



Department of  
**Industries & Commerce**  
Government of Jammu & Kashmir



**JKTP** 

JAMMU & KASHMIR TRADE PROMOTION ORGANIZATION  
(A Government of J&K Undertaking)



# District Export Action Plan

## Jammu

# PREFACE

This district export plan for Jammu is being prepared as a part of Developing District as Export Hub under the District Export Hub Scheme initiated by the Ministry of Commerce & Industry, Govt of India. Hon'ble Prime Minister in his Independence Day Speech on 15th August 2019, had, inter- alia observed that each of our district has a diverse identity and potential for targeting global markets and there is a need for converting each district into potential export hubs. To implement Hon'ble PM's vision for each district, Govt of J&K is working to promote Jammu as an export hub. In view of above, a District Level Export Promotion Committee has been formed by the office of DIC, Jammu under the chairmanship of District Magistrate. With the said objective, 'District Export Action Plan' has been prepared and being presented to concerned stakeholders. The report encompasses in-depth information on each district's geographic, demographic, and administrative profile, along with key statistics of prominent exporting products of Jammu, gaps identified basis diagnostic survey, recommendations proposed to mitigate the gaps and action plans required to implement those recommendations. The report provides insights into exports from the cluster, via analyzing exports over the last five years from India and Jammu & Kashmir for the respective product. The report also shares insights on availability of raw material, technology upgradation, infrastructure, designing, packaging, access to finance, skill development etc. Besides the detailed action plans, the timeline and responsibility matrix has also been defined with implementation schedule to give implementation roadmap of the product. For this desired purpose, an extensive primary and secondary research was conducted. The report has been prepared in coordination with the Office of DGFT and Jammu & Kashmir Trade Promotion Organisation (JKTPO). The data has been sourced from multiple sources, including but not limited to data provided by office of DGFT, DICs, Diagnostic Study Reports, stakeholder consultation and several other secondary resources.

## LIST OF ABBREVIATIONS

DGFT	Director General Foreign Trade
DGCI&S	Directorate General of Commercial Intelligence and Statistics
DEH	District as Export Hub
SEPC	State Export Promotion committee
DEPC	District Export Promotion committee
GDP	Gross Domestic Product
FIEO	Federation of Indian Export Organizations
ITPO	India Trade Promotion Organization
APEDA	The Agricultural and Processed Food Products Export Development Authority
CEPC	Carpet Export Promotion Council
EPCH	Export Promotion Council for Handicrafts
WWEPC	Wool & Woolens Export Promotion Council
IICT	Institute of Carpet Technology
ODOP	One district One Product
CDI	Craft Development Institute
GeM	Government e Marketplace
IICT	Institute of Carpet Technology
CSIR	Council of Scientific and Industrial Research
IIIM	Indian Institute of Integrative Medicine
KVK	Krishi Vigyan Kendra
FCSC	Farmer's common service center

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## Vision of District as Export Hub (DEH)

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

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

Foreign trade from India constitutes of 45% of its GDP. Until 2019, only the central government was engaged in the decision making of foreign trade, without any participation or involvement of state and/or district stakeholders. However, now, understanding that there are diverse elements that contribute towards an enabling and conducive foreign trade environment; the central government has identified that with policy & strategy, active support of the state governments/UT and district administration are also equally required. Thus, to decentralize the existing activities, to boost local production & its exports and to ensure active participation of state & district stakeholders, the vision of district as export hubs was put to action. Department of Commerce, through Directorate General of Foreign Trade (DGFT) is working with the State / UT Governments to achieve this objective. DGFT and JKTPo have aimed at synergizing their efforts to identify the key products, export trends and challenges.

Further, to minimize the challenges, quantify the exports and outline export strategy; a detailed district-wise Export Action Plan has been made for all 20 districts of Jammu & Kashmir, where Ernst & Young (EY) has contributed as Knowledge Partner.

## Introduction

In a bid to implement Indian Prime Minister Narendra Modi's vision and turn every district into an export hub, the finance minister has mentioned in her 2020-21 budget speech that every district should be developed as an export hub.

The Ministry of Commerce and Industry, through the Directorate General of Foreign Trade (DGFT), has been working with the states/university cities to initiate the development and implementation of a district-specific export plan (DEP) for each district in each state/ UT through a district-level institutional structure. Products identified as having export potential from the country's 750 districts include leather goods, sand and stone products, spices, garments, wool, food, ceramics, cement, silk, carpets, glassware, metal handicrafts, sporting goods, pharmaceuticals, and other products.

JKTPO has been conveyed approval from administrative department I&C J&K carry out the detailed analysis for suggesting hard and soft interventions after re-examining district export action plans by taking up matter with DLEPCs and getting it approved.

## District Apex and District level Committee under DEH -Jammu

To promote export from the UT, J&K has constituted Apex Level Export Promotion Committee and District Level Export Promotion Committee. Government Order No 667JK(GAD) of 2020 dated 25.06.2020. As amended vide Government Order No 1101JK(GAD) of 2020 dated 09.12.2020 as Annexure-01 and this notification has been revised as per recommendations given in new export policy J&K and is attached as Annexure-02

Sanction is hereby accorded to the:

Designation of Commissioner/Secretary to the Government, Industries and Commerce Department as Export Commissioner Jammu and Kashmir; And

Constitution of Apex/District Level Export Promotion Committee(s) Comprising the following, to boost exports from Jammu and Kashmir:

Following is the composition of committees.

### Apex Level Export Promotion Committee

1	Commissioner/ Secretary to the Government, Industries and Commerce Department (Export Commissioner)	Chairman
2	Manager Director, J&K Trade Promotion Organization (JKTPO)	Member Secretary
3	Divisional Commissioner Jammu and Kashmir	Member(s)
4	Representative of Ministry of Micro, Small & Medium Enterprises (MSME), GoI	Member
5	Representative of Director General of Foreign Trade (DGFT), GoI	Member
6	Director, Industries and Commerce, Jammu/Kashmir	Member(s)
7	Director, Handloom and Handicraft, Jammu/Kashmir	Member(s)
8	Director, Planning, Industries and Commerce Department	
9	Secretary/Chief Executive Officer, J&K Khadi & Village Industries Board	Member



10	Representative of Agriculture Production Department (not below the rank of Director)	Member
11	Representative of Horticulture Department (not below the rank of Director)	Member
12	President Lead Bank	Member

#### District Level Export Promotion Committee

1	District Development Commissioner	Chairman
2	General Manager, DIC	Member Secretary
3	Chief Agriculture Officer	Member
4	Chief Horticulture Officer	Member
5	District Lead Bank Manager	Member
6	Assistant Director, Handicraft	Member
7	Assistant Director, Handloom	Member
8	District Officer, J&K KVIB	Member

#### DLEPC Meeting and Approval of DEAP

DLEPC meeting is being regularly held in the district under chairmanship of Deputy Commissioner (District Collector), General Manager of DIC as convener with other committee members. After deliberations, the committee decided various sector/products as focus products for exports from the district

Following are the major parameters: -

1. **Export data of the state/UT:** -We have analyzed last 10 years data of exports from the state. We have compared the export potential with district infrastructure.
2. **Export data of India and the world:** - We have analyzed both in terms of growth of export products.
3. **Experience of departments and officers:** -Officers of the departments have wide experience of the market, products along with their strengths and weaknesses.
4. **SWOT Analysis of the product/s:** -After analysis of every product produced in the region with comparative studies, by calculating, analyzing, taking inputs from all stake holders, DLEPC sorted out products for exports from the districts

#### Products Shortlisted Under Districts as Export Hub in various districts of UT

S No	District	Products Identified under District as Export Hub	Product under ODOP selected by Concerned DC's
1	Jammu	Basmati Rice, Mango, Phulkari (replaced with Sozni), dairy products	Basmati Rice
2	Samba	Bamboo, Amla, Mushroom, Pharmaceutical	Mushroom

3	Kathua	Organic Spices, Basholi painting Basholi Pashmina	Basohli Painting and Basohli Pashmina
4	Udhampur	Pickle, Tourism, Garlic	Garlic
5	Reasi	Spices, Aromatic Plants, Tourism	Aromatic Plants
6	Poonch	Adventure Sport, Walnut, Woollen baby garments, Rajmash, Pecanuts	Pecanuts
7	Rajouri	Dairy products walnut and its products, wool products	Walnut
8	Doda	Natural Oils , Rajmash, Walnut	Lavender Oil
9	Kishtwar	Walnut, Saffron, Rajmash	Saffron
10	Ramban	Honey, Walnut, Anardana	Honey
11	Anantnag	Cricket Bat, Walnut, Scented Rice (Mushkbudji), Honey, Red Chillies Trout Fish.	Trout Fish
12	Bandipora	Honey, Fish (Trout/Crab), Black cumin	Crewal based Shawls
13	Baramulla	Apple, Carpets	Apple
14	Budgam	Kani Shawls, Sozni, Crewel.	Kani Shawl
15	Ganderbal	Wicker Willow, Trout Fish, Kani shawl	Wicker Willow
16	Kulgam	Apple, Walnut, Garlic, Honey, Red Chilies', Crewel, fish, dairy, Products, Sheep Wool	Garlic
17	Kupwara	Red Rice, Walnut.	Walnut
18	Pulwama	Saffron, Apple and its derivatives	Saffron
19	Shopian	Apple	Apple
20	Srinagar	Walnut, Walnut Wood Carving, Carpet, Leather Pashmina, Kani Shawl, Paper Machie	Silk Carpet

### Interventions Required for Export

- ▶ Identification of structural issues and capacity building like quality assessment, supply chain and logistic documentation/regulation has been done vide Gap analysis of Export Strategy at district level
- ▶ Revamping of Export policy with fiscal and non-fiscal interventions for exporters
- ▶ Branding and Promotion gaps
- ▶ Market Outreach and SWOT analysis of products in each district

- ▶ Export Data and Analytics
- ▶ Analysis of main exporting and Target countries
- ▶ Key Gaps and Recommendations
- ▶ Action Plan for each district
- ▶ Capacity Building & Skill Development
- ▶ Knowledge Management – marketing collaterals
- ▶ Stakeholder Management – Support in information dissemination

### **DISTRICT EXPORT ACTION PLAN FEATURES**

**The District Export Plan must include: -**

- ▶ Details of support required by the local industry in boosting their manufacturing and exports with impetus on supporting the industry from the production stage to the exporting stage.
- ▶ Strategy to enhance logistics and infrastructure at the district level
- ▶ Identification of bottlenecks for exports
- ▶ Strategy to enhance logistics and infrastructure at the district level .
- ▶ Action plan to increase the exports.
- ▶ Key recommendation from stakeholders, industry association, export department officials etc.
- ▶ Informative material on various incentives provided by the Government of India and the respective State/UT of exporters will be disseminated to the industry and other potential exporters.

### **J&K Export Policy Interventions/Incentives To Boost Export From Ut**

- Preparation of database and market research for exporters
- Development of Common Facility Centers for Exporters
- Strengthening of existing infrastructure at district level
- Leveraging E commerce platforms for market linkages at global platform
- Financing of export infrastructure within the funds approved for respective districts

### **Strategic Interventions -Required**

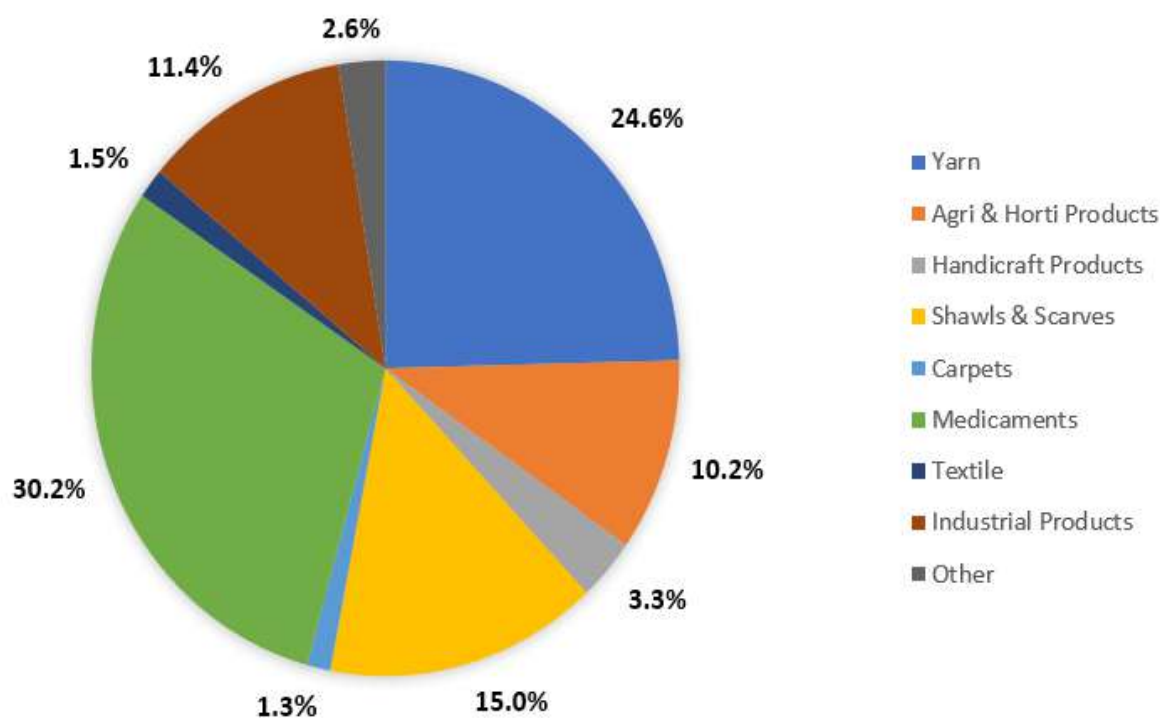
The Government of J&K must follow strategic moves to increase exports from the UT of J&K in the upcoming **three years or by 2026:**

- ▶ Strengthening UT's ties with international trade organizations, export promotion councils, the Federation of Indian Exports Organisation, the India Trade Promotion Organisation, the National Centre for Trade Information, and product sectoral associations.
- ▶ Conducting promotional activities like external publicity, participation in fairs and exhibitions, promotion of exclusive exhibitions and trade fairs of specific products in targeted markets for export-oriented units buyer seller meets. Sector specific trade fairs.
- ▶ Engagement with various organizations like APEDA, ITPO. TPCI, CEPC, EPCH, WWEPC, SGPC and SPICE Board for the promotion of local products.
- ▶ Liaison with the DGFT and export-related training/workshops/capacity building
- ▶ Preparation of a holistic vision strategy aiming at cluster-based needs for bringing all the cluster players at one platform for exploring potential of ODOP Export products procured at international level,
- ▶ Knowledge transfer of various export schemes to the identified ODOP products and benefits available in availing the same related to exports.

- ▶ Assisting exporters in linking with finance institutions to avail credit at competitive rates.
- ▶ Geographical Indicator (GI) products identification for every district pertaining to local strength and resources available.
- ▶ Activities like Outreach programs, Export Haats, Virtual meetups with Stake holders, Knowledge sessions organized by DEPC to encourage export in all districts.
- ▶ Establishment of Permanent Exhibition Centres – Jammu Haat and Kashmir Haat in all districts of J&k
- ▶ Providing e-Commerce platform for artisans/ weavers/producers/sellers/startups etc
- ▶ Communication and Logistics Infrastructure for exports to be speed up i.e civic amenities at the major loading and unloading points/warehouses/cold chains / and overnight parking lots for the goods carriers.
- ▶ Tie ups with good packaging institutes for packaging of international level eg IIPM etc
- ▶ Testing lab facility for all major products

Develop human resources and skills to create a better workforce. For example, training institutes such as the Craft Development Institute (CDI) and the Indian Institute of Carpet Technology (IICT) in Srinagar intend to offer training programs in craft design and handloom technology, respectively.

### Export Scenario of Jammu and Kashmir



Source: -Commerce.gov.in

Jammu and Kashmir (J&K) is a region rich in natural resources, cultural heritage, and skilled artisans, offering a diverse range of products for export. The strategic location of the region, coupled with its unique offerings, presents significant opportunities for economic growth through exports.

Key Export Products includes:-

**Horticultural Produce:**

**Apples:** J&K is renowned for its high-quality apple production, particularly varieties like Delicious, Ambri, and American. The region's temperate climate and fertile soil create ideal conditions for apple cultivation, making it a major export commodity.

**Other Fruits:** Besides apples, J&K also produces a variety of other fruits such as cherries, apricots, pears, and walnuts. These fruits are sought after for their freshness, flavor, and nutritional value in both domestic and international markets.

**Handicrafts and Handlooms:** Furthermore, Jammu and Kashmir's globally acclaimed handicrafts contribute significantly to its export profile. Items like pashmina shawls, carpets, silk fabrics, tweeds, Kashmir willow cricket bats, and various wooden artifacts enjoy a thriving market across different parts of the world.

**Pashmina Shawls:** Kashmiri Pashmina shawls, made from the fine wool of Pashmina goats, are highly prized for their softness, warmth, and intricate embroidery. These luxurious shawls have a strong demand in international fashion markets.

**Carpets and Rugs:** J&K is known for its exquisite hand-knotted carpets and rugs, crafted using traditional techniques passed down through generations. The intricate designs and superior quality of Kashmiri carpets make them coveted items in global home décor markets.

**Wood Carvings and Papier-Mâché:** The region boasts skilled artisans who create intricate wood carvings and papier-mâché products, including decorative items, furniture, and traditional artifacts. These handicrafts showcase the rich cultural heritage of J&K and are popular among collectors and enthusiasts worldwide.

**Saffron:**

J&K is one of the largest producers of saffron in India, with the saffron fields of Pampore being particularly famous. Kashmiri saffron is known for its unique flavor, aroma, and medicinal properties, making it a valuable export commodity in the culinary and pharmaceutical industries.

**Tourism Services:**

Besides tangible products, J&K also exports tourism services, including hospitality, adventure sports, pilgrimage tours, and cultural experiences. The region's stunning landscapes, historical sites, and vibrant festivals attract tourists from around the world, contributing significantly to the state's economy through foreign exchange earnings.

Exports play a crucial role in driving economic growth and development in Jammu and Kashmir. By leveraging its abundant natural resources, skilled workforce, and cultural heritage, the region can capitalize on export opportunities to enhance livelihoods, foster entrepreneurship, and contribute to overall prosperity.

The region's rich biodiversity also yields numerous medicinal plant species, which are exported for pharmaceutical purposes. Moreover, minerals like gypsum, limestone, sapphire, granite, and other decorative stones form a notable portion of Jammu and Kashmir's export portfolio.

While tourism is not typically categorized as a traditional export, it can be viewed as an export within the service sector. The captivating natural beauty, cultural heritage, and adventurous offerings of Jammu and Kashmir attract tourists from all corners of the globe, generating substantial revenue for the region.

In the fiscal year 2022-23, Jammu and Kashmir recorded exports worth INR 1,337 Cr. Industrial products, including medicaments, industrial chemicals, cotton/woolen/silk yarn, accounted for approximately 66.2% of the total exports, while agricultural and horticultural products contributed about 10.2%, and handloom & handicraft products constituted around 19.6%. It is anticipated that the export value of the Union Territory will witness a minimum 15% increase in the fiscal year 2023-24, primarily attributed to the upsurge in industrial production.

### Export Preparedness Index Rating Of J&K

Jammu & Kashmir has emerged among top performers, reaching 2nd position among UT's from 2nd in last year in of Export Preparedness Index 2022 by Niti Aayog.

J&K recorded an improvement in its score rising to 47.79 from 30.07 in 2021 from earlier scores of 12.27 in 2020. Overall ranking of J&K has improved from rank 23 to rank 17. in 2022, and improved it to 17th Place in India

### Overall Ranking Points -2022



## About Jammu District

### GEOGRAPHICAL AREA -JAMMU

Particulars	Details
Geographical Area	2336 Sq Kms
Population (2011)	15.30 Lacs, (Male-8.14 Lacs, Female-7.16Lacs)
Literacy Rate	83.45%
Number of Blocks	20

### Economy-Jammu-District

The city of Jammu is the main cultural and economic center of the administrative district of Jammu. One of the most famous local basmati rice is produced in RS Pura near Jammu. Apart from the rice mills scattered all over Jammu, Bari Brahmna industrial area has many industrial units manufacturing a variety of products ranging from carpets to electronics to electrical items etc. Bari-Brahmna also has a freight train connection that facilitates the transportation of goods manufactured here to other parts of India.

In the designation of Jammu as a District Export Hub (DEH), Dairy Products, Pulkari, and Mango have been recognized as having export potential.

### History-Jammu

Raja Jamboo Lochan, who lived in the 14th century BC, is thought to have created the city, which was formerly known as "Jamboo" after his own name and is now known as "Jammu." The Jammu district

is named after the city of Jammu, which is often referred to as the "city of temples" and serves as the UT's winter capital.

### Location

Jammu is situated on a hill on the banks of the river Tawi and is located at 74 degrees 24' and 75 degrees 18' east longitude and 32 degrees 50' and 33 degrees 30' north latitude and falls under category 'B'

### How To Reach Jammu



Jammu is the winter capital of Jammu & Kashmir and is well connected by all three modes of transport i.e. air, rail and road..

**By Air:**

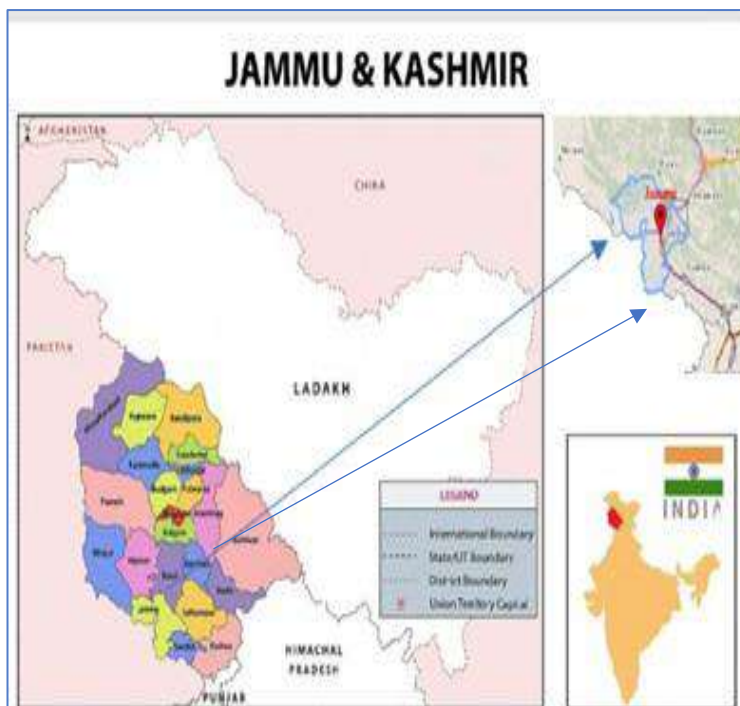
The city has a national airport at Satwari, and there are regular flights between Jammu and several other cities in the country.

**By Rail:**

Jammu Tawi is an important rail junction of the UT of J & K and connected with important cities of the country by express and fast trains including Bande Bharat train.

**By Road:**

National Highway 44 passes through Jammu district and connects the rest of the UT with the summer capital, Srinagar.



**Administrative Set Up -Jammu**

The city of Jammu, the winter capital of Jammu and Kashmir and Srinagar serves as the summer capital and is the headquarters of the Jammu district. For administrative purposes, the district is divided into **7 sub-districts, 20 blocks, 21 tehsils and 305-gram panchayats.**

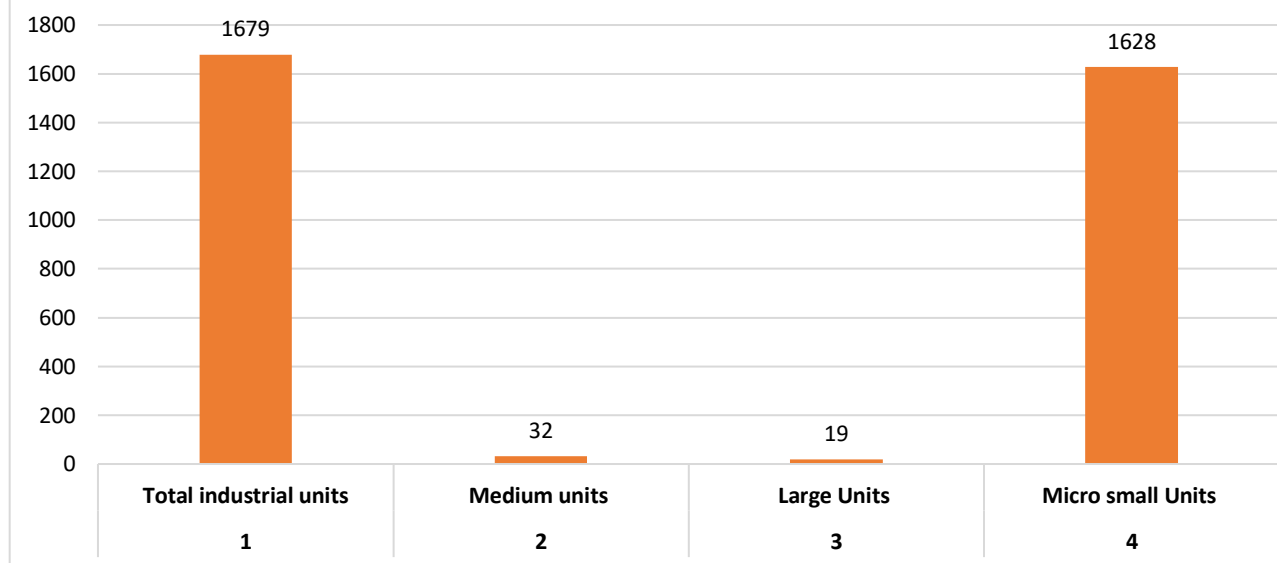
**Industrial Information -Jammu**

S No	Information	Unit	Particulars
1.	Registered industrial units	No.	4693
2.	Total industrial units -Micro & Small	No.	1679
3.	Registered medium & large units	No.	Medium -32 Large-19
4.	Estimated avg. No. Of daily worker employed in small Scale industries	No.	30735
5.	Employment in large and medium industries	No.	Medium-2163 Large 6800
6.	No. Of industrial area	No.	06

Source-DIC Jammu



### Status of MSME in Jammu



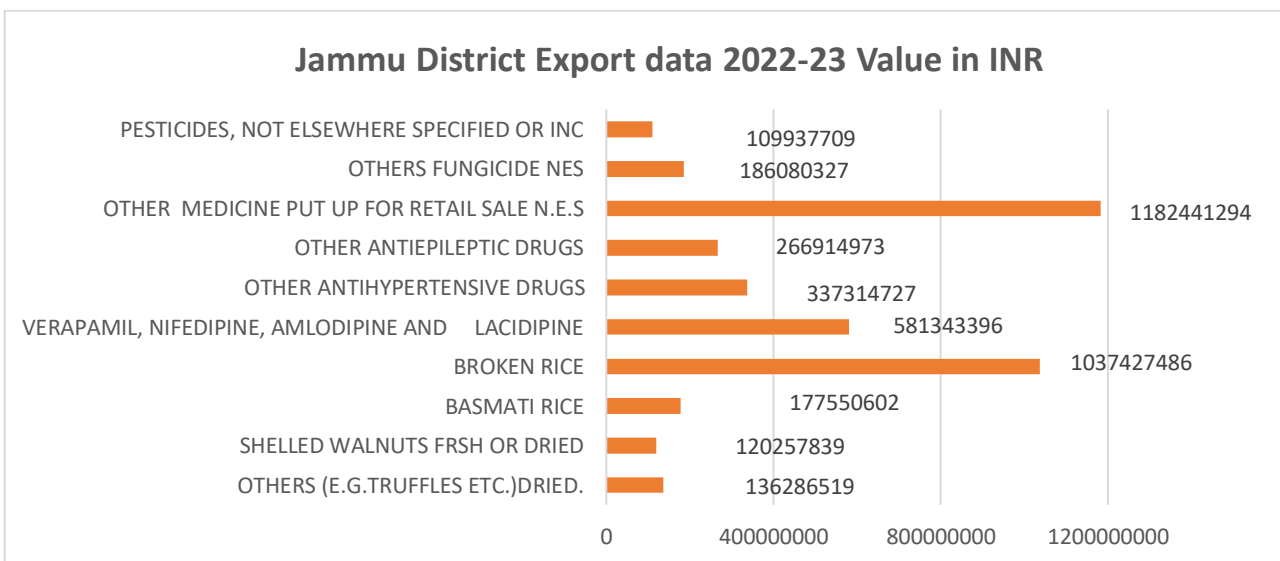
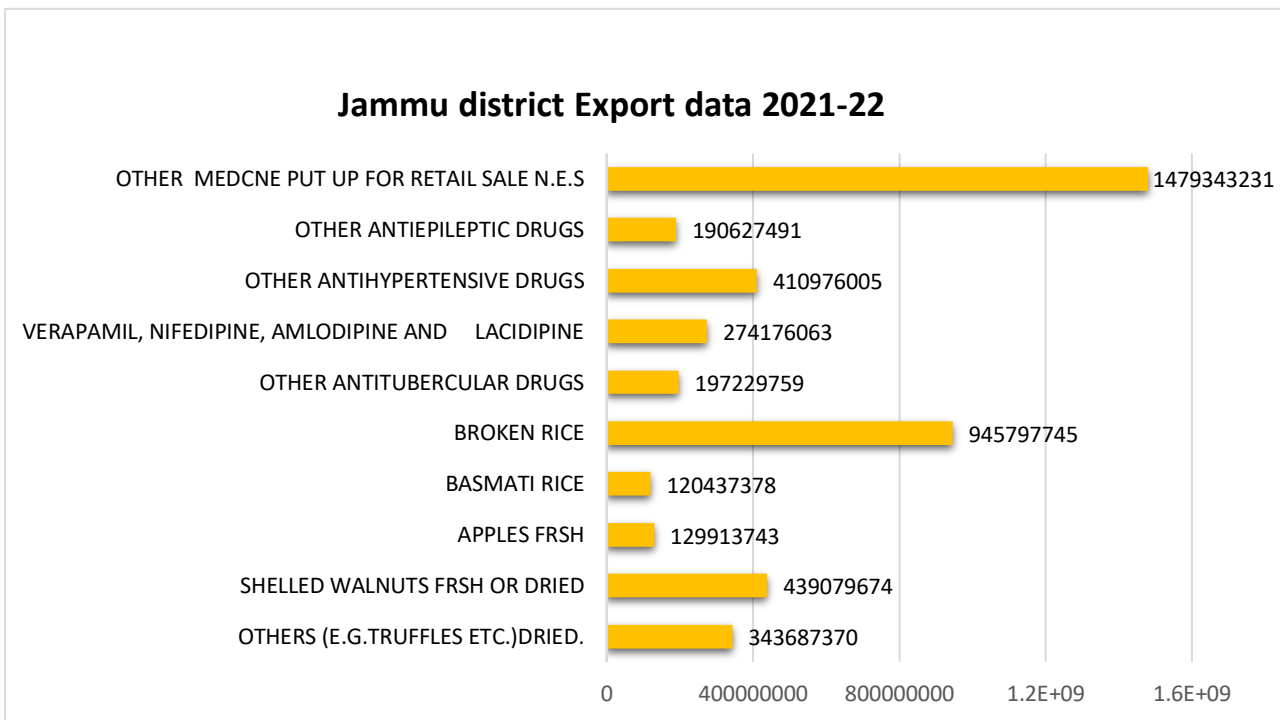
### Export From -J&K

Export data of Indian States/UT including J&K

S.No.	States	Sum of 2020-21 In Crores	Sum of % Share in 2020-21	Sum of 2021-22 In Crores	Sum of % Share in 2021-22	Sum of 2022-23(April -Oct) In Crores	Sum of % Share in 2022-23 (April - Oct)	% Change
1	Gujarat	448299.5287	20.76	945796.4	30.06	686972.5627	33.06	33.16
2	Maharashtra	431532.8658	19.99	545083.7	17.33	337508.1187	16.24	8.96
3	Tamil Nadu	193294.6541	8.95	262322.6	8.34	182567.8217	8.79	26.87
4	Karnataka	112075.7872	5.19	193064.1	6.14	128921.9949	6.20	25.61
5	Uttar Pradesh	121139.9366	5.61	156897.2	4.99	101555.3419	4.89	22.41
6	Andhra Pradesh	124744.4573	5.78	143843.2	4.57	93937.72626	4.52	10.90
7	Haryana	85731.16999	3.97	115972.6	3.69	71968.604	3.46	15.10
8	West Bengal	66247.59191	3.07	103599.8	3.29	61147.68939	2.94	6.14
9	Unspecified	95794.98163	4.44	38022.33	1.21	53648.97642	2.58	216.00

S.No.	States	Sum of 2020-21 In Crores	Sum of % Share in 2020-21	Sum of 2021-22 In Crores	Sum of % Share in 2021-22	Sum of 2022-23(April -Oct) In Crores	Sum of % Share in 2022-23 (April - Oct)	% Change
27	Jammu & Kashmir	1180.18773	0.05	1835.434	0.06	962.8969298	0.05	-2.74
28	Chandigarh	558.9015964	0.03	736.8897	0.02	615.9237366	0.03	53.05

### JAMMU -EXPORT DATA (Value In INR)



## ONE DISTRICT ONE PRODUCT (ODOP)- PRODUCTS-Jammu

District	Products Identified under District as Export Hub	Prioritized Product under ODOP selected by Concerned DC's	GI Product
Jammu	<ul style="list-style-type: none"> <li>• Basmati Rice,</li> <li>• Mango,</li> <li>• Phulkari</li> <li>• Dairy Products</li> </ul>	Basmati Rice	Basmati Rice

## Export Potential products of Jammu district

Jammu boasts a diverse array of export potential, offering numerous opportunities for economic expansion and prosperity. By leveraging the strengths inherent in its agricultural, artisanal, and industrial sectors, Jammu has the capacity to emerge as a significant contender in the global market arena. Through our exploration of Jammu's export potential, it becomes clear that the region is endowed with a wealth of products poised for success in international markets. Notable among these are:

### A) Basmati Rice:

Jammu's fertile plains and conducive climatic conditions make it an ideal region for the cultivation of Basmati rice. Known for its long grains, exquisite aroma, and delicate flavour, Jammu's Basmati rice stands out in the global market. By implementing modern agricultural practices, quality control measures, and efficient packaging techniques, Jammu can further enhance its position as a leading exporter of premium Basmati rice, catering to the discerning palates of consumers worldwide.

### B) Mango:

The succulent mangoes of Jammu, renowned for their sweetness and juiciness, hold immense export potential. Varieties such as Dussehri, Langra, and Amrapali flourish in the region's orchards, offering a delightful burst of flavor. By ensuring optimal harvesting techniques, post-harvest handling, and packaging standards, Jammu can capitalize on the global demand for high-quality mangoes, establishing itself as a reliable supplier in international markets.

### C) Phulkari:

Jammu's rich cultural heritage is encapsulated in the exquisite art of Phulkari embroidery. Traditionally adorned on fabrics such as shawls, dupattas, and sarees, Phulkari reflects the region's vibrant craftsmanship and aesthetic sensibilities. By promoting skill development initiatives, fostering collaborations with designers, and leveraging e-commerce platforms, Jammu can showcase its Phulkari craftsmanship on the global stage, captivating fashion enthusiasts and connoisseurs alike.

### D) Dairy Products:

Jammu's dairy sector holds immense potential for export, with its abundance of milk, butter, ghee, and cheese. The region's dairy industry, characterized by modern dairy farms and cooperative societies, produces high-quality dairy products adhering to stringent hygiene and safety standards. By investing in cold chain

infrastructure, product diversification, and market research, Jammu can position itself as a reliable exporter of premium dairy products, meeting the demands of international markets for wholesome and nutritious dairy offerings.

## BASMATI RICE

Following HS Code have been used to export Basmati from India

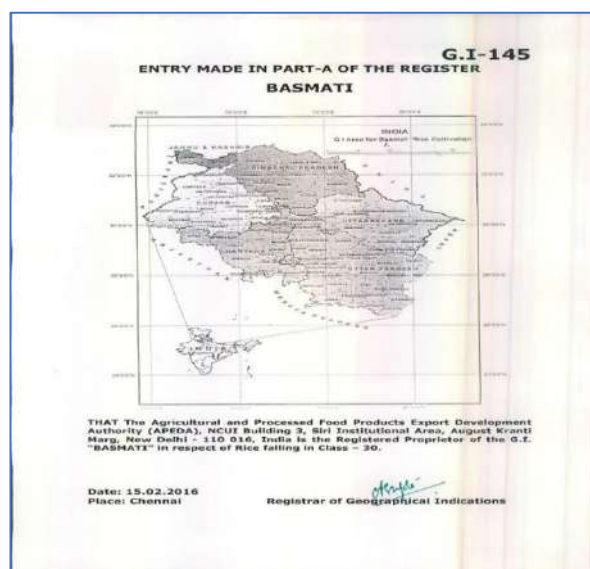
HS codes	Description
10063020	Basmati Rice

Because of its three key quality characteristics—*pleasant fragrance, superfine grains, and extraordinary grain elongation*—basmati rice, also known as the "Pearl of Rice," is the most popular aromatic fine grade rice in international trade.

India exports over two thirds of its basmati rice production. Most people in the nation and overseas have acquired a taste for basmati rice, which has a high premium value in the national and international markets due to its distinctive grain, cooking, eating, and digestive features.



## GI Tag Certification Of Basmati



## EXPORT Value of Basmati from J&K

S No	HS Code	Item Exported Description	Value in INR	Value in INR 2022-23
1	10063020	BASMATI RICE	120437378	79496925
2	10064000	BROKEN RICE	945797745	1037427486

Source:- Commerce.gov.in

### SWOT Analysis-Basmati Rice

Strengths	Weaknesses
<p>High productivity compared to other cereals</p> <p>Staple food with a large and stable demand in the world market.</p> <p>India ranks first among world exporters and has the potential to increase the value of exports.</p> <p>India's basmati has created a stable market, especially in the Gulf countries.</p> <p>The Jammu region has favorable geographical conditions like Punjab, where there is ample opportunity for basmati rice production.</p> <p>basmati rice in the Jammu region is slightly higher quality than in the Punjab region in terms of flavour, quality, length, and production,</p> <p>The use of pesticides in the Jammu region is less than in the Amritsar region, Europeans demand more basmati rice from the Jammu region.</p>	<p>The land area is very limited and cannot be increased in the future.</p> <p>The demand for apricots and apples in the region is increasing, so farmers are focusing more on other products.</p> <p>Transportation costs to seaports are one of the highest in the region.</p>
Opportunities	Threats
<p>Less pesticide-laden and higher quality than basmati rice from Jammu.</p> <p>The export of the product has increased many times in the last 10 years.</p> <p>New markets can be developed in European countries, USA and Japan. But these developed countries have strict standards for food products.</p>	<p>Pakistani Grover rice has more surplus toward the Gulf and is of higher quality than Indian because less pesticides and fertilizers are used.</p>

### Varieties:

So far 34 varieties of Basmati rice have been notified under the seeds Act, 1966. These are Basmati 217, Basmati 370, Type 3 (Dehraduni Basmati) Punjab Basmati 1 (Bauni Basmati), Pusa Basmati 1, Kasturi, Haryana Basmati 1, Mahi Sugandha, Taraori Basmati (HBC 19 / Karnal Local), Ranbir Basmati, Basmati 386, Improved Pusa Basmati 1 (Pusa 1460), Pusa Basmati 1121 (After amendment), Vallabh Basmati 22, Pusa Basmati 6 (Pusa 1401), Punjab Basmati 2, Basmati CSR 30 (After amendment), Malviya Basmati Dhan 10-9 (IET 21669), Vallabh Basmati 21 (IET 19493), Pusa Basmati 1509 (IET 21960), Basmati 564, Vallabh Basmati 23, Vallabh Basmati 24, Pusa Basmati 1609, Pant Basmati 1 (IET 21665), Pant Basmati 2 (IET 21953), Punjab Basmati 3, Pusa Basmati 1637, Pusa Basmati 1728, Pusa Basmati 1718, Punjab Basmati 4, Punjab Basmati 5, Haryana Basmati 2 and Pusa Basmati 1692.

### Areas of Cultivation:

The areas of Basmati Rice production in India are the UT of J & K, Himachal Pradesh, Punjab, Haryana, Delhi, Uttarakhand, and western Uttar Pradesh.

### Facts and Figure:

India is the leading exporter of Basmati Rice to the global market. The country has exported 3,948,161.03 MT of Basmati Rice to the world for the worth of Rs. 26,416.49 Crores/ 3,540.40 US\$ Mill.) during the year 2021-22.

**Major Export Destinations (2021-22) : Iran, Saudi Arab, Iraq, United Arab EMTs, U S A and Yemen Republic,**

### Value Chain Analysis -Basmati Rice

The value chain for Basmati rice involves the entire process from cultivation to consumption, with various stages and actors contributing to the production, processing, and distribution of this premium variety of rice. An overview of the value chain for Basmati rice:

**Cultivation:** Basmati rice is primarily cultivated in specific regions of India and Pakistan, having specific soil and climate conditions favorable for Basmati rice cultivation where farmers are responsible for planting, nurturing, and harvesting the rice crop.

**Harvesting:** It is done at the right stage of maturity to maintain the grain's characteristic aroma and elongated grains.

**Milling and Processing:** Once harvested, the rice is transported to rice mills for processing. Here, the rice is cleaned, de-husked, and polished to produce the final product

**Packaging:** After processing, Basmati rice is packaged in various sizes and types of packaging, such as bags, sacks, or containers. Packaging often includes branding and labeling to distinguish it as Basmati rice.

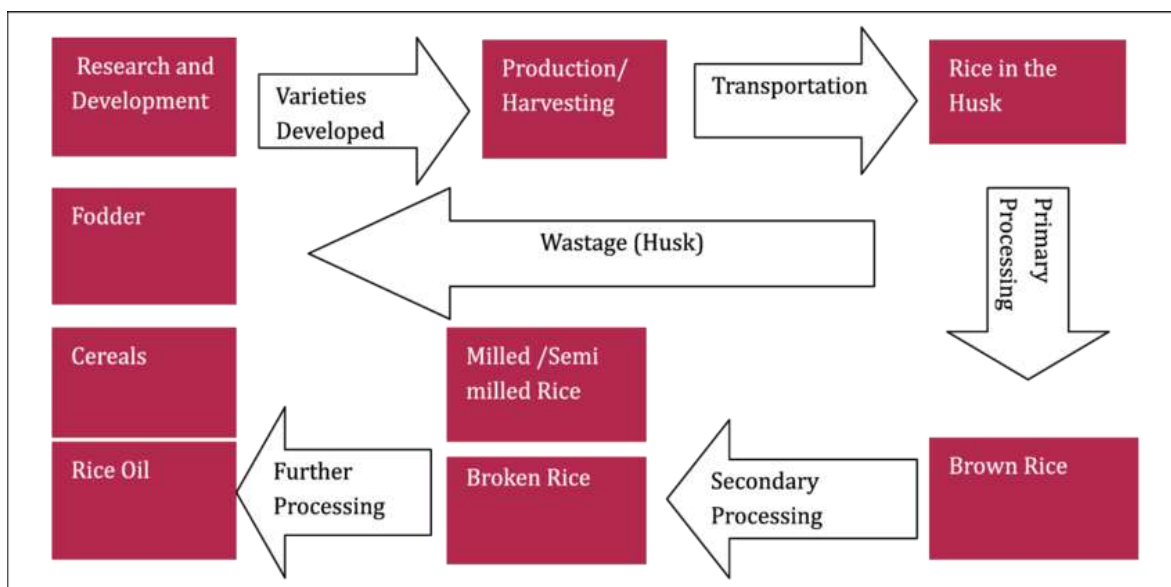
**Distribution:** BY **Wholesalers/Distributors:** These entities purchase Basmati rice in bulk from rice millers and package it into smaller quantities for distribution. They may supply it to retailers, restaurants, or export markets.

**Retailers:** Basmati rice is sold in grocery stores, supermarkets, and specialty food stores, both locally and internationally.

**Restaurants:** Many restaurants, particularly those serving Indian and South Asian cuisine, use Basmati rice in their dishes. It's a staple in various biryanis, pulao, and other rice-based dishes.

**Exports:** Exporters play a crucial role in shipping Basmati rice to international markets, where it's highly sought after for its premium quality.

**Consumers:** Consumers purchase Basmati rice for personal use due to its distinct aroma, long grains, and excellent cooking properties. It's particularly popular for special occasions and in households that prefer premium rice varieties



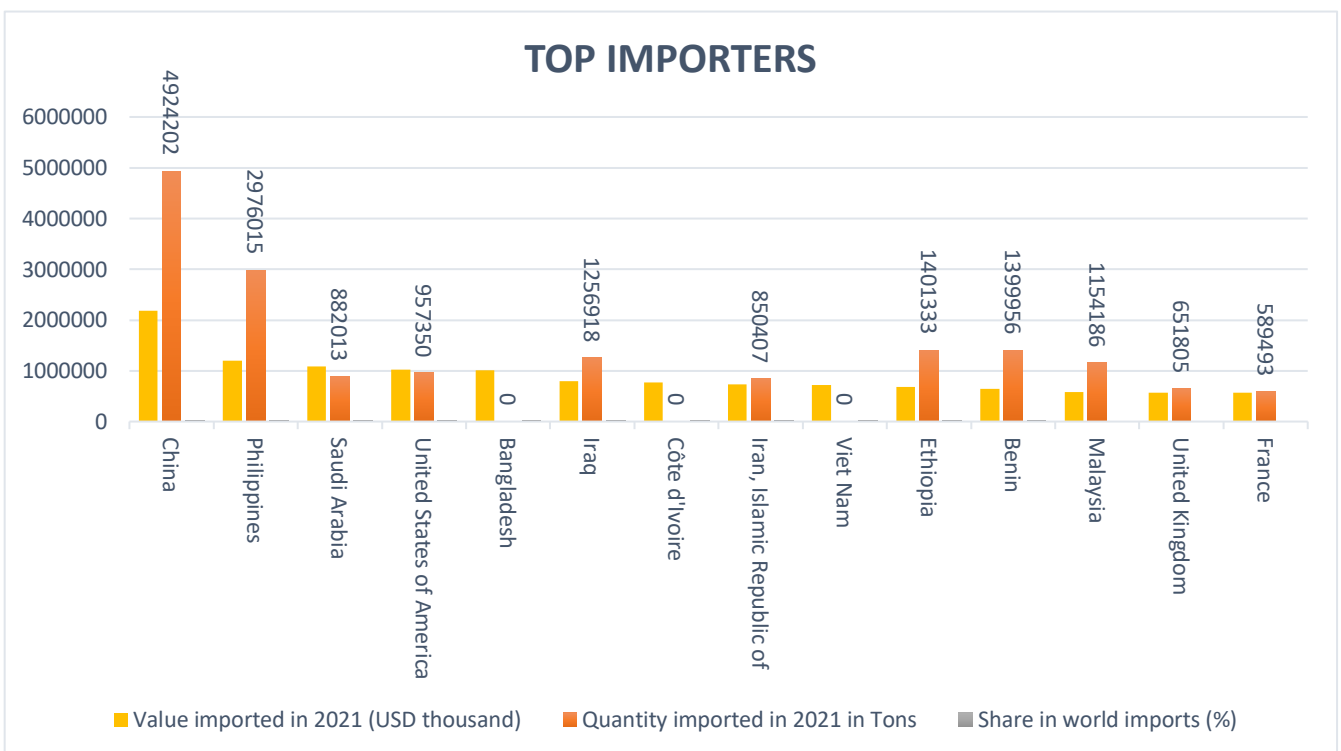
### BASMATI RICE -Jammu District ( Facts and Figures )

S No	Area sown	Area sown in 2020-21	Area sown in 2021-22
1	Rice ( All Varieties)	58430 Hectares	51330 Hectares
<b>Basmati Rice Jammu</b>			
2	Basmati Rice – Total Production		11.78 Lakh Qls
3	Area of Production -Basmati		43,600 Hectares
4	Total Farmer’s associated		40348 Nos
5	Total FPOs associated with Basmati Rice		<b>03 No’s (Under Formulation)</b> <ul style="list-style-type: none"> <li>● Baba Jitto Basmati Prod Co.</li> <li>● Pallanwala Basmati Prod Co</li> <li>● RS Pura Basmati Prod. Co</li> </ul>
6	Sales Price per Quintal		Rs 6500-Rs 7000
7	Storage/cold Storage facility if any available		NIL
8	Basmati Clusters if any		Suchetgarh (50 hectares) (Inactive)
9	Percentage of basmati Exported to other states		87.50% of total produced
10	Percentage of basmati Exported to other countries from Jammu		12.50% of total produced
11	Export		4 Lakh Quantiles
12	Common production and Logistic Centre		ICD Samba ( Coming up )
13	Testing lab availability		Nil
14	Grading Machine available		No

15	Skill Development Centre if any		No
16	Common Facility center for farmers of basmati grown		No

**Source:** - Govt of J&K Department Agriculture marketing and Production Jammu and Economic survey report J&K

**TOP IMPORTERS ((USD Thousand))**



Source-Trade Map

**EXPORT SCENARIO**

Genuine basmati rice is grown only in India and Pakistan. India is the leading producer and exporter of basmati rice in the world market. Due to its geographical exclusivity, basmati rice can only be grown in the northern Indian states of Punjab, Delhi, Himachal Pradesh, Haryana, Uttarakhand and parts of western Uttar Pradesh and Jammu & Kashmir. In Pakistan, it is grown in Punjab and Sindh provinces and accounts for 88% of the country's total basmati rice production.

About 85% of the high-quality basmati rice is exported from India alone to all over the world. Pakistan accounts for the rest of the world's export. Currently, about 45% of the world's rice export market is dominated by India.

Iran, Saudi Arabia, Iraq, the United Arab Emirates, Yemen, and other Middle Eastern nations are the top importers of basmati rice, according to APEDA (Agricultural and Processed Food Products Export Development Authority). Additionally, the European Union and the United States have considerable demand for Indian



basmati rice. Iran, Saudi Arabia, and the United Arab Emirates make up the majority of the region's buyers, accounting for 30% of basmati rice exports from India.

#### Indian exports of basmati rice, valued in lakhs

HS Code	Commodity	2021-2022	%Share	2022-2023(Apr-Oct)	%Share	%Growth
10063020	BASMATI RICE	26,39,021.63	0.8386	20,07,813.78	0.9662	
	India's Total Export	31,47,02,149.28		20,78,09,323.98		

Source: - DGCIS

#### J&K (UT)'S Basmati Export Share In 2021-22

Country/UT	Quantity (Lakh Qntls)	Amount In Lakhs	%age of Share
India	394.82	2641.65	
J&K (UT) Direct Exp.	0.50	3.35	
J&K UT Indirect Exp.	3.50	23.42	
Total J&K UT Share	4.00	27.76	1.01

#### Challenges And Interventions-Basmati Export

Parameter	Challenges	Intervention	Department/Agency
Focus on high Yielding Export Quality Basmati Rice	Challenges in developing high yielding export quality rice	▶ To help exporters to maintain their exports in the future, a breeding program may be started to provide high yielding rice for export (Basmati). It is possible to make the necessary arrangements for the distribution to farmers at discounted or reasonable costs.	▶ Agriculture department
Cluster based approach	Setting up of export quality belts/zones	To identify export quality belts/zones for production of rice (Basmati) to meet the requirement of exports. The Department of agriculture, under the chairmanship of chief agriculture officer is responsible for defining the area of Cluster and number of Farmers/FPOs/FPCs in the cluster as per suitability and goals of export promotion. It will also be responsible for monitoring the cluster development work, promotion to increase the area under cultivation of exportable items and facilitate cluster level coordination among key departments and various stakeholders.	Agriculture department/MSE-CDP/APEDA/KVK

Parameter	Challenges	Intervention	Department/Agency
		<p>Deputy Commissioner Industries and representative of State Agricultural Department may examine the proposal for setting up at least one clusters for Rice (Basmati), in the district and submit the same to the state/UT level Export Monitoring Committee.</p> <p>Liaising amongst Industry department, Agriculture department, APEDA, FIEO, DGFT, NABARD, EXIM Bank, FPOs, cooperatives etc. may be developed for farmer friendly policy formation to promote export.</p>	
<b>Promotion of export of organic produce</b>	Unawareness about promoting organic products	It is suggested that special efforts should be made to promote the export of organic products such as Rice (Basmati) from the district.	Agriculture department /APEDA
<b>Training program to educate the cultivators</b>	Unawareness about technical standards in international market	<p>Training on efficient use of Soil Health Card in line with the recommendations given by the authorized testing laboratories for soil, water, and plant analysis.</p> <p>The District Industry Centre in consultation with regional DGFT officer &amp; APEDA may chalk out the program on quarterly basis to train and education cultivators and other stake holders about SPS/ technical standards in international markets.</p> <p>Steps shall also be taken to promote organic cultivation and certification and required skill training in this area shall be promoted involving the APEDA and the State Agriculture Department. Organic Certification under National Program for Organic Production (NPOP) can be initiated. Quarterly/Half-yearly workshop may be organized with FPOs, farmers, Basmati industries etc. to update about emerging practices and technologies in Paddy sector as per the national and International Rice research institutes for its promotion.</p>	DGFT/APEDA
<b>Distribution of Certified seeds</b>	Challenges in distribution of certified seeds	Distribution of Certified seeds to farmers partially through Krishi Vigyan Kendra (KVK) of Jammu and Farmer Producers Organization	KVK/SKUAST
<b>Use of Modern technologies</b>	Unawareness about use of modern technology to reduce costs and increase production	Low-cost production technology may be developed (use best practices) to bring down the cost of production to enable the exporters to compete with competing	SKUAST/KVK

Parameter	Challenges	Intervention	Department/Agency
		countries in the international markets. State/UT Agriculture department may take the help of State/UT Agriculture Universities / other technical institutes of repute.	
<b>Use of Modernized Rice Mills</b>	Many rice mill owners are not using modernized rice mills for better recovery and reducing the percentage of broken rice.	Rice mills have not been fully modernized to ensure high milling recovery and reduce the percentage of broken rice. The conventional rice mills are having Rubber Roll Sheller in which percentage of broken rice is more than the modern rice mills that are having under Runner Sheller. Hence, head rice obtained from milling of conventional mills becomes costly due to recovery of higher percentage of broken rice. Therefore, conventional mills are required to be modernized to get recovery of higher percentage of head rice suitable for export.	APEDA/KVK/ICAR
<b>Marketing &amp; Promotion of products</b>	Offline marketing is broadly used over online marketing. Increasing the participation in International Trade fairs Limited Market diversification Lack of knowledge of existing schemes and govt. initiatives Lack of participation in national and international events related to the sector	Collaboration with E-commerce companies focusing on vegetables and fruit sale like Big Basket, Natures Basket etc. DIC and FIEO can play a pro-active role in this regard. <b>10% increase</b> in every year in the number of units taking part in the trade fairs organized by FIEO and other organizations may be proposed as a target under this segment Conduct awareness workshops at block level to create awareness about schemes like International Cooperation (IC), etc which provides assistance to individuals/ associations wishing to participate in marketing events The DGFT/FIEO can set targets for participating in events per year. Example: Participation in <b>at least 3 international events</b> for this sector every year to create foreign linkages and increase	FIEO/DGFT/JKTPO
<b>Access to Finance</b>	Shortage of working capital to farmers given long cultivation cycle of agri products The linkages with banks and financial institution in the cluster are not well established. High quality, genetically modified seeds are often expensive, and farmers do	Tie up with the banks/financial institutions for better interest rates, enhanced working capital limits etc. Introducing the Kisan credit card scheme in the cluster Handholding of units in the cluster to create awareness about financing schemes viz. ODOP Margin Money scheme. Introduction of revolving working capital within the cluster to help farmers procure	Agriculture department /ICAR/KVK/SKUAST

Parameter	Challenges	Intervention	Department/Agency
	not have enough capital/ credit to purchase those directly.	high quality seeds and fertilizers and undertake production without hinderances	
<b>Exporter's issue</b>	DEPC to act as a focal point for all exporters issue	Deputy Commissioner Industries may be given this responsibility to monitor the cell.	DIC
<b>Cost Structure</b>	India's cost of logistics is one of the highest in the world. In J&K, logistic cost remains 10-15% more than national average.	<p>The JKTPO/DIC office should organize workshops for exporters to apprise them about Foreign Trade Policy benefits viz. Duty Exemption Scheme / Advance Authorization Scheme / Duty Free Import Authorization Scheme.</p> <p>The JKTPO/DIC office should organize workshops for exporters to apprise about Export Promotion Scheme of the Department of MSME &amp; Export Promotion, UP such as <b>Market Development Assistant (MDA), Financial Assistance for Foreign fairs/exhibition, Financial Assistance for sending samples to foreign buyers, Subsidy on freight charges up to gate way port Air Freight Rationalization Scheme</b> etc.</p> <p>The CONCOR rates are to be made available at regular intervals to the DIC office for updating of the same at the district website. The formation of the Sub-committee comprising the representative of CONCOR and Deputy Commissioner Industries to understand the issue and suggest ways to help Industry. Ease of Logistics portal of FIEO has been developed to provide information about container availability and issues relating to it. The industry may be informed of this portal.</p>	DIC/MSE- CDP/MSME

Source: - Govt of J&K

### **E Commerce opportunities for rice growers to boost export**

E-Commerce can be a tool for rice farmers to create product differentiation, such as adding organic labelling, indicating the specific types of rice providing special packaging, or proceeding with marketing strategies .Ecommerce is provided with a professional development and consulting features, intelligent services, shopping cart integration, ecommerce integration, reengineering and enhancement facility, search engine optimization, custom & professional web design .Department should explore partnership with major e-commerce companies, such as Amazon, Flipkart, etc. which would provide a global digital marketing platform to the initiatives of ODOP by ensuring a market base to identified products

### Major Reasons of Less Export of Basmati Rice from Jammu

- With an increase in MSP of Non-Basmati Rice, the acreage of Basmati had been reduced.
- In the last 3 years, around 20 per cent area has shifted from Basmati to Non- Basmati rice production.
- Loss of the traditional market of Iran due to US sanctions
- High use of chemical pesticides resulted in residual problems in the EU
- European Commission has reduced maximum permissible residue levels for Tricyclazole to 0.01 ppm from 1 ppm for all crops in 2018.
- India's NPK fertilizer use in 2017 was 156.93 kg/ha as against the world average of 122.74 kg/ha
- Basmati sales to the EU had dropped to 15 - 25 Lakh Qtls from 50 Lakh Qtls/Year
- Oman, Egypt, Jordan, UAE, and Saudi Arabia adopted pesticide residue norms in 2021 that were on par with those in the EU countries.

Source: - Agriculture Department Jammu

### Action Plan -Basmati -- Next 03 Years

District: Jammu					
Product: Basmati Rice		Year			
		2019	2020	2021	2022
1	Total Production of Basmati Rice (Lakh Qtls)	14.15	14.78	11.78	14.85
2	Total Farmers associated with production of Basmati Rice (No's)			40348	40348
3	Total area under cultivation (000Hac)	42.10	42.90	43.40	43.60
4	Total FPO's associated	NA	NA	NA	<b>03 Nos. (under formulation) Imp. Agency - NABARD</b> (1) Baba Jitto Basmati Prod. Co. Samba (JK Dairy Coop.) (2) Pallanwala Basmati, Prod. Co. (Sarveshwar) (3) R S Pura Basmati Prod. Co. (SKUAST)
5	Sale Price per quintal	4500-5000	5000-5500	6000-6500	6500 - 7000
6	Storage/cold storage facility and capacity if any	NA	NA	NA	NA

District: Jammu					
Product: Basmati Rice		Year			
7	Basmati clusters in Jammu district	NA	NA	NA	NA
	<b>Parameters</b>				
	Functional units of production	<i>Pertains to Deptt. of Industries</i>	<i>Pertains to Deptt. of Industries</i>	<i>Pertains to Deptt. of Industries</i>	<i>Pertains to Deptt. of Industries</i>
	No of jobs in the cluster				
	Manufacturing capacity of the cluster				
	Annual turnover				
	Only xx% of the produce is processed locally				
	Percentage is being exported to other states	NA	NA	NA	87.50%
	Percentage is being exported to other Countries	NA	NA	NA	12.50%
8	Export				1.5 Lakh Qtls
9	<b>Hard &amp; Soft Interventions</b>				
10	Common Production & Logistic Centre				ICD - Samba (upcoming)
11	Testing Laboratory				Following interventions are requested under Export Promotion Plan submitted to TWG (Technical Working Group) for Agri Export Import Policy: (1) Upgradation of Quality Control Lab. at SKUAST-J, (2) Creation of Pesticide Residual Analysis Lab. for analysis of heavy metals & biological contamination (3) Requested for GAP Demonstrations to farmers for their skill development (4) Requested for creation of Centre of
12	Grading Machine Facility				
13	Packaging & Labelling Centre				
14	Skill Development Centre				
15	Facilitation centre if any				

District: Jammu					
Product: Basmati Rice		Year			
16	Capacity building sessions if any conducted to promote export				Excellence for Basmati
17	Marketing Linkages				Branding & Marketing of Basmati Rice as a 'GI- product' by using registered 'GI Logo', Showcase of Basmati from Jammu at GI Trade Fairs
18	Capacity enhancement techniques adopted, if any				Adoption of GAPs in Basmati rice production to maintain quality standards as per export requirement.
19	Departmental Schemes to enhance Exports				NA
20	Focus on high yielding seeds for Export Quality to increase production				Replacement of traditional Basmati variety 370 with high yielding varieties such as Jammu Basmati 118, Pusa Basmati 1718, Jammu Basmati 123 & 138
21	Use of Modern Technologies				Use of Direct Seeded Rice (DSR) & Paddy Transplanter is promoted to save on labour costs
22	Cost Structure of New Machinery Required				DSR - Rs.3Lakh/Unit, Transplanter - Rs.13Lakh/Unit
23	Setting up of CFC				NA
24	Storage				NA
25	Centre of Excellence				Proposed
26	Packaging & Labelling Centre / GI Branding etc.				Branding & Marketing of Basmati Rice as a 'GI- product' by using registered 'GI Logo'
27	Quality Control Lab. / Testing Lab.				Upgradation of Quality Control / Testing Lab. at SKUAST-J, is proposed

Source: - Department of Agriculture Production & Farmer's Welfare

## Financial Implications for Basmati

Estimated budget for proposed Hard intervention-Basmati Rice					
S. No	Intervention	Priority	Timeline	Funding scheme/Agency	Cost
1.	Quality Testing and Certification Lab at district level for basmati Rice	Medium	6-12 months	MSE-CDP//Agriculture department /HADP program	1.00 Cr
2.	Pesticide residual Analysis Lab including heavy Metal & Biological contamination to stop high chemical pesticide as per EU standards	Medium	6-12 months	MSE-CDP//Agriculture department /HADP program	10.0 Cr
3.	Infrastructure Development: Setting up of common facility centre and , center of excellence etc and packaging etc	Medium	6-12 months	MSE-CDP/SKUAST	7.0 Cr
4.	Research and Development/Quality control etc	Medium	12-36 months	MSE-CDP/APEDA/SKUAST	3.0 Cr
Estimated budget for proposed Soft intervention-Basmati rice					
5.	Market linkages and export Promotion (organizing exhibition, event, workshops, social media, participation in trade fair, exhibition)	High	1-6 months	APEDA/DGFT	2.00 Cr
6.	Skill Up-gradation and Capacity Building Training to enhance the skills of farmers and increase the production	High	6-12 months	APEDA/DGFT/Agriculture department /HADP program	0.50 Cr
<b>Total</b>					23.50 Cr

## MANGO

Following HS Code have been used for Mango from India

HS codes	Description
80450	Mango

Indian mangoes come in different shapes, sizes and colors with a wide variety of aroma and flavor. Indian mango is a special product that contains the high-quality standards and rich nutrients. In India, mangoes are grown



mainly in tropical and subtropical regions between sea level and an altitude of 1,500 meters. Mangoes grow best at temperatures around 27°C.

#### Areas of Cultivation: -

The major mango-growing areas in Jammu are **Khour, Marh, Dhansar, Akhnoor, Balwal Satwari, R S Pura** which has potential for mango production .

#### India Facts and Figures:

- Varieties grown in Jammu: ----- Dashari, 60% langara Chousa, Malika, Amarpali etc have fewer production.
- No of Orchards in Jammu-----286
- Farmers associated with Mango farming -----286
- Export from J&K -----Nil

#### PRICE

- 2020-21 -----Rs -2600 to 3600 per quantal
- 2021-22----- Rs -4000 to 5500 Per quantal
- 2022-23----- Rs -2350 to 3750 Per quantal

#### Schemes under Horticulture Department for Mango Growers

- **HIGH DENSITY PLANTATION SCHEME:** - A subsidy of 50,000 per hectare will be provided on minimum capax of 1 lakh
- **HOLISTIC AGRICULTURE DEVELOPMENT PROGRAM (HADP) :-** This scheme aims to strengthen the existing market infrastructure and create a robust market ecosystem that caters to the needs of all stakeholders. These included market reforms, infrastructure development, institutional and capacity building, branding, digital marketing, and market research information systems etc

**Source: - Horticulture department Jammu**

#### Export And Production Potential-Mango

At present, varieties like Dasher, Langra, Chousa, Malika and Amarpali are being produced and most of these Mangoes are either locally consumed or sent to neighboring states. These varieties production at this time is less. Whenever the production increased can also be exported to other countries.

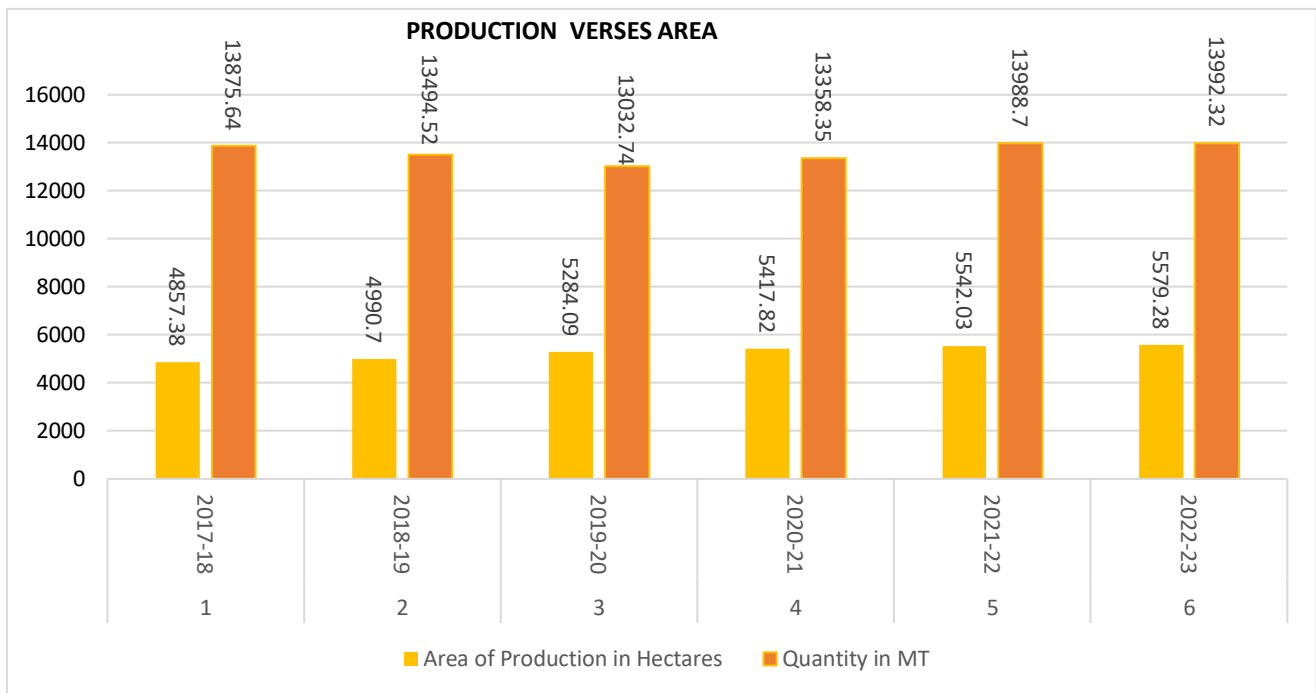
Desi Mango has 6000 Metric Ton production out of which 40-45% go waste if proper export market is arranged at proper time in the month from January to March and accordingly supply order will be placed in advance to the Value-added units.

#### MAJOR STEPS REQUIRED FOR MAKING MANGO MAJOR EXPORT ITEM:

- **Creation of Water Source:** Most of the mango producing blocks in Jammu district are Khour and Akhnoor, which are rain-fed areas. The water level is quite low and the cost of a tube well is very high and farmers are mostly poor who can't afford it. Govt should come forward to arrange irrigation facilities for mango growers.
- **Infrastructure Required:** After post-harvest there will be great need of packaging material for packing of Quality fruits and also required cold storage facilities for storing of Quality Mango.

- **Cluster Formation:** The Department of Horticulture has also started the process of formation of farmers producers' organization for Mango and Anola. This is expected to be formed very soon by horticulture department.
- **Value Addition:** The Department is imparting training to the farmers for value addition of fruits and vegetables. Moreover, Department is also giving Incentive for opening of preservation units.

### FACTS and FIGURES of Mango Production in Jammu District



### VALUE CHAIN ANALYSIS-Mango

Any product without any value addition when sold in market in the raw form will fetch relatively low price. Further there would not be much of product differentiation. At each stage of supply chain, there would be additional cost without any additional value. However, in value chain, at each stage, of the stake holder's involvement there would be additional value to the product in the form of packaging, processing, quality branding, grading, etc

#### Objectives of the value chain analysis

- ▶ To conduct a sample survey in Jammu from different partners of value chain of mango viz., nursery units, farmers, traders, and processing units.
- ▶ To analyze the existing situation about value chain of mango and study the potential of mango value chain and constrains being faced by different partners of value chain.
- ▶ To arrive the actionable activities to be undertaken to further encourage and strengthen the mango value chain system in Jammu district.

**EXPORT DATA- HS CODE 080450: GUAVAS, MANGOES/MANGOSTEENS FRESH/DRIED**

Table: Export from India

Values in Rs. Lacs

HS Code	Commodity	2020-2021	%Share	2021-2022	%Share	%Growth
80450	GUAVAS, MANGOES/MANGOSTEENS FRESH OR DRIED	1,07,679.56	0.0499	1,42,266.22	0.0452	32.12
	India's Total Export	21,59,04,322.13		31,47,02,149.28		45.76

Source: Ministry of Commerce, India

**EXPORT – TOP COUNTRY WISE HS CODE 080450: GUAVAS, MANGOES/MANGOSTEENS FRESH OR DRIED**

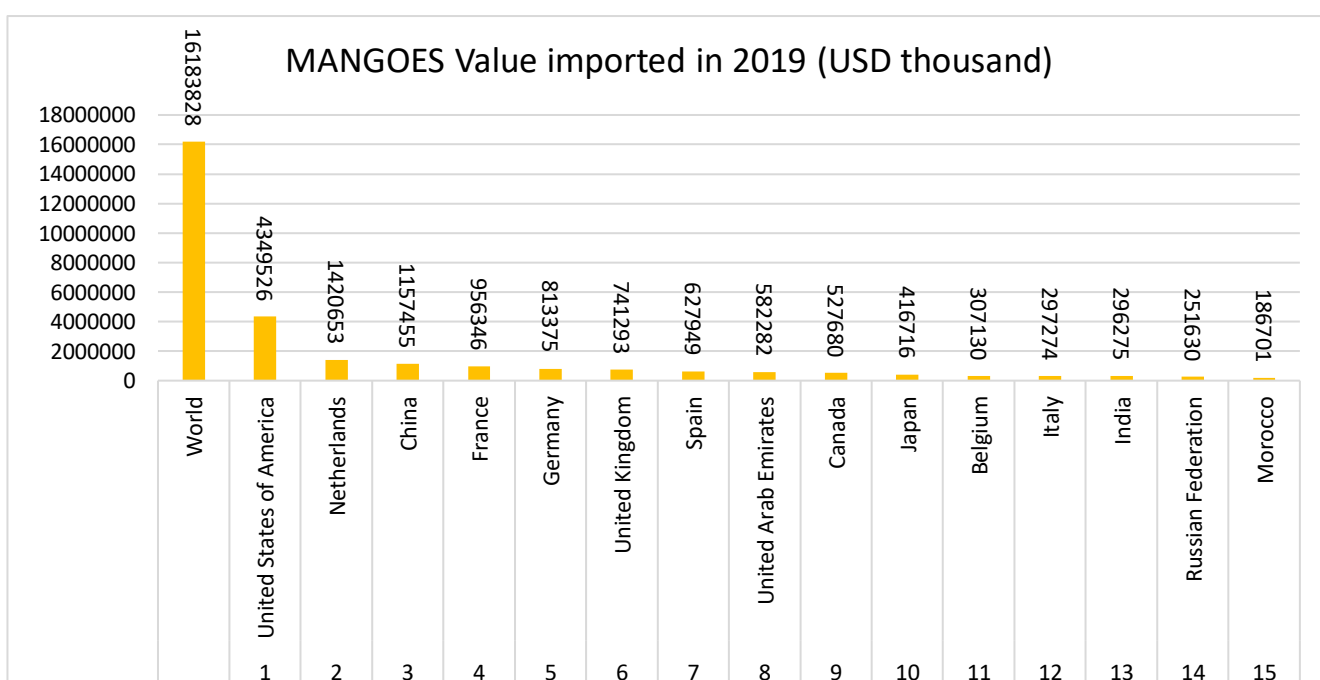
Commodity: 080450 GUAVAS, MANGOES/MANGOSTEENS FRESH OR DRIED Unit:

S. No.	Country	Values in Rs. Lacs		Quantity in thousands	
		2021-2022	2022-23(Apr-Nov)	2021-2022	2022-23(Apr-Nov)
1	U ARAB EMTS	19,473.72	18,314.74	19,727.53	14,695.61
2	SAUDI ARAB	14,914.18	15,949.47	25,727.45	17,405.59
3	NETHERLAND	14,146.91	15,173.09	16,896.54	15,214.91
4	U K	13,136.64	12,111.34	9,304.82	7,643.07
5	U S A	9,773.51	12,267.75	7,650.76	6,836.29
6	YEMEN REPUBLIC	8,305.77	5,273.59	15,939.03	7,253.85

7	KUWAIT	6,387.06	4,140.97	7,465.14	3,868.46
8	GERMANY	5,917.68	4,410.74	5,601.82	3,641.13
9	OMAN	4,887.11	4,065.84	6,692.48	3,886.55
10	CHINA P RP	4,674.14	2,715.44	4,895.83	2,466.13
11	QATAR	4,031.57	3,946.62	4,139.49	3,062.44
12	NEPAL	3,870.37	2,719.11	19,214.47	9,850.31
13	CANADA	3,290.38	3,609.45	2,849.05	2,770.67
14	SUDAN	2,627.71	2,498.30	3,998.80	2,206.80
15	TANZANIA REP	1,923.98	546.15	2,649.60	917.42

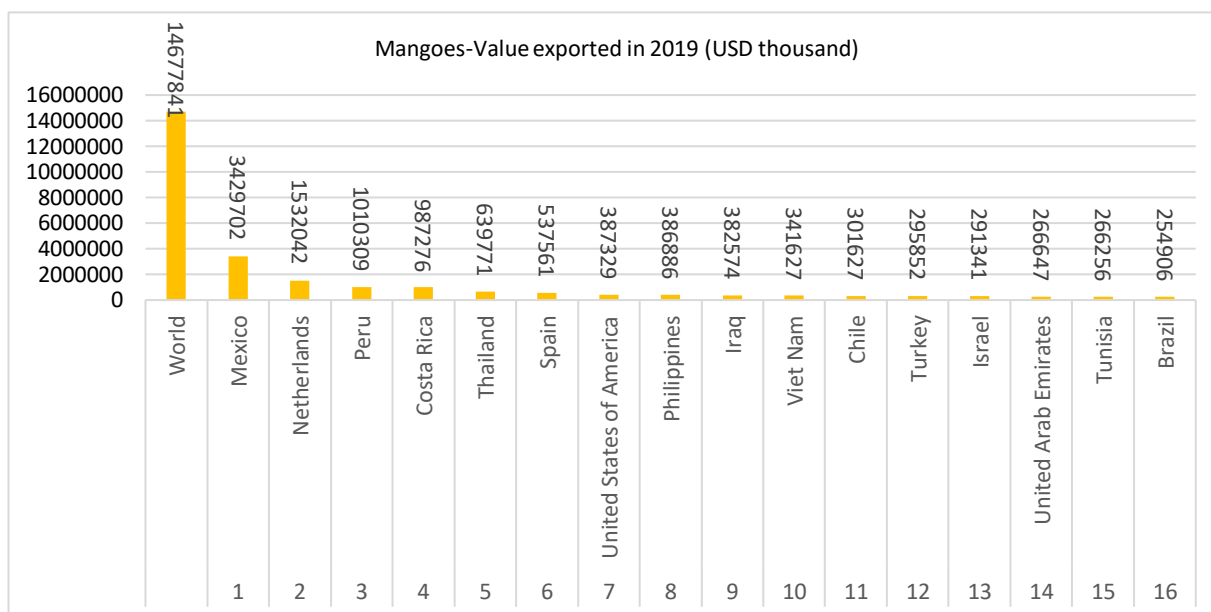
Source: Ministry of Commerce, India

TABLE: WORLD'S TOP IMPORTER HS CODE 080450: GUAVAS, MANGOES/MANGOSTEENS FRESH OR DRIED



(Source: Trade map)

HS CODE 080450: GUAVAS, MANGOES/MANGOSTEENS FRESH OR DRIED



### SWOT ANALYSIS-Mango

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Strong diversification strategies	Inability to adapt to new markets	Increase product value	Increasing competition in export markets
Dynamic Product Line	Customer disappointment from fruit outside market specs at the start of the season	Improve efficiency and sustainability.	Reduced accuracy of crop estimates and tree census
Affordable Cost	Market access issues	Health benefits	Lack of cold storage
Capability to produce premium export quality	Potential for inaccurate crop estimates	Provide a supportive operating environment	
Great demand in export markets		Increased demand for high quality product supporting well-known brands	

## KEY GAPS AND RECOMMENDATIONS-Mango Export

### Raw materials

- Various studies on fresh fruits and vegetables, in India have indicated a loss percentage ranging from about 8% to 18% on account of poor post-harvest management, absence of cold chain and processing facilities.
- Establishment of Raw material bank with storage facility for easy access of raw materials to food processing units at reduced prices and creating consciousness about working capital loans within the cluster.

### Challenges

- ▶ The farmers are using manual methods for ripening the mangoes and currently there is no ripening chamber existed in the cluster.
- ▶ This stands as a constraint in maintaining the quality, color, and taste of mango.
- ▶ Due to this constraint, farmers are not being able to export mangoes to other countries.

### Recommendations

#### ▶ Hard Interventions

Establishment of ripening chambers in mango producing blocks will act as a boost to increase the quality of Mango and export to other countries can also be started.

#### ▶ Soft Intervention:

Creating awareness amongst small processing units to leverage working capital loan from the banks to procure raw material in larger quantity.

### Technology Upgradation

Productivity of Mangoes depends mainly upon three factors i) selection of cultivator, ii) the age of the tree and iii) adoption of pre-harvest technology

### Challenges

- Due to less purchasing power of upgraded equipment, Mango food processing units lack innovation in design and differentiation in products.
- Mango cluster has shown resistance and lacks the innovation and design due to lack of availability of modern infrastructure.
- The micro and small industries are equipped with old machineries which are not capable of producing high quality products advanced grading and cutting machines are not available to the producers to complete the product and sell finished product in the market directly.

### Marketing and Branding

Creation of brand name in the name of Jammu Mango product

Increasing market access by establishing Marketing linkages, leveraging schemes of Govt., collaboration with e-commerce companies and participation in events & fairs

## Challenges

- ▶ Lack of long-term contracts to sell the product/s
- ▶ More awareness programs and workshops need to be conducted which also includes the skill training programs to make them aware about the standards and requirements for marketing of product. Two types of interventions required are:-
  - **Soft Interventions:**
  - **Recommendations**
- ▶ Training among the processing units and manufactures on how to brand their products using the Company logo, Company brand et.al and how to get their brand register, cataloguing of products.
- ▶ The Mango products manufactured from the districts of Jammu should be branded owing to its fine intricacies. This can be then promoted widely within and outside the country by through marketing centers that can be established in domestic and international airports of India.

Taking example of Market Development Scheme of ODOP: - Amazon, Flipkart e commerce platforms can be used for marketing of Mango and selling.
- ▶ Collaboration with these E-commerce giants for marketing and training on how to catalog and do selling on e-commerce web portals will play a crucial role in marketing and boosting exports.
- ▶ For Organizing & participating in exhibitions, buyer seller meets, trade shows etc. Leveraging Govt schemes like International Cooperation Scheme of MSME, Govt of India.

## Packaging

Collaboration with **Indian Institute of Packaging (IIP)** for improving the current packing techniques to create a global mark

### Challenges

- There are no proper packaging facilities in the cluster.
- No checks and balances are made on the quality of the product which hampers the sales and potential to export.

### Recommendations

#### Soft Intervention

- Collaboration with Indian Institute of Packaging (**IIP**)
- adopt the latest techniques, it will help enthrall new customers thus, increasing the overall sales.

## QUALITY CONTROL

Quality standards to be defined through collaboration with QCI to build trust, ensure authenticity and focus on creating a unique brand for Mango products.

### Challenges

- Unaware of global standards and quality ratings
  - No checks and balances made for quality certification/maintenance.
- ▶ Advance testing is often outsourced and need based.
- ▶ There is no testing lab and quality certified agency in Jammu district.

### Recommendations

- ▶ For the expansion and better production, there is a need to implement tissue culture lab in the district and avail the samplings in subsidized rate to farmers.
- ▶ MoU signing with QCI for defining quality standards of processed food products so that their quality can be maintained/ improved, and export quality products can be manufactured.
- ▶ Licensing or Franchising of the testing lab should be allowed so that quality certifications and testing can be done at District level only.

There are requirements of Ripening chamber, Packing House, Testing Lab, Cold storage in the district.

- ▶ Lack of proper infrastructure affects the productivity of the cluster and its overall sales and growth. Effective policy implementation, setting up of proper infrastructure with modern technical and market know-how would certainly lessen the Gap and the share of utilization of raw Mango by the units in the district would increase.

#### Hard Interventions:

- ▶ This requires expansion and up gradation of available facilities and creation of New Infrastructure such as Ripening chamber, Packing House, Testing lab, cold Storage etc. in the cluster.

Assistance in terms of **revolving working capital fund, interest subvention and collaboration with financial institutions** to eliminate credit crunch

### Challenges

- ▶ Difficulty in receiving financial support.
- ▶ Tedious paperwork and long waiting time of banks usually persuade farmers from not taking financial support from banks.

#### Soft Interventions:

- **Interest Subvention** to provide a **reimbursement of five percentage points** on the interest charged by the lending agency for the purpose of modernization, working capital requirement and technology up-gradation related to product manufacturing.

**ACTION PLAN FOR NEXT 3 YEARS -Mango**



District	Jammu					
Product	Mango				Action Plan of Next year	Action Plan of Next 03 Years
Total Production (in Mt Ton)	2019-20	2020-21	2021-22	2022-23	10 Hac new area under High Density plantation will be taken up to under improved cultivators	
	<u>13032.74</u>	<u>13358.35</u>	<u>13988.7</u>	<u>13992.32</u>		
Total Farmers associated	7000	7020	7050	7100		
Total Area Under Cultivation (in Hectares)	5284.09	5417.82	5542.03	5579.28		
Total FPO's associated (with Production in each FPO if available)						
Sale Price per MT						
Storage/ cold storage facility and capacity if any						
<b>Mango clusters in Jammu District: -1) Sungal Akhnoor 2) Malla Khaur</b>						
	<b>Parameters</b>	<b>Unit Value</b>				
	Functional Units of Production	Production units of 600 orchards				
	No of jobs in the clusters	1.23 Lacs				
	Manufacturing capacity of the cluster	Fruit Production of 1230 MT				
	Annual Turnover	Rs 2.5 Cr				
	Only 0.5% of the Produce is	6.15 MT				
	Percentage is being exported to other states	Nil				
	Exported to other countries	Nil				
<b>Export</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>		
	Nil	Nil	Nil	Nil		
<b>Hard and Soft Interventions</b>						
Common Production & Logistics	02 Nos Proposed					
Testing Laboratory						

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## Financial Implications for Mango

### Estimated budget for proposed Hard intervention-Mango

S. No	Intervention	Priority	Timeline	Funding source	Cost
1.	Quality Testing and Certification Lab at district level for mango	Medium	6-12 months	National Horticulture Mission/MSE-CDP/ Mission for Integrated Development Of Horticulture (MIDH)	1.25 Cr
2.	Infrastructure development such as cold storage facilities, ripening chambers, and packaging	Medium	6-12 months	National Horticulture Mission/MSE-CDP	1.25 Cr
3.	Setting up of common facility and packaging etc.	Medium	6-12 months	MSE-CDP	1.25 Cr
4.	Orchard Establishment and Expansion/Setting up of new nurseries for mango plantation	Medium	6-12 months	National Horticulture Mission/MSE-CDP/ Mission for Integrated Development Of Horticulture (MIDH)	4.0 Cr

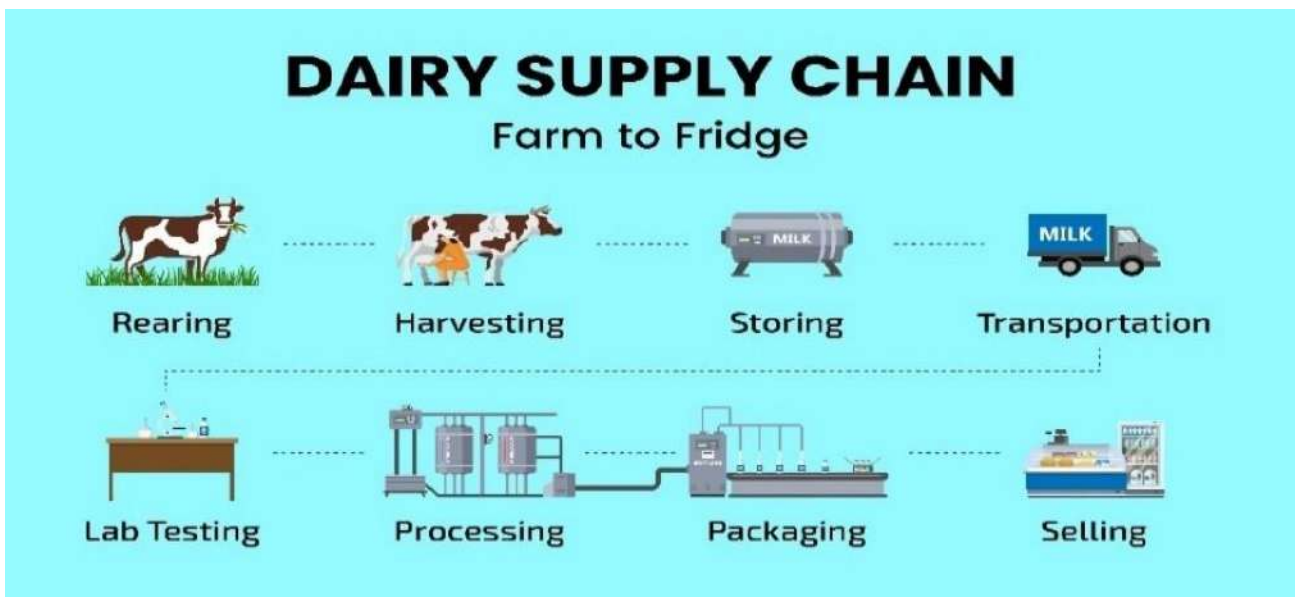
### Estimated budget for proposed soft intervention-Mango

5.	Market linkages and export Promotion (organizing exhibition, event, workshops, social media, participation in trade fair, exhibition)	High	1-6 months	APEDA/DGFT/Horticulture department J&K	2.00 Cr
6.	Capacity Building Training to enhance the skills of farmers and increase the production/ Skill Up-gradation of new trainees	High	6-12 months	APEDA/DGFT/Horticulture department J&K	0.50 Cr
<b>Total</b>					10.25 Cr

## DAIRY PRODUCTS

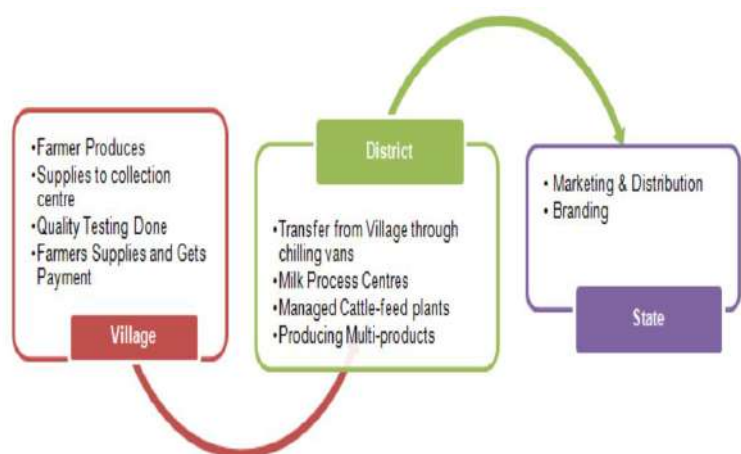
J&K has a milk production of 2503 Thousand MTs per year & to supplement this production & generate employment in the sector; following major steps have been taken by the Government of UT during 2020-21.

### SUPPLY CHAIN-DAIRY



### Dairy Products -Value Chain

Value chain analysis is a strategic tool used to analyze and understand the various activities and processes involved in the production and delivery of a product or service. In the case of dairy products, such as milk, cheese, yogurt, and butter, the value chain typically consists of several stages, each adding value to the product before it reaches the end consumer.



Following is the value chain analysis of dairy products:

a) Raw Material Procurement:

- Dairy farming: The value chain starts with dairy farmers who raise cows, goats, or other milk-producing animals.
- Feed production: Farmers procure or produce animal feed to nourish their livestock.

#### **b) Milk Production:**

- Milking: Farmers milk the animals, typically twice a day.
- Milk storage: The collected milk is stored in tanks or containers.

#### **c) Milk Processing:**

- Transportation: Raw milk is transported to dairy processing plants.
- Pasteurization: The milk is pasteurized to kill harmful bacteria while preserving its nutritional qualities.
- Homogenization: The milk is homogenized to ensure a consistent texture and prevent separation.
- Separation: Cream is separated from milk to make various dairy products.

#### **d) Dairy Product Manufacturing:**

- Cheese production: Cheese is made by curdling milk, separating the whey, and aging the curds.
- Yogurt production: Yogurt is produced by fermenting milk with beneficial bacteria.
- Butter production: Butter is made by churning cream until the fat separates.
- Other dairy products: Various other products like ice cream, sour cream, and cottage cheese are manufactured through specific processes.

#### **e) Packaging:**

- Dairy products are packaged in various forms, including bottles, cartons, tubs, or cheese wheels.
- Packaging may include labelling, branding, and nutritional information.

#### **f) Distribution and Logistics:**

- Dairy products are distributed to retailers, wholesalers, and other customers.
- Refrigerated transport and storage are crucial to maintaining product freshness.

#### **g) Retailing:**

- Grocery stores, supermarkets, and specialty shops sell dairy products to consumers.
- Retailers may offer promotions, discounts, and display dairy products attractively.

#### **h) Marketing and Promotion:**

- Dairy companies engage in marketing efforts to promote their products through advertising, social media, and promotions.
- Health benefits, taste, and convenience are common marketing themes.

#### **i) Consumer Purchase:**

- Consumers buy dairy products based on factors like taste, price, brand reputation, and nutritional value.
- The purchase may be influenced by personal dietary preferences, health concerns, and cultural factors.

#### **j) Consumption:**

- Consumers consume dairy products directly or use them as ingredients in cooking and baking.

- The product's quality, taste, and health benefits are critical to consumer satisfaction.

#### k) Post-Consumption:

- Disposal: Consumers dispose of packaging and any leftover dairy products.
- Recycling or waste management may be involved in environmentally friendly disposal.

#### l) Feedback and Quality Control:

- Dairy companies gather feedback from consumers and retailers to improve their products and processes.
- Quality control measures are implemented to maintain product consistency.

Understanding the dairy value chain helps identify areas for optimization, cost reduction, quality improvement, and sustainability efforts. It's important for dairy companies to consider each stage of the value chain to remain competitive in the market and meet consumer demands.

### Dairy Products

Milk in India is largely consumed in its original form, resulting in the high spend on primary products. In case of secondary products, khoya (reduced milk derivate), ghee (hardened oil) are high consumption products since they are important ingredients in making Indian sweets. Milk-based sweet products processed milk and spreadable fats take up a significant share of consumer spending, with a large presence of small and unorganized players in this category.

Following HS Code have been used Dairy products.

HS codes	Description
04059020	Dairy Products

#### Export Status

India's Export by Principal Commodity From Apr-2021 To Mar-2022				
Commodity	Unit	Qty	April, 21 To March, 22 Value (INR)	April, 21 To March, 22 Value (US \$)
DAIRY PRODUCTS	KGS	191954015	47441315510	634890220

India's Export by Principal Commodity from Apr-2022 To Nov-2022				
Commodity	Unit	Qty	April, 22 To November, 22 Value (INR)	April, 22 To November, 22 Value (US \$)
DAIRY PRODUCTS	KGS	112755770	33251157482	420788287

Source-DGCIS

### Govt Schemes under dairy production

### Integrated Dairy Development Scheme (IDDS) 2020-21:

The scheme has been launched under UT Capex during 2020-21 with B.E of Rs. 1830.16 lac. The scheme aims to provide 50% subsidy with fixed ceilings for establishment of dairy units, establishment of Milk collection/chilling/processing unit, establishment of market infrastructure including milk ATMs, establishment of milk transportation system etc.

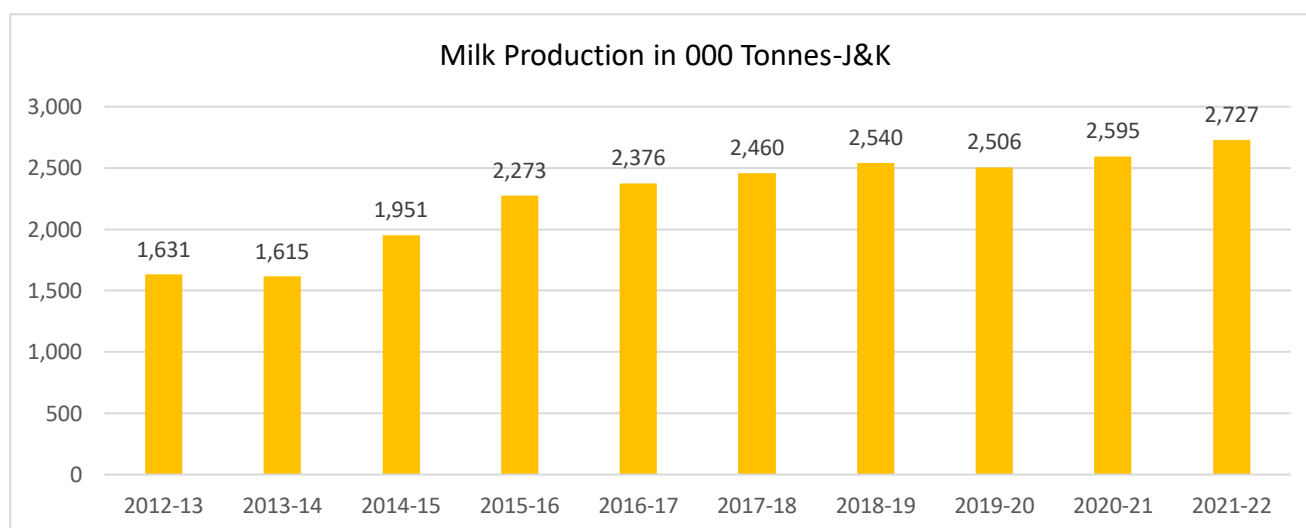
#### FEATURES OF IDDS

- a) Establishment of dairy units.
- b) Establishment of Milk collection/chilling/processing unit.
- c) Establishment of market infrastructure including milk ATMs;
- d) Establishment of milk/milk product transportation system.
- e) Environment Management of Dairy Farms

#### Status of Self-Employment Generation under IDDS Scheme in Jammu: -

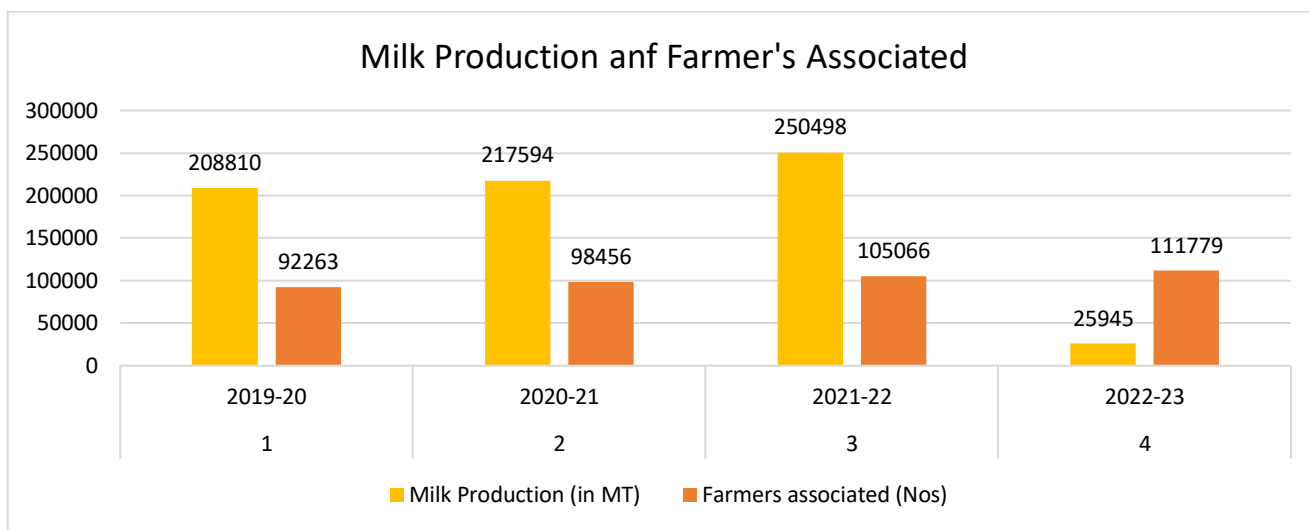
Year	No of beneficiaries	No of Units	Employment Generated
2021-22	314	615	1230
2022-23	197	573	786

#### Milk Production in J&K in last 10 Years trend



Source-National Dairy Board, GOI

#### Total Milk Production in Jammu District : -



Criteria - UT = Jammu & Kashmir / Commodity = Meat , Dairy And Poultry Products (In Mn Dollars )

2021-22

Commodity group	Total Exports Apr'21 - Mar'22 (\$Mn)	Mar - 22 Exports (\$Mn)	Feb - 22 Exports (\$Mn)	% Growth compared to previous month	% Share in selected criteria's total exports
Meat, Dairy and Poultry Products	0.04	0.02	0	0.00%	0.00%

2022Apr-Dec 2022

Total Exports Apr'22 - Dec'22 (\$Mn)	Dec - 22 Exports (\$Mn)	Nov - 22 Exports (\$Mn)	% Growth compared to previous month	% Share in selected criteria's total exports
0	0	0	0.00%	0.00%

Source- <https://niryat.gov.in/>

#### J&K SCENARIO -MILK AND MILK PRODUCTS

##### MILK Products

- Khoya Sweets, -
- Basen Sweets,
- Dry Fruits Sweets
- Other Sweets item

Major Milk Dairy Products which, has unique taste and aroma of Jammu are as follows: -

**JAMMU KALADI/KALARI:-** Usually made from cow's or buffalo's milk, kaladi is extremely tasty and legendary food of Jammu, which is not to be mistaken as Mozzarella. This is a ripened cheese which is a very dense & is usually sautéed in its own fats

MILK CAKE:- A mixture khoya and sugar with various flavors

**EXPORT FROM INDIA HS CODE 04059020: MELTED BUTTER (GHEE)**

Values in Rs. Lacs

HS Code	Commodity	2021-2022	%Share	2022-2023 (Apr-Nov)	%Share
4059020	MELTED BUTTER(GHEE)	59,981.00	0.0191	40,990.91	0.0173
	<b>India's Total Export</b>	<b>31,47,02,149.28</b>		<b>23,63,81,841.90</b>	

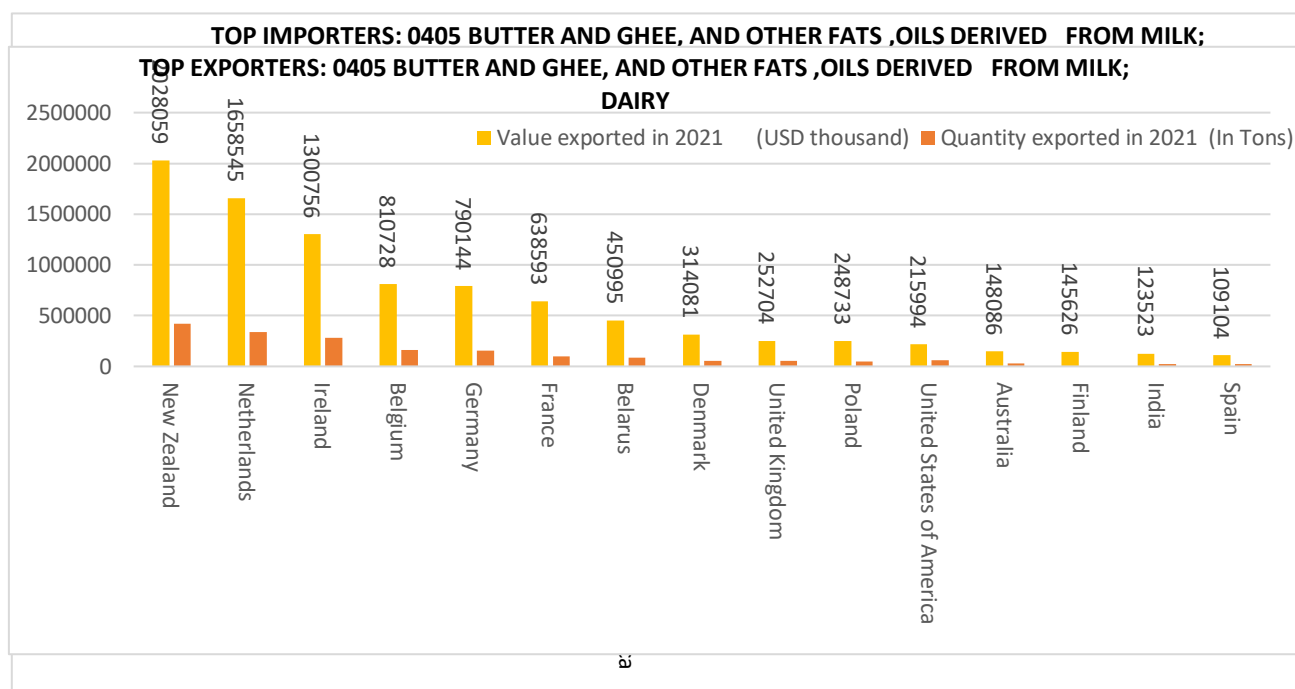
Source: Ministry of Commerce, India

**EXPORT FROM INDIA-TOP COUNTRY WISE-HS CODE 04059020: MELTED BUTTER (GHEE)**

S. No.	Country	Values in Rs. Lacs		Quantity in thousands	
		2021-2022	2022-2023(Apr-Nov)	2021-2022	2022-2023(Apr-Nov)
1	U ARAB EMTS	17,946.69	12,470.63	3,563.03	2,204.52
2	QATAR	8,872.02	3,266.02	1,931.72	551.33
3	U S A	6,537.37	6,110.23	1,169.15	1,039.10
4	SINGAPORE	4,742.90	3,076.41	915.8	517.97
5	SAUDI ARAB	3,929.16	3,787.25	870.38	707.93
6	AUSTRALIA	3,895.55	3,740.16	764.38	683.83
7	OMAN	2,961.53	1,808.68	608.17	319.15
8	KUWAIT	1,743.64	1,059.45	355.29	183.32
9	MALAYSIA	1,476.39	1,195.00	294.81	213.93
10	MAURITIUS	1,076.92	678.9	216.72	115.71



**TOP EXPORTERS: 0405 BUTTER AND GHEE, AND OTHER FATS ,OILS DERIVED FROM MILK;**



**TOP IMPORTERS: 0405 BUTTER AND GHEE, AND OTHER FATS ,OILS DERIVED FROM MILK; DAIRY**

**ANALYSIS- MILK AND MILK PRODUCTS**

Strength	Weaknesses
<p>India is the largest producer of milk and milk products in the world.</p> <p>India has its own test texture characteristics of its milk product which are different from European and Australian continent milk products.</p> <p>Due to heavy production of milk products, India needs to develop its export markets. On supply side, we are in good position for the exports.</p> <p><b>Dairy entrepreneurship development scheme</b> (to promote setting up of modern dairy farms for production of clean milk)</p> <p>Under <b>Dairy development scheme</b>, a lot of schemes have been introduced wherein there is a provision to provide subsidy and incentives for setting up of Dairy units</p> <p>Establishment of milk collection/chilling unit/processing unit</p> <p>Establishment of market infrastructure including milk ATMs</p> <p>Establishment of milk transportation system.</p> <p>Environment management of dairy farms</p>	<p>Jammu and Kashmir has not developed good ecosystem for exports. So, that is why the region needs to improve its exportability of the product.</p> <p>Farmers in Jammu have no knowledge about these world norms, then trader and processor also have no knowledge about these norms. While at the time of export and at the time of importing in that country, these norms are entrance to Indian Exports.</p> <p>Dairy products have less shelf life, high transportation cost which are weaknesses for the export.</p> <p>Lack of structured and clear benefit packages to motivate milk producing farmers</p> <p>Milk collection centers are not well equipped</p> <p>Insufficient raw milk supply for milk processing plants.</p> <p>Low level of milk procurement</p>
Opportunities	Threat:

Indian agricultural products have found a good market in the countries ASEAN and in China. However, there is no market for dairy products in these countries. These countries are the same buyers of dairy products as India. In the northern regions, there are now companies such as Verka, Amul, Vita, Sars, etc. and many others. Processed products from milk can be developed for export. More milk producers are willing to join cooperatives. Opportunities for convergence with allied departments and other agencies to obtain funding. Significant scope for unit modernization and new product development. Growing milk demand and expandable market share. Development of infrastructure such as processing plants, milk cooling plants, cooling centres and feed manufacturing units.

Exporters visit developed dairy markets to see if there is a price increase in the sector so that the government can impose export restrictions. The developed European markets such as the Netherlands, Germany and the Australian continent with New Zealand can be our main entry point for our exports. Dairy farmers are losing interest in dairy farming. The high cost of credit for dairy farmers is inhibiting their expansion. Lack of financing programs for dairy farms. Lack of appropriate government policies to promote the dairy sector. Rising costs of inputs.

#### EXPORT POTENTIAL -Milk products of Jammu

Product		Dairy Products				Action plan of next Year	Action Plan of Next Three Years
1	Total Production -	2019-20	2020-21	2021-22 till Dec	2022-23		
		XXX	XXX	XXX	XXX		
2	Total Farmers associated	nil under ODOP	Nil under ODOP	14 under ODOP	25 Under ODOP pending with Bank	More beneficiaries will be adjoined with the OPOD scheme as well as al the schemes related to the Animal Husbandry department	
4	Total FPO's associated ( with production in each FPO if available)	01 (Kaushal Jammu Milk Producers Company Lmtt. Functional since 2017	Nil	Nil	Nil ( whereas a toal of 42 Milk cooperative socities are associated)	Formulation of atleast 1-2 More FPO in regards to milk and milk byproducts	Formulation of atleast 2-3 More FPO in regards to milk and milk byproducts
3	Sale Price per MT						
4	Storage/cold storage facility and capacity if		BMC: 06	BMC:09	BMC;01, AMC:01	establishment of 1-2 BMC &AMC	establishment of 3-4 BMC &AMC
<b>5 Dairy products clusters in Jammu district</b>							
		<b>Parameters</b>	<b>Unit</b>				
		Functional units of production	386(5 animal/unit)	865(5animal/ unit)	286 (2 animal/unit)		
		No of jobs in the cluster	772	1730	286		
		Capacity of the cluster in	23160 approx.	5190 lit approx.	6864 lits approx.		
		Annual turnover	INR in Cr				
		xx% of the produce is processed locally	100%	100%	100%		
		Percentage is being exported to other states	Nil	Nil	Nil		
		Percentage is being exported to other Countries	Nil	Nil	Nil		
6	Export	2019-20	2020-21	2021-22 till Dec	2022-23 till Dec		

Due to its perishable nature, the dairy sector requires more complicated supply chain operations and logistics to ensure freshness and safety. Domestic demand for dairy could be impacted by inflation, fluctuations in disposable income, and continued fluctuations in demand for food in restaurants and out-of-home dining. Despite the phenomenal growth in dairy production, Jammu and, of course, all of India face a number of challenges that can be summarized as follows:

The low value of Jammu's dairy exports is mainly

- Due to the high domestic demand for milk and milk products,
- The very low yield of milk production,
- Low exportable surplus of processed dairy products.
- Maintaining quality and quantity within a diverse supply base

- Despite being large production India’s average milk yield per cattle is much lower compared to developed and even many other developing countries.
- The small size of milch-animal holdings in J&k
- Milk being a source of nutrient for vegetarians’ population of Jammu a very low surplus is left for exports unlike other major dairy exporting states/countries.
- In many developed counties India faces despite the sporadic incidences of the disease in some part of J&K including Jammu production of milk decreases at enormous rate
- Cow milk is the only popular milk in most developed countries whereas buffalo milk or other dairy products made from Buffalo milk is not considered as suitable for consumption.

**Action Plan Dairy Products -Next 03 Years**

7	<b>Hard and soft interventions</b>						
8	Common Production	209607 TONNE MILK	265.83 TONNE	1022072.60 TONNE	259245.00 TONNE MILK		
9	Testing Laboratory	02 (*Disease investigation Labs of Department of Animal Husbandry)					
10	Packaging & Labelling Centre	N/A	N/A	N/A	N/A		
11	Skill Development	N/A	N/A	N/A	N/A		
12	Common Facilitation centre if any (CFC)	N/A	N/A	N/A	N/A		
13	capacity building sessions if any cobducted to promote	N/A	N/A	N/A	N/A		
14	Marketing Linkages	THE ONLY MARKET					
15	Capacity enhancement techniques adopted if	N/A	N/A	N/A	N/A		
16	Departmental Schemes to enhance exports	NAD	NAD	NAD	NAD		
17	Focus on high milk yielding breeds of cows/buffaloes etc for Export Quality to increase production	NAD	Under IDDS	UNDER IDDS	UNDER IDDS	Induction of animals under IDDS	Induction of animals under IDDS
18	<b>Use of Use of Modern technologies</b>						
19	Cost Structure of new machinery required		N/A	N/A	N/A		
20	Setting up of CFC	N/A	N/A	N/A	N/A		
21	storage	N/A	N/A	N/A	N/A		
22	Centre of Excellence	N/A	N/A	N/A	N/A		
23	Packaging and labelling/GI branding	N/A	N/A	N/A	N/A		
24	Quality Control Lab /testing Lab	02 disease investigation Labs functional (Government department of					

### Govt Schemes under dairy production

Scheme	Component	Eligibility	Where to apply
National Livestock Mission (NLM) (2020-21)	a). Poultry Venture Capital Fund Scheme (PVCFS) under Entrepreneurship Development and Employment Generation (EDEG) component of National Livestock Mission (NLM)	Farmers, individual entrepreneurs, NGOs, Companies, Cooperatives, groups of organized and un-organized sector, which includes SHGs and JLGs.	Chief Animal Husbandry Officer of District where farm is running or to be established.
	Objectives:		
	<ul style="list-style-type: none"> <li>To encourage entrepreneurship in various poultry activities and provide capacity building for employment opportunities.</li> </ul>		
	<ul style="list-style-type: none"> <li>To improve production of poultry products and productivity of processing units through technology up-gradation and also encourage introduction of innovative technology.</li> </ul>		
	<ul style="list-style-type: none"> <li>To encourage rearing of other poultry species like quails, ducks, and turkeys etc. which have good potential.</li> </ul>		
	Pattern of Assistance: -		
	i. Normal Areas: APL-25% of the outlay (33.33 % for BPL/ SC / ST farmers), as back ended capital subsidy.		
	ii. Northeast regions/ Hill areas/ LWE affected areas: APL-35% of the outlay (50 % for BPL/ SC / ST farmers), as back ended capital subsidy.		
iii. Difficult Areas: APL-45% of the outlay (60 % for BPL/ SC / ST farmers), as back ended capital subsidy.			

<p>Dairy Entrepreneurship Development Scheme (DEDS)</p>	<p>Objectives .</p> <ul style="list-style-type: none"> <li>• To generate self-employment and provide infrastructure for dairy sector.</li> <li>• To promote setting up of modern dairy farms for production of clean milk.</li> <li>• To encourage setting up of vermi-compost pits along with milch animal units.</li> <li>• To encourage heifer calf rearing, thereby conserving good breeding stock.</li> <li>• To bring structural changes in the unorganized sector and upgrade traditional technology to handle milk on a commercial scale (purchase of milking machines, milk testers and bulk milk cooling units; cold storage facilities for milk)</li> <li>• To provide value addition to milk through manufacture of indigenous milk products and establishment of dairy product transportation facilities, cold chain and cold storage;</li> <li>• To encourage setting up of dairy marketing outlets.</li> </ul> <p>Eligible Beneficiaries:</p> <p>Priority shall be given to projects being implemented in a cluster mode covering dairy farmers/ women in Self Help Groups, Cooperatives and Producer Companies including creation of facilities for processing, value addition and marketing of milk produced in the cluster.</p> <p>Pattern of Assistance</p>	<p>Farmers, Individual Entrepreneurs and Groups of Unorganized and Organized Sector etc. Groups of organized sectors include Self-Help Groups on behalf of their members, Dairy Cooperative Societies, Milk Unions on behalf of their members, Milk federation, Panchayat Raj Institutions (PRIs) etc</p>	<p>CAHO concerned.</p>
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	<p>a) 25% of the outlay (33.33 % for SC / ST farmers), as back ended capital subsidy.</p> <p>b) Entrepreneur contribution (Margin) – 10% of project cost (Minimum)</p> <p>c) Bank Loan- Balance portion</p> <p>Subsidy component under the Dairy Entrepreneurship Development Scheme (DEDS) is provided by the National Bank for Agriculture and Rural Development (NABARD) which is the nodal agency for implementation of the scheme in the state/UT.</p>		
Kissan Credit Card	To provide Working capital for dairy / poultry farmers with 2% interest subvention and 3% prompt repayment incentive (benefit up-to Rs. 3.00 lacs, no collateral guarantee/ mortgage up-to Rs. 1.60 lacs)	All Livestock Farmers	CAHO Concerned
Integrated Dairy Development Scheme (J&K)	<p>The scheme has been launched under UT Capex during 2020-21 with B.E of Rs. 1830.16 lac. The scheme aims to provide 50% subsidy with fixed ceilings for establishment of dairy units, establishment of Milk collection/chilling/processing unit, establishment of market infrastructure including milk ATMs, establishment of milk transportation system etc.</p> <p>Support is given by the department in terms of incentives/ subsidy for the following activities: -</p>	Any individual /group of individuals/milk processing unit holders/milk/federation/ retailer/ self-help group/ dairy cooperative/society/farmers producer organization (subject to fulfilling of eligibility)	

	a) Establishment of dairy units (5 cows/ buffaloes per Unit; maximum 10 units); b) Establishment of Milk collection/chilling/processing unit; c) Establishment of market infrastructure including milk ATMs; d) Establishment of milk transportation system and e) Environment Management of Dairy Farms		
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Status of Self-Employment Generation under IDDS Scheme in Jammu: -

Year	No of beneficiaries	No of Units	Employment Generated
2021-22	314	615	1230
2022-23	197	573	786

### Dairy Value Chain - The Way Forward

Dairy farming is a subset of agriculture and a significant source of income for landless workers, small-scale farmers, and marginal farmers.

With the implementation of the prestigious flag-ship schemes like Rashtriya Gokul Mission, Integrated Dairy Development Scheme (IDDS), Feed and Fodder development Scheme (F&FDS), Animal Husbandry Infrastructure Development Fund, establishment of Cluster Model Milk Villages under Tribal sub plan, etc., dairying has created a demand for development of a commercial module to combat the extant ill-organised and primitive marketing scenario.

The mechanism for distributing milk is mostly outdated and exploitative, and only a small part is handled by the organised sector. It requires development of region-specific commercialization strategies for milk and other dairy-based value-added products that would limit or end the wastage of the produce at the producer level.

Augmentation and integration of dairying with processing and value-addition is perceived to have ample scope and could boost milk production and increase income and employment.

The organized milk procurement, processing and marketing would help farmers to earn remunerative prices and enhance their quality of life, while providing for better socio-economic and nutritional stability of both the producers as well as consumers.

The only way forward is development of strong and commercially viable dairy value-chain, where facilities and infrastructure for milk procurement, processing, marketing, cold storage facilities and quality control, etc. are created, upgraded, and intensified.

The institutional support, aimed at provision of appropriate technologies for increased dairy production, processing of the produce, feeding, breeding and scientific management of the animals, training and capacity building of all the stakeholders, healthcare and veterinary services, is essential for achieving the purpose.

Therefore, the overall picture of obstacles and opportunities for the development of the dairy industry calls for a food system perspective, which starts with the desired results and includes all the activities involved in producing and using food, including growing, harvesting, packaging, processing, transporting, marketing, eating, and getting rid of food waste.

### Financial Implications for Dairy Products

Estimated budget for proposed Hard Intervention-Dairy Products					
S. No	Intervention	Priority	Timeline	Funding Source	Cost
1	Dairy Infrastructure Development: modernization of dairy farms, including investment in cattle sheds, milking parlors, fodder storage facilities, and manure management systems.	Medium	6-12 months	Rashtriya Krishi Vikas Yojana (RKVY)/ Integrated Dairy Development Scheme (J&K)/ National Livestock Mission (NLM)	2.50 Cr
2	Financial assistance for the installation of milk chilling units, bulk milk coolers, and transportation infrastructure to maintain the quality and freshness of milk from farm to processing facilities.	Medium	6-12 months	Yojana (RKVY)/ Integrated Dairy Development Scheme (J&K)/ National Livestock Mission (NLM)	2.0 Cr
3	Technology Adoption and Upgradation: milk testing and quality control equipment, including equipment for testing milk fat, protein, and microbial contamination/value addition	Medium	6-12 months	Yojana (RKVY)/ Integrated Dairy Development Scheme (J&K)/ National Livestock Mission (NLM)	2.0 Cr
4	Cost of Setting up packaging machines etc	Medium	6-12 months	Yojana (RKVY)/ Integrated Dairy Development Scheme (J&K)/ National Livestock Mission (NLM)	2.0 Cr
Estimated budget for proposed Soft intervention-Dairy products					
5	Market linkages and Promotion (organizing exhibition, event, workshops, social media, participation in trade fair, exhibition)	High	1-6 months	Yojana (RKVY)/ Integrated Dairy Development Scheme (J&K)/ National Livestock Mission (NLM)	2.0 Cr
6	Skill Up-gradation and Capacity Building Training to enhance the skills	High	6-12 months	Yojana (RKVY)/ Integrated Dairy	2.0 Cr



	of farmers and increase the production			Development Scheme (J&K)/ National Livestock Mission (NLM)	
7	Financial Inclusion and Access to Credit:  Facilitation of access to formal credit facilities, microfinance programs, and dairy development schemes for smallholder dairy farmers and women entrepreneurs engaged in dairy entrepreneurship.	High	6-12 months	Yojana (RKVY)/ Integrated Dairy Development Scheme (J&K)/ National Livestock Mission (NLM)	3.0 Cr
<b>Total</b>					1.50 r

## PHULKARI

Jammu and Kashmir has a rich and diverse heritage in handicrafts. The artisans from Jammu district are known for their attractive designs and high quality of their craftsmanship in areas like hand embroidery, modern art, lathe and lacquer work, phulkari and many others. This sector has tremendous potential in terms of wealth creation as well as employment. From Jammu district, Phulkari can be considered for export.

HS codes	Description
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)

**Phulkari Embroidery** Phulkari - A traditional craft, recently revived, is Phulkari, Bagh or Shaloo embroidered in the Phulkari style was an essential part of the bride's trousers till only a few decades back. A craft with its origin in Punjab Phulkari as the very name suggests is a style of embroidery of floral designs. The present-day designs, however, are by no means limited to flowers alone and include a variety of other patterns.

Phulkari has taken a prominent place in Jammu's traditional and handmade tailoring. Many artisans now produce phulkari of international standard and export quality.

Phulkari is a rural tradition of handmade embroidery, literally meaning "flower work". It is a form of craft in which embroidery is done in a simple and sparse design over shawls and dupattas. The main characteristics of Phulkari embroidery are use of darn stitch on the wrong side of coarse cotton cloth with colored silken thread. Phulkari is a skillful manipulation of single stitch that provides



**Multicolour Embroidered Phulkari Dupatta**

interesting pattern on the cloth. The base is khaddar cloth. Punjabi women create innumerable alluring and interesting designs and patterns by their skillful manipulation of the darn stitch. Many folk songs on Phulkari are part of Punjab culture. The craftsmen of Punjab appear to possess an innate understanding of the various elements in the creation of an object. Exquisite, beautiful, fascinating, fabulous, delightful...one can well run out of adjectives when it comes to the Handicrafts of Punjab. Marked by elegant creativity, a wise blend of colors, superb patterning & extremely good execution, the ethnic creations of Punjab command sizeable domestic and overseas markets

## VALUE CHAIN -Phulkari

Phulkari is made of two words: Phul means flower and Akari means shape. Phulkari meant the shape/direction of flowers which symbolized life.

Phulkari being a traditional, Cultural, and famous product has enormous potential for exports as Indian diaspora (especially Punjabi's) has been settled everywhere in the world. Phulkari as a product having aesthetic and artistic value have potential to attract not even native of Punjab but others also.

Now a day, Patiala district is famous for Phulkari among other things/products. So, it can be a part of Export Action Plan.

### Origin: -

In its present form, Phulkari embroidery has been popular since the 15<sup>th</sup> century Pal (1960) believes that no matter its origin, Phulkari work is distinctive and uniquely Punjabi. There are different theories about the origin of Phulkari. One such belief is that this embroidery was prevalent in different parts of the country as far back as the 7<sup>th</sup> century CE but survived only in Punjab.

### Fabrics

Various coarse textured fabrics such as khaddar, dasuti, and khaddar weaves were used for embroidery, including phulkari. Depending on the use of the phulkari types "chaddar"," bhagh"," or "chope"," these khaddar characteristics differed in thickness, weight, and loose or tightly woven structures. The first was a loosely woven khaddar with coarse yarns, which contrasted with "halwan" (a light and finely woven khaddar), and the third was "chaunsa khaddar" woven with finer yarns, which was chosen for "bhag.

Phulkari was essentially a product of domestic labor performed by women in the household. The fabric on which phulkari embroidery was done was hand-spun khaddar (a hand-woven cotton fabric in plain weave).

The fabric was woven in narrow panels because the width of the loom was so large. Therefore, the fabric had to be sewn lengthwise to obtain the desired width, which was later embroidered. This practice of sewing two pieces together was common in Punjab textiles in the early 20th century.

## Designs and Patterns

A variety of Phool kari items like handkerchiefs, table covers sofa and cushion covers, bedspreads and wall hangings are now being produced on large scale that testifies to the increasing popularity of the craft among the local population.

There is an extensive pattern of designs used in phulkari. Every possible representation of life and nature find expression therein. Though it began with geometrical patterns, flowers and leaves, today, the designs have been enlarged to encompass birds, animals, human figures, the sun, moon, the objects of everyday use and everything found on the earth. Then, there is a special bagh design called dhoop-chhaon (sunshade), which is extremely popular in the UT. However, no religious subjects or darbar scenes are embroidered. Some of the most famous varieties of phulkaris and baghs have been listed below.

### CHOPE:

This variety is usually presented to the bride by her grandmother, during a ceremony before the wedding. It has straight, two-sided line stitch and appears the same on the reverse. However, only the border is embroidered, and the center is left plain. It is usually red in color and worn as a veil.

### VARI-DA-BAGH:

This is also done on a red cloth. It is covered with lozenge golden yellow embroidery, with smaller ones within the border.

### Ghunghat Bagh:

This includes a small border on all the four sides, with a large triangular motif in the center. It is worn as a veil.

### Darshan Dwar:

This is usually used for presentation in temples or for adorning the walls of home, when the Granth Sahib is brought therein. It is also done on a red cloth with the motifs of arched gates facing design of humans, animals, birds, flowers etc.

### Chamba:

This includes a series of wavy creepers, stylized leaves and flowers and is highly in vogue recently.

### Suber:

This is worn by the bride during marriage. It contains five motifs, one in the center and one in each of the corner.

Other than the above mentioned, there are some more important phulkaris like bawan bagh, satrang, surajmukhi, mor, mirchi, belan and parantha and ikka or ace of diamonds. A new form of phulkari has evolved of late which is not as detailed and time consuming as the older variety. Using a range of different fast colored synthetic threads, it is done from the top of the cloth rather than on its reverse.

## Threads and Colour

The embroidery is made with silk thread from floss. Soft untwisted silk floss called patt was used for embroidery. The thread came from Kashmir, Afghanistan and Bengal and was dyed in the big cities by the Lalaris. The best quality silk came from China. The women in the villages obtained the yarn from peddlers or traders who moved from village to village selling daily necessities.

The most popular colour was red and its shades, because red is considered lucky by both Hindus and Sikhs in Punjab. Madder brown, rust red, or indigo were the usual background colours used as the basis for embroidery. White was used in Bagh by elderly ladies and widows. Black and blue were less preferred in western Punjab, while white was less commonly used in eastern Punjab. Geometric designs are usually embroidered on the phulkaris. Scenes from everyday life in villages were depicted on phulkari. Animals and birds represented success, beauty, pride and goodwill, various fruits symbolised wealth, prosperity and fertility, and stalks of wheat and barley with ears of corn were also common motifs. No religious themes or darbar (Sikh temple hall) scenes were embroidered. The decorated end of a shawl or cloak, the pallu, has separate panels of exquisite phulkari work with striking design.

**Cooperative Societies dealing in Craft:** There are 121 artisans in Jammu District who got registered with Department of Handicrafts and Handloom in staple craft in the FY 2020-21.

Further, below mentioned 11 Cooperative societies with membership of 11 persons in each society are working actively:

## LIST OF TRAINING CENTRES IN J&K UT

### FACTS AND FIGURES -JAMMU

- ❖ No of Training Centres in Jammu -25
- ❖ No of Artisans-121
- ❖ Export value and data-Nil
- ❖ Countries of Export-Nil
- ❖ Total value produced in rupees -Rs 7545000 (In last five years
- ❖ Clusters areas-Jammu (Nanak Nagar, Peermitha, Jain Bazaar, Roop Nagar)

Source:- Handloom and Handicraft Department Jammu

S.NO	CRAFT	JAMMU			SAMBA			KATHUA			UDHAMPUR			REASI			POONCH			RAJOURI			DODA			RAMBAN			KISHIWAR			TOTAL		
		ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL	ADV	ELE	TOTAL			
1	STAPPLE	1	4	5	0	0	0	0	0	0	1	2	3	1	2	3	1	5	6	1	5	6	1	1	2	0	2	2	1	0	1	7	21	28
2	PHOOKARI	2	5	7	0	0	0	0	2	2	1	4	5	1	1	2	1	2	3	0	3	3	1	0	1	0	0	0	0	0	6	17	23	
3	CREWAL	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	2	3	1	1	2	3	3	6	1	2	3	2	1	3	8	10	18
4	SOZNI	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	6	6	1	4	5	0	2	2	0	1	1	0	1	1	14	15	
5	CARPET WEAVING	0	3	3	0	1	1	2	2	4	0	4	4	0	0	0	0	1	1	0	1	1	0	1	1	0	1	1	0	1	1	2	15	17
6	CALICO PRINTING	1	1	2	0	2	2	0	3	3	1	1	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	7	9
7	LATHE-CUM-LACUARE	0	3	3	0	0	0	0	3	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7	7
8	BAMBOO	0	0	0	0	2	2	2	2	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	4	6
9	CHIKRI WOOD	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	2	2	0	0	0	0	0	0	0	0	0	3	3	
10	CHAMBA EMB.	0	0	0	0	1	1	0	1	1	1	0	1	0	0	0	0	0	0	0	1	1	0	1	1	0	0	0	0	0	0	1	4	5
11	LEATHER ZARI	0	1	1	1	0	1	0	1	1	0	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	1	3	4
12	WHEAT STRAW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
13	NARA PRANDHA	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2
14	TILLA EMB	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2
15	TAILORING AND CUTTING	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
16	HTC(Multicraft)	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
17	MODERN ART	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
18	BASHOLI PAINTING	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
19	HANDLOOM WEAVING	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
20	COMMON FACILITY CENTRE	4	21	25	1	7	8	4	16	20	4	11	15	2	4	6	3	17	20	3	20	23	5	9	14	1	6	7	3	4	7	30	115	145
		0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
		4	21	25	1	7	8	4	16	21	4	11	15	2	4	6	3	17	20	3	20	23	5	9	14	1	6	7	3	4	7	30	115	146

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## EXPORT SENRIO

### EXPORT DATA

HS CODE 6214: ARTICLES OF APPAREL AND CLOTHING ACCESSORIES, NOT KNITTED OR CROCHETED

Values in Rs. Lacs

S.No.	HS Code	Commodity	2022-2023	%Share	2023-2024(Apr-May)	%Share	%Growth
1	6214	.	2,29,705.03	0.0634	39,749.70	0.0693	
		India's Total Export	36,20,63,094.86		5,73,30,725.37		

**EXPORT FROM INDIA**

S.No.	Country / Region	Values in Rs. Lacs	Quantity in thousands
		2021-2022	2022-2023(Apr-Nov)
1	SENEGAL	23,573.45	10,700.81
2	ITALY	22,787.94	23,094.89
3	NIGERIA	14,232.36	7,363.09
4	TOGO	11,076.75	3,639.31
5	U ARAB EMTS	8,818.81	6,441.51
6	U S A	8,446.65	5,738.61
7	GAMBIA	7,867.32	1,153.80
8	FRANCE	6,283.65	5,681.68
9	AFGHANISTAN	5,390.38	173.46
10	U K	3,854.80	3,381.48
11	GUINEA	3,466.20	463.11
12	TURKEY	1,600.85	1,505.57
13	LEBANON	1,468.32	1,289.71
14	THAILAND	1,402.51	1,007.35
15	SAUDI ARAB	1,389.77	1,097.00

Source: -Commerce.gov.in

## TOP EXPORTERS

List of exporters for the selected product in 2022

Product : 621490 Shawls, scarves, mufflers, mantillas, veils and similar articles of textile materials 2022

Exporters	Value exported in 2022 (USD thousand)	Quantity exported in 2022 in Tons
World	413874	0
India	141628	60884988
China	123655	7424
Italy	30696	187
France	15219	242
Türkiye	13412	3116
Germany	9521	178
United Kingdom	5764	60
Spain	5263	169
United Arab Emirates	5108	1016
Netherlands	5027	219
Bangladesh	4980	0
Viet Nam	3584	81
Iran, Islamic Republic of	3515	346
Czech Republic	3493	48

## TOP IMPORTERS

List of importers for the selected product in 2022

Product : 621490 Shawls, scarves, mufflers, mantillas, veils and similar articles of textile materials 2022

Importers	Value imported in 2022 (USD thousand)	Quantity imported in Tons in 2022
World	371290	0
France	53382	697
Saudi Arabia	31965	2502
United Arab Emirates	20605	0
United States of America	19253	703
Germany	18059	506

United Kingdom	16821	963
Macao, China	13523	21
Korea, Republic of	11581	128
Pakistan	10224	319034
Spain	9165	475
Italy	9147	277
Brunei Darussalam	8084	351911
Bangladesh	7683	0
Netherlands	6711	192

## SWOT ANALYSIS

A SWOT analysis involves examining the Strengths, Weaknesses, Opportunities, and Threats of a particular product, service, or business. In the context of Phulkari in Jammu,

### Strengths:

- **Cultural Heritage:** Phulkari is deeply rooted in traditional Punjabi culture. Its association with cultural events, weddings, and festivals can be a strength, adding cultural significance to the craft.
- **Artisanal Craftsmanship:** Phulkari involves intricate hand embroidery, showcasing the skill and craftsmanship of local artisans. The handmade and artisanal nature of Phulkari can be a unique selling point.
- **Tourism Potential:** Jammu attracts tourists, and Phulkari can be positioned as a unique cultural souvenir. This can boost sales and create opportunities for local artisans.

### Weaknesses:

- **Limited Market Reach:** The market for Phulkari may be limited to local or niche markets. Expanding the reach beyond the region could be a challenge, especially if there's limited awareness outside of the local community.
- **Competition with Mass-Produced Goods:** The availability of cheaper, mass-produced textiles may pose a challenge. Phulkari, being handmade, might face competition from more affordable options.
- **Dependency on Traditional Designs:** If Phulkari primarily relies on traditional designs, there may be a need to innovate and adapt to contemporary tastes to attract a wider audience.

### Opportunities:

- **E-commerce and Online Platforms:** Utilizing online platforms can broaden the market reach, allowing Phulkari to be accessible to a global audience. Online sales platforms can be explored for reaching customers beyond geographical boundaries.
- **Collaborations and Events:** Collaborating with fashion designers, organizing cultural events, or participating in craft exhibitions can provide opportunities to showcase Phulkari to a wider audience.
- **Promotion through Tourism:** Leveraging the tourism industry in Jammu, Phulkari can be promoted as a cultural attraction. Workshops, demonstrations, and sales in tourist areas can attract both domestic and international buyers.

### Threats:



- **Changing Consumer Preferences:** If there's a shift in consumer preferences towards modern or Western-style clothing, it may impact the demand for traditional Phulkari designs.
- **Imitation and Mass Production:** The risk of imitation and mass production of Phulkari-like products, especially at lower costs, can pose a threat to the authenticity and value of handmade Phulkari.
- **Economic Factors:** Economic downturns or fluctuations may affect the purchasing power of consumers, leading to a decline in demand for non-essential items like handmade textiles.

## Export potential

Phulkari, a traditional embroidery finds its roots in Punjab and is an amalgamation of various stitches. It has found a big space in fashion industry, has been reinvented innumerable times and has earned good prestige in India and abroad.

It also occupies an important position in the economic structure and is appreciated worldwide for its high quality craftsmanship, attractive design and functional utility.

## Challenges And Possible Interventions –

S. No	Parameter	Challenges	Proposed Intervention	Department/Agency responsible
1	Branding	Brand development strategy and Improving Quality	Branding of Phulkari as ODOP Product of J&K to promote Phulkari across the Nation by participating in exhibitions/fairs. Branding with G.I registration of products will authenticate Handicrafts & Handloom Products. This will add additional value to the local craft as well as genuineness of the products. Quality Certification of Hand knotted carpets through GI Tagging	Handicraft & Handloom Department /DC Handicrafts/SFURTI/
2	Awareness	Export Procedure/FTP Product Analytics Quality assurance & Certification Credit Support/Insurance	Seminars, workshops, and training programs Advertisement on Radio, social media, News papers Video Conferences Apps or Web Pages	Handicraft & Handloom Department /DC Handicrafts
3	Quality Assurance /Certification	No NABL Accredited Testing Laboratory in J&K	Quality assurance testing lab of National Accreditation Board for Testing and Calibration Laboratories may be made	Handicraft & Handloom Department /DC Handicrafts/SFURTI/NIFT

		No checks and balances made for quality certification/ maintenance	available for quality check at Jammu	
4	Credit Support	Lack of awareness about existing financial institutions and their schemes & policies Blockage of working capital owing to extended payment timelines and return of unsold stock No or less financial support	Collaboration with nationalized banks Awareness and outreach program for raising consciousness about existing central and state government schemes that can be leveraged.	Handicraft & Handloom Department /DC Handicrafts/SFURTI/
5	Common Facilitation Centre	90% of tufting is done by manual tufting machine Vertical looms have adverse effect on the health conditions of the weaver. Non- environment friendly dying.	raw material bank at Jammu that can cater to the needs of artisans. The artisans need to buy raw material from different places like Amritsar, Surat, and Srinagar. For a small or newly registered artisan, this causes inconvenience. Setting up of Common Facility Centres with Modern Facilities. Common facility centers are extremely important to have modern infrastructure and quality to withstand with international market	Handicraft & Handloom Department /DC Handicrafts/SFURTI/MSE-CDP
6	Logistics	High cost of logistics Non availability of containers Non availability of same logistics branch in another country Development of Modern warehousing	Manufacturing of containers Cost Optimizing Use of technology like RFID (Tags — Radio-frequency identification)	Handicraft & Handloom Department /DC Handicrafts/SFURTI/
7	Marketing Support	Marketing is done traditionally (offline), online presence is negligible. Lack of knowledge of existing schemes and govt. initiatives <b>Inaccessibility of market for independent artisans:</b>	The department can participate in conventions/events/fairs at National and International levels for attracting investments and promoting export of Handicrafts Products of UT of J&K Marketing help should be given to those artisans that can help them in selling their products not only in Indian market but also in foreign markets as well.	Handicraft & Handloom Department /DC Handicrafts/SFURTI/

8	Training	<p>Overreliance of Traditional designs and offline marketing</p> <p>Upgradation of weaver's skills</p> <p>Use of new designs</p> <p>Skill Upgradation and capacity building training</p>	<p>Training should be given to artisans, weavers, entrepreneurs for onboarding, cataloguing, and engaging in selling activities on e-commerce platform.</p> <p>Collaboration with NSDC for providing job-oriented training for skilling and upskilling.</p> <p>Skill Development /Skill up-gradation &amp; Capacity Building Training programs need to be arranged for the artisans that can help them in learning new designs and color combinations that can be easily sold</p>	Handicraft & Handloom Department /DC Handicrafts/SFURTI/NSDC/
9	Supply Chain	<p>Exhibition centers</p> <p>Profit maximization strategy</p> <p>Improve Distribution Network</p> <p>Sudden Shortages</p> <p>Centralized Inventory</p>	<p>Development of Software</p> <p>Financial intervention on competition among green supply chains</p> <p>Phulkari embroidery is done sometimes on superior fabrics like Pashmina and sometimes on light- coloured fabrics also. So packaging of these need to be such that the product is saved from any kind of damage.</p> <p>Proper packaging facility needs to be developed that can keep the product safe as well as make it attractive for the buyers.</p>	Handicraft & Handloom Department /DC Handicrafts/SFURTI/
10	Problems of weaver's artisans	<p>Problem of labour</p> <p>Lack of information</p>	<p>Aware them about rising cost of the raw materials.</p> <p>Aware artisans themselves are ready to work on low labour as they don't have any source of earning their livelihood.</p> <p>Aware artisans have the lack of information of Labour rights.</p> <p>In order to increase production and meet the latest technological changes, old worn-out looms need replacement</p> <p>Today, a large no. of machine-made products is available in market that resemble to the</p>	Handicraft & Handloom Department /DC Handicrafts/SFURTI/

			original hand made products. These machine-made products are of fine quality and are available at cheap rates also. So, the original hand made products face severe competition from these machine-made products. For solving this problem tagging/branding of the handmade products is needed. This will help in identifying the hand made products and differentiating them from machine-made products.	
11	Declaration of J&K as Special Economic Zone for wool and silk processing, handloom and handicrafts sector	To overcome competitive infrastructure, duty free exports, tax incentives	Creation of Special Economic Zone for handloom and handicraft in Jammu and Kashmir Union Territory. Special economic zones (SEZs) offer incentives to resident businesses. SEZs typically offer competitive infrastructure, duty free exports, tax incentives, and other measures designed to make it easier to conduct business.	Handicraft & Handloom Department /DC Handicrafts/SFURTI/
12	E Marketing Facility	Exposure of products at national and international level	Various e-marketing giants like Flipkart, Amazon, Meesho, JioMart etc have provided facility to Phulkari weavers to e market their products along with handholding and logistic support. A massive campaign is required to get artisans/weavers to get acquainted with this digital platform of e marketing for maximum profit.	Handicraft & Handloom Department /DC Handicrafts/SFURTI/

### Steps to be taken to promote Phulkari in J&K

Promoting Phulkari in Jammu and Kashmir involves a combination of strategic initiatives to create awareness, enhance market access, and celebrate the cultural significance of this traditional embroidery. Here are steps that could be taken to promote Phulkari in J&K:

#### Cultural Events and Festivals:

Organize cultural events and festivals that showcase Phulkari, its history, and its significance in Punjabi culture.

Incorporate Phulkari exhibitions, workshops, and fashion shows into existing cultural festivals or events in the region.

### **Collaborations with Designers:**

Collaborate with fashion designers to incorporate Phulkari into contemporary designs, making it more appealing to a broader audience.

Showcase Phulkari collections in local and national fashion shows to attract attention from the fashion industry.

### **Craft Workshops and Training:**

Conduct Phulkari embroidery workshops to teach the traditional techniques to a new generation of artisans and enthusiasts.

Establish training programs to enhance the skills of existing artisans and ensure the preservation of this traditional craft.

### **Tourism Integration:**

Promote Phulkari as a cultural souvenir for tourists visiting Jammu and Kashmir. Create dedicated spaces in tourist areas for Phulkari sales and demonstrations.

Develop guided tours or experiences that include visits to Phulkari workshops and interactions with artisans.

### **Online Presence and E-commerce:**

Establish an online presence for Phulkari, including a dedicated website or social media pages showcasing different Phulkari products and their cultural significance.

Explore e-commerce platforms to make Phulkari accessible to a global audience, facilitating online sales and shipping.

### **Collaboration with Local Businesses:**

Partner with local businesses, including retailers, boutiques, and souvenir shops, to feature and sell Phulkari products.

Encourage hotels and resorts to incorporate Phulkari in their decor or offer it as part of their hospitality experience.

### **Educational Initiatives:**

Introduce educational initiatives in schools and colleges to raise awareness about Phulkari, its history, and the skill involved in its creation.

Collaborate with educational institutions to include Phulkari in art and cultural studies.

### **Government Support and Policies:**

Advocate for government support in the form of financial assistance, subsidies, or incentives to Phulkari artisans and businesses.

Work with local authorities to create favorable policies that promote and protect traditional crafts.

### Participation in Trade Fairs:

Participate in regional, national, and international trade fairs and exhibitions to showcase Phulkari and connect with potential buyers and collaborators.

### Media and Public Relations

Utilize traditional and digital media for promotional activities, including feature articles, interviews, and documentaries about Phulkari and its artisans.

## FINANCIAL IMPLICATIONS: - Phulkari

Estimated budget for proposed Hard Intervention-Phulkari					
S. No	Intervention	Priority	Timeline	Funding Source	Cost
1.	Strengthening of infrastructure of Phulkari training centers	Medium	6-12 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana	3.0 Cr
2.	Setting up of raw material banks	Medium	6-12 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana	2.0 Cr
3.	Design Innovation and Product Diversification:	Medium	6-12 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana/NIFT/Craft Development Institute (CDI), Srinagar:	1.0 Cr
Estimated budget for proposed Soft intervention					
4.	Marketing and Promotion (organizing exhibition, event, workshops, social media, participation in trade fair, exhibition)	High	1-6 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana/DGFT/JKTPO	2.0 Cr
5.	Artisan Support and Skill Development	Medium	6-12 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana/	0.50
6.	Access to Finance and Credit	Medium	6-12 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana/	1.0 Cr
7.	Skill Up-gradation and Capacity Building Training to enhance the skills of artisans increase the production	High	6-12 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana/DGFT/JKTPO	2.0 Cr
8.	Research and study on Phulkari potential in Jammu	Medium	6-12 months	MSE-CDP/SFURTI-Ambedkar Hastshilp Vikas Yojana/	1.0 Cr
<b>Total</b>					12.50 Cr

## ACTION PLAN -NEXT 03 YEARS

S.No.	District	Jammu					
	Product	Phulkari				Action plan of next year	Action plan of Next
		2019-20	2020-21	2021-22 till Dec.	2022-23	At District Administration Level:	At Departmental Level:
1	Total Production	81666.89	32404.07	242172	10667.88	1. Common Facility Centre. 2. New Technology intervention. i) Dying. ii) Packaging unit iii) finishing unit 3. Raw material Bank. 4. Advance Training to Artisans. 5. Design upgradation. 6. Organsiation of Awareness camp at large scale. 7. Market linkage for artisans. <b>Note:- It require funding to establish all these units.</b>	1. Department will impart training to unskilled youth through training centres. No. of Training centres- 07 Nos. No. of students enrolled- 20/centres 2. cover the artisans under financial support Scheme under which maximum number of cooperatives can be formed. 3. Marketing support to Artisans in the form of exhibition at National/State/District Level.
2	T total Artisans Associated	58	38	71	59 +247= 306		
3	Total Societies formed	-	-	-	3		
4	Annual Turn over	-	-	-	9,00,000		
5	Raw material available	-	-	-	-		
6	Raw material Required	-	-	-	-		

## STRATEGIES TO FULFIL PLAN

Schedule	Categories	Strategies	Action Plan
Short Term and Medium	Skill Development	<ul style="list-style-type: none"> <li>▶ Organize outreach programs/ workshops for the farmers/prospecting exporters.</li> <li>▶ Work towards continuous feedback from the farmers</li> <li>▶ Upskill the existing workforce for enhancing the production</li> </ul>	Concerned stakeholders to be invited to Conducting of business events/workshops with concerned stake which will provide market linkages to exporters. Agriculture Dept. must make effective use of existing training institutes for imparting training in present industries. The Agricultural University and Colleges located in the district are to be sensitized for providing best practices far the farmers to grow the quality products
	Financial assistance	Provide term loans to small and medium enterprises to enable them to upgrade export production capability. Assist exporters with pre-shipment and post-shipment credit.	Support smaller units in establishing their business through financial • Information Dissemination of information to exporters and other relevant stakeholders about existing financial schemes. Export Credit Guarantee Corporation of India Limited can be loop in for providing credit for export.
	GI Marketing & Packaging Support	Adoption of modern packaging technology would reduce the packaging cost of the products. Latest marketing techniques to	With the help of Indian Institute of Packaging (IIP), district can work towards improving the quality standards & manufacturing compliances, learning

		promote the exports of Products like Basmati Rice, Mango and Dairy products etc	new techniques etc. Adoption of innovative methods in the growth of quality Agri products will help to enhance exports, farmers / exporters etc
	Export Facilitation Cell/	<ul style="list-style-type: none"> <li>• It will act as Grievance Redressal system.</li> <li>• Create Awareness</li> <li>• Market Intelligence</li> <li>• Share Best Practices among farmers etc</li> <li>• Export Policy Recommendations if any</li> </ul>	<ul style="list-style-type: none"> <li>• Will provides market intelligence for exports.</li> <li>• Export cell will analyze and suggestions.</li> <li>• Latest measures to strengthen the existing and establish new infrastructure facilities to promote the present industries.</li> <li>• The cell shall work towards establishing direct linkage between FPOs and Exporters for promoting the exports and the farming requirements for quality production</li> </ul>
Long Term	Branding and Promotion	Design logos for Agri products goods like GI tag logo of basmati is pending to design and unveil. Leveraging the power of social media	Appointment of independent agency for designing of the logo and ensure only quality products use this logo which will ensure product differentiation. Tie up with various e-commerce players to market the products on their online e-commerce platforms.
	Infrastructure	Quality testing and certification labs for exports Logistical infrastructure should be developed. Uninterrupted Power Supply Agri Export Zones	Set up an Agri Export Zone In Jammu district for Mango, Basmati and dairy products. Mega food/Industrial parks should include creation of processing infrastructure near the farm, transportation, logistics and centralized processing centers. This would facilitate food processing units and other industries to meet environmental and safety standards
	Policy Inputs/Regulatory Reforms	Capitalizing on the existing TIES scheme to support the export logistics. Online single window system (No physical touchpoints between the applicant and department from the time of application process till the final decision)	Identification of relevant projects to address the gaps in infrastructure which are not addressed by any other scheme. Encourage investor/ entrepreneur to apply for all the licenses/approvals through the online single window portal. Single Window System should be integrated with SMS gateway/ emails so that applicant gets notification at every critical stages of application processing.



## HARD AND SOFT INTERVENTIONS REQUIRED TO BE INTRODUCED TO PROMOTE EXPORTS

FOR SUCCESSFUL IMPLEMENTATION OF DISTRICT EXPORT ACTION PLAN, THE FOLLOWING POINTS CAN BE CONSIDERED-

### SOFT INTERVENTIONS

1. Strategies built on strengths and weaknesses of the UT of J&K.
2. Strategies aim to minimize existing weaknesses that are acting as hurdles to tap identified opportunities.
3. Other soft interventions suggested.

#### **1. Strategies built on strengths and weaknesses of the UT of J&K**

- To leverage strengths in Agri products to grab opportunities and building on existing exports and expansion in emerging Asian and Middle East markets.

#### **2. Strategies aim to minimize existing weaknesses that are acting as hurdles to tap identified opportunities**

- To eliminate hurdles like high tariffs, incompetent airports resulting in grabbing the opportunity of making J&K as the Aviation Hub.
- To eliminate hurdles in connectivity and infrastructure related areas to bring in competitive advantages relating to transportation costs of exports.
- To encourage and equip all stakeholders to meet EU, HACCP and FDA standards resulting in consistent and value-added exports to focus on new markets.
- Stronger Interventions for reducing the higher freight charges for shipment of commodities from the UT, since the place being landlocked.
- Adapting branding of several unique products like Jammu Basmati, Jammu /Udhampur Kalardi /Jammu mangoes etc and processed products to create value while competing with other exporting Nations / States in global markets.

#### **3. Other soft interventions from the State/UT Government suggested are as follow**

- Export Awareness Programs.
- Export Training Programs.
- Export Management Training Programs.
- Seminars, Workshops & Conferences.
- Interaction and Open House Meetings.
- Participation in National/International Exhibitions & Trade Fairs for Promotion of Trade
- Financial support to all Artisans, SC, ST, Women Entrepreneurs of Micro and Small enterprises, who participate in the Trade Fair and Exhibitions.
- Conferring State Export Awards for Export Excellence.
- Market Development Assistance (MDA) Scheme for Overseas Visits / Trade Fair for business promotion.
- Reverse Buyer-Seller Meet through Market Access Initiatives and Market Development Assistance of Govt. of India.

- Disseminating Overseas Live Trade Enquiries.
- Incubation Centre, Facilitation Cell, R&D Cell, Entry strategies.
- Assisting the traders/exporters in certification for the export/ import of commodities.
- Trade Point to provide live trade enquiries, Global Directory Services & Online Trading facility

## HARD INTERVENTIONS

- 1) CREATING EXPORT INFRASTRUCTURE
- 2) ENCOURAGING SPECIAL ECONOMIC ZONES (SEZS)
- 3) ENCOURAGING DEVELOPMENT OF ICDS & CFSS
- 4) SEGMENT SPECIFIC STRATEGIES

### 1) Creating Export Infrastructure

- Government Departments / Organizations which are mandated for development of infrastructure may reserve certain percentage of their annual budget to support critical infrastructure to encourage exports.
- Private participation would be encouraged for the development of Inland Container Depots, Container Freight Stations, Logistics Parks, pre & post-harvest technology centres, ware housing and other infrastructure facilities through PPP mode.
- Trade bodies and industry associations would be encouraged to promote development of infrastructure, R&D Centre, Training Centre and Testing Centre to augment the development and growth of exports.
- Private participation, Export Promotion Councils, Trade bodies/Industry Associations would be encouraged to create warehousing facilities overseas for exporters near transit ports to help trans-shipment of goods on main line vessels.
- Connectivity to major seaports and airports need to be strengthened and upgrade facilities to meet the demand exporters and enhance the capacity for facilitating exports.
- The rail network in J&K to be strengthened to facilitate speedy movement of goods to ports.

### 2) Encouraging SEZs

- Development of SEZs both multi product and sector specific, would be encouraged in the State by dovetailing the provisions available in the Central / State SEZ Policy.

### 3) Encouraging Development of ICDs & CFSS

- Inland Container Depot (ICDs) / Common Facility Centres (CFSS) and logistic parks would be developed in the clusters and in the major industrial areas of potential districts to facilitate exports.
- CFS facilities would be encouraged at potential locations to help exporters especially in MSME segments, which generally ship small quantities as they cannot utilize a full container load

### 4) Sector Specific Interventions

- Food parks / Agri special zones / Agri Logistic Parks / Corridors would be encouraged for establishment at different locations across the UT. These parks will have the entire required infrastructure facilities like pre-harvest & post-harvest technology, cold chain, and temperature-controlled warehouses and refrigerated transport / reefer trucks to minimize the loss in storage and transit.
- It is proposed to support the establishment of better connectivity from fruits and vegetables growing areas to ports and to the National / State highways to facilitate easy movement of goods.

- Market intelligence reports to be provided for dissemination of information to farmers on a real time basis.
- Modern packaging technology would be encouraged to reduce the packaging cost. The State/UT would support the establishment of a branch of Indian Institute of Packaging in this regard.

## Funding source for hard and soft interventions for Jammu exportable potential products

### For hard interventions

#### Government Grants and Subsidies:

Government grants and subsidies play a crucial role in supporting hard interventions for infrastructure development and modernization of processing facilities. Programs offered by agencies such as the Ministry of Food Processing Industries (MOFPI), Ministry of Agriculture and Farmers' Welfare, and Ministry of Textiles provide funding for setting up rice mills, cold storage units, textile manufacturing units, and dairy processing plants. Jammu can leverage these grants to enhance the production, processing, and packaging infrastructure for its export products.

#### Development Financial Institutions (DFIs):

Development Financial Institutions (DFIs) such as the National Bank for Agriculture and Rural Development (NABARD) and Small Industries Development Bank of India (SIDBI) provide financial assistance for infrastructure projects in agriculture, food processing, and textile sectors. Jammu can access loans, grants, and technical assistance from DFIs to invest in hard interventions such as setting up modern rice mills, mango processing units, handloom clusters, and dairy processing plants.

#### Export Promotion Councils and Boards:

Export Promotion Councils and Boards associated with agriculture, textiles, and handicrafts sectors offer financial support and guidance to exporters for infrastructure development and market promotion. Jammu can collaborate with these organizations to access funding for establishing common facilities centers, quality testing laboratories, and marketing initiatives aimed at enhancing the competitiveness of its export products.

#### Public-Private Partnerships (PPPs):

Public-Private Partnerships (PPPs) can facilitate investments in infrastructure projects through collaboration between government agencies and private investors. Jammu can explore PPP models for developing agro-processing zones, textile parks, and dairy clusters, wherein both parties share resources, risks, and returns. PPPs can accelerate the implementation of hard interventions required for establishing Jammu as a robust export hub for Basmati Rice, Mango, Phulkari, and Dairy Products.

#### Special Purpose Vehicles (SPVs):

Establishing Special Purpose Vehicles (SPVs) through public-private partnerships (PPPs) can facilitate investments in infrastructure projects related to export promotion. SPVs bring together government agencies, private investors, and local stakeholders to jointly finance, develop, and operate infrastructure assets. Jammu can explore the formation of SPVs for building warehouses, cold storage facilities, and packaging units to support the export value chain for Basmati Rice and Mango etc .

### For soft interventions

As we strategize to position Jammu as an export hub for products like Basmati Rice, Mango, Phulkari, and Dairy Products, it's essential to consider soft interventions that focus on capacity building, skill development, market research, and promotional activities. Following are the source of funds

#### **Government Schemes and Grants:**

Government schemes and grants can provide valuable support for soft interventions aimed at enhancing the competitiveness and market readiness of Jammu's export products. Programs such as the Export Promotion Capital Goods (EPCG) Scheme, Market Access Initiative (MAI), and Trade Infrastructure for Export Scheme (TIES) offer funding for market research, branding, packaging, and promotional activities. By leveraging these schemes, Jammu can access funds to enhance the visibility and market penetration of its export products.

#### **Skill Development Programs:**

Investing in skill development programs for farmers, artisans, and entrepreneurs is crucial for improving the quality, productivity, and value addition in Jammu's export sectors. Funding for skill development initiatives can be sourced from government agencies such as the Ministry of Skill Development and Entrepreneurship (MSDE), National Skill Development Corporation (NSDC), and State Skill Development Missions. These funds can be utilized for training programs, workshops, and capacity building initiatives tailored to the specific needs of each sector.

#### **Export Promotion Councils and Boards:**

Export Promotion Councils and Boards associated with agriculture, handicrafts, and textiles offer financial assistance and guidance to exporters for soft interventions such as market research, product development, and participation in trade fairs and exhibitions. Jammu can collaborate with these organizations to access funding for conducting market studies, developing promotional materials, and organizing buyer-seller meets to showcase its export products to a wider audience.

#### **Industry Associations and Chambers of Commerce:**

Industry associations and chambers of commerce play a vital role in promoting exports and facilitating networking opportunities for businesses. Jammu can seek funding support from these organizations for soft interventions such as organizing training programs, seminars, and trade delegations to enhance the capabilities and competitiveness of exporters in the district.

#### **Corporate Sponsorships and Partnerships:**

Engaging with corporate entities operating in related sectors can provide additional funding opportunities for soft interventions. Companies involved in agriculture, food processing, textiles, and retail may be interested in sponsoring market promotion campaigns, skill development initiatives, and capacity building programs aimed at supporting Jammu's export growth. By fostering partnerships with corporate sponsors, Jammu can leverage additional resources to drive its export agenda forward.

## Action Plan and Strategies

Quantifiable activity/ intervention	Responsible authority	Timeline for implementation
<b>Export Assistance- Increasing the overall exports from the UT</b>		
Sensitization and facilitation in availing Import/ export documents: Majority of the cluster actors though interested and sensitized on exports are unaware of Import-Export Code which is crucial for participating in global trade.	IP cell, DEPC /DGFT/JKTPO	Continuous initiative
Creation of a Single Window System for speedy clearances. The online portal to include various export schemes of the government along with real time information about targeted market, tariff rates, freight rate calculations, documents and quality certifications required and product information. Training planned and organized by DGFT, FIEO and other concern authorities	MSME-JK, DGFT, DEPC, JKTPO	Continuous initiative
Creation of an event calendar comprising of events to be conducted in a Financial Year with a focus on international marketing events. Further, DGFT and FIEO can finalize a target to participate in international events in a year per product category/industry	IP cell, DEPC JKTPO	Continuous initiative
<b>Cost Structure:</b> The DIC office should organize workshops for exporters to apprise them about Foreign Trade Policy benefits viz. Duty Exemption Scheme / Advance Authorization Scheme / Duty Free Import Authorization Scheme. The CONCOR rates are to be made available at regular intervals to the DIC office for updating of the same at the district website. The formation of the Sub-committee comprising the representative of CONCOR and Deputy Commissioner Industries to understand the issue and suggest ways to help Industry.	DEPC/JKTPO  DEPC/JKTPO  DEPC/JKTPO/ FIEO	Long term  Long term  Short term
<b>Sensitization of cluster actors:</b> The individuals of a cluster should be sensitized on the plethora of schemes available for them for maximizing the potential of exports.	IP cell, DEPC JKTPO	Continuous initiative
Common interventions across sectors/ clusters		
<b>E-commerce and financial assistance</b>		
Collaboration with e-commerce companies like Amazon, ebay, Flipkart , GeM,etc.	IP cell, DEPC JKTPO	Short term (6- 24 months)
<b>Quality and Packaging</b>		
MoU with QCI for defining quality standards of the products	IP cell, DEPC JKTPO	Short term
Collaboration with IIP to define cluster-wise packing standards	IP cell, DEPC JKTPO	Short term
<b>Financial support</b>		

Quantifiable activity/ intervention	Responsible authority	Timeline for implementation
Sensitization of banks and bankers to help them understand the niche sectors of MSME and their specific requirements which shall help banks evaluate projects better while lending credit	JKTPO/DEPC and Lead Bank	Short term
Introduction of revolving working capital within the cluster to help MSMEs procure raw materials and undertake production without hinderances	JKTPO/DEPC and Banks	Intermediate( 12 -24 months )
Tie up with the banks/financial institutions (SIDBI, etc.) for better interest rates, enhanced working capital limits etc.	IP cell, DEPC JKTPO	Intermediate
Handholding of MSMEs for increasing their awareness on schemes of state & center and the procedure to apply to avail financial assistance	JKTPO/DEPC	Intermediate
DEPC to act as a focal point for all exporters issues. Deputy Commissioner Industries may be given this responsibility to monitor the cell in consultation with DGFT.	DEPC/DGFT/JKTP O	Long term( 12-36 Months )
<b>Product – Basmati, Dairy Products, Phulkari Mango</b>		
<b>Infrastructure – Institutional support</b>		
<ul style="list-style-type: none"> <li>Establishment of Common Facility Centre with:</li> <li>Marketing center for undertaking Buyer-Seller meeting and marketing events.</li> <li>Packaging Units</li> <li>Collaboration with KVK's, NABARD, APEDA</li> </ul>	DEPC, DGFT and IP Cell,	Long term
Collaboration with ICAR, Indian Centre for Agriculture Research & National Research Centre for selected products for cultivation techniques and varieties of crop/product	IP cell, DEPC JKTPO,	Long term
Increase the usage of the ODOP mart which facilitates the unit holders and artisans to provide information about their products and to sell to large number of customers.	JKFCSCA, IP cell, DEPC JKTPO, DHHK	Short term
Establishment of testing laboratory	IP cell, DEPC JKTPO	Long Term
Setting of modern technology based ETPs	JKTPO/DEPC/ District Administration	Long term
<b>Skill Upgradation</b>		
Collaboration with NSDC for providing job-oriented training for skilling and upskilling.	NSDC/ Directorate of concerned department	Continuous Initiative

**Note:- Long term-12-36 months, Short- 6-24 months Intermediate -12-24 months**

#### **Sensitization and facilitation in availing Import/ export documents**

Most of the cluster participants are uninformed of the import-export code, which is essential for engaging in international trade even though they are interested in and sensitive to exports. Even though some of them are informed, they have trouble applying. Therefore, a camp should be organised at the district level once every three months to assist those interested in trade in understanding the necessary paperwork for import and export and to help them obtain it

Annexure

## Schemes Run By J&K Govt for Artisans

- **Karkhandar Scheme:** - Under this scheme as financial assistance rate of stipend per trainee/per month is Rs. 2000/- (Rs. 1000/- shall be paid in cash through individual bank account and rest of the amount shall be disbursed on the successful completion of probation/practical training session). Logistic charges / Honorarium to Trainer / Karkhandar is Rs. 25000/- per batch in two equal instalments of Rs. 12500/- as logistics charges and Rs. 2000/- per trainee per month.
- **Credit Card Scheme for Artisan and Weavers of Handicrafts and Handloom Sector:** -
- **The Scheme envisages:** -
  1. Access to credit of Rs. 2.00 lakh by the artisans and weavers from the recognized bank.
  2. Interest subsidy of 07% for a period of 5 years from the day of disbursement of loan.
- **Financial Support Scheme for Cooperatives in Handicrafts and Handloom Department:** - Under the scheme the new cooperative registered under the ambit J&K Self-Reliant Cooperative Act, 1999 shall be eligible for financial assistance of Rs.1.00 lakh, to be paid in two yearly equal instalment of Rs. 0.50 lakh each.
- **Schemes run by central Govt**
- **Pradhanmantri Weaver Mudra Scheme** of Gol is being implemented by the Handloom Department to provide adequate and timely credit up to Rs. 2 lakhs to the weavers to meet their credit requirement,
- **The Block Level Clusters are sanctioned by the Ministry of Textiles, Government of India, New Delhi under National Handloom Development Program**
- **Cluster development Program**
  
- **Market Access Initiative (MAI)** Scheme provides assistance to Export Promotion Organizations/Trade Promotion Organizations/National Level Institutions/ Research Institutions/Universities/Laboratories, Exporters etc., for enhancement of exports through accessing new markets or through increasing the share in the existing markets.
- **'Transport and Marketing Assistance (TMA)** for Specified Agriculture Products' provides assistance for the international component of freight, to mitigate the freight disadvantage for the export of agriculture products, and marketing of agricultural products, is under implementation.
- Assistance to the exporters of agricultural products is also available under the Export Promotion Schemes of **Agricultural & Processed Food Products Export Development Authority (APEDA)**, etc
- 'Districts as Export Hubs Initiative' for products and services with export potential have been identified in all districts of the country.
- Trade Infrastructure for Export Scheme (TIES) provides assistance to Central and State Government agencies for creation of appropriate infrastructure for growth of exports.
- Remission of Duties and Taxes on Exported Products (RoDTEP) provides remission of Central, State and Local duties/taxes/levies which are incurred in the process of manufacture and distribution of exported products but are currently not being refunded under any other duty remission scheme.
  
- Active role of EPCs, Commodity Boards and Indian missions abroad towards promoting India's trade, tourism, technology and investment goals has been enhanced.
- **Role of DGFT:-** It can provide details about various Government scheme for export and documentation required for IEC Code registration etc.



- **Dhak Ghar Niryat Kendras** :- They act as facilitation center for E-Commerce exports and are being established in J&K at Srinagar, Udhampur and Srinagar to promote exports of MSMEs. Exporter with IEC code can export any item weighing around 35 kg to point of destination from point of origin. Exporter can easily track their products delivered. Exporters can file postal bill of exports online through the web link created for the purpose and get the export shipments booked at designated DNKs/Post Offices. This will reduce the transit time and manual paper works for the exporters, thus facilitating direct export from the region to the buyers from abroad.
- **ECGC Ltd (ECGC Ltd. (Formerly Export Credit Guarantee Corporation of India Ltd.))**, wholly owned by Government of India, was set up in 1957 with the objective of promoting exports from the country by providing Credit Risk Insurance and related services for exporters.
- **Federation of Indian Export Organizations (FIEO)**:- Apex body of the Government recognized Export Promotion Councils, Commodity Boards and Export Development Authorities in India set up in 1965 . FIEO provides the crucial interface between international trading community of India and the Central and State Governments, financial institutions, ports, railways, surface transport and all engaged in export trade facilitation. Other schemes include.
- **SFURTI Scheme**:- Scheme of Fund for Regeneration of Traditional Industries (SFURTI) is an initiative by Ministry of MSME to promote Cluster development. Khadi and Village Industries Commission (KVIC) is the nodal Agency for promotion of Cluster development for Khadi.
- Micro and Small Enterprises - Cluster Development Programme (MSE-CDP)
- National Handloom Development Programme (NHDP)
- Financial Assistance to Industrial Cooperatives
- PMEGP and REGP
- PM Vishvakarma etc



GOVERNMENT OF JAMMU AND KASHMIR,  
GENERAL ADMINISTRATION DEPARTMENT,  
Civil Secretariat, J&K.

Subject:- Re-constitution of UT Level Export Promotion Committee and District Level Export Promotion Committee(s)-reg.

Ref: U.O. No. IC-GEN/245/2022-01 received from Industries & Commerce Department.

Government Order No: 879-JK(GAD) of 2023  
Dated:21-07-2023

In partial modification of Government Order No. 677-JK(GAD) of 2020 dated 25.06.2020, sanction is hereby accorded to re-constitution of the UT Level Export Promotion Committee and District Level Export Promotion Committee(s), comprising the following, as per the New Foreign Trade Policy 2023-28, to boost exports from J&K:-

**UT Level Export Promotion Committee:-**

1	Chief Secretary	Chairperson
2	Administrative Secretary, Agriculture Production Department.	Member
3	Administrative Secretary, Finance Department.	Member
4	Administrative Secretary, Industries and Commerce Department.	Member
5	Divisional Commissioner, Kashmir.	Member
6	Administrative Secretary, Planning, Development and Monitoring Department.	Member
7	Divisional Commissioner, Jammu.	Member
8	Administrative Secretary, Tourism Department.	Member
9	Deputy Commissioners (All)	Members
10	Managing Director, JKTPO.	Convener Cum Member Secretary
11	Regional Authority of DGFT	Co- Convener
12	Representatives of major Export Promotion Council viz. APEDA, WWPEC, HEPC, CEPC, FIEO, or any other similar organization recommended by the Committee.	Members
13	Representatives of local trade bodies of J&K viz Jammu Chamber of Commerce/Kashmir Chamber of Commerce or any other as advised by the Committee.	Members

**District Level Export Promotion Committee(s):-**

1	Deputy Commissioner	Chairperson
2	Designated DGFT Regional Authority	Co-Chair
3	GM-District Industries Center (DIC)	Convener
4	Representative from JKTPO	Member

5	Nominated member from the Government (Industries and Commerce Department)	Member
6	Lead Bank Manager	Member
7	Representative-Department of MSME, Government of India.	Member
8	Representative- Sector Specific Export Promotion Council	Member
9	Representative-Quality & Standards Implementation body	Member
10	Representative from District Trade/Commerce Associations	Member
11	Sector Specific Ministry in Government of India (Agriculture, Fisheries, Plantation Boards etc)	Member
12	Sector Specific Ministry of the State Government	Member
13.	Sectoral Agencies Specific to Product identified in each District (NABARD etc.)	Member
14.	Other State Government Representative (As per requirement)	

The terms of reference of these Committees shall remain same as notified vide Government Order No. 677-JK(GAD) of 2020 dated 25.06.2020.

By order of Government of Jammu and Kashmir.

Sd/-  
(Sanjeev Verma) IAS  
Commissioner/Secretary to the Government

No. GAD-ADMOIV/194/2022-09-GAD

Dated: 21.07.2023

Copy to the:-

1. Administrative Secretary, Agriculture Production Department.
2. Principal Secretary to the Government, Finance Department.
3. Principal Secretary to the Lieutenant Governor, J&K.
4. Joint Secretary (J&K), Ministry of Home Affairs, Government of India.
5. Commissioner/Secretary to Government, Industries & Commerce Department. The Industries and Commerce Department shall ensure that the first meeting of the Committee(s) is convened at an early date.
6. Divisional Commissioner, Kashmir.
7. Secretary to the Government, Planning, Development & Monitoring Department.
8. Divisional Commissioner, Jammu.
9. Secretary to Government, Tourism Department.
10. All Deputy Commissioner(s).
11. Managing Director, JKTPD.
12. Director, Archives, Archaeology & Museums.
13. Private Secretary to the Chief Secretary, J&K.
14. Private Secretary to Commissioner/ Secretary to the Government, GAD.
15. Government Order/Stock file/Website, GAD. Hindi and Urdu version shall follow.

  
(Mohit Raina) JKAS  
Under Secretary to the Government



JAMMU & KASHMIR TRADE PROMOTION ORGANIZATION  
(A Government of J&K Undertaking)

**Districts**  
as Export Hubs



## Jammu and Kashmir Trade Promotion Organization

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Jammu and Kashmir 180012  
Phone-[0191 246 6988](tel:01912466988)

3rd floor, State Cable Car Corporation Complex,  
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Srinagar, Jammu and Kashmir 190017  
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