise analysis)

Category: Home

HS code	India's export destination not so promising	Top Global importers
691110	Brazil, UK, Germany, USA	Vietnam, USA, Germany, Iraq
691190	USA, Nepal, UK, Germany	Italy, UK, Saudi Arabia, USA
691200	Brazil, USA, UK, UAE	USA, Germany, France, UK
701328	Nepal, Korea, USA, Japan, Netherlands	USA, Germany, Netherlands, France, UK
701337	USA, Bangladesh, Nepal, Maldives, Bhutan	USA, Germany, Vietnam, UK, France
701341	Curacao, Germany, Hong Kong, Malaysia	UK, USA, Brazil, France, Italy
701349	USA, Brazil, UK, Kenya, Sri Lanka	USA, Germany, Russia, France, Canada, Vietnam
970400	USA, Bahrain, Zambia, South Africa	Switzerland, Germany, USA, Denmark, China
970500	Bahrain, USA, Canada, UK, Belgium	USA, UK, France, Germany, Belgium

Global importers marked in red against each product are the ones that Indian handicraft exporters should aim to shift to from its traditional export destinations considering high import demand of these products in these markets. While these markets should be the focus areas both for Indian Govt. as well as handicraft exporters; it is equally important to analyze the feasibility of Indian exporters to enter these new markets.

CATEGORY: HOME

HS code	Importing Country	Signing RTA beneficial	Non Price Factors more prevalent	Price Sensitivity	Major Competitors	Fall of China Impact
691190	Italy	No	Yes	Yes	China/ France	Positive
	Saudi Arabia	Not Much	Unknown	Yes	UAE	Positive
691200	Germany	Not Much	Yes	No	China	Positive
	France	Yes	Yes	No	UK	Positive
701328	Germany	Yes	No	Yes	Czech / Slovakia	Negative
	France	No	Yes	Yes	China / Slovakia / Germany	Positive
	UK	Yes	Yes	Yes	China / Germany	Positive
701337	Germany	No	Unknown	Yes	China	Positive
	Vietnam	Yes	Yes	No	China	Positive
	UK	No	Unknown	Yes	China/ Germany	Positive
	France	No	Unknown	Yes	China/ Germany	Positive
701341	Italy	No	Yes	No	Turkey / China	Positive
	Brazil	No	Unknown	Yes	China (93.1%)	Positive
	UK	Yes	Unknown	Yes	China	Positive
	USA	Yes	Unknown	Yes	China	Positive
	France	No	Yes	No	China / Spain	Positive
701349	Germany	Yes	Unknown	Yes	China / Czech	Positive
	Russia	No	Unknown	Yes	China	Positive
	France	Yes	Unknown	Yes	Spain	Positive
	Vietnam	Yes	Yes	Yes	China (89%)	Positive
970400	Germany	No	Yes	No	Switzerland	Negative
	Denmark	No	Yes	No	Norway	Negative
	China	No	Yes	No	Macao	Negative
970500	France	No	Yes	No	USA	Negative
	Germany	No	Yes	No	USA / Brazil	Negative

CATEGORY: HOME

691190	Household and toilet articles, of porcelain or china	Italy, UK, Saudi Arabia, USA
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	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (If India signs RTA)	FLP 1	FLP 2	TII	Remarks
Italy									
Denmark	21270	85	661	0	0	661	661	31.21	FTA or RTA would not make any difference. Focus should be on supreme quality to compete with China or France. TII of Denmark is too high to compete
China	1293	5.2	8031	12	12	8995	8995	0.32	
Spain	873	3.5	2807	0	0	2807	2807	0.27	
France	404	1.6	101000	0	0	101000	101000	0.27	
India	0	0	0	0	0	0	0	0.00	
Saudi Arabia									
China	7013	71.9	2807	5	5	2947	2947	3.19	FTA or RTA might only give India an edge over UAE but proximity might work against India. Fall of China might yield a new market but price competition would be important
UAE	699	7.2	5504	0	0	5504	5504	0.72	
Taipei	263	2.7	3247	5	5	3409	3409	17.59	
Turkey	247	2.5	3088	5	5	3242	3242	2.49	
India	15	0.2	5000	5	0	5250	5000	0.00	

FTA or RTA would not make a difference for HS 691190 in the EU markets but for the middle eastern market price competitiveness combined with FTA or RTA might bring about a positive change in the Import numbers

691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than ...	Germany, France
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	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (If India signs RTA)	FLP 1	FLP 2	TII	Remarks
Germany									
China	100538	44	2838	6.3	6.3	3016.79	3016.79	0.577	FTA or RTA might reduce the price but the reduction is miniscule. It is difficult to compete with the EU competitors either due to price disadvantage or TII but can work on non-price factors to compete with China
Poland	26664	11.7	14740	0	0	14740	14740	1.526	
Portugal	20610	9	2667	0	0	2667	2667	6.261	
United Kingdom	9858	4.3	1220	0	0	1220	1220	2.478	
Romania	9826	4.3	1200	0	0	1200	1200	2.634	
India	1300	0.6	3790	2.8	0	3896.12	3790	0.299	
France									
China	82812	47.4	3245	6.3	6.3	3449.44	3449.44	0.419	FTA or RTA can reduce the price to be able to compete with UK, but TII of UK is significantly higher. Hence India should focus on non-price factors
Portugal	35042	20	1634	0	0	1634	1634	2.773	
Germany	7895	4.5	6241	0	0	6241	6241	0.738	
Netherlands	5523	3.2	3362	0	0	3362	3362	4.977	
United Kingdom	5459	3.1	7357	0	0	7357	7357	2.622	
India	185	0.1	7708	2.8	0	7923.82	7708	0.074	

FTA or RTA might give a slight advantage to the price in the EU markets but nothing significant. India needs to work on the price competitiveness of the products or work towards innovation to create international demand

701328	Drinking glasses, stemware (excluding of glass ceramics)	USA, Germany, Netherlands, France, UK
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	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (If India signs RTA)	FLP 1	FLP 2	TII	Remarks
Germany									
Slovakia	12068	22.2	4652	0	0	4652	4652	7.54	FTA or RTA might help in competing with Czech Republic for price competitiveness. TII is high for the others, hence improvement on that front is also essential
Netherlands	6495	12	3688	0	0	3688	3688	2.49	
Czech Republic	6452	11.9	4713	0	0	4713	4713	2.19	
France	6108	11.2	3759	0	0	3759	3759	1.23	
Italy	4848	8.9	3966	0	0	3966	3966	1.16	
India	32	0.1	4571	7.5	0	4914	4571	0.01	
France									
Italy	12957	25.5	1931	0	0	1931	1931	0.72	Indian products are already price competitive yet the export numbers are poor. Non-price factors should be checked and improved to compete in France
Germany	7528	14.8	6076	0	0	6076	6076	0.88	
Netherlands	6803	13.4	3478	0	0	3478	3478	2.72	
China	5832	11.5	6025	11	11	6688	6688	0.29	
Slovakia	4095	8.1	8077	0	0	8077	8077	0.38	
India	19	0	4750	7.5	0	5106.25	4750	0.00213	
UK									
France	11036	27.4	5754	0	0	5754	5754	2.26	RTA or FTA can bring a significant change to the price but India needs to be more price competitive to compete in the UK market. Fall of China will have a significant advantage
China	8129	20.2	5572	11	11	6185	6185	1.05	
Turkey	3890	9.6	2576	0	0	2576	2576	4.25	
Netherlands	3042	7.5	4150	0	0	4150	4150	4.978767	
Germany	2772	6.9	10229	0	0	10229	10229	0.802298	
India	217	0.5	7000	7.5	0	7525	7000	0.00204	

For 701328, European potential is significant, since there are no single dominant player, but India needs to work on its price competitiveness and other non-price factors to improve export numbers. RTA or FTA can significantly help in that endeavour

701337	Drinking glasses (excluding glasses of glass ceramics or of lead crystal and stemware)	Germany, Vietnam, UK, France
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	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (If India signs RTA)	FLP 1	FLP 2	TII	Remarks
Germany									
China	14684	14.1	2678	11	11	2973	2973	1.0762	Even a FTA or RTA would not prove to be beneficial in this market. India is way behind the competitors
Italy	14410	13.9	1801	0	0	1801	1801	2.3594	
Bulgaria	13507	13	1099	0	0	1099	1099	19.721	
Poland	12237	11.8	1934	0	0	1934	1934	1.2738	
France	9567	9.2	1608	0	0	1608	1608	1.247	
India	116	0.1	3625	7.5	0	3897	3625	0.1556	
Vietnam									
China	81916	86.8	2261	0	0	2261	2261	1.2672	35% is a significantly high Import Duty. India should negotiate that to get a RTA to open business channels. Fall of China can be very helpful
Thailand	10953	11.6	827	0	0	827	827	3.4836	
Czech Republic	196	0.2	3630	35	35	4900.5	4900.5	2.0087	
Bulgaria	165	0.2	1012	35	35	1366.2	1366.2	15.256	
France	154	0.2	3949	35	35	5331.2	5331.2	0.6747	
India	0	0	0	35	0	0	0	0	
UK									
France	13414	18.9	2521	0	0	2521	2521	1.7814	Even a FTA or RTA would not prove to be beneficial in this market. India is way behind the competitors
China	13074	18.4	3092	11	11	3432.1	3432.1	0.7458	
Turkey	8024	11.3	1649	0	0	1649	1649	2.5077	
Germany	5931	8.3	4233	0	0	4233	4233	0.6017	
Italy	5008	7	3632	0	0	3632	3632	1.5834	
India	189	0.3	6750	7.5	0	7256.3	6750	0.2876	
France									
Italy	11508	20	2571	0	0	2571	2571	1.5487	Even a FTA or RTA would not prove to be beneficial in this market. India is way behind the competitors
China	10811	18.8	3503	11	11	3888.3	3888.3	1.7691	
Czech Republic	5891	10.3	4433	0	0	4433	4433	3.0374	
Turkey	5407	9.4	1550	0	0	1550	1550	5.835	
Germany	4350	7.6	3955	0	0	3955	3955	0.4369	
India	13	0	6500	7.5	0	6987.5	6500	0.0298	

For the European markets, Even an FTA or RTA would not prove to be beneficial. India is way behind the competitors. India needs to work on its production price and innovation of products to get a bigger share of imports from these markets

701341	Glassware of lead crystal, of a kind used for table or kitchen purposes	Italy, Brazil, UK,USA, France
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	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (If India signs RTA)	FLP 1	FLP 2	TII	Remarks
Italy									
France	1858	69.0	4622	0	0.0	4622	4622	5.5751	India needs to work on price competitiveness to compete with China, but at the given point, a FTA or RTA will make no difference
China	327	12.1	1677	11	11.0	1868	1861	1.0574	
Turkey	166	6.2	3255	0	0.0	3255	3255	0.9618	
Slovenia	83	3.1	10375	0	0.0	10375	10375	1.5915	
Germany	70	2.6	14000	0	0.0	14000	14000	0.1593	
India	0	0.0	NA	7.5	0	NA	NA	0.0000	
Brazil									
China	3784	93.1	1125	18	18.0	1328	1328	2.6216	India needs to work on price competitiveness to compete with China or the European competitors, but at the given point, a FTA or RTA will make no difference
Czech Republic	203	5.0	5342	18	18.0	6304	6304	1.6533	
Slovakia	19	0.5	6333	18	18.0	7473	7473	4.1910	
Egypt	12	0.3	286	18	18.0	337	337	0.2975	
India	10	0.2	10000	18	0.0	11800	10000	0.0454	
United Kingdom									
France	3356	46.7	76273	0	0.0	76273	76273	4.4138	India needs to work on price competitiveness to compete with China or the European competitors, but at the given point, a FTA or RTA will make no difference
China	1607	22.4	3369	11	11.0	3753	3740	0.9078	
Ireland	652	9.1	22483	0	0.0	22483	22483	6.6412	
Portugal	473	6.6	39417	0	0.0	39417	39417	11.6005	
Slovenia	378	5.3	14000	0	0.0	14000	14000	23.6005	
India	20	0.3	10000	7.5	0	10750	10000	0.3014	
USA									
Slovenia	1775	27	25	11.4	11.4	28	28	121.34	India needs to work on price competitiveness to compete with China or the European competitors, but at the given point, a FTA or RTA will make a difference
France	1073	17	19	11.4	11.4	21	21	5.94	
China	994	15	3	11.4	11.4	3	3	0.45	
Czech Republic	726	11	12	11.4	11.4	13	13	16.40	
Poland	652	10	13	11.4	11.4	14	14	9.88	
Ireland	557	9	123	11.4	11.4	137	137	83.60	
India	77	1	9.41	7.3	0	10	9	0.53	
France									
Spain	678.0	20.2	30,818	0	0	30818	30818	1.93	FTA or RTA would make no difference. India needs to working on its non-price factors to improve the numbers
United Kingdom	583.0	17.4	145,750	0	0	145750	145750	8.16	
China	368.0	11.0	2,706	11	11	3004	3004	1.03	
Czech Republic	295.0	8.8	1,113	0	0	1113	1113	2.60	
Netherlands	282.0	8.4	11,750	0	0	11750	11750	2.48	
India	10.0	0.3	10,000	0	0	10000	10000	0.39	

701349		Glassware for table or kitchen purposes				USA, Germany, Russia, France, Canada, Vietnam			
	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (if India signs RTA)	FLP 1	FLP 2	TII	Remarks
Germany									
China	49304	39.5	2250	11	11	2498	2498	3.00	India can negotiate to sign a FTA or RTA. Czech is a potential competitor. If China falls, India would be benefited
France	22042	17.6	2116	0	0	2116	2116	2.39	
Poland	10911	8.7	3882	0	0	3882	3882	0.94	
Czech Republic	8474	6.8	6479	0	0	6479	6479	0.84	
India	758	0.6	5156	7.5	0	5543	5156	0.84	
Russia									
China	45607	57.9	1640	10	10	1804	1804	1.81	Market too competitive and difficult. FTA or RTA would make no difference unless innovation is brought
France	18900	24	1933	10	10	2126	2126	2.42	
UAE	3394	4.3	1787	10	10	1966	1966	5.69	
Turkey	3126	4	2067	10	10	2274	2274	0.79	
India	31	0	10333	10	0	11366	10333	0.03	
France									
China	37213	50.6	2410	11	11	2675	2675	4.76	Market too competitive and difficult. FTA or RTA would make no difference unless innovation is brought
Italy	7097	9.7	2676	0	0	2676	2676	0.75	
Spain	5453	7.4	5096	0	0	5096	5096	0.71	
Turkey	5251	7.1	1898	0	0	1898	1898	4.4309	
India	167	0.2	6185	7.5	0	6648.875	6185	0.2269	
Canada									
USA	28720	40.3	NOT GIVEN	0	0	0	0	0.67	Information nit enough to draw analysis
China	25856	36.3	NOT GIVEN	0	0	0	0	1.69	
Korea,	6088	8.5	NOT GIVEN	0	0	0	0	17.51	
France	2481	3.5	NOT GIVEN	0	0	0	0	2.66	
India	529	0.7	NOT GIVEN	0	0	0	0	1.77	
Vietnam									
China	41721	89.7	10111	20	20	12133.2	12133.2	1.3	China is the biggest competitor although they have one of the highest CIF prices. India needs to discuss FTA or RTA for better trade
Indonesia	1768	3.8	2737	0	0	2737.0	2737.0	2.5	
Thailand	598	1.3	308	0	0	308.0	308.0	0.4	
Korea,	577	1.2	173	35	35	233.6	233.6	0.1	
India	26	0.1	8667	35	0	11700.5	8667.0	0.1	

For this HS Code, majority of the European markets are too competitive due to dominance by China and European nations. FTA would only give a slight boost. India needs to focus on price competitiveness and Innovation. For the Vietnam market it should definitely try for RTA or FTA

	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (If India signs RTA)	FLP 1	FLP 2	TII	Remarks
Switzerland									
Germany	6561	47	234321	0	0	234321	234321	0.06	Insufficient data to perform analysis but major competitors are USA and Austria due to their relatively lower TII
UK	2701	19.4		0	0			0.07	
USA	2436	17.5		0	0			0.02	
Austria	494	3.5	247000	0	0	247000	247000	0.04	
India				0	0				
Germany									
Switzerland	4640	46.6	386667	0	0	386667	386667	3.27	Very competitive market. Philately collectibles items are often locally procured hence reducing the opportunity for a lucrative export market FTA or RTA won't help
USA	906	9.1	453000	0	0	453000	453000	0.12	
Netherlands	684	6.9	42750	0	0	42750	42750	63.77	
Singapore	505	5.1	505000	0	0	505000	505000	116.02	
India	22	0.2		0	0			11.48	
Denmark									
Germany	2356	34.1	294500	0	0	294500	294500	10.21	Very competitive market. Philately collectibles items are often locally procured hence reducing the opportunity for a lucrative export market. FTA or RTA won't help
Norway	975	14.1	121875	0	0	121875	121875	2.98	
France	686	9.9	343000	0	0	343000	343000	12.59	
Netherlands	668	9.7	334000	0	0	334000	334000	12.779	
India	5	0.1		0	0			0.693	
China									
Macao	2798	2	1399000	0	0	1399000	1399000	123.92	Very competitive market. Philately collectibles items are often locally procured hence reducing the opportunity for a lucrative export market. FTA or RTA won't help
Hongkong	1210	1	1210000	0	0	1210000	1210000	7.86	
France	828	0		5	5			1.69	
Germany	162	28	5786	5	5	6075	6075	0.56	
India				5	0				

Very competitive market. Philately collectibles items are often locally procured and culturally relevant hence reducing the opportunity for a lucrative export market. FTA or RTA won't help here.

970500	Collections and collector's pieces of zoological	USA, UK, France, Germany, Belgium
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	Value imported	% Share	CIF price	Import Duty (actual)	Import Duty (If India signs RTA)	FLP 1	FLP 2	TII	Remarks
France									
USA	87073	55.9	15829	0	0	15829	15829	0.09	This market is not price sensitive and requires extensive regulation to prevent smuggling. Very competitive for India
Switzerland	12402	8	689000	0	0	689000	689000	1.28	
Canada	8088	5.2	10463	0	0	10463	10463	3.26	
Italy	3430	2.2	1715000	0	0	1715000	1715000	1.81	
Japan	3420	2.2	14016	0	0	14016	14016	0.00	
India	278	0.2	278000	0	0	278000	278000	0.00	
Germany									
USA	86423	61.8	10814	0	0	10814	10814	0.42	This market is not price sensitive and requires extensive regulation to prevent smuggling. Very competitive for India
Switzerland	27828	19.9	18918	0	0	18918	18918	1.23	
United Kingdom	9758	7	101646	0	0	101646	101646	0.99	
Japan	2268	1.6	7902	0	0	7902	7902	0.29	
Brazil	1944	1.4	12226	0	0	12226	12226	0.00	
Canada	1901	1.4	6647	0	0	6647	6647	1.15 1765	
India	21	0	21000	0	0	21000	21000	0	

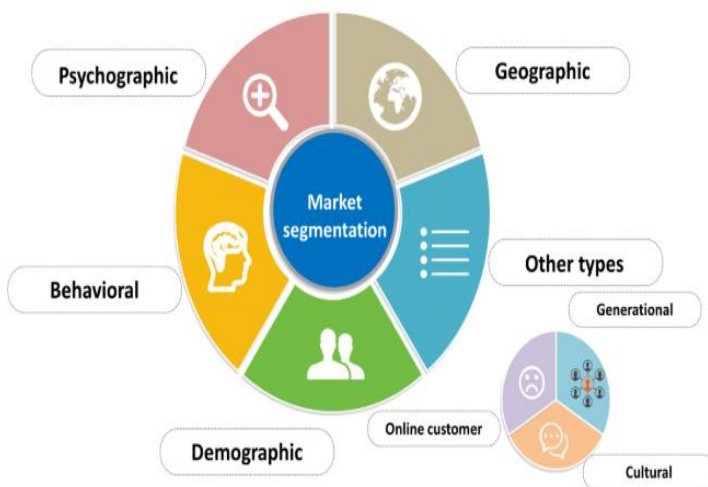
For this HS, this market is not price sensitive and requires extensive regulation to prevent smuggling. Very competitive for India

CHAPTER 6

GLOBAL CONSUMER BEHAVIOUR ANALYSIS

PRE AND POST COVID-19

In every market, consumers are the drivers of the market competitiveness, growth and economic integration. As indicated in the section above, there have been incidences where Indian handicraft products have been reasonably priced as against other competing players including China, ASEAN and African countries in the traditional export destinations of the USA and EU; still share of Indian handicrafts was found meagre in these countries; highlighting the fact that while being price competitive was important to combat global competition there are other non-price factors which are much more important in certain developed markets. This highlights the importance of Indian handicrafts exporters to customize their products as per the consumer behavior, custom,



customs and traditions, gifting etiquette, beliefs and taboos, demographic profile etc. to gain competitive advantage. Hence exploration of these factors through country case studies towards adoption of Indian handicraft products as per importing country becomes important.

With economic instability, consumers are also

experiencing a transformation in behavior. The COVID-19 pandemic has upended life for individuals across the globe, from how they work to how they socialize and even how they shop. This section therefore also looks at how has consumer behavior changed considering COVID-19, what trends in consumer behavior and sentiment have been witnessed in the past few months, and what are consumers expecting as we move closer to a post-pandemic lifestyle.

Product Mix Analysis

Indian Home product exports have been divided into five prime categories (i) Metals (ii) Bone China & Porcelain (iii) Ceramic (iv) Glass & Glassware (v) Misc. Manufactured Articles



5.3.1 Metal Work		5.3.2 Bone China & Porcelain		5.3.3 Ceramic		5.3.4 Glass & Glassware		5.3.5 Misc. Manufactured Articles		
74199930	Brass Articles	69111011	Tableware of bone china & Soft prcln	69149000	Other ceramic articles (excl. prcln/China)	70200090	Other Glassware articles	44219160	Decorative tableware	
73239420	Utensils		69111029	Kitchenware	69120090	Others	70099200	Other Glass mirror (Framed)	96031000	Brooms & brushes
73239490	Other household iron articles (not enamel)		69111019	Tableware	69120020	Ceramic Kitchenware	70134900	Other Glassware in table/Kitchen	83063000	Picture Frames Mirror
76151030	Other household articles		69119090	Other Household & Toilet Articles	69120040	Clay Articles	70200029	Other Glass Chimneys	96089910	Pen & Similar Holders
74199940	Copper worked articles			69111021	Kitchenware of bone china & Soft prcln	69120010	Ceramic Tableware	70133300		Of Lead Crystal
74181021	Of brass				69119020	Water filter cap <= 40 lit of prcln	69141000	Other ceramic articles of prcln/China		70133700
74181022	Of copper		69119010	Toilet articles of prcln China	69120030	Toilet articles other than prcln/China		70134100	Glassware of LED crystal	
74181039	Other utensils									
73239200	Other household enamel iron articles									
74199920	Articles of copper alloy electroplated with Ni-Ag									
74181023	Of other copper alloys									

	High value, growing
	Low value, growing
	High value, declining
	Low value, declining



METAL WORKS

WHERE DOES INDIA STAND IN GLOBAL METAL WORKS?

For Home Products, China & India are largest manufacturer of metal works. This segment has vast products made of steel, aluminum, copper, iron etc. India has significant sources of coal (fourth-largest reserves in the world) and is largest producer of iron ore in the world.



India is the world's second-largest manufacturer of metal works after China. Being the world's top exporter in this category, China is a fierce competitor in the global market.

For an emerging market, China is already supply threat to Indian suppliers due to its export share which is much more for household products for any segment. It has largest share for ceramics, metals, porcelain, glassware and undoubtedly bone China products. In fact, China exported metal-based home products almost 5 times more than what India exported during the same year. And not just India's exports but China is eating up India's domestic market with low priced imports.

PROSPECTS FOR INDIAN METAL WORKS ACROSS GLOBAL MARKETS

a. Metal Kitchenware

The global kitchenware market size was valued at USD 56.8 billion in 2018 and is expected to expand at a CAGR of 4.5% by 2024. Economic growth in emerging countries and rapid urbanization are the primary factors driving the market. Moreover, rising disposable income, changing lifestyles, and an increasing number of households are surging the demand for the product over the last few years and are expected to propel the market growth in the forecast period.



A major population prefers to have their dinnerware of metal in countries such as India. Glasses and stands are mostly made of stainless steels, thus fueling the demand for metalware in the forecast period. Demand for metals such as stainless steel and aluminum for dinnerware is increasing due to increasing awareness about the health benefits of metal plates for eating. These are the prominent factors boosting the segment growth.

In Europe, Germany accounts for the majority of share and is expected to register a CAGR of 7.6% over the forecast period. High usage of different types of tableware and increased spending power of the consumer group are driving the market in the region. Metal works continues to attract markets of USA, Germany and Japan has also seen rising demand for same due to its durability.

UNITED STATES OF AMERICA

USA Import Trends of Metal based household articles in USA has been found to be high in Table and kitchen household articles, and pot scourers and scouring or polishing pads, gloves, and the like, of aluminum (761510), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 741810 i.e., table or kitchen household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves, and the like, of copper although it has a low import share in USA (3%), as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Metal works	1174815	1263750	1288819	1300857	1344976		
'761510	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring ...	1038132	1123312	1152605	1170424	1204898		90%
'732394	Table, kitchen or other household articles, and parts thereof, of iron other than cast iron ...	80001	85282	80535	87923	105211		8%
'741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring ...	56682	55156	55679	42510	34867		3%

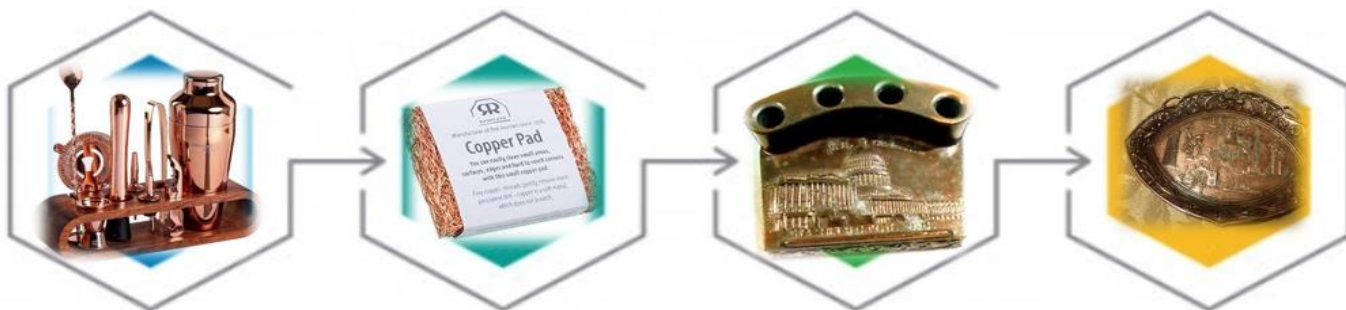
Exporting country to USA	Value imported in 2019(US \$ Thousand)	Share in USA imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by USA
India	11104	32%	16163	3%
China	9115	26%	8409	3%
France	4058	12%	27605	3%
Mexico	3166	9%	8443	0%
Italy	1991	6%	23151	3%
Taipei, Chinese	1430	4%	17024	3%
Turkey	961	3%	16860	3%
Germany	812	2%	32480	3%
United Kingdom	544	2%	60444	3%

As is indicated in the table above, India is largest exporter for HS code 741810 but has tariff of 3% in MFN. China is the closest competitor for India here and to perform better in market India need to have competitive advantage in future too.

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

In America, any special occasion - such as a birthday, anniversary, or wedding - is ideal for sending a Spa Gifts or a Wine Gifts to help any hard worker wind down and relax. Such hard-working people also often celebrate business partnerships and achievements, and these occasions are also perfect for Tea-Coffee Gifts or Wine sets.





Wine sets, coffee or mug sets can be made of copper which is durable and has associated saying of Ayurveda that you copper recharges the drink and has medical properties associated with it.





North America was the largest market, with an increasing number of fine dining restaurants in the U.S. and Canada with a greater emphasis on hygiene post covid. Furthermore, some modern recipes of beef and lamb expect the meat to be cooked for over 24 hours, which leaves extremely tough stains on the cookware. As a result, the use of a scouring pad acts as a necessary tool for cleaning.

Altanta was originally called as Terminus and is famous for its barbeque , barbeque stick made of metal is a good oppotunity for sellers here. Also vintage copper pen stand and ash trays are a luxury in the US market.

EUROPEAN UNION (EU)

Countries like Germany, France, the United Kingdom, Spain, the Netherlands and Italy have a high acceptance for metalworks from non-EU suppliers. France and Spain may be particularly interesting since they have the highest average import prices and a positive price evolution over the last five years.

Import Trends of Metal based household articles in EU has been found to be high for kitchen household articles, pot scourers, scouring or polishing pads, gloves, and the like, of aluminum (761510), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 741810 i.e., Table or kitchen household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves, and the like, of copper although it has a low import share in EU (4%), as it has a better stand in comparison to Chinese RCA for the same HS code & has increasing import demand from last 5 years.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Metal works	1400456	1497778	1635568	1767146	1780782		
761510	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring ...	1195966	1283885	1368636	1467035	1480445		83%
732394	Table, kitchen or other household articles, and parts thereof, of iron other than cast iron ...	156671	161306	208044	232886	234903		13%
741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring ...	47819	52587	58888	67225	65434		4%

Germany & Netherlands has an increasing demand for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the EU, growing at the rate of 1% and -9% in the past year in the metal-based household article category. However, in the absence of any trade remedy on the select product, import tariff rate of 4% is applied in Germany and Netherlands.

Importers	Value imported in 2019(US \$ Thousand)	Quantity imported in 2019, Tons	Unit Value (USD tons)	Annual growth in value between 2018-2019, %
Germany	311233	42324	7354	1
United Kingdom	193944	32327	5999	-1
France	189802	28236	6722	3
Italy	169681	24718	6865	14
Spain	148915	25986	5731	-2
Poland	128972	24164	5337	6
Netherlands	107667	13778	7814	-9
Belgium	102400	15478	6616	-9
Slovakia	52282	5633	9281	-6
Czech Republic	46987	7967	5898	-14

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Beer Pong Is a very widely accepted Bonding game played in Germany which uses a lot of plastic cups. Can be used as an avenue to promote sustainability by using made copper which will create a natural sound to soothe and excite the environment.



Kitchen or Tableware in France modern kitchen uses a lot of understanding from using copper as a material for shine and ancestral Indian use. Even the nobs of kitchen gas stove/tableware can of copper for aesthetic and has good tensile property.

LATIN AMERICA

Import Trends of Metal based household articles in LAC has been found to be high in Table and kitchen household articles, and pot scourers and scouring or polishing pads, gloves and the like, of aluminium (761510), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 741810 i.e. Table or kitchen household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves and the like, of copper although it has a low import share in LAC (1.14%), as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	metal article	3,43,256	3,33,896	3,77,385	3,92,572	3,76,713		
761510	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	2,87,847	2,83,660	3,25,569	3,39,603	3,32,622	88.3	
732394	Table, kitchen or other household articles, and parts thereof, of iron other than cast iron . . .	51,293	45,392	47,284	47,854	39,796	10.56	
741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	4,116	4,844	4,532	5,115	4,295	1.14	

Ecuador and Chile have an increasing demand for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the LAC region, growing at the rate of 9% and -1% in the past year in the metal based household article category. However, in the absence of any trade remedy on the select product, import tariff rate of 6% is applied in Chile and high tariff rate of 30% is applied in Ecuador.

Metal article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Mexico	86234	0	-	-9
Brazil	45248	8291	5457	20
Chile	43951	44230	994	-1
Peru	23793	4340	5482	11
Guatemala	21465	5284	4062	2
Colombia	19383	4075	4757	-12
Argentina	17198	3098	5551	-31
Panama	14926	6	2487667	N/A
Ecuador	14002	2769	5057	9
Dominican Republic	12369	2202	5617	16
Jamaica	11333	7332	1546	30
Bolivia, Plurinational State of	11113	3098	3587	-3
Costa Rica	9448	1793	5269	-14

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

LAC countries like Mexico, Columbia, Peru, Venezuela and Ecuador love bulls depicted by their bull fighting festival, hence **bull shaped metallic cutlery holders** (dhokra art) can be designed to entice their taste.



In Brazilian culture, living in a community is vital, maintain a high level of social involvement, and consider personal relations of primary importance in all human interactions. Due to the fact Brazilians are highly involved with social life, many friends, family members, or business partners join together to associate. Therefore, **large sized utensils for bulk cooking** can be a viable export option.



Brazilian use cutlery for eating everything. Hence, **innovative metal holders for fork, spoon and toothpick holders** can be targeted.





Chileans are crazy for week end expeditions, hence metal tiffin sets can be targeted to facilitate carrying food on those expeditions.

Copper Paella pan for Chilean paella dish. Flat and low depth pans with handles are widely used for preparing Chilean dish Paella, hence the pan derives its name from the dish

Vintage Ecuador souvenir copper wall hanging plate, Hand painted tooled copper pans



Hand painted handicraft objects are a part of folk culture of Ecuador and is widely accepted as a decoration item in Ecuadorian households.



CIS

Import Trends of Metal based household articles in CIS has been found to be high in Table and kitchen household articles, and pot scourers and scouring or polishing pads, gloves and the like, of aluminium (761510), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a great potential for HS code 741810 i.e. Table or kitchen household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves and the like, of copper although it has a low import share in CIS (0.73%), as it has a better standing in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past two years.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	metal article	1,40,050	1,36,963	2,07,862	2,34,761	2,66,253		
761510	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	1,05,832	1,01,515	1,49,597	1,81,064	2,12,965	79.99	
732394	Table, kitchen or other household articles, and parts thereof, of iron other than cast iron . . .	32,744	33,595	55,345	51,861	51,334	19.28	
741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	1,474	1,853	2,920	1,836	1,954	0.73	

Kazakhstan has an increasing demand with good volume for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the CIS region, growing at the rate of 6% in the past year in the metal based household article category. However, in the absence of any trade remedy on the select product, import tariff rate of 5% is applied in Kazakhstan.

Metal article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Russian Federation	150283	28638	5248	15
Kazakhstan	32260	7784	4144	6
Ukraine	25396	5946	4271	-3
Belarus	18567	3911	4747	18
Uzbekistan	10846	4263	2544	117
Azerbaijan	9585	2739	3499	5
Georgia	6246	1722	3627	3
Moldova, Republic of	4311	844	5108	-2
Kyrgyzstan	4130	1318	3134	54
Armenia	2712	650	4172	0
Tajikistan	1054	-	-	2
Turkmenistan	863	189	4566	N/A

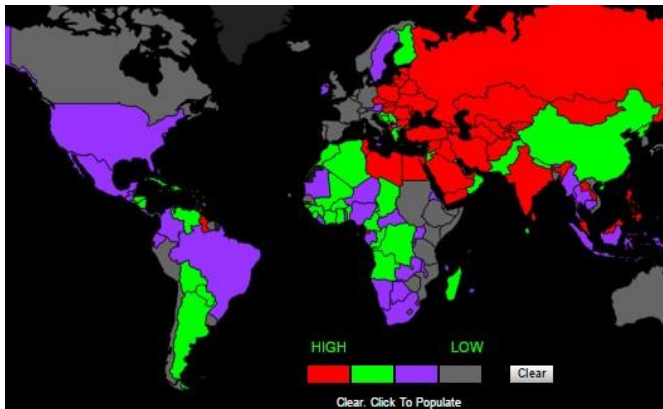
MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



The horse is probably the most central part of CIS culture reflected in their history and stamps across CIS nations. Kazakhs love horses, riding them for transportation in the villages, using them for farming, racing them for fun, and eating them for celebrations. Hence **horse shaped cutlery** can be targeted for such horse loving markets.



Maximum percentage of CIS citizens lie in the age bracket of 39-45 years. Hence, products should be designed according to the needs of young professionals. **Metal tiffin boxes for carrying food to offices** can be a viable option to target the office going segment.



Country	Rate	Rank	Country	Rate	Rank	Country
TURKMENISTAN	461.09	59	BURKINA FASO	111.03	117	BRAZIL
UKRAINE	384.18	60	BOLIVIA	110.96	118	BOTSWANA
UZBEKISTAN	362.62	61	HONDURAS	110.88	119	QATAR
KAZAKHSTAN	358.06	62	DOMINICAN REP.	110.75	120	SOLOMON ISLANDS
KYRGYZSTAN	354.50	63	PAKISTAN	110.65	121	SWEDEN
BELARUS	342.59	64	OMAN	110.48	122	RWANDA
MOLDOVA	336.63	65	GUINEA-BISSAU	108.36	123	COSTA RICA
ARMENIA	323.68	66	MOROCCO	107.05	124	ZAMBIA



CIS countries have very high number of heart ailment cases. Hence Copper utensils can be promoted siting its cardiovascular health benefits as it helps clean plaque as well as dilate the blood vessels to increase the blood flow to the heart. Studies have proved that Copper deficiency can result in the dysfunction of the heart muscles, leading to insufficient pumping of the blood, impaired circulation of blood in the body and the inability to respond correctly to stress.



Azerbaijani dishes have traditionally been cooked with copper utensils in copper cookware. Copper bowls and plates are still commonly used as serving dishes.



Copper biryani deggh is used to prepare pilaf (pilaw) – a rice preparation which is very famous in Kazakhstan household.



Sarposh is used in traditional Kashmiri dishes to cover plates which can be used in Kazakhstan as well owing to similarities in culture and food eating habits.

AFRICA

Import Trends of Metal based household articles in Africa has been found to be high in Table and kitchen household articles, and pot scourers and scouring or polishing pads, gloves and the like, of aluminum (761510), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a great potential for HS code 741810 i.e., Table or kitchen household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves and the like, of copper although it has a low import share in Africa (2.2%), as it has a better standing in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 3 years.

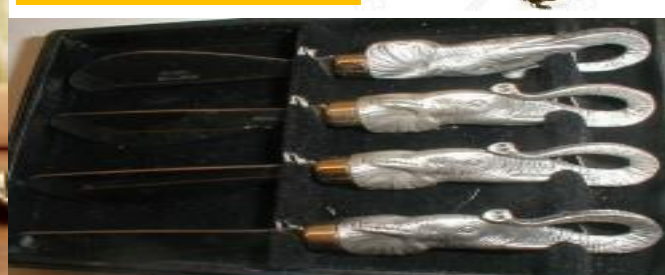
Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	metal article	1,73,439	1,80,022	1,99,607	2,64,636	3,03,098		
761510	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	1,15,593	1,29,927	1,49,808	2,01,634	2,36,045	77.88	
732394	Table, kitchen or other household articles, and parts thereof, of iron other than cast iron . . .	54,238	45,806	46,386	56,686	60,394	19.93	
741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	3,608	4,289	3,413	6,316	6,659	2.2	

Nigeria and **Mauritius** have an increasing demand for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the African region, growing at the rate of 35% and -5% in the past year in the metal-based household article category. However, in the absence of any trade remedy on the select product, a high import tariff rate of 20% is applied in Nigeria. 0% tariff rate for the HS code is applied in Mauritius.

Metal article	Value Imported In 2019 (USD thousand)	Quantity Imported In 2019	Unit value (USD/unit)
Egypt	83382	425	196193
Algeria	38004	8088	4699
South Africa	21781	6809	3199
Morocco	18942	4071	4653
Sudan	15552	4801	3239
Libya, State of	13782	2837	4858
Tanzania, United Republic of	11137	3349	3325
Djibouti	10904	2189	4981
Somalia	7676	2137	3592
Congo, Democratic Republic of the	6742	583	11564
Angola	6631	2509	2643
Guinea	6613	2575	2568
Cameroon	6014	1867	3221
Ethiopia	5713	1835	3113
Nigeria	5594	3951	1416
Côte d'Ivoire	5299	6622	800
Tunisia	4207	1357	3100
Mauritius	3358	546	6150
Rwanda	2771	1487	1863
Ghana	2702	3136	862



Africa is home to variety of animals, and hence inclined towards animal prints and designs. **Metallic Animal shaped cutlery** can be promoted in such markets.





ASEAN

Import Trends of Metal based household articles in ASEAN has been found to be high in Table and kitchen household articles, and pot scourers and scouring or polishing pads, gloves and the like, of aluminum (761510), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a great potential for HS code 741810 i.e., Table or kitchen household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves and the like, of copper although it has a low import share in ASEAN (3.25%), as it has a better standing in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	metal article	1,05,889	1,29,832	1,65,193	1,72,132	1,49,042		
761510	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	85,231	1,06,520	1,17,603	1,31,373	1,23,098	82.59	
732394	Table, kitchen or other household articles, and parts thereof, of iron other than cast iron . . .	17,812	19,021	41,445	35,503	21,094	14.15	
741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring . . .	2,846	4,291	6,145	5,256	4,850	3.25	

Thailand has an increasing demand in good volumes for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the ASEAN region, growing at the rate of 5% in the past year in the metal-based household article category. However, in the presence of ASEAN-India FTA on the select product, preferential import tariff rate of 5% is applied in Thailand while the MFN rate of duty is 20%.

Metal article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Indonesia	40703	13121	3102	-3
Malaysia	25043	6261	4000	-24
Singapore	22759	0	-	-14
Thailand	21950	3568	6152	5
Viet Nam	17836	2692	6626	-12
Philippines	13940	4320	3227	-2
Myanmar	4750	8015	593	-66
Cambodia	1296	362	3580	109
Brunei Darussalam	482	135	3570	-13
Lao People's Democratic Republic	283	489	579	10

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

One of the most widely used metals in earlier times in Thailand was thong lueang, or brass. Upper-class betel chewers had brass betel paraphernalia. Besides these betel utensils there were also trays for floral offerings made to monks, ornamental water bowls (called khan in Thai) and, in every household, a brass wok for making sweets or fruit preserves



In Myanmar Suitable **servicing spoons** of metal or even Chinaware is put into curries and bowls



Majority ASEAN countries use chopsticks. Hence, metal chopsticks in various designs can be sold here, highlighting reusability and environmental sustainability as key marketing factor.



In Indonesia, spoons and forks are used (never knives). Hence Knives in cutlery set for export in Indonesia should be avoided.



Kan Nam bowls (water bowls of brass) are still used but not for drinking, instead they are used during the songkran (the Thai new year) for pouring water over Buddha statues to ritualistically wash them. They are also used during the celebrations to hold scented water to splash gently on other people.



BONE CHINA & PORCELAIN MADE HOME PRODUCTS

WHERE DOES INDIA STAND IN BONE CHINA & PORCELAIN INDUSTRY FOR HOME PRODUCTS?

India's share in exports is growing but very less as compared to top exporters. Considering the changing demands and world turning to vegan friendly, India stands a chance to exports these in coming future. Comparative advantage of India loses against China in Bone china and porcelain-based tableware and kitchenware household articles. India needs to make effort to sustain its comparative advantage in it considering declining values of RCA in past 5 years. Other competing countries for prime export potential products for Indian porcelain and bone china-based household articles include Germany.


PROSPECTS FOR INDIAN BONE CHINA & PORCELAIN INDUSTRY ACROSS GLOBAL MARKETS

The global Bone China market is anticipated to rise at a considerable rate during the forecast period, between 2020 and 2025. In 2020, the market was growing at a steady rate and with the rising adoption of strategies by key players, the market is expected to rise over the projected horizon. However, the low durability of ceramic tableware is one of the major factors anticipated to hamper the growth of the ceramic tableware market.

In Asia-Pacific, China is the largest producer, exporter and consumer, but most of Chinese manufacturers are supplying the low-end products, low price and fierce competition. Japanese and other European brands are dominating the high-end market. India, Indonesia and Thailand also are important producers, but most of players are small- and medium-sized manufacturers and supplying the low-and-medium-grade products.

UNITED STATES OF AMERICA

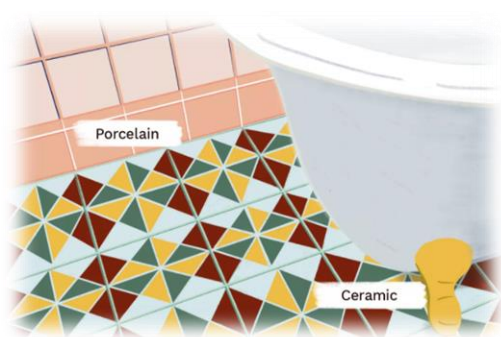
Import Trends of porcelain-based household articles in USA has been erratic. However, Indian exporters have a huge potential for HS code 691110 i.e., Tableware and kitchenware of porcelain or bone china as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Bone China & pore	461435	428369	431963	427226	387063		
691110	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, ...	461435	428369	431963	427226	387063		100%

As is indicated in the table below, the average tariff is 25% for all major suppliers to USA for bone china & porcelain.

Exporting country to USA	Value imported in 2019(US \$ Thousand)	Share in USA imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by USA
China	233610	60%	15	25%
Indonesia	36969	10%	26	25%
United Kingdom	19543	5%	38	25%
Germany	17627	5%	43	25%
Thailand	17359	4%	20	25%
France	16655	4%	92	25%

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES




Bone china is the strongest of the porcelain or china ceramics, Its high strength allows it to be produced in thinner cross-sections than other types of porcelain. Lenox was the only major manufacturer of bone china in the United States and has supplied presidential services to the White House. It closed production in the US permanently in March



Handcrafted bone china & porcelain products have potential for US market citing different type of designs or pottery like blue & indigo pottery.

Import Trends of porcelain-based household articles in EU has been erratic. However, Indian exporters have a huge potential for HS code 691110 i.e., Tableware and kitchenware of porcelain or bone china as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Bone China & pore	461435	428369	431963	427226	387063		
691110	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, ...	461435	428369	431963	427226	387063		100%

Italy has an increasing demand for tableware and kitchenware of porcelain or bone china (HS code 691110) i.e., 6% among all the countries in the European Union. However, for Italy instead of MFN duty of 12% , Preferential tariff of 8.4% for GSP country is applied.

Importers	Value imported in 2019(US \$ Thousand)	Quantity imported in 2019, Tons	Unit Value (USD tons)	Annual growth in value between 2018-2019, %
Germany	241759	72726	3324	1
Italy	162968	46167	3530	6
United Kingdom	160266	48030	3337	6
France	121532	37380	3251	-6
Netherlands	96774	33710	2871	16
Spain	78025	23816	3276	-5
Austria	71820	13157	5459	-8
Poland	59867	17673	3387	7
Belgium	58836	20867	2820	-1
Sweden	57995	8431	6879	-4

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

Germans collect Bottle caps in Gentranke Shops (Shops selling drinks on the go). Also, German Culture promotes sustainability.



Bowls made of bone china or porcelain can be used as collecting bowl

It's the number one classic Swedish souvenir: **The Dala horse**, or Dalecarlian horse. Originally it comes from the region of Dalarna.



These days Dala horse is a traditional gift in Sweden for any kind of life celebration including weddings and graduations. Considered good luck symbol. The horse itself was considered as a status symbol and highly valued property in the Swedish household.

Porcelain tiles are available that are remarkably good at mimicking natural stone such as marble or even wood grains. This makes porcelain tile an excellent choice where you want the look of wood without wood's susceptibility to water damage. It is best for used for appearance.



European style Santos rose wood tile

JAPAN

Import Trends of porcelain-based household articles in Japan has been erratic. However, Indian exporters have a huge potential for HS code 691110 i.e., Tableware and kitchenware of porcelain or bone china as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Bone China & pore	155266	146436	136508	125072	120708		
691110	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, ...)	155266	146436	136508	125072	120708		100%

As is indicated in the table below, except for China all other major suppliers enjoy duty free exports to Japan.

Exporting country to Japan	Value imported in 2019(US \$ Thousand)	Share in Japan imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by Japan
China	73684	61%	3446	2.3%
Thailand	12617	10%	13380	0.0%
Indonesia	6485	5%	12400	0.0%
Sri Lanka	5439	5%	12087	0.0%
France	5205	4%	70338	0.0%
Germany	4742	4%	53886	0.0%
United Kingdom	3480	3%	28525	0.0%
Hungary	2654	2%	156118	0.0%
Italy	2370	2%	21944	0.0%



It is rude to directly handover money to someone in Japan which arises a demand of *cash tray*

LATIN AMERICA

Import Trends of porcelain-based household articles in LAC has been erratic. However, Indian exporters have a huge potential for HS code 691110 i.e. Tableware and kitchenware of porcelain or bone china as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in	Trend
	Porcelain article	1,88,419	1,72,795	1,76,527	1,97,118	1,76,526		
691110	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, . . .	1,88,419	1,72,795	1,76,527	1,97,118	1,76,526	100	

Mexico and Chile have an increasing demand for tableware and kitchenware of porcelain or bone china (HS code 691110) among all the countries in the LAC region. However, in the absence of any trade remedy on the select product, import tariff rate of 15% is applied in Mexico and 6% in Chile.

bone china & porcelain article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Mexico	28014	7812	3586	-22
Panama	26277	0	-	N/A
Chile	22324	53555	417	-14
Peru	20700	16577	1249	21
Brazil	13261	5036	2633	-34
Dominican Republic	10662	1715	6218	11
Colombia	7083	6213	1140	-22
Guatemala	7014	8837	794	27
Ecuador	5814	4518	1287	-34
Argentina	4549	1347	3377	-10
Costa Rica	3486	1865	1869	1
Cuba	3162	882	3585	N/A
Venezuela, Bolivarian Republic of	2688	0	-	N/A

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Latin Americans in general have a taste for bright and happy colors and patterns, hence porcelain cutlery should have colorful and floral designs on it to suit their preference.



Brazilian use cutlery for eating everything. Hence, we can market aesthetic porcelain cutlery and toothpick holders to this country.



Mexican porcelain kitchenware and tableware are generally brightly coloured with vibrant floral and geometric patterns.

Chile porcelain kitchenware are color coordinated with simple designs and patterns.

CIS

Import Trends of porcelain based household articles in CIS has been on a rise for the past five years. Hence, Indian exporters have a huge potential for HS code 691110 i.e. Tableware and kitchenware of porcelain or bone china as it has a better stand in comparison to Chinese RCA for the same HS code and a good import demand from CIS.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	Porcelain article	70,598	73,399	1,05,848	1,35,681	1,41,787		
691110	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, ...)	70,598	73,399	1,05,848	1,35,681	1,41,787	100	

Russian Federation and Ukraine have an increasing demand for tableware and kitchenware of porcelain or bone china (HS code 691110) i.e. 3% and 23% respectively among all the countries in the CIS region. However, in the absence of any trade remedy on the select product, import tariff rate of 12% is applied in Russian Federation and 10% in Ukraine.

bone china porcelain article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Russian Federation	85873	31582	2719	3
Ukraine	18559	8290	2239	23
Kazakhstan	10111	4949	2043	-17
Belarus	6592	2860	2305	-5
Uzbekistan	5509	7345	750	117
Azerbaijan	4928	1027	4798	-21
Georgia	3169	883	3589	-6
Moldova, Republic of	2719	938	2899	47
Turkmenistan	1924	986	1951	N/A
Armenia	1084	134	8090	-21
Tajikistan	988	0	-	-33
Kyrgyzstan	331	122	2713	33

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



The horse is the most central part of Kazakh culture. Many Kazakhs own horses and keep pictures of them in their houses or offices. Hence porcelain cutlery with horse images on it can be marketed well.



Russia has imperial porcelain kitchenware company, popularly known as Lomonosov porcelain. It has royal designs, Russian nobility caricatures and has immense usage of gold colors to depict Russian heritage and vintage taste.



AFRICA

Import trends of porcelain based household articles in Africa has been on a rise for the past five years. Hence, Indian exporters have a huge potential for HS code 691110 i.e. Tableware and kitchenware of porcelain or bone china as it has a better stand in comparison to Chinese RCA for the same HS code and a good import demand from Africa.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	Porcelain article	1,56,757	1,63,467	1,70,057	2,81,287	3,76,842		
691110	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, . . .	1,56,757	1,63,467	1,70,057	2,81,287	3,76,842	100	

bone china porcelain article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Libya, State of	84123	24527	3430	N/A
Algeria	56040	26211	2138	N/A
Egypt	34276	12440	2755	-17
Morocco	33890	29879	1134	31
Tanzania, United Republic of	28810	0		N/A
Sudan	23288	12466	1868	N/A
South Africa	19489	22021	885	-12
Djibouti	19430	4709	4126	N/A
Cameroon	12878	9539	1350	N/A
Kenya	5646	9416	600	-3
Angola	5543	8425	658	-38
Nigeria	5211	7610	685	-7
Congo, Democratic Republic of the	5007	1976	2534	N/A

Morocco and South Africa have an increasing demand for tableware and kitchenware of porcelain or bone china (HS code 691110) among all the countries in the African region. However, in the absence of any trade remedy on the select product, high import tariff rate of 30% is applied in Morocco and South Africa.

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Moroccan porcelain and bone china kitchenware and tableware has very intricate patterns, with a dominance of blue color in it.

ASEAN

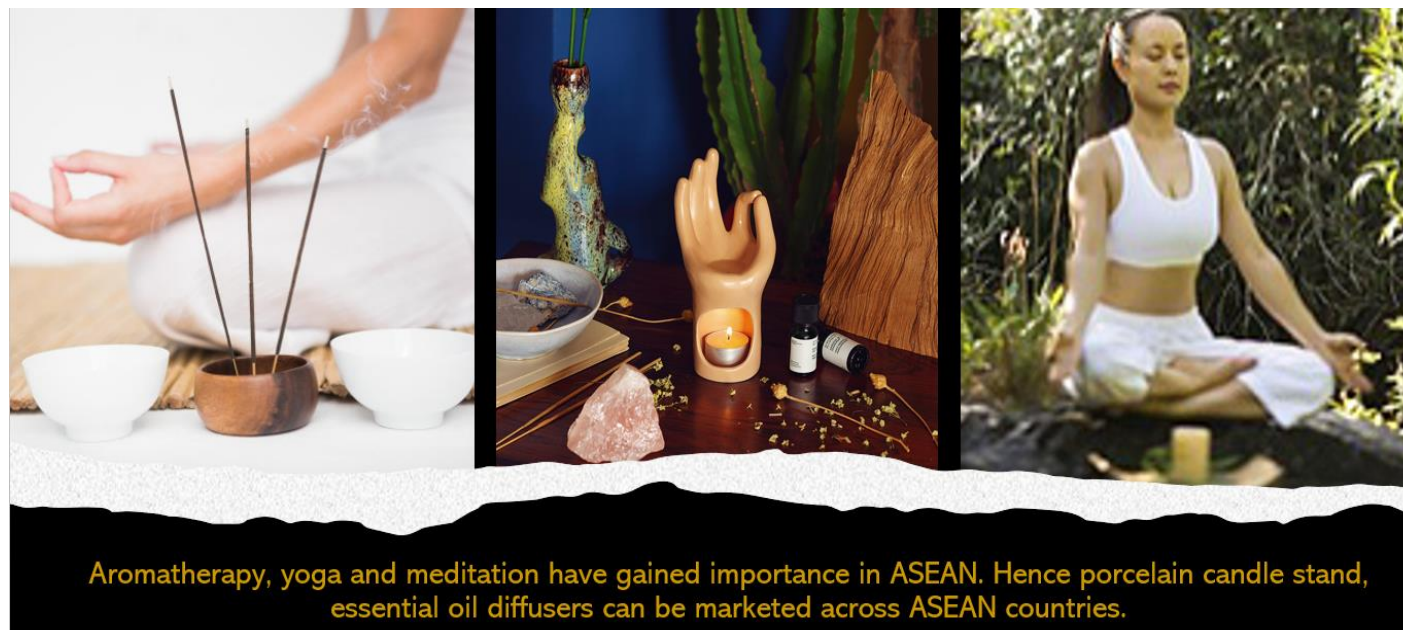
Import trends of porcelain based household articles in ASEAN has been on a rise for the past five years. Hence, Indian exporters have a huge potential for HS code 691110 i.e. Tableware and kitchenware of porcelain or bone china as it has a better stand in comparison to Chinese RCA for the same HS code and a good import demand from ASEAN.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	Porcelain article	88,664	95,496	1,02,195	1,10,664	1,16,465		
691110	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, . . .	88,664	95,496	1,02,195	1,10,664	1,16,465	100	

bone china porcelain article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Singapore	23974	0	-	40
Malaysia	19031	11239	1693	-11
Philippines	18291	17716	1032	4
Indonesia	15727	24220	649	-12
Cambodia	12361	11538	1071	90
Viet Nam	10851	2498	4344	-22
Thailand	10009	6268	1597	-3
Myanmar	5328	9103	585	4
Brunei Darussalam	522	158	3304	11
Lao People's Democratic Republic	371	105	3550	2

Singapore and Malaysia have an increasing demand for tableware and kitchenware of porcelain or bone china (HS code 691110) among all the countries in the ASEAN region. Despite the absence of any trade remedy on the select product, import tariff rate of 0% is applied in Singapore. In the presence of India-Malaysia CECA agreement, a preferential tariff of 25% is applied in

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Aromatherapy, yoga and meditation have gained importance in ASEAN. Hence porcelain candle stand, essential oil diffusers can be marketed across ASEAN countries.



The pestle and mortar and the cutting board are also subjects of great interest for any food lover in Thailand. pestle and mortar sets can be seductive as collectables, too, and cooks who are susceptible may want to own a lot of them. Mortars are used throughout Asia. The stone pestle and mortars used in Thailand have round knobs on either side, big enough to grasp, so that the mortar could be held still with the left hand when something was being pounded.



Modern-style pestle and mortars are made from black marble and are manufactured in China, although they are designed and sold in Ikea, in Bang Na, another interesting variant of the traditional type. It does provides Indian bone china and terracotta exporters an opportunity to look ahead of South East Asian countries.



VARIETY: An Indonesian stone pestle and mortar.

PHOTOS: SUTHON SUKPHISIT

In Indonesia, pestles and mortars are carved from volcanic rock. The mortars tend to be flat and shallow and the pestles are curved, with the part held in the hand much smaller than the business end. They are used more for crushing than for the kind of hard pounding done in some other countries, but are attractive and useful. Mortars in China also have these knobs, but they are in the shape of small lion's heads. One like that would certainly attract attention in the kitchen.



Need for design innovation



Singaporean porcelain and bone china kitchenware majorly consists of chop stick holder, soup bowls, soup spoon, rice container, tea cups and tea pots. Singaporean signs and rooster are particularly popular designs on porcelain kitchen and table ware.





CERAMIC BASED HOME ARTICLES

WHERE DOES INDIA STAND IN GLOBAL CERAMIC BASED HOME ARTICLES?

The ceramic products are produced both in organized as well as in unorganized sector. Small and medium enterprises (SMEs) account for more than 50 % of the total market in India, offering a wide range of articles including crockery, art ware, sanitary ware, ceramic tiles, refractory and stoneware pipes, among others.

India is the 6th largest consumer of ceramic tiles and the 8th largest manufacturer of this product.

Comparative advantage of India has been better off than China in case of other ceramic household articles, however India loses against China in ceramic based tableware, kitchenware and other household and toilet articles. India needs to make effort to sustain its comparative advantage in other ceramic household articles considering declining values of RCA in past 5 years. Other competing countries for prime export potential products for Indian ceramic based household article includes Spain and USA for other ceramic household articles and Portugal and UK for ceramic based tableware, kitchenware and other household and toilet articles.

GLOBAL CERAMIC BASED HOME ARTICLES TREND: WAY FORWARD FOR INDIA

The global ceramic sanitary ware market size was valued at USD 40.2 billion in 2018. The growing popularity of ceramic materials in the construction industry on account of their cost-effectiveness and excellent resistance to chemicals and scratches is expected to remain a favorable factor. Furthermore, shifting inclination towards sanitation and hygiene is projected to promote consumer spending on the usage of luxury items with aesthetic appeal in the near future.

Consequently, growth of the hospitality industry as a result of a positive outlook towards the tourism sector in countries including China, Japan, and Australia is

projected to expand the scope of ceramic-based advanced materials over the next few years.



In countries such as India, a large population prefers to cook their meal on their own. Thus, it increases the demand for cookware products. Increasing health awareness among consumers regarding the adverse effects of junk food. Changing trends have influenced the young bachelors to cook their food instead of consuming junk food. These are the prominent factors for segment growth.

PROSPECTS FOR INDIAN CERAMIC-BASED HOME ARTICLES ACROSS GLOBAL MARKETS

Asia Pacific is expected to expand at the fastest CAGR of 14.3% from 2019 to 2025. Infrastructural development and expansion of middle-class income groups in emerging economies including China and India are expected to play a crucial role in expanding the industry size in commercial and residential applications. North America accounted for over 20.0% share of the global revenue in 2018. Increased consumer awareness regarding luxury sanitary products with aesthetic appeal in the key markets including U.S and Canada is expected to remain a favorable factor for the industry.

UNITED STATES OF AMERICA

Import trends of Ceramic based household articles in USA have been found to be high in Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (691200), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 691490 i.e., Ceramic articles, n.e.s since it has a decent import share in USA (10%), and it has a better standing in comparison to Chinese RCA for the same HS code. As is indicated in the table below, all other major suppliers enjoy duty free exports to USA for ceramic articles n.e.s. (excluding porcelain or bone china)

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Ceramic	1156363	1119427	1127367	1252678	1260659		
'691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than ...	1023862	969819	980392	1110216	1136479		90%
'691490	Ceramic articles, n.e.s. (excluding of porcelain or china)	132501	149608	146975	142462	124180		10%



Exporting country to USA	Value imported in 2019(US \$ Thousand)	Share in USA imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by USA
Spain	26090	21%	109	0%
Japan	24854	20%		0%
China	22712	18%		0%
Italy	10912	9%	10	0%
Mexico	7929	6%	64	0%
Viet Nam	7085	6%	89	0%
Germany	5571	4%		0%
India	3083	2%	13	0%
Canada	2618	2%	86	0%

Ceramic tableware can be predominantly cut down into three different categories, namely beverageware, tableware, and flatware. In the United States, the market for tableware is robust and is expected to witness substantial growth in the upcoming years. Some of the major factors fuelling the growth of ceramics tableware in the United States include a rising number of home renovation projects, increasing household units, and the increasing installation of modular kitchens.

The ceramic dinnerware segment includes plates, bowls, mugs, saucers, and cups. The ceramic tableware products are witnessing an increasing demand in this category in the US market, due to their aesthetic appeal and attractive features, such as more extended durability. The companies such as Saint Gobain, Morimura Group and Kyocera Corp. are some of the major ceramic manufacturers. Lenox, Noritake, Wedgwood, Royal Doulton, and Mikasa dominate the ceramic dinnerware market in the United States.

EUROPEAN UNION

Import trends of Ceramic based household articles in EU have been found to be high in Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (691200), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 691490 i.e., Ceramic articles, n.e.s since it has a decent import share in EU (26%), and it has a better standing in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Ceramic	1273088	1290882	1420418	1621041	1632747		
'691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than ...	971670	956446	1058820	1212440	1201034		74%
'691490	Ceramic articles, n.e.s. (excluding of porcelain or china)	301418	334436	361598	408601	431713		26%

France & Germany have an increasing demand for Other ceramic articles (HS code 691490) among all the countries in the EU, dealing in high import volumes in the ceramic based household article category.

Importers	Value imported in 2019(US \$ Thousand)	Quantity imported in 2019, Tons	Unit Value (USD tons)	Annual growth in value between 2018-2019, %
Germany	274828	90868	3024	0
United Kingdom	254026	109091	2329	6
France	217131	83093	2613	0
Netherlands	144763	58148	2490	-4
Italy	116411	47918	2429	-1
Poland	91500	33849	2703	11
Belgium	88052	28486	3091	-20
Spain	77069	37366	2063	-3
Austria	51562	13605	3790	5
Denmark	48499	22006	2204	15



Europe Aromatherapy Diffuser Market is projected to grow at a CAGR of 7.22% during the forecast period 2020-2025. Also, in France orange color can be used by mixing copper in clay as it signifies earth there. **Hand-made diffuser of famous blue and indigo pottery with handcrafted painting will be a huge market.**



- Board games are an essential element of hobbies in Scandinavian and Nordic Cultures.
- Tafl games are a family of ancient Nordic and Celtic strategy board games played on a checkered or latticed gameboard with two armies of uneven numbers
- The impact of the Viking culture can be found throughout Norway, even in the games they play.

.Nordic countries are a Promising Market for Ceramic made Board Game Pieces

JAPAN

Import trends of Ceramic based household articles in Japan have been found to be high in Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (691200), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 691490 i.e., Ceramic articles, n.e.s since it has a decent import share in Japan (42%), and it has a better standing in comparison to Chinese RCA for the same HS code

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Ceramic	136883	142528	135744	134752	127972		
691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than ...	80901	86123	81414	81695	74688		58%
691490	Ceramic articles, n.e.s. (excluding of porcelain or china)	55982	56405	54330	53057	53284		42%

Exporting country to Japan	Value imported in 2019(US \$ Thousand)	Share in Japan imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by Japan
China	29272	55%	2383	0%
Taipei, Chinese	4291	8%	10002	0%
Viet Nam	3936	7%	983	0%
Korea, Republic of	3914	7%	8070	0%
Thailand	3689	7%	3660	0%

As is indicated in the table above, India is not the top importers of Japan despite being duty free in this product.

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Tea drinking is a ceremony in Japan and consumers behavior prefer sustainability



Ikebana is a traditional Japanese art form that developed through the custom of offering flower at Buddhist altars. Pots of IKEBANA can be handmade.

LATIN AMERICA

Ceramic art was produced on Colombia's Caribbean coast earlier than anywhere else in the Americas outside the lower Amazon basin, with relics dating back to 3100 BC. Hence Columbia's local players are pretty strong in ceramic industry. Countries like Mexico, Columbia, Peru, Venezuela and Ecuador love bulls. Hence ceramic and bone china tableware with bull designs on it will be a great way to attract LAC buyers. Import Trends of Ceramic based household articles in LAC has been found to be high in Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (691200), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 691490 i.e. Ceramic articles, n.e.s since it has a decent import share in LAC (21.57%) and it has a better standing in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	ceramic article	2,34,268	2,14,503	2,34,484	2,71,988	2,42,004		
691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than . . .	1,65,098	1,61,936	1,79,251	2,08,904	1,89,800	78.43	
691490	Ceramic articles, n.e.s. (excluding of porcelain or china)	69,170	52,567	55,233	63,084	52,204	21.57	

Mexico and **Chile** have an increasing demand for Other ceramic articles (HS code 691490) among all the countries in the LAC region, dealing in high import volumes in the ceramic based household article category. However, in the absence of any trade remedy on the select product, high import tariff rate of 15% is applied in Mexico and 6% is applied in Chile.

ceramic article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Mexico	91204	0	-	-8
Peru	23534	21753	1082	-9
Chile	22342	13588	1644	-12
Brazil	21693	10012	2167	-19
Colombia	15443	9747	1584	13
Costa Rica	7663	2418	3169	4
Argentina	7647	2740	2791	-35
Bolivia, Plurinational State of	7618	9706	785	-2
Ecuador	6948	6070	1145	-4
Guatemala	5863	5435	1079	-14
Paraguay	4943	3036	1628	-21
Dominican Republic	4364	1611	2709	8
Panama	3174	0	-	N/A

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Burnished Mexican ceramic pottery



Ceramics in Mexico date back thousands of years before the Pre-Columbian period, when ceramic arts and pottery crafts developed with the first advanced civilizations and cultures of Mesoamerica. With one exception, pre-Hispanic wares were not glazed, but rather burnished and painted with colored fine clay slips. The potter's wheel was unknown as well; pieces were shaped by molding, coiling and other methods. Animal figurines including birds, frogs, and elephants are seen all over Chile. These figurines have been made in Chile for long from ceramic.



Bullfighting or *corrida de toros* is a 500-year-old traditional Mexican sport played in a bullring for the entertainment of the audience. This sport, brought to Mexico by Spanish *conquistadores* (conquerors), Mexico has the largest bullfighting ring in the world.

Appreciating great connect of Mexicans for bullfighting and their connect with the animal "bull", design patterns resembling the same would work well in the country.



Brazilians love floral pattern and paintings. Hence ceramic tableware with floral designs and patterns would attract their attention.

In Brazilian culture, living in a community is vital, maintain a high level of social involvement, and consider personal relations of primary importance in all human interactions.

Due to the fact Brazilians are highly involved with social life, many friends, family members, or business partners join together to associate.





In Brazilian culture, living in a community is vital. Due to the fact Brazilians are highly involved with social life, many friends, family members, or business partners join together to associate. **Dinner sets of bone china can be curated for congregation and dinner/lunch meets**, celebrating the essence of socializing in its marketing.

CIS

Import trends of Ceramic based household articles in CIS has been found to be high in Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (691200), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 691490 i.e. Ceramic articles, n.e.s. since it has a better standing in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	ceramic article	1,26,766	1,28,068	2,03,809	2,22,394	2,07,629		
691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than . . .	1,11,651	1,08,108	1,73,219	1,88,482	1,76,067	84.8	
691490	Ceramic articles, n.e.s. (excluding of porcelain or china)	15,115	19,960	30,590	33,912	31,562	15.2	

Russian Federation and Ukraine have an increasing demand for Other ceramic articles (HS code 691490) among all the countries in the CIS region, dealing in high import volumes in the ceramic based household article category. Ukraine has a growth rate of

15% for the previous year in the ceramic based household article segment. However, in the absence of any trade remedy on the select product, import tariff rate of 10% is applied in Ukraine. Russian federation applies a preferential tariff of 11.25% (while MFN duty is 15%) on Indian import of the HS code on account of EAEU for developing countries.

ceramic article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Russian Federation	87455	50692	1725	-29
Kazakhstan	39411	31788	1240	28
Ukraine	19623	10616	1848	15
Kyrgyzstan	14481	15262	949	48
Azerbaijan	12006	8037	1494	5
Belarus	11552	14317	807	35
Georgia	9014	4168	2163	-15
Armenia	7185	3887	1848	25
Moldova, Republic of	3704	2089	1773	4
Uzbekistan	1975	2335	846	72
Tajikistan	1081	0	-	22
Turkmenistan	142	62	2290	N/A

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES





Russians drink their tea in teacups filled to the brim with hot tea. Kazakhs drink their tea in small wide-mouthed saucers called kasirs that they never fill more than halfway (usually only a quarter full). The intent is that the tea should never get cold, and the passing of the empty cup by a guest or a family member to the woman pouring tea serves as a way to keep them interacting, a way of showing respect. Cue can be taken from this while designing tea cups for these markets.



Gzhel is a Russian style of blue and white ceramics. All kinds of ceramic potter in blue and white color code is a niche in Russian federation.



Matryoshka nesting dolls are kept in every Russian household as a part of their culture, and ceramic items like mugs with these dolls printed on it is widely accepted in Russian market.



Earthenware and ceramics have been known to the people resident on the Ukrainian territory since as early as the fourth to fifth millennia BC. The discovered ancient pieces are attributed to the so-called Trypillya culture, highly-evolved for that period. Ceramics from the Kosiv district in Western Ukraine are known for their greenish and reddish-brown colors on white background, adorned with the images of birds, animals and people. Ceramics from the village of Opishne are renowned for their natural colors and intricately decorated vases and plates, traditionally featuring images of sheep, bears, goats and

AFRICA

Import share of Ceramic based household articles in Africa has been found to be high in Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (691200), but it has a decreasing trend in the past 5 years and its RCA for India is poor . Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 691490 i.e. Ceramic articles, n.e.s. since it has a decent import share in LAC (17.98%), has an overall increasing trend and has a better standing in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	ceramic article	1,23,022	1,10,987	1,22,147	97,965	91,041		
691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than . . .	1,09,972	98,277	1,03,337	77,497	74,668	82.02	
691490	Ceramic articles, n.e.s. (excluding of porcelain or china)	13,050	12,710	18,810	20,468	16,373	17.98	

South Africa has an increasing demand for Other ceramic articles (HS code 691490) among all the countries in the African region, dealing in high import volumes in the ceramic based household article category. However, in the absence of any trade remedy on the select product, high import tariff rate of 20% is applied in South Africa.

ceramic article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
South Africa	27523	29641	929	-7
Egypt	5830	719	8108	5
Angola	5270	5809	907	-15
Morocco	3842	2198	1748	10
Algeria	3660	3608	1014	N/A
Tunisia	3230	2790	1158	-12
Nigeria	3227	4395	734	231
Uganda	2678	6606	405	-5
Ghana	2497	7151	349	-15
Namibia	2483	1159	2142	13
Madagascar	2135	3130	682	57
Gabon	2064	5046	409	N/A
Congo, Democratic Republic of the	1915	1300	1473	N/A

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Africans in general have an inclination for wildlife and hence prefer animal prints. Innovation in ceramic articles by incorporating animal features and designs is desirable.



A traditional South African Zulu ceramic pot is a large, burnished, black, wide-mouthed vessel with a surface pattern of raised bumps, brightly colored enamel paint, a necklace of beads (another marker of Zulu identity), and/or intricate geometric sgraffito. They are fired twice in outdoor bonfires. They are used as beer pots in South Africa.

ASEAN

ASEAN ceramics market is to reach a market size of US\$ 69.08 billion by 2025. Ceramic tiles were the largest segment for ASEAN ceramics, accounting for 25.5% of the ASEAN ceramics industry revenues in 2016. Import Trends of Ceramic based household articles in ASEAN has been found to be high in Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (691200), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 691490 i.e. Ceramic articles, n.e.s. since it has a decent import share in ASEAN (25.82%) and it has a better standing in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	ceramic article	2,06,317	2,51,233	2,55,855	2,87,280	2,73,596		
691200	Tableware, kitchenware, other household articles and toilet articles, of ceramics other than . . .	51,498	60,917	64,231	80,405	70,649	74.18	
691490	Ceramic articles, n.e.s. (excluding of porcelain or china)	1,54,819	1,90,316	1,91,624	2,06,875	2,02,947	25.82	

Thailand has an increasing demand for Other ceramic articles (HS code 691490) among all the countries in the ASEAN region, dealing in high import volumes in the ceramic based household article category. However, in the presence of Indo-ASEAN FTA, a preferential tariff of 0% on the select product is applied on Indian imports in Thailand.

ceramic article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Thailand	171157	16720	10237	0
Viet Nam	21266	6414	3316	-10
Philippines	20839	17494	1191	-15
Singapore	18667	0	-	-11
Cambodia	17188	30598	562	-28
Malaysia	13573	5749	2361	-10
Indonesia	3372	1908	1767	39
Myanmar	3248	6323	514	17
Lao People's Democratic Republic	3222	1049	3072	170
Brunei Darussalam	1064	709	1501	-32

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Thailand's long-standing fame for spas and spa tourism can be leveraged by exporting Thai ceramic elephant aroma burner, elephant because it is the national animal of Thailand and an integral part of their culture.



Benjarong ware is a kind of painted Thai ceramics porcelain. Actual decoration can have anywhere between three and eight colors. For the decoration, repetitive forms, usually geometric or flower-based, are used.

A design is usually named after the decoration base name and a background color (for example, Phum Kao Bin on dark blue). Blue and white colored pottery with a dash of gold and Thai elephants are widespread in Thai ceramic articles.



For Myanmar, dishes should be small but deep, unlike the large serving dishes of the West. For relishes, pickles and dips Burmese use 3-4-inch diameter bowls. For normal curries, fried vegetables and salads they use 5-7-inch diameter bowls. Suitable serving spoons of metal or even Chinaware are put into curries and bowls.



Tea drinking behavioral pattenr across the world and its impact on the design of Ceramic



Egypt is a large importer of tea, and it's common to drink [unsweetened black tea](#) throughout the day. Hibiscus tea is often a specialty at Egyptian weddings.

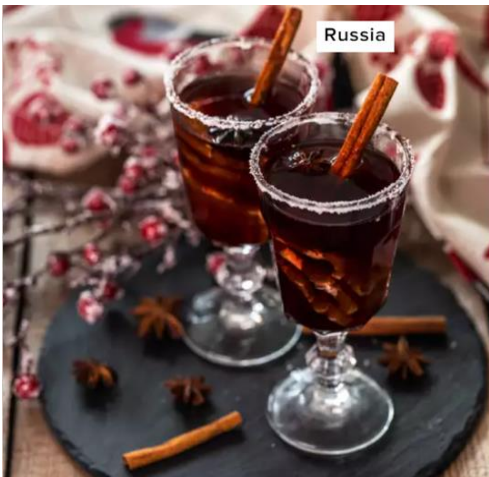


Five Yixing clay teapots showing a variety of styles from formal to whimsical

In the [culture of China](#) teacups are very small, normally holding no more than 30ml of liquid. They are designed to be used with [Yixing](#) teapots or [Gaiwan](#).

Morocco

The tea is served in three batches in tall glasses and you get to experience a new flavour each time. The flavours are then meant for you to reflect on the meaning of life in aspects of love and death. Typically, the first batch of tea is light in flavour so it is explained as “gentle as life”, the second is comparatively stronger hence, “as strong as love”. And the third is bitter of all and is called “bitter as death”.



Russia

Russia is known to have embraced tea later than most countries but has still managed to come up with its own one-of-a-kind tea called Zavarka. As part of the culture, the drinkers would use a traditional samovar (an ornate metal container) which holds the boiling water and the person who is responsible for pouring the water would dictate the intensity of the tea brew.



Best known for their iced tea called “Cha-yen”, Thailand iced tea is made with strongly brewed tea poured over ice and served cold.



Britain

The tea culture of Britain is as famous as the royal family. Facts show that over 160 million cups of tea are consumed in the UK each day!



Russians drink their tea in teacups filled to the brim with hot tea.



China



The *podstakannik*, or tea glass holder, is a holder with a handle, most commonly made of metal that holds a drinking glass (*stakan*). Their primary purpose is to be able to hold a very hot glass of tea, which is usually consumed right after it is brewed.

In Russian-speaking cultures and West Asian cultures influenced by the [Ottoman Empire](#) tea is often served in a glass held in a separate metal container with a handle, called a [zarf](#). or in Russian a [podstakannik](#).



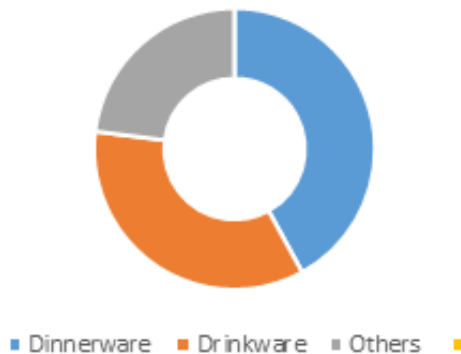
- In Europe, fine porcelain tea cups made of porcelain (Limoges porcelain from a [kaolin](#) base heated in ovens or China porcelain) were a delicacy for enjoying tea time. The cups are made with a handle and are paired with a saucer in a set, they feature hand-painted decoration and gold or silver patterns especially lining the rim and the handle.



GLASSWARE

Global glassware market reached USD 9,953.89 Million in 2017 and is expected to gain revenue of USD 13,644.36 Million by the end of 2025, expanding at a CAGR of 13.2% over the forecast period i.e. 2017-2025.

Global Glassware market share, by product, 2018



Dinnerware segment held the largest share of more than 40%. It consists of a wide range of dishes, including basic plates and bowl, which are used to serve a meal. Drinkware products are projected to witness the fastest growth in the coming years owing to the increasing consumption of both alcoholic and non-alcoholic drinks. The surge in the number of bars, pubs, and other fine dining places have been boosting the demand for glass drinkware in the foodservice industry.

WHERE DOES INDIA STAND IN GLASSWARE INDUSTRY FOR HOME ARTICLES?

The major glass producing countries in the world are China, Germany, Vietnam, USA, UK, and Japan. The main glass consuming regions are Europe, China, and North America. India, with an emerging and rapidly expanding industrial infrastructure, have a particular opportunity to increase their competitiveness by applying energy-efficient best practices from the outset in new industrial facilities and supply glass-based articles to markets. Comparative advantage of India has been better off than China in case of articles of glass, however India loses against China in glass mirrors and glassware for kitchen and table purposes.

GLASSWARE INDUSTRY FOR HOME ARTICLES TREND: WAY FORWARD FOR INDIA

Consumers prefer glass products as they do not have pores and they eliminate the existence of the bacteria. As a result, health-conscious consumers are shifting towards glass tableware from plastic products. Glass tableware products are available in transparent, colored, and matte forms.

Geographically, Europe dominated the global glassware market by contributing a market share of 34.44%. The increase in the urbanization globally, positively impacted the consumption and utilization of glassware among the migrating population.



Asia Pacific dominated the market, accounting for more than 35% share of the global revenue. The region is also anticipated to witness the fastest growth in the coming years. Changing lifestyle and increasing adoption of luxury tableware are fueling the growth of the product in this region. Also, the growing trend of luxury dining is expected to expand the scope for premium glass products soon. The surge in investments in the hotel and catering industry in Asia Pacific economies including India and China has boosted the growth of the glass tableware market. Factors including rising purchasing power, rapid urbanization, growth of the hospitality sector, and increasing brand awareness in the afore-mentioned countries are expected to open new avenues for glass tableware over the next few years.

PROSPECTS FOR INDIAN GLASSWARE INDUSTRY FOR HOME ARTICLES ACROSS GLOBAL MARKETS

UNITED STATES OF AMERICA

Size of Glass Product Manufacturing in the US Market is \$26.2bn in 2021. High urbanized population across North America is driving the utilization of durable and attractive glassware products. The change in consumer behavior on the back of urbanization implicates the consumer's process of selection. The easy availability of a wide range of products in the selection of luxury and semi luxury products delineates the growth of glassware industry in urbanized regions.

Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 702000 i.e., other articles of glass although it has a moderate import share in USA (26%), as it has a better stand in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 4 years.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	glass & Gw	970672	928392	944628	1049525	1000927		
'700992	Glass mirrors, framed (excluding rear-view mirrors for vehicles, optical mirrors, optically ...	487583	489421	503587	582817	505302		50%
'702000	Articles of glass, n.e.s.	272245	221146	234085	238261	263980		26%
'701349	Glassware for table or kitchen purposes (excluding glass having a linear coefficient of expansion ...	210844	217825	206956	228447	231645		23%

Exporting country to USA	Value imported in 2019 (US \$ Thousand)	Share in USA imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by USA
Japan	58362	22%		5%
China	58083	22%		5%
Germany	40640	15%		5%
Switzerland	25333	10%	16	5%
Korea, Republic of	23763	9%		0%
Turkey	16272	6%	12	5%
Italy	11297	4%	3.67	5%
Canada	7813	3%	12	0%
United Kingdom	5926	2%		5%

As is indicated in the table above, India is not the top importers of USA and has MFN duty of 5% in this product.



The change in the food preferences due to urbanization also exhibit the positive trend in Glassware market. The structural taste change from one taste preference to the other evince increased utilization of glass products. Uses in social gatherings have been substantially rising due to the high concentration of urbanized population.

EUROPEAN UNION

Import Trends of glass-based household articles in EU has been found to be high in glassware for table and kitchen purposes (701349), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 702000 i.e., other articles of glass although it has a moderate import share in EU (48%), as it has a better stand in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 4 years.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	glass & Gw	1768980	1903246	2051369	2194889	2226871		
'702000	Articles of glass, n.e.s.	829206	911421	991851	1066419	1076362		48%
'701349	Glassware for table or kitchen purposes (excluding glass having a linear coefficient of expansion ...	525875	567845	588917	610820	597610		27%
'700992	Glass mirrors, framed (excluding rear-view mirrors for vehicles, optical mirrors, optically ...	413899	423980	470601	517650	552899		25%

Importers	Value imported in 2019(US \$ Thousand)	Quantity imported in 2019, Tons	Unit Value (USD tons)	Annual growth in value between 2018-2019, %
Germany	474285	125722	3772	-4
United Kingdom	335141	108059	3101	10
France	276202	68498	4032	3
Netherlands	169508	65912	2572	-6
Italy	145945	49084	2973	4
Poland	122704	32924	3727	14
Belgium	120397	57046	2111	8
Spain	85287	12388	6885	-11
Austria	80804	48046	1682	0
Denmark	62743	19977	3141	-3

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

- Belgian Trappist Monks are renowned for their crisp and refreshing beers including Einkels, Dubbels, Tripels, and Quads. This Trappist Style Ale is a solid base recipe to start your foray into Belgian ales
- *Belgium is a big market to popularize Trappist Beer Making Kit*



Eastern Europe increasingly important in global pet care market. Declining birth rates, the rise of one-person households and growing rates of divorce all contribute to the rise in the status of pets in Germany and other European markets. Essential Oils for Pets need to be diluted for end use. Even aromatherapy is projected to grow in Europe, which requires a huge market for glass bottles for essential oils both for dogs and humans.





JAPAN

Import Trends of glass-based household articles in Japan has been found to be high in glassware for table and kitchen purposes (701349), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 702000 i.e., other articles of glass although it has a moderate import share in Japan (66%), as it has a better stand in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 4 years.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	glass & Gw	209624	221451	243431	313782	320925		
'702000	Articles of glass, n.e.s.	107186	120420	141805	202869	211833		66%
'700992	Glass mirrors, framed (excluding rear-view mirrors for vehicles, optical mirrors, optically ...)	53439	55253	55932	61060	65156		20%
'701349	Glassware for table or kitchen purposes (excluding glass having a linear coefficient of expansion ...)	48999	45778	45694	49853	43936		14%

Exporting country to Japan	Value imported in 2019(US \$ Thousand)	Share in Japan imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by Japan
China	135657	64%	21130	0%
Korea, Republic of	40817	19%	14242	0%
Taipei, Chinese	10847	5%	9897	0%
United States of America	10337	5%	72796	0%
Germany	5389	3%	138179	0%

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



LATIN AMERICA

Import Trends of glass based household articles in LAC has been found to be high in glassware for table and kitchen purposes (701349), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 702000 i.e. other articles of glass although it has a moderate import share in LAC (27.2%), as it has a better stand in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 4 years.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	glass article	3,18,892	2,86,196	3,02,837	3,47,252	3,54,481		
701349	Glassware for table or kitchen purposes (excluding glass having a linear coefficient of expansion . . .	1,52,459	1,34,252	1,49,441	1,79,608	1,69,991	47.95	
702000	Articles of glass, n.e.s.	88,267	88,584	85,051	92,670	96,418	27.2	
700992	Glass mirrors, framed (excluding rear-view mirrors for vehicles, optical mirrors, optically . . .	78,166	63,360	68,345	74,974	88,072	24.85	

Chile has an increasing demand for other articles of glass (HS code 702000) among all the countries in the LAC region, growing at the rate of -4% in the past year in the glass based household article category. However, in the absence of any trade remedy on the select product, import tariff rate of 6% is applied in Chile.

Glass article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Mexico	101981	6413	15902	31
Brazil	72403	50428	1436	1
Chile	33581	73258	458	-4
Peru	24022	11560	2078	-2
Argentina	16916	8771	1929	-41
Colombia	15390	5066	3038	-12
Ecuador	12743	6016	2118	-14
Panama	12507	0	-	N/A
Dominican Republic	8159	2104	3878	41
Costa Rica	7344	2493	2946	16
Bolivia, Plurinational State of	6814	4659	1463	22
Guatemala	6227	3148	1978	-8
Cuba	5649	793	7124	N/A

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



LAC countries like Mexico, Columbia, Peru, Venezuela and Ecuador love bulls. This gives a good export opportunity for bull shaped glass figurines.



Chilean wine is famous worldwide. Even domestically, Chile has a good consumption. Chile is wine haven for tourists as well. Hence market for wine glasses is huge in Chile



About 2/3 of the population are Roman Catholics which gives us the scope for Christmas tree ornaments and lanterns made of glass. Avoid green color as it isn't considered auspicious due to its connection with Amazon forest which is the source of forest borne diseases.



CIS

Import Trends of glass based household articles in CIS has been found to be high in glassware for table and kitchen purposes (701349), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 702000 i.e. other articles of glass although it has a moderate import share in CIS (33.77%), as it has a better stand in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 5 years.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	glass article	1,94,302	2,04,099	2,36,859	2,64,440	2,82,003		
701349	Glass ware for table or kitchen purposes (excluding glass having a linear coefficient of expansion . . .	99,800	1,07,650	1,29,833	1,49,949	1,44,296	51.17	
702000	Articles of glass, n.e.s.	63,921	68,150	72,670	79,359	95,243	33.77	
700992	Glass mirrors, framed (excluding rear-view mirrors for vehicles, optical mirrors, optically . . .	30,581	28,299	34,356	35,132	42,464	15.06	

Russian Federation and **Ukraine** has an increasing demand for other articles of glass (HS code 702000) among all the countries in the CIS region, growing at the rate of -1% and 7% respectively in the past year in the glass based household article category. However, in the absence of any trade remedy on the select product, import tariff rate of 10%-15% is applied in Russian federation and 10% in Ukraine.

Glass article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Russian Federation	142668	58832	2425	-1
Ukraine	48216	23943	2014	7
Belarus	19715	7131	2765	13
Kazakhstan	18390	9973	1844	13
Azerbaijan	17762	7234	2455	99
Georgia	8915	3843	2320	15
Uzbekistan	7815	32470775	0.24	102
Moldova, Republic of	5352	2071	2584	0
Armenia	5092	2912	1749	6
Kyrgyzstan	5089	2022	2517	18
Tajikistan	2541	0	-	52
Turkmenistan	448	102	4392	N/A

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



AFRICA

Import Trends of glass based household articles in Africa has been found to be high in glassware for table and kitchen purposes (701349), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 702000 i.e. other articles of glass although it has a low import share in Africa (21.18%), as it has a better stand in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 3 years.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	glass article	1,95,890	1,93,158	1,97,689	2,18,444	2,77,717		
701349	Glass ware for table or kitchen purposes (excluding glass having a linear coefficient of expansion . . .	1,09,932	1,19,686	1,27,157	1,37,511	1,72,337	62.05	
702000	Articles of glass, n.e.s.	48,043	37,260	33,995	41,066	58,811	21.18	
700992	Glass mirrors, framed (excluding rear-view mirrors for vehicles, optical mirrors, optically . . .	37,915	36,212	36,537	39,867	46,569	16.77	

Egypt has an increasing demand for other articles of glass (HS code 702000) among all the countries in the African region, growing at the rate of 24% in the past year in the glass based household article category. However, in the absence of any trade remedy on the select product, import tariff rate of 10% is applied in Egypt.

Glass article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Egypt	53593	24739	2166	24
Algeria	50215	32632	1539	N/A
South Africa	30551	20894	1462	8
Morocco	26211	16460	1592	10
Libya, State of	19882	5091	3905	N/A
Sudan	16016	12581	1273	N/A
Tunisia	9298	7388	1259	-12
Kenya	8566	7734	1108	-7
Djibouti	8212	2188	3753	N/A
Tanzania, United Republic of	8152	4191	1945	N/A
Angola	4803	4936	973	-16
Cameroon	3352	826	4058	N/A
Ethiopia	3312	1926	1720	N/A

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Arabic culture has wide usage of fragrance in daily lives. It can be a good opportunity for Indian attar manufacturers and pretty small decorated glass bottle manufacturers to work together for attar and attar glass bottle exports.

ASEAN

Import Trends of glass based household articles in ASEAN has been found to be high in glassware for table and kitchen purposes (701349), but its RCA for India is poor. Amongst the product categories imported in this category, Indian exporters have a huge potential for HS code 702000 i.e. other articles of glass although it has a very low import share in ASEAN (10.8%), as it has a better stand in comparison to Chinese RCA for the same HS code and has an increasing import demand for the past 5 years.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
	glass article	4,92,257	5,21,350	6,57,818	9,05,229	10,65,447		
701349	Glassware for table or kitchen purposes (excluding glass having a linear coefficient of expansion . . .	1,06,761	1,08,655	1,02,755	1,13,198	1,15,094	85.89	
702000	Articles of glass, n.e.s.	3,59,748	3,81,659	5,17,108	7,51,165	9,15,155	10.8	
700992	Glass mirrors, framed (excluding rear-view mirrors for vehicles, optical mirrors, optically . . .	25,748	31,036	37,955	40,866	35,198	3.3	

Singapore has an increasing demand for other articles of glass (HS code 702000) among all the countries in the ASEAN region, growing at the rate of 32% in the past year in the glass based household article category. Despite the absence of any trade remedy on the select product, import tariff rate of 0% is applied in Singapore.

Glass article	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between
Singapore	591119	0	-	32
Malaysia	162140	25363	6393	31
Viet Nam	136559	15829	8627	-5
Thailand	84202	19672	4280	-12
Philippines	44039	26975	1633	-3
Indonesia	43720	21768	2008	3
Myanmar	1788	2638	678	-48
Cambodia	1136	1280	888	6
Brunei Darussalam	581	224	2594	-29
Lao People's Democratic Republic	163	121	1347	-31

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

People in ASEAN countries are very particular about fragrance, as they find it as a way to express themselves. Hence this provides an opportunity for perfume glass bottle exports.





Essential Oils Market to Rise at 9.65% CAGR, Young Living's Expansion to Southeast Asia to Give Tailwinds to growth. The global market for essential oils was worth US\$ 7.03 Bn in 2018 and is anticipated to reach US\$ 14.6 Bn by 2026.





BROOMS & BRUSHES

Today, India is the third largest producer of coconut in the world. The Southern state of India- Kerala produces roughly **45 %** of the country's coconuts, with around 92 % of total production lying in Kerala's neighbor's and the other Southern Indian States. While Indian coir industry has already been utilizing waste coconut husks, it forms only 28.41 % of their total availability. The government of India suggests the coir industry to collect at least 60 % of the total coconut husks produced in the country for fibre extraction.

PROSPECTS FOR INDIAN BROOMS ACROSS GLOBAL MARKETS

UNITED STATES OF AMERICA

Import Trends of brooms and brushes in USA has been declining. However, Indian exporters have a huge potential for HS code 960310 i.e., brooms and brushes as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Brooms & Brushes	25129	22831	20799	18737	16921		
'960310	Brooms and brushes, consisting of twigs or other vegetable materials bound together, with or ...	25129	22831	20799	18737	16921	↘	100%

As is indicated in the table below, India does not have duty free status in USA as an MFN rate of 8% is applied. However, Indian market is one of the largest markets in USA. This arises a question of the meagre share of India which is 0.1% against Mexico of 83%. This arises a need for India to understand the USA consumer closely & have trade agreement with USA for being competitive in its market.

Exporting country to USA	Value imported in 2019(US \$ Thousand)	Share in USA imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by USA
Mexico	14052	83%	2.22	0%
Sri Lanka	1569	9%	1.01	8%
China	425	3%	0.34	8%
Viet Nam	329	2%	1.17	8%
Thailand	91	1%	0.77	8%
India	73	0%	0.91	8%
Japan	69	0%	1.11	8%
Philippines	43	0%	2.17	8%
Taipei, Chinese	38	0%	1.89	8%

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Natural Boot brushes can be sold in America as they are very particular about cleaning.

Import Trends of brooms and brushes in EU has been erratic. However, Indian exporters have a huge potential for HS code 960310 i.e., brooms and brushes as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Brooms & Brushes	33699	34013	32939	36345	33703		
960310	Brooms and brushes, consisting of twigs or other vegetable materials bound together, with or ...	33699	34013	32939	36345	33703		100%

France has an increasing demand for brooms and brushes (HS code 960310) among all the countries in the European Union. France enjoys a Preferential tariff as GSP country as 0% in this product.

Importers	Value imported in 2019(US \$ Thousand)	Quantity imported in 2019, Tons	Unit Value (USD tons)	Annual growth in value between 2018-2019, %
United Kingdom	6948	0		18
France	5458	1611	3388	-2
Italy	3859	1989	1940	-8
Germany	3826	1418	2698	-30
Netherlands	1818	680	2674	-11
Belgium	1667	1375090	1.21	-6
Hungary	1060	564	1879	-21
Croatia	918	437	2101	2
Ireland	847	181	4680	6
Greece	796	320	2488	13

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

French Cosmetics Industry is moving towards sustainability. Paper packaging is a raging trend being widely followed by some key Cosmetics Giant



Cold countries in EU households on an average use mechanised cleaning machines like vacuum cleaner, hence small brush components can be exported as supplementary parts.

Boot cleaner for snow made of natural coconut coir for cold countries

JAPAN

Import Trends of brooms and brushes in Japan has been erratic. However, Indian exporters have a huge potential for HS code 960310 i.e., brooms and brushes as it has a better stand in comparison to Chinese RCA for the same HS code.


Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Brooms & Brushes	25542	26473	25775	24824	26084		
'960310	Brooms and brushes, consisting of twigs or other vegetable materials bound together, with or ...	25542	26473	25775	24824	26084		100%

As is indicated in the table below, India does not lie in top importer in Japan as an MFN rate of 2.7% is applied. However, Indian market enjoys duty free tariff in this product.

Exporting country to Japan	Value imported in 2019(US \$ Thousand)	Share in Japan imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by Japan
China	14467	55%	2410	2.50%
Sri Lanka	4308	17%	4232	0.00%
Thailand	2890	11%	8426	0.00%
Indonesia	2434	9%	4888	0.00%
Viet Nam	971	4%	2617	0.00%
Taipei, Chinese	590	2%	6413	2.50%
Cambodia	366	1%	2905	0.00%
Germany	31	0%	31000	0.00%
Korea, Republic of	11	0%		2.50%

LATIN AMERICA

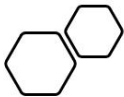
Import Trends of brooms and brushes in LAC has been pretty erratic. However, Indian exporters have a huge potential for HS code 960310 i.e. brooms and brushes as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in	Trend
960310	Brooms and brushes, consisting of twigs or other vegetable materials bound together, with or without handles	4,536	4,388	4,221	5,015	3,577	100	

Dominican Republic has an increasing demand for brooms and brushes (HS code 960310) among all the countries in the LAC region. However, in the absence of any trade remedy on the select product, import tariff rate of 20% is applied in Dominican Republic.

broom & brushes	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Dominican Republic	983	284	3461	-2
Chile	400	258	1553	-20
Peru	261	76	3434	88
Mexico	233	110775	2.1	47
Suriname	212	121	1752	112
Costa Rica	209	76	2750	-2
Aruba	182	36	5056	-16
Trinidad and Tobago	137	0	-	N/A
Bolivia, Plurinational State of	114	98	1163	-44
Brazil	108	91	1187	21
Guyana	107	41	2610	-19
Jamaica	72	89	809	125
Nicaragua	72	42	1714	414

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



- Brazil is a land of beaches, hence, beach broom can be a good proposition there.
- Brazilian people are pretty tall on an average, so the broom stick should be long enough to complement their height.



Import Trends of brooms and brushes in CIS has been rising for the past 3 years. Hence, Indian exporters have a huge potential for HS code 960310 i.e. brooms and brushes as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
960310	Brooms and brushes, consisting of twigs or other vegetable materials bound together, with or without handles	6,875	5,835	5,270	6,719	7,739	100	✓

Georgia has an increasing demand for brooms and brushes (HS code 960310) among all the countries in the CIS region. Despite the absence of any trade remedy on the select product, import tariff rate of 0% is applied in Georgia.

broom & brushes	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Russian Federation	3147	3302	953	48
Kazakhstan	2465	5074	486	20
Georgia	1011	667	1516	-16
Belarus	615	430	1430	-7
Kyrgyzstan	186	799	233	-38
Azerbaijan	111	67	1657	-17
Armenia	97	149	651	14
Tajikistan	64	0		-38
Ukraine	33	13	2538	-43
Uzbekistan	9	1167	-	350
Moldova, Republic of	1	0	-	0


MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES



Georgian households on an average use mechanised cleaning machines like vacuum cleaner, hence small brush components can be exported as supplementary parts. Also, outdoors and porch is cleaned using broom with plastic bristles, basically to remove dried fallen leaves and dust.

AFRICA

Import Trends of brooms and brushes in Africa has been on a constant downfall. However, Indian exporters have a huge potential for HS code 960310 i.e. brooms and brushes as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
960310	Brooms and brushes, consisting of twigs or other vegetable materials bound together, with or without handles	16,533	14,721	16,423	13,112	12,399	100	

Nigeria and **Morocco** have an increasing demand for brooms and brushes (HS code 960310) among all the countries i.e. 87% and 42% last year in the African region. However, in the absence of any trade remedy on the select product, a very high import tariff rate of 20% is applied in Nigeria and in 30% Morocco.

broom & brushes	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Nigeria	1378	1083	1272	87
South Africa	864	3482273	0.25	-24
Angola	825	934	883	-46
Morocco	785	316	2484	42
Namibia	713	166	4295	-13
Senegal	713	1374	519	55
Botswana	657	209	3144	3
Uganda	565	797	709	25
Zambia	492	390	1262	12
Madagascar	473	383	1235	13
Ghana	468	696	672	-39
Eswatini	438	113	3876	31
Kenya	349	0	-	-13

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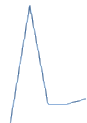
Jumping the broom is a traditional act performed at African weddings. After vows are exchanged, the newlyweds hold hands and jump over a broom to seal the union. Such decorated wedding brooms can be targeted with the back story to be used in marketing the product.

Brooms made from palm frond are excessively used in Nigeria, despite mechanical means, because of its environmental friendliness and biodegradability. Palm frond broom production can be done machinery or Hand depending on your capacity. Using machinery (mechanically) after cutting Fresh palm fronds from the palm tree.



ASEAN

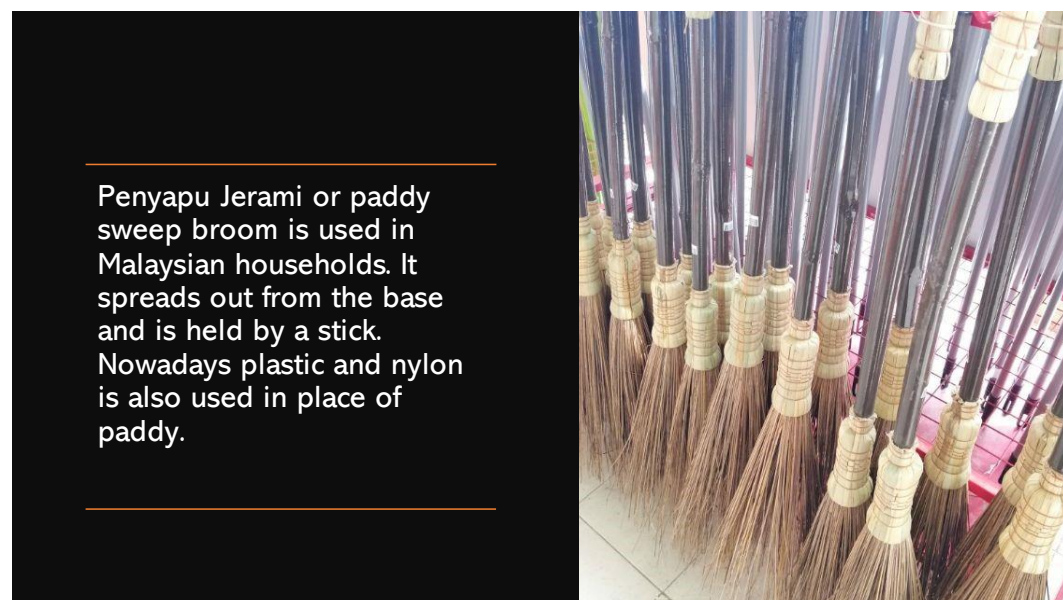
Import Trends of brooms and brushes in ASEAN has been rising for the past 3 years. Hence, Indian exporters have a huge potential for HS code 960310 i.e. brooms and brushes as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
960310	Brooms and brushes, consisting of twigs or other vegetable materials bound together, with or without handles	22,105	34,367	24,072	24,041	24,657	100	

Malaysia has an increasing demand for brooms and brushes (HS code 960310) i.e. 24% among all the countries in the ASEAN region. In the presence of India-Malaysia CECA trade agreement on the select product, preferential import tariff rate of 5% is applied in Malaysia.

broom & brushes	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Malaysia	9293	28741303	0.32	24
Philippines	7724	4049	1908	-18
Cambodia	3064	1444	2122	210
Viet Nam	1870	835	2240	-1
Thailand	1019	9057941	0.11	-55
Singapore	796	1574513	0.51	-21
Myanmar	458	342	1339	54
Brunei Darussalam	275	248469	1.11	2
Indonesia	119	59	2017	-69
Lao People's Democratic Republic	39	18	2172	56

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES





BASE METAL WORKS

PROSPECTS FOR ACROSS GLOBAL MARKETS

UNITED STATES OF AMERICA

Import Trends of photograph frames in USA has been on a downfall. However, Indian exporters have a huge potential for HS code 830630 i.e., Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Base metal	109548	104723	100319	107877	89999		
'830630	Photograph, picture or similar frames, of base metal; mirrors of base metal (excluding optical ...	109548	104723	100319	107877	89999	M	100%

As is indicated in the table below, India does not have duty free status in USA as an MFN rate of 2.7% is applied. However, Indian market is one of the largest markets in USA. This arises a question of the meagre share of India which is 5% against China of 77%. This arises a need for India to understand the USA consumer closely.

Exporting country to USA	Value imported in 2019(US \$ Thousand)	Share in USA imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by USA
China	69425	77%	6323	2.70%
India	4374	5%	8493	2.70%
Korea, Republic of	3904	4%	90791	0.00%
Taipei, Chinese	2633	3%	6700	2.70%
Sweden	1967	2%	6601	2.70%
Viet Nam	1642	2%	7202	2.70%

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES




Also, for special occasions like Thanksgiving, Easter , metal frames for picture , metal bases jewellery box can capture the market .



EUROPEAN UNION

Import Trends of photograph frames in EU has been increasing. This poses an huge potential to Indian exporters for HS code 830630 i.e., Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese RCA for the same HS code.

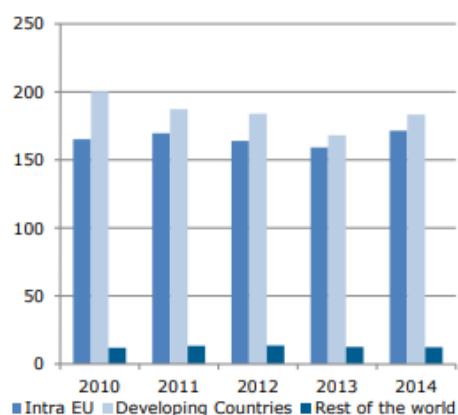
Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Base metal	132243	132939	134134	139142	139181		
'830630	Photograph, picture or similar frames, of base metal; mirrors of base metal (excluding optical ...	132243	132939	134134	139142	139181		100%

France and Netherland have an increasing demand for photograph frame and mirrors of base metal (HS code 830630) i.e.,5% & 19% respectively last year among all the countries in the European Union. However, MFN import tariff rate of 2.7% is applied in both the countries.

Importers	Value imported in 2019(US \$ Thousand)	Quantity imported in 2019, Tons	Unit Value (USD tons)	Annual growth in value between 2018-2019, %
Germany	31745	6935	4578	-4
United Kingdom	29889	0		0
France	14671	3095	4740	5
Netherlands	10791	2066	5223	19
Italy	6103	948	6438	-4
Spain	5651	1022	5528	-16
Czech Republic	4517	923	4892	29
Denmark	4338	905	4793	-1
Austria	4219	440	9589	3
Sweden	4146	891	4653	-7

With the increasing popularity of putting up frames in the home, frames have developed new functions.

European imports of picture & Frames by origin, in euro million



Source: Trademap

Depending on various uses, frames have a spectrum of styles: from almost invisible to more expressive. Generally, frames for artworks are neutral, as the consumer's focus is on the framed painting or drawing rather than on the frame itself. Photo and mirror frames are more relevant for Developing Country exporters, as the consumer makes a conscious choice for a particular type and style of a frame that is in line with the style of the interior of the home.

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Low end: inexpensive



Mid end: accessible design and price



High end: premium materials and techniques



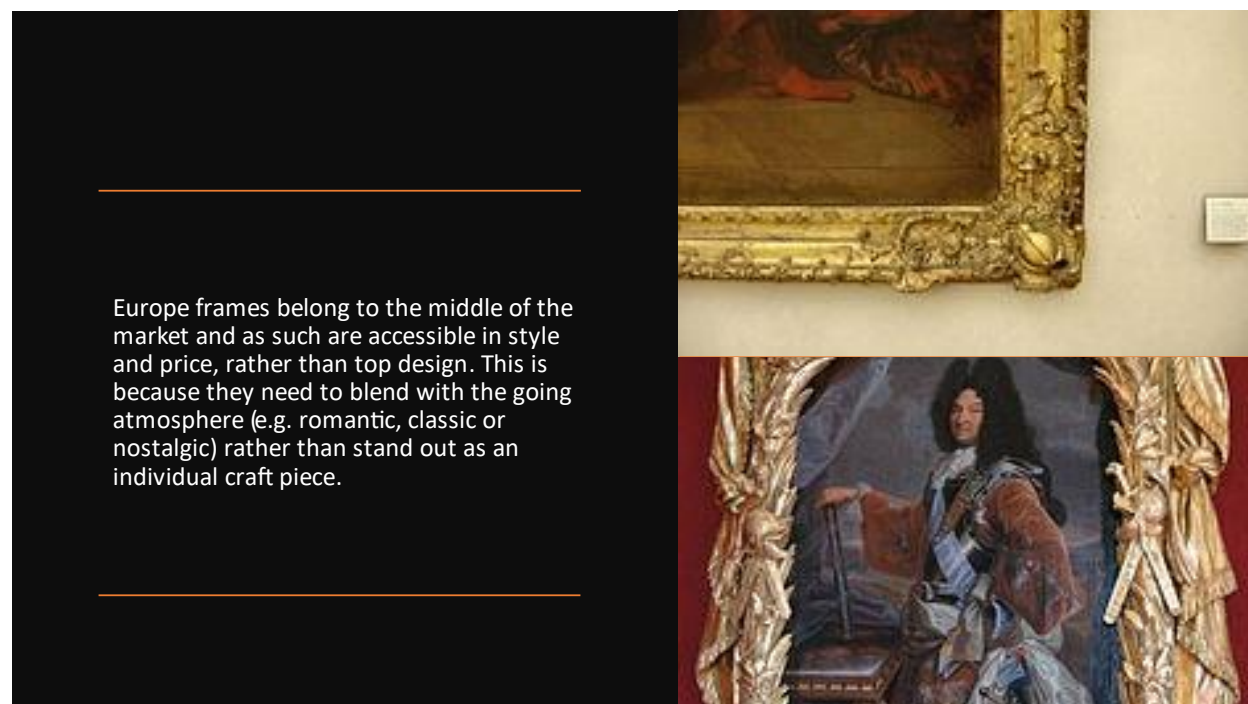
What trends offer opportunities on the European market for picture and mirror frames?

Frames have become typical decorative items, taking pride of place on walls and throughout the home. Also, frames have developed new directions.

- Both in mirrors and photo frames, clustering is popular. Consumers randomly group their frames on the wall or buy ready-made clusters of frames.
- 'Making Your Own' has already been a trend for quite long in-home decoration. We should offer materials to accessorise or style the frames or put them together themselves in a way that suits the occasion or the consumer's taste.
- Mid-market, frames are an important accessory. Reaching the right atmosphere in this market is more important than individual product excellence.
- We must become aware of our target consumers, which can be the average consumer, or dedicated target groups such as young women, infants, or, beyond the consumer market, interior decorators for projects in the contract market. Alternatively, a moment in the seasonal calendar (Valentine, Easter, Christmas etc.) can be chosen to position one's business in frames.

In the European market, frames generally follow the normal segmentation of home decoration, but vary somewhat in having a very broad lower and middle segment, and quite a small top segment. Overall, frames are affordable and accessible.

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Europe frames belong to the middle of the market and as such are accessible in style and price, rather than top design. This is because they need to blend with the going atmosphere (e.g. romantic, classic or nostalgic) rather than stand out as an individual craft piece.



Green' offers are rare in frames, so we can open new segments using frames that are sustainable in terms of material use, clean production, socially responsible practices, efficient transport solutions, and other formats that will help the consumer to feel good about your product's contribution to the planet and its people.

We can offer base of metal and use biodegradable items for decoration

JAPAN

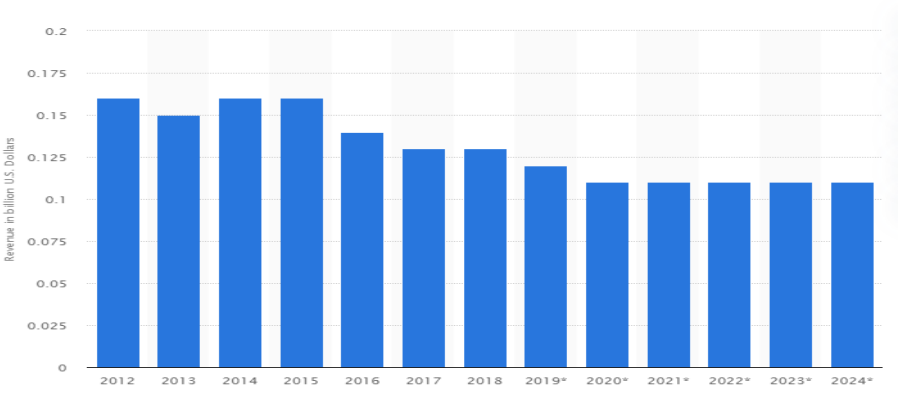
Import Trends of photograph frames in Japan has been on a downfall. However, Indian exporters have a huge potential for HS code 830630 i.e., Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product label	2015	2016	2017	2018	2019	Trend	Share in Imports
	Base metal	12142	10793	9858	10123	8463		
'830630	Photograph, picture or similar frames, of base metal; mirrors of base metal (excluding optical ...	12142	10793	9858	10123	8463		100%

As is indicated in the table below, despite enjoying duty free status in Japan as against an MFN rate of 3.1% for China and USA, Indian imitation jewelry could only capture a meagre share of total Japanese imports.

This is also even though Indian products made of base metal is decently priced. This highlights the need for Indian companies to understand the consumer preferences in Japan.


Exporting country to Japan	Value imported in 2019(US \$ Thousand)	Share in Japan imports (%)	Unit Value (USD /unit)	Average tariff (estimated) applied by Japan
China	5549	66%	9856	3.10%
Malaysia	923	11%	6500	0%
Indonesia	715	8%	4673	0%
Italy	460	5%	115000	0%
United States of America	218	3%	43600	3.10%
Korea, Republic of	112	1%	56000	4.60%
Denmark	105	1%	26250	0.00%
Taipei, Chinese	105	1%	10500	3.10%
Spain	59	1%	59000	0.00%



It is projected that the revenue of Mirror frames and picture frames in Japan will amount to approximately 0,1 billion U.S. Dollars by 2024


MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

- Mirror items, photographs, picture made of base metal can be a gifting option for a country like Japan which is prone to earthquake. These items are durable and has market which can be captured. Some points to remember for Japanese gifting market is
 - Best sales seasons in Japan are March and April. Christmas, Valentine's Day (16 February), White Day (16 March) are also prime gift-giving times.
 - Fancy Mirror, photo frames can be good gifting options for men/ women



LATIN AMERICA

Import Trends of photograph frames in LAC has been on a downfall. However, Indian exporters have a huge potential for HS code 830630 i.e. Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in	Trend
830630	Photograph, picture or similar frames, of base metal; mirrors of base metal (excluding optical elements)	11,689	9,816	10,344	9,428	8,915	100	

Mexico and **Brazil** has an increasing demand for photograph frame and mirrors of base metal (HS code 830630) among all the countries in the LAC region. However, in the absence of any trade remedy on the select product, import tariff rate of 15% is applied in Mexico and 16% in Brazil.

photograph frame	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Mexico	2172	0	-	-4
Brazil	1855	468	3964	12
Colombia	764	688	1110	20
Dominican Republic	527	147	3584	-14
Jamaica	468	140	3343	69
Panama	400	70	5714	N/A
Chile	382	99	3853	-11
Ecuador	335	75	4467	-18
Peru	323	42	7690	-6
Bahamas	193	12	16083	N/A
Paraguay	174	41	4244	-19
Argentina	160	49	3265	-67
Honduras	157	51	3078	1

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES




Chileans are crazy for Lama and Alpaca, which can be used in designing photo frames with alpaca design on it.



Brazilians love floral pattern and paintings. Hence floral rimmed photo frames can be a good way to market the product.

CIS

Import Trends of photograph frames in CIS has been pretty erratic. However, Indian exporters have a huge potential for HS code 830630 i.e. Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
830630	Photograph, picture or similar frames, of base metal; mirrors of base metal (excluding optical elements)	3,110	2,772	4,311	3,124	4,984	100	

Russian Federation and Azerbaijan have an increasing demand for photograph frame and mirrors of base metal (HS code 830630) i.e. 28% and 2% respectively last year among all the countries in the CIS region. However, in the absence of any trade remedy on the select product, import tariff rate of 15% is applied in Russian Federation and 15% in Azerbaijan.

photograph frame	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Russian Federation	2123	367	5785	28
Kyrgyzstan	1599	704	2271	403
Azerbaijan	367	168	2185	2
Kazakhstan	299	105	2848	41
Ukraine	231	20	11550	-15
Belarus	164	42	3905	27
Moldova, Republic of	87	4	21750	190
Georgia	56	8	7000	-22
Armenia	43	4	10750	-10
Tajikistan	9	0	-	50
Uzbekistan	6	0	-	-65

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SVG
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TOMMY & TILLY
PAPER DESIGN

The horse is probably the most central part of Kazakh culture. Kazakhs love horses, riding them for transportation in the villages, using them for farming, racing them for fun, and eating them for celebrations. Many Kazakhs own horses and keep pictures of them in their houses or offices.

Russian metallic photo frames have a royal and vintage feel to them. They are seldom adorned with a bow or crown like structure on the top. The frame part is pretty broad.

AFRICA

Import Trends of photograph frames in Africa has been erratic. However, Indian exporters have a huge potential for HS code 830630 i.e. Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese RCA for the same HS code.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
830630	Photograph, picture or similar frames, of base metal; mirrors of base metal (excluding optical elements)	7,623	5,444	5,778	6,102	5,940	100	

South Africa and Uganda have an increasing demand for photograph frame and mirrors of base metal (HS code 830630) i.e. 6% and 58% respectively last year among all the countries in the African region. However, in the absence of any trade remedy on the select product, import tariff rate of 0% is applied in South Africa and 25% in Uganda.

photograph frame	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
South Africa	2616	855	3060	6
Kenya	446	195	2287	25
Uganda	291	438	664	58
Morocco	275	30	9167	-18
Algeria	204	40	5100	N/A
Angola	178	233	764	-33
Bots wana	172	45	3822	-33
Egypt	160	55	2909	76
Namibia	156	42	3714	3
Tunisia	156	35	4457	-13
Cameroon	113	19	5947	N/A
Mauritius	112	24	4667	4
Madagascar	95	4	23750	850

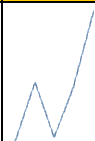
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Africans have perennial love for animal prints, hence photo frames with animal designs can be exported in such

ASEAN

Import Trends of photograph frames in ASEAN has been increasing for the past 3 years. Hence, Indian exporters have a huge potential for HS code 830630 i.e. Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese RCA for the same HS code and good import potential in ASEAN.

Code	Product Label	2015	2016	2017	2018	2019	Share in Imports (2019)	Trend
830630	Photograph, picture or similar frames, of base metal; mirrors of base metal (excluding optical elements)	14,966	16,554	15,117	16,411	18,468	100	

photograph frame	Value imported in 2019 (USD thousand)	Quantity imported in 2019	Unit value (USD/unit)	Annual growth in value between 2018-2019 (%)
Philippines	5385	3419	1575	-22
Singapore	4944	0	-	54
Indonesia	3386	411	8238	37
Thailand	1747	556	3142	4
Viet Nam	1378	231	5965	151
Malaysia	1281	689	1859	-2
Brunei Darussalam	158	23	6870	65
Cambodia	77	42	1833	126
Lao People's Democratic Republic	71	11	6289	9
Myanmar	41	2	20500	-46

Philippines and Indonesia have an increasing demand for photograph frame and mirrors of base metal (HS code 830630) among all the countries in the ASEAN region. In the presence of ASEAN-India FTA on the select product, preferential import tariff rate of 0% is applied in Philippines and preferential tariff of 12% in Indonesia while MFN

MOVING FROM HS CODE TO NTL: COUNTRY CASE STUDIES

