



Boosting India's Agri-Exports to selected CIS Countries

Russia, Kazakhstan, Uzbekistan





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BOOSTING INDIA'S AGRI EXPORTS TO SELECTED CIS COUNTRIES: RUSSIA, KAZAKHSTAN, UZBEKISTAN

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ABBREVIATIONS

AAGR	Average Annual Growth Rate
ADB	Asian Development Bank
AI	Avian Influenza
APEDA	Agricultural and Processed Food Products Export Development Authority
BRI	Belt and Road Initiative
BRICS	Brazil, Russia, India, China, South Africa
BSM	Buyer-Seller Meet
CAREC	Central Asia Regional Economic Cooperation
CICA	Conference on Interaction and Confidence-Building Measures in Asia
CIS	Commonwealth of Independent States
CISSAT	CIS Stat
DAHD	Department of Animal Husbandry and Dairying
DGCIS	Directorate General of Commercial Intelligence and Statistics
DGFT	Directorate General of Foreign Trade
EAEU	Eurasian Economic Union
EMC	Eastern Maritime Corridor
EU	European Union
FAO	Food and Agriculture Organization (of the United Nations)
FAOSTAT	FAO Statistical Database
FMD	Foot and Mouth Disease
FPO	Farmer Producer Organisation

FTA	Free Trade Agreement
GAP	Good Agricultural Practices
GDP	Gross Domestic Product
GI	Geographical Indication
HS	Harmonized System (for commodity classification)
HSN	Harmonized System of Nomenclature
ICAR	Indian Council of Agricultural Research
ICRIER	Indian Council for Research on International Economic Relations
IGC	Inter-Governmental Commissions
INSTC	International North–South Transport Corridor
IT	Information Technology
ITC	ITC Trade Map
JWG	Joint Working Group
KII	Key Informant Interview
LCL	Less than Container Load
MEA	Ministry of External Affairs
MFN	Most Favoured Nation
MT	Metric Ton
NADCP	National Animal Disease Control Programme
NSR	Northern Sea Route
PPP	Public-Private Partnership
PTA	Preferential Trade Agreement
QR	Quantitative Restriction
RBI	Reserve Bank of India
RELOS	Reciprocal Exchange of Logistics Support

RFG	Republican Fumigation Group
SCO	Shanghai Cooperation Organisation
SPS	Sanitary and Phytosanitary (measures)
SRVA	Special Rupee Vostro Accounts
TE	Triennium Ending
TEU	Twenty-foot Equivalent Unit
TITR	Trans-Caspian International Transport Route
UAE	United Arab Emirates
UK	United Kingdom
UN	United Nations
USA	United States of America
USD	United States Dollar
USDA	United States Department of Agriculture
UVP	Unit Value Price
VTB	Vneshtorgbank (Foreign Trade Bank of Russia)
WDI	World Development Indicators

FOREWORD

Ongoing geopolitical realignments, including the Russia-Ukraine war and resulting Western sanctions, have reshaped global trade flows. Adding to this, the US recently imposed punitive tariffs on Indian goods, largely due to India's discounted oil purchases from Russia. This tariff intensifies the challenges for Indian exporters to traditional markets, compelling India to pivot towards alternative markets like Russia and the broader CIS region. Despite India's longstanding strategic and cultural ties with the CIS countries, the region remains largely untapped for Indian agricultural exports, presenting a timely opportunity amid shifting global trade dynamics.

Russia alone imported over USD 24 billion worth of agri-food products in 2024, with sourcing patterns shifting away from traditional partners in the European Union and the United States. This has led to increased engagement with emerging suppliers in Asia, Latin America, and the Middle East. India, with its expanding agri-export base of around USD 50 billion annually, led by rice, spices, processed foods, and fresh produce has a strategic window to scale up its footprint in the CIS. However, India's current agricultural exports to the CIS account for just 1 per cent of its total agri-exports, even as its import dependence on the region, especially for fertilizers and crude oil, has steadily increased. This asymmetry underscores the need for a more focused and strategic engagement. The recent visit of President Putin to India has further strengthened this momentum, with new agreements and renewed emphasis on trade corridors, including the International North-South Transport Corridor (INSTC), the Chennai-Vladivostok Corridor, and the Northern Sea Route. These initiatives are central to the shared objective of achieving USD 100 billion in bilateral trade by 2030.

It is in this context that the present study, jointly undertaken by ICRIER and APEDA assumes relevance. The report combines ICRIER's expertise in evidence-based policy research with APEDA's operational experience in agri-export promotion to offer a comprehensive assessment of India's export potential in the CIS and puts forth actionable strategies for market entry and expansion across key selected CIS countries. The report also examines how the emerging trade ecosystem fuelled by new logistical corridors, rising trade in local currencies, and discussions around a potential Free Trade Agreement with the Eurasian Economic Union, can be leveraged to boost India's agricultural exports to the region.

We hope this report proves useful to policymakers and stakeholders. By aligning trade strategy with broader diplomatic and economic objectives, India has the opportunity to

emerge as a reliable and long-term agri-export partner for the region and our goal is to contribute to that vision.

ABHISHEK DEV

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PREFACE

India's engagement with the Commonwealth of Independent States (CIS) has historically been shaped by strong diplomatic ties, cultural exchanges, and cooperation in defence, education, and energy. Yet, one of the most underdeveloped areas of this relationship has been agricultural trade. Despite India's growing strength in agri-exports and the CIS region's increasing reliance on food imports, India's share in CIS agricultural markets remains modest and fragmented. The region, comprising Russia, Kazakhstan, Uzbekistan, and others, presents a timely and strategic opportunity for India to expand its agricultural footprint, especially as global trade dynamics undergo significant transformation in the wake of geopolitical disruptions and shifting food security priorities.

Today, the CIS countries are undergoing rapid demographic and economic transitions. Rising urbanisation, evolving consumption patterns, and gaps in domestic agricultural productivity are contributing to a growing demand for food imports, especially fruits, processed foods, meat products, beverages, and condiments. While India possesses a natural comparative advantage in supplying many of these commodities, several challenges have limited its market presence in the region. These include logistics bottlenecks, tariff and non-tariff barriers, gaps in regulatory alignment, and lack of dedicated trade facilitation infrastructure. Moreover, there is limited analytical work that maps India's agricultural trade with the CIS, or offers a strategic blueprint for scaling up this engagement.

This report seeks to fill that critical gap. It comes at a time when India is actively seeking to diversify its export markets, reduce trade imbalances, and strengthen regional connectivity through corridors such as the International North-South Transport Corridor (INSTC), Chennai-Vladivostok maritime route, and the Eastern Maritime Corridor. It also aligns with recent efforts by APEDA to identify new destinations for India's value-added and processed agricultural products.

The objectives of this study are threefold. First, to assess the existing trade flows between India and key CIS countries with a focus on agriculture and food products. Second, to identify specific commodities that offer high potential for export growth, based on demand patterns, India's global competitiveness, and trade barriers. Third, to develop a phased and actionable strategy; short-term, medium-term, and long-term for enhancing India's agri-exports to the region.

The study uses a combination of primary and secondary sources. Detailed trade data from international and Indian databases such as UN COMTRADE, ITC Trade Map, FAOSTAT, and DGCIS, were analysed alongside field insights obtained through consultations with exporters, government officials, logistics providers, and trade experts. Special attention was given to understanding port logistics, SPS regulations, currency mechanisms, and the role of diplomatic and commercial channels in supporting trade with Russia, Kazakhstan, and Uzbekistan, the three focus countries of this study.

The report is structured into seven sections. Section 1 introduces the background, objectives, and methodology. Section 2 presents a socio-economic and agri-market overview of the selected CIS countries. Section 3 explores India's current trade relations with these countries. Section 4 identifies potential commodities with significant export scope. Section 5 outlines key challenges that hinder trade expansion, while Section 6 highlights enabling factors and recent developments that support growth. Section 7 offers a comprehensive strategy framework with specific policy implications.

As India looks to rebalance its trade relationships and deepen economic linkages with the extended neighbourhood, the CIS region stands out as a frontier of both opportunity and strategic relevance. Tapping into this potential will not only enhance India's export competitiveness but also reinforce its role as a trusted agri-partner in Eurasia. It is hoped that the insights presented in this report will guide policymakers, exporters, logistics players, and trade promotion agencies in building a robust and future-ready agri-trade partnership with the CIS.

AUTHORS

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EXECUTIVE SUMMARY

INTRODUCTION AND BACKGROUND

The Commonwealth of Independent States (CIS), a strategically located region encompassing Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, and Uzbekistan, represents a vast but underutilized opportunity for India's agricultural exports. Despite historical ties, shared diplomatic frameworks, and complementarity in agri-food needs, India's agricultural trade with the CIS remains marginal accounting for just 1.28 per cent of its total exports in 2023–24. In contrast, CIS imports from India were valued at USD 5.62 billion, while India's imports from the region surged to USD 62.7 billion, resulting in a staggering trade deficit of over USD 57 billion.

With Western sanctions isolating Russia from traditional trade partners, ongoing disruptions in global agri-supply chains, and rising food demand in Central Asia, India has a timely opportunity to reposition itself as a credible, long-term supplier of agricultural and processed food products to the region. This report, developed under the APEDA-ICRIER Knowledge Partnership, draws from trade data, policy analysis, and field consultations with exporters and officials to offer a roadmap for unlocking India's agri-export potential to three key CIS markets Russia, Kazakhstan, and Uzbekistan.

INDIA-CIS TRADE LANDSCAPE: OPPORTUNITIES AND MISMATCHES

CIS countries collectively represent over 248 million consumers and span diverse agro-climatic zones, economic profiles, and food systems. While Russia leads the bloc in GDP and purchasing power, Kazakhstan and Uzbekistan show rapid population growth and a rising demand for imported agri-products. At the same time, these nations are grappling with shrinking rural workforces, climate-linked crop vulnerabilities, and low agri-mechanization, making them increasingly reliant on food imports.

India's strength in tropical and sub-tropical agriculture, coupled with its cost-competitive processed foods and growing logistical connectivity (e.g., the International North-South Transport Corridor, Chennai-Vladivostok route, and the Eastern Maritime Corridor), can address critical CIS food system needs. Yet, India's agri-trade footprint in the region remains fragmented, with major exports limited to a few categories such as bovine meat, tea, grapes, groundnut, and gherkins. Many high-potential products like bananas, mangoes, potatoes,

juices, eggs, or value-added cereals, remain either underexploited or absent from CIS markets due to tariff disadvantages, phytosanitary restrictions, or weak market access infrastructure.

IDENTIFYING EXPORT-READY COMMODITIES AND MARKETS

This report identifies over 15 high-potential commodities based on CIS import trends, India's export capabilities, and strategic alignment with APEDA's priority sectors. These include:

- ✚ **ANIMAL PRODUCTS:** Frozen bovine meat, edible offals, eggs, and dairy products (ghee, paneer)
- ✚ **FRUITS AND VEGETABLES:** Potatoes, bananas, grapes, mangoes, oranges, pomegranates, gherkins
- ✚ **BEVERAGES:** Indian whiskey and juices
- ✚ **SNACKS AND CEREALS:** Sweet biscuits, bread and pastries, cereal preparations, and groundnuts
- ✚ **PICKLED AND PRESERVED PRODUCTS:** Gherkins

India already dominates Russia's import of gherkins and holds a strong position in Uzbekistan's groundnut trade. However, major gaps persist in premium processed foods, tropical fruits, and beverages where India's presence is negligible, and competitors from South America, Southeast Asia, and the EU have historically held ground.

BARRIERS TO SCALING INDIA'S AGRI EXPORTS

Multiple structural and procedural challenges continue to hinder India's agri-export expansion in CIS countries:

- ✚ **TARIFF AND SPS BARRIERS:** Products like bovine meat and fruits face high MFN tariffs (up to 15-39 per cent) and require certification aligned with Eurasian Economic Union (EAEU) standards.
- ✚ **VETERINARY AND PHYTOSANITARY RESTRICTIONS:** Limited approvals of Indian processing units (e.g., for meat) and pest-related concerns limit access.
- ✚ **LOGISTICAL COMPLEXITY:** High inland freight, lack of multimodal connectivity to landlocked Central Asian states, and reliance on circuitous routes raise transaction costs.
- ✚ **AWARENESS AND OUTREACH:** Indian exporters often lack CIS-specific market intelligence, buyer linkages, and familiarity with local regulations, labelling, and packaging preferences.
- ✚ **ABSENCE OF BRANDING AND RETAIL VISIBILITY:** Unlike Western or Turkish products, Indian food items are often unbranded and unstandardized in CIS shelves, affecting consumer recall.

STRATEGIES FOR UNLOCKING EXPORT POTENTIAL

To boost India's agri-export presence in the selected CIS countries, a phased strategy is recommended, combining short-term trade facilitation with long-term ecosystem development:

FOCUSSED STRATEGIES

- i. Strengthen Compliance with Russian Food Safety and Animal Health Standards**
 - Establish India-Russia JWG: Create a joint working group with Rosselkhoznadzor and Indian agencies to address SPS and veterinary certification issues.
 - Expand pest-free zones and veterinary recognition: Strengthen pest and disease surveillance systems across relevant production clusters and pursue mutual recognition of disease-free zones with key importing partners to facilitate smoother market access.

- ii. Pursue a Free Trade Agreement (FTA) for Agricultural Products**
 - Negotiate with EAEU & SCO: Accelerate India-EAEU FTA talks and use BRICS/SCO platforms to push trade facilitation.
 - Prioritize tariff reduction: Identify key tariff lines (e.g., whiskey, food preparations, biscuits) and negotiate bilateral reductions or quotas.

- iii. Enhance Branding and Marketing Strategies**
 - Run branding campaigns: Launch digital/offline promotions, food festivals, and influencer marketing in major CIS cities with embassy and APEDA support.
 - Position niche products: Promote healthy, millet-based biscuits and premium RTE foods as ethnic and wellness-focused offerings in urban supermarkets.

OTHER STRATEGIES

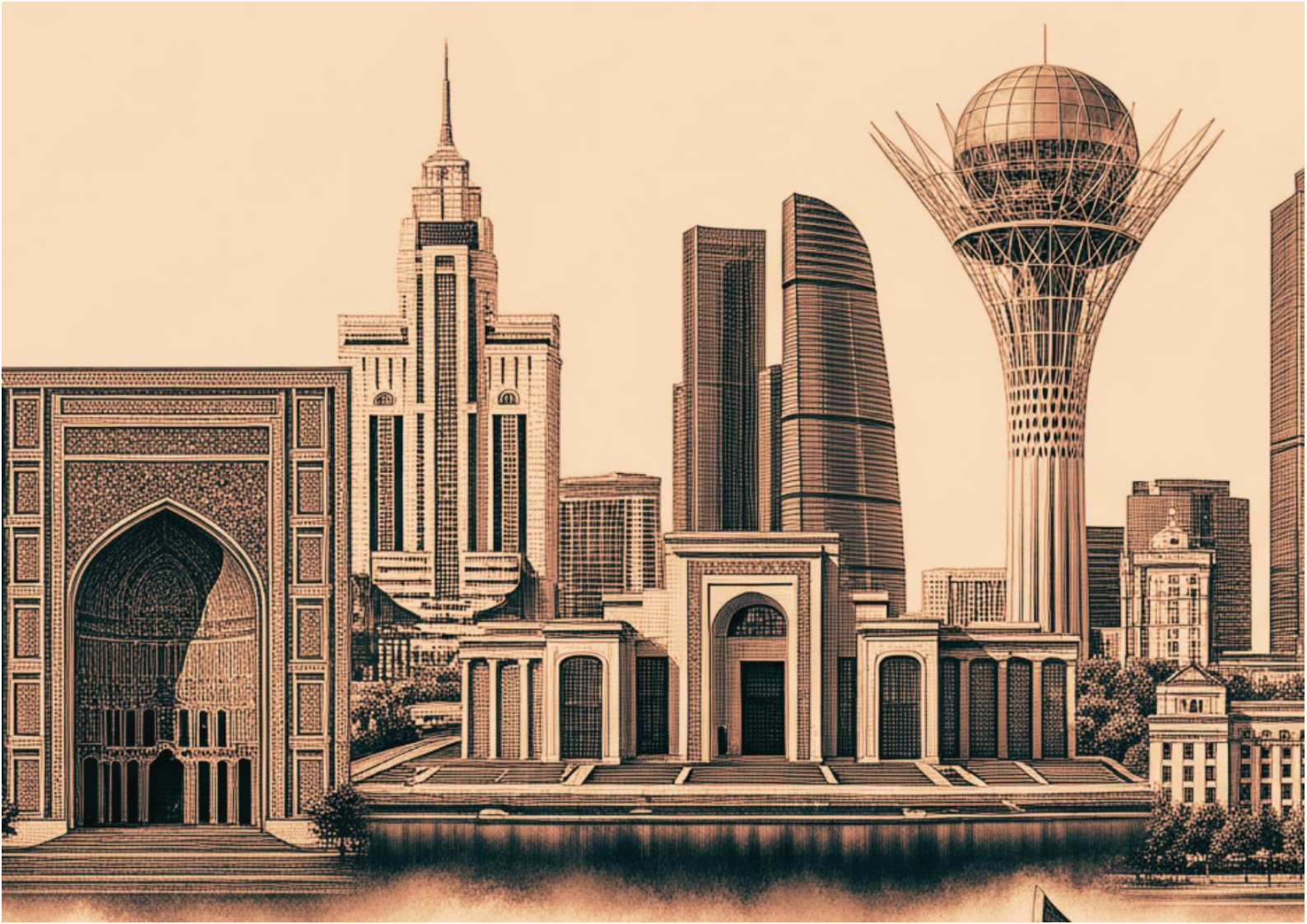
- i. Develop Export Zones for Quality Assurance**
 - Create commodity-specific zones: Establish specialized agri-export hubs (e.g., potatoes in Banaskantha, eggs in Namakkal), linked to CIS via Chabahar and INSTC.
 - Strengthen cluster infrastructure: Build farm-level quality logging systems, cold rooms, and grading centres; promote contract farming for uniform pesticide control.

ii. Strengthen Agricultural Value Chains

- Farmer training & input R&D: Invest in training on pesticide use, packaging, and introduce aflatoxin-free and climate-resilient seed varieties.
- Develop post-harvest infrastructure: Build cold rooms for grapes, moisture-proof sacks for potatoes, and aflatoxin labs for groundnuts; expand blast freezing units for eggs and meat.

iii. Enhance Trade Connectivity and Reduce Logistics Costs

- Leverage INSTC and new maritime corridors: Prioritize INSTC and Eastern Maritime Corridor (Chennai-Vladivostok) for faster, cost-effective cargo movement.
- Tailor logistics to commodity needs: Use reefer containers for perishables, LCL shipments for packaged foods, and cross-border e-commerce to connect with smaller buyers.



Boosting India's Agri Exports to Selected

CIS Countries

RUSSIA, KAZAKHSTAN, UZBEKISTAN

1

INTRODUCTION

1.1 BACKGROUND OF THE STUDY

CIS COUNTRIES AND ITS ECONOMIC DIVERSITY

The Commonwealth of Independent States (CIS) as a regional organization was formed after the dissolution of the Soviet Union in 1991 with the aim of fostering economic, political, and cultural cooperation. The current full members include Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, and Uzbekistan. Turkmenistan is an associate member, while Ukraine (withdrawn in 2018 but historically significant) and Georgia (Withdrawn in 2008) are former members (CISSTAT, n.d.). With shared deep historical, cultural, and economic ties, CIS countries make a unique geopolitical region.

The region spans a vast landmass of approximately 21.4 million square km, accounting for around 15 per cent of the world's total land area. Among its members, Russia dominates in terms of geographic size, covering more than 17 million square km, about 80 per cent of the CIS total. Other sizable countries include Kazakhstan, the world's ninth-largest country by area, with 2.7 million square km, and Uzbekistan, covering around 448,000 square km (CISSTAT, 2025). As of 2023, the total population of the CIS region stands at approximately 248 million, which is about 4 per cent of the global population. The most populous country is Russia, with over 145 million people. It is followed by Uzbekistan, which has a population of 36 million, and Kazakhstan, with around 20 million. While Russia's population is projected to decline to 136 million by 2050 (with an annual growth rate of -0.29 per cent in 2023), countries like Uzbekistan (2.02 per cent), Tajikistan (2.02 per cent), and Kyrgyzstan (1.77 per cent) are experiencing rapid demographic growth (WDI, 2025).

In terms of economic output, the CIS region contributes around 4.8 per cent of global Gross Domestic Product (GDP), with significant disparities between member states (CISSTAT, 2025). Russia leads with a GDP of approximately USD 2.2 trillion (2024), followed by Kazakhstan (USD 263 billion) and Uzbekistan (USD 102 billion). In contrast, smaller economies like Armenia (USD 24 billion), Kyrgyzstan (USD 14 billion), and Moldova (USD 17 billion) contribute more modestly. GDP per capita also varies widely with Russia having the highest GDP per capita at USD 13,817, USD 44,120 in PPP terms. In contrast, countries like Tajikistan (USD 1,161 GDP per capita, USD 4,964 PPP) and Kyrgyzstan (USD 1,970 GDP per capita, USD 7,106 PPP) smaller and landlocked Central Asian economies have lower per capita incomes (CISSTAT, 2025).

The CIS region as a whole is immensely rich in natural resources. It possesses some of the largest proven reserves of natural gas, petroleum, coal, iron and manganese ores, and a wide range of non-ferrous metals and other industrial minerals (CISSTAT, n.d.). These endowments have significant implications for the global energy market and for the geopolitical importance of the region.

AGRICULTURE SCENARIO IN THE CIS

CIS region is endowed with vast arable land, favourable climatic conditions, and abundant water resources, making it a global player in the production of grains, fruits, vegetables, and livestock. However, the role of agricultural sector in different CIS countries is highly diverse. While in Russia (3.7 per cent) and Kazakhstan (4.1 per cent), agriculture accounts for less than 5 per cent in gross value added; in Uzbekistan (21.6 per cent), it contributes to more than 20 per cent. Similarly, share of employment in agriculture varies between 5.5 per cent in Russia, 11.9 per cent in Kazakhstan and 23.9 per cent in Uzbekistan (CISSTAT, 2025).

The region is a major global food producer, with Russia leading wheat exports, Kazakhstan as key grain suppliers, and Uzbekistan excelling in cotton and fruit production. However, labour shortages, cost constraint and adverse weather in Russia are pushing farmers toward alternative crops like peas, lentils, and sunflowers, highlighting the sector's varied dynamics across the region.

Several countries in the CIS face challenges such as outdated farming techniques, limited mechanization, and a reliance on imports for certain agricultural products. Countries such as Uzbekistan and Kazakhstan, are net importers of agricultural products, indicating a growing demand for quality food imports. On the other hand, countries like Russia are major exporters of grains and other agricultural commodities, though their import demand for processed foods and niche agricultural products remains substantial.

INDIA'S RELATIONS WITH CIS

India has historically maintained cordial and multifaceted relationships with CIS countries, anchored in shared historical connections and mutual interests in economic growth, energy security, and regional stability. The CIS region is a priority for India's "Connect Central Asia" policy, which emphasizes enhancing trade, energy partnerships, and cultural exchange. India has strengthened ties with individual CIS countries through various institutional mechanisms like Inter-Governmental Commissions (IGCs) and Joint Working Groups (JWSs) on Trade and Investment.

India's trade with the CIS region has witnessed significant fluctuations over the years, with imports consistently outweighing exports, leading to a persistent trade deficit. In 2023-24, India's exports to the CIS region stood at USD 5.62 billion, accounting for a modest 1.28 per cent of its total exports compared to other regions. Indian imports from the region amounted

to USD 62.70 billion, contributing 9.25 per cent to total imports. The trade balance remained heavily negative at (-) USD 57.08 billion. Although total trade with the CIS region grew by 29.62 per cent compared to the previous year, this was largely driven by a surge in imports rather than export expansion. Key export commodities to the CIS include engineering goods, pharmaceuticals, chemicals, and marine products, whereas India's major imports from the region consist of mineral fuels & oils, fertilizers, animal or vegetable fats, iron & steel etc. Notably, the sharp rise in imports from the CIS in recent years, particularly since 2022-23, suggests a growing dependence on the region for energy and raw materials, which has further widened the trade deficit (MoC&I, 2024a).

In terms of agricultural trade, India exports products such as marine products, buffalo meat, tea tobacco products, coffee, rice, spices, fruits, and vegetables to CIS nations. Despite this, there remains significant untapped potential in the agri-trade sector. With increasing populations and economic growth, CIS countries are witnessing rising demand for diverse and high-quality food products. Indian agricultural exports, renowned for their variety and affordability, are well-positioned to meet this demand. India's strengths in processed foods, grains, spices, and tropical fruits complement the agricultural needs of CIS countries, which often focus on temperate crops like wheat and barley.

GEOPOLITICAL TENSIONS AND OPPORTUNITY FOR INDIA

The Russia-Ukraine conflict and the subsequent wave of Western sanctions on Russia have caused significant disruptions to global supply chains, particularly in the agricultural sector. These geopolitical shifts have not only exposed the vulnerabilities of existing trade routes but also opened new avenues for countries like India to reposition themselves in evolving global markets.

Amid this changing landscape, the Commonwealth of Independent States (CIS) region presents a timely and strategic opportunity for India to expand its agricultural exports. This study delves into the current state and future potential of India-CIS agricultural trade, highlighting the need for a focused strategy to deepen economic engagement. By understanding regional agri-market dynamics, trade patterns, and India's comparative advantages, the study aims to offer actionable insights for policymakers, businesses, and stakeholders committed to enhancing India's presence in this vital geopolitical space.

1.2 OBJECTIVES AND SCOPE OF THE STUDY

Given the growing demand for diverse agricultural and processed food products in the CIS region, and the global supply chain disruptions, this study aims to assess India's current trade position and explore opportunities for expansion. The primary objective of this study is to identify and analyse the potential for India to enhance its agricultural exports to selected CIS

(Commonwealth of Independent States) countries, namely Russia, Kazakhstan, and Uzbekistan.

The study will also analyse various challenges including tariff and non-tariff barriers, SPS (Sanitary and Phytosanitary) issues, logistical hurdles, and currency-related concerns that hinder trade expansion. The study will further assess the enablers in boosting agricultural exports. Based on the analysis, the study will propose targeted policy recommendations and trade strategies to strengthen India's export presence in the CIS region.

1.3 METHODOLOGICAL FRAMEWORK

DATA SOURCES

This study uses both primary and secondary data sources to analyse India's agricultural export potential to CIS countries. While global data was gathered from international databases such as UN COMTRADE, ITC Trademap, FAOSTAT, World Bank Development Report, and country specific statistics for the CIS countries, national data was collected from reports and databases of DGFT, Ministry of Agriculture and Farmer's Welfare. Additional insights were drawn from academic articles, published reports, and online sources to ensure a comprehensive analysis.

Key information interviews (KIIs) were held with exporters, government officials, and other stakeholders to identify challenges and opportunities for boosting agri exports to CIS countries. These Stakeholders were engaged through semi-structured interviews and discussions with APEDA and government officials. These consultations aimed to identify challenges, opportunities, and infrastructure gaps in the export value chain.

RATIONALE FOR COUNTRY SELECTION FROM CIS

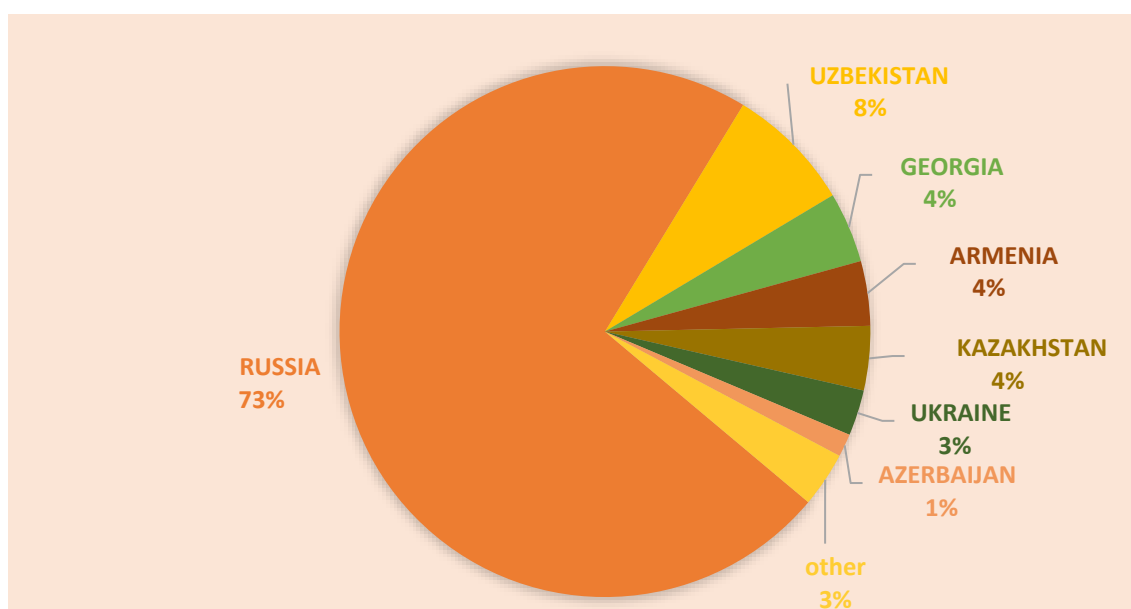
This section outlines the rationale behind the selection of countries for a detailed study on enhancing India's agricultural exports to CIS countries. The selection is based on key demographic and economic indicators that reflect both demand and purchasing capacity of the countries. Demographic factors, such as total population and population growth rate, help estimate the present and future demand for food and agricultural products. Meanwhile, economic indicators such as GDP and GDP per capita (in purchasing power parity), provide insights into a country's ability to import agricultural commodities. Further, net imports highlight the potential market for Indian agricultural products, while foreign reserves indicate a country's economic stability and capacity to sustain imports.

Based on an assessment of these indicators (**TABLE 1**), Russia, Kazakhstan, and Uzbekistan emerged as the most promising markets for expanding India's agricultural exports. These three countries have the largest populations in the CIS region. Russia, with a population of 144 million, surpasses the combined total of the other CIS countries. Uzbekistan and

Kazakhstan, with 36 million and 20 million people, respectively, also have rapidly growing populations. Uzbekistan’s population growth rate stands at 2.02 per cent, while Kazakhstan’s is 1.46 per cent, indicating expanding consumer markets in these countries.

From an economic perspective, these three countries also lead the CIS region. Russia has the highest GDP at USD 2021 billion, followed by Kazakhstan at USD 263 billion, and Uzbekistan at USD 102 billion. In terms of GDP per capita, Kazakhstan ranks second after Russia, both in USD and PPP terms, signifying strong purchasing power. This economic strength underlines their potential as major markets for agri-imports. The financial stability of these nations is supported by their substantial reserves. Russia holds USD 597 billion in total reserves (including gold), the highest in the CIS. Kazakhstan and Uzbekistan also maintain strong reserves of USD 36 billion and USD 35 billion, respectively. These figures underscore their ability to sustain and increase imports (WDI, 2025).

FIGURE 1: INDIA'S EXPORTS TO CIS COUNTRIES (2024-25)

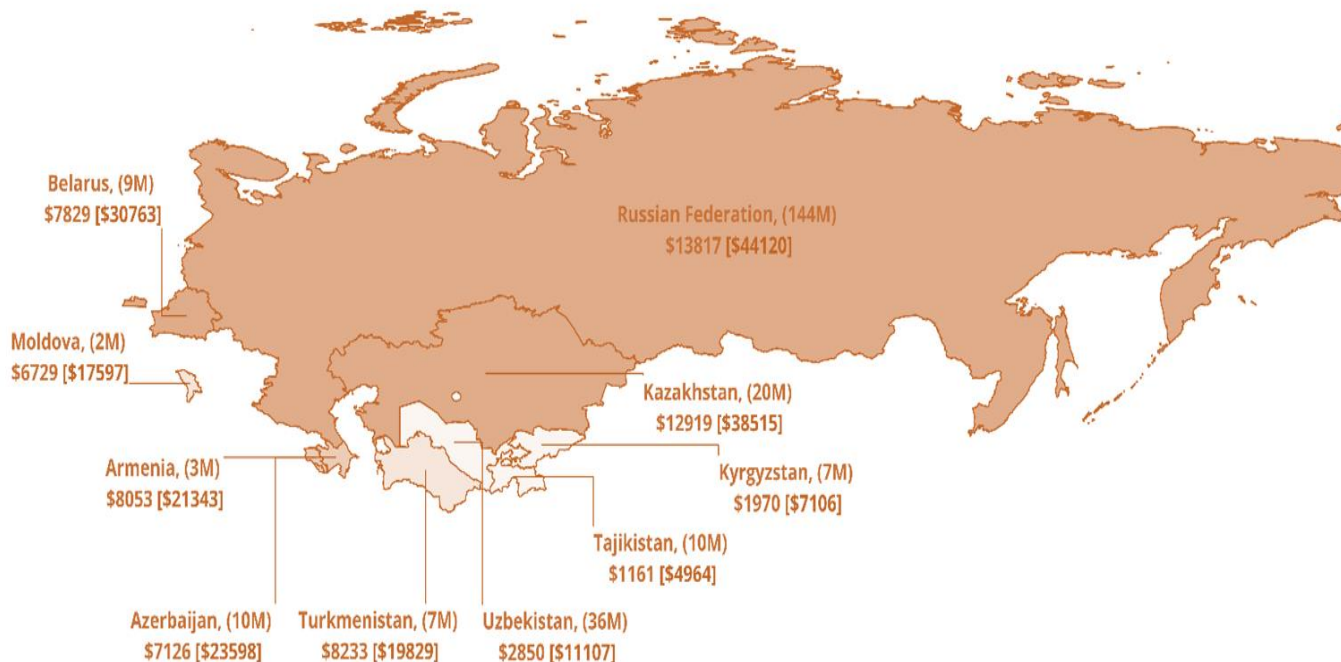


Source: (MoC&I, 2024a)

Between April 2024 to March 2025, India's total exports to CIS countries totalled USD 6.7 billion, with the largest shares contributed by Russia (USD 4880 million), followed by Uzbekistan (USD 517 million) and Kazakhstan (USD 262 million). These three countries together accounted for over 84 per cent of India's exports to the CIS region (WDI, 2025). Both Kazakhstan and Uzbekistan are net importers of agricultural commodities, with trade deficits of USD -0.73 billion and USD -2 billion, respectively. This dependency on imports presents an opportunity for India to expand its agri-export in these markets.

TABLE 1: DEMOGRAPHIC AND ECONOMIC INDICATORS OF CIS COUNTRIES

S. No	Variable (Year 2023)	RUS	ARM	AZE	BLR	KAZ	KGZ	MDA	TJK	TKM	UZB
1	Population in 2023 (Millions)	144	3	10	9	20	7	2	10	7	36
2	Projected Population in 2050 (Millions)	136	2	11	7	27	10	2	16	10	52
3	Annual Population Growth in 2023 (%)	-0.29%	0.73%	0.12%	-0.54%	1.46%	1.77%	-2.84%	2.02%	1.84%	2.02%
4	Current GDP (USD Billion)	2021	24	72	72	263	14	17	12	61	102
5	Current GDP per capita (USD)	13817	8053	7126	7829	12919	1970	6729	1161	8233	2850
6	Current GDP per capita PPP (USD)	44120	21343	23598	30763	38515	7106	17597	4964	19829	11107
7	Conversion Factor per capita GDP in USD and PPP	3.2	2.7	3.3	3.9	3.0	3.6	2.6	4.3	2.4	3.9
8	Net Exports of Agri products (USD Billion)	14	-0.16	-1.49	2.2	-0.73	-0.75	0.45	-0.89	-0.50	-2.0
9	Total Reserves (Including gold) (USD Billion)	597	4	14	8	36	3	5	4	N/A	35
10	Total imports (USD billion)	208	12	17	49	61	12	8.7	5.7	5.3	37
11	Import Capacity (9/10)	2.87	0.30	0.81	0.17	0.59	0.27	0.63	0.67	N/A	0.93
12	Total reserves in months of imports	16.3	2.7	5.5	1.9	4.2	3.1	6.1	8.3	N/A	8.8



Source: Authors' compilation using data from WDI World Bank

RATIONALE FOR COMMODITY SELECTION FOR RUSSIA, UZBEKISTAN & KAZAKHSTAN

In order to identify agricultural commodities with strong export potential from India to Russia, Kazakhstan and Uzbekistan countries, the top 50 imported agricultural products for each of the three selected Russia, Uzbekistan and Kazakhstan were analysed (Annex 1-4). By comparing the total imports of these commodities in Russia, Uzbekistan and Kazakhstan with India's export share, seven key commodities were selected based on their export volume from India and APEDA's strategic interest. The details of the selected commodities for analysis are presented in Annex 5.

Additionally, few other commodities from the list of selected commodities covered under the APEDA-ICRIER Knowledge Partnership project were examined. These commodities include banana, mango, potato, cashew nut, makhana, pomegranate, pickles and sauces, pineapple, cereal preparations (biscuits, papad, pasta), oranges and its products, juices and pulps, chilli, grapes, okra, baby corn honey, milk products, table eggs, and groundnut (Annex 6).

Based on India's exports and Russia, Uzbekistan and Kazakhstan demand, the commodities listed above have been categorized into three groups:

Established commodities: These are commodities where India already exports in significant volumes or holds a notable share of the CIS country's import market and can aim to scale up trade. For example, India dominates Russia's imports of processed gherkins, grapes and supplies a majority of Uzbekistan's groundnut imports.

Untapped commodities: This category includes commodities where India has the capacity and global presence but hasn't tapped into the CIS market fully. Commodities like potatoes, bananas, mangoes, whiskies, eggs, milk products etc. to Russia or bakery products to Kazakhstan fall into this group. With targeted promotion and logistical support, these items could become important exports.

Low potential commodities: These are products where India neither export to the CIS country nor there is any significant potential of expansion. Commodities like pomegranates, food preparations, nes. are prime examples where India has global competitiveness but is largely absent in CIS markets. Hence short-term export growth is unlikely and there is a requirement of major policy or logistical shifts.

The list of final products selected for the study is presented in **TABLE 2**. These include bovine meat, eggs, potatoes, bananas, grapes, mangoes, pomegranates, oranges, whisky, fruit juices, groundnuts, sweet biscuits, bread, pastries, cakes, other bakery products, and miscellaneous food preparations (not elsewhere specified).

TABLE 2: SELECTED COMMODITIES FOR CIS COUNTRIES

COMMODITY CATEGORY	COMMODITIES
Products of animal origin	Bovine meat, eggs, milk products (ghee and paneer)
Fruits and Vegetables	Potatoes, bananas, grapes, mangoes, pomegranate, oranges, gherkins,
Beverages and Juices	Whiskey, juices
Groundnut	Groundnut
Bakery and cereal preparations	Sweet biscuits, bread pastry, cakes, biscuits and other bakers' wares
Misc. food preparations nes	Food preparations nes

Source: Authors' own compilation

2

OVERVIEW OF SELECTED CIS COUNTRIES

2.1 RUSSIA

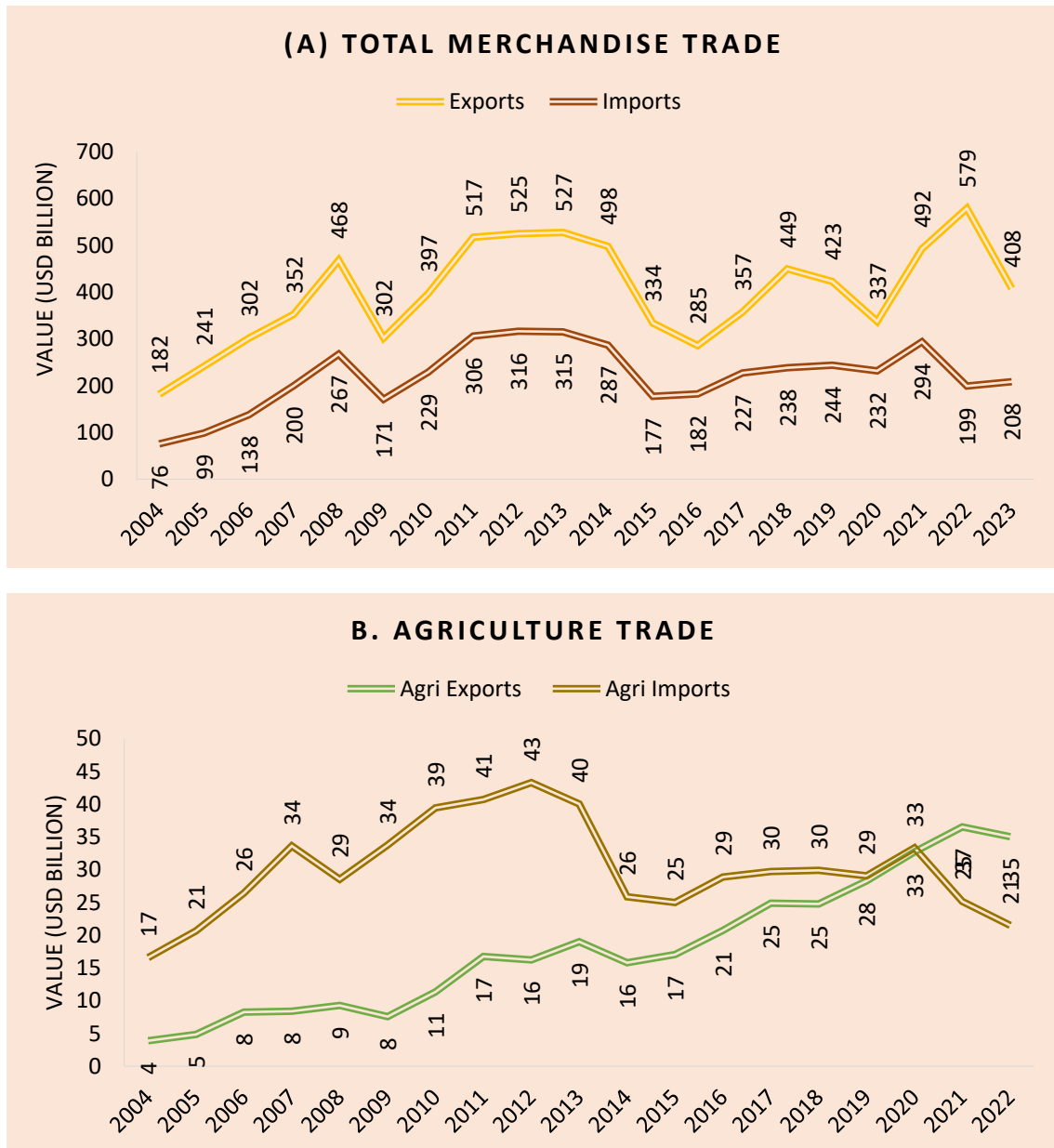
COUNTRY PROFILE

Russia is the largest country in the world, spanning both Eastern Europe and Northern Asia, covering an area of 17.1 million square km, which accounts for approximately 11 per cent of the global landmass (CISSTAT, 2025). Despite its vast size, Russia has a relatively low population density of 8.5 people per square km. In 2023, the country had a population of 144 million, making it the ninth-largest in the world and accounting for 1.8 per cent of the global population (WDI, 2025).

Russia ranks as the 11th largest country by nominal GDP, while in terms of Purchasing Power Parity (PPP), it holds the 4th position. The country is a leading exporter of key agricultural commodities, including wheat, barley, sunflower oil, and other grains. Its trade relationships have been significantly impacted by geopolitical factors including the Russia-Ukraine war, which have led to various international sanctions. Nations such as the European Union (EU), the United Kingdom (UK), the United States (USA), Australia, Canada, Japan, and New Zealand have imposed sanctions on Russia, affecting its economic and trade dynamics.

Russia experiences a wide range of climate from tundra in the north and steppes in the south due to its vast size and varied geography. Winters are cold and long and vary from cool along the Black Sea coast to frigid in Siberia. Summers vary from warm in the steppes to cool along the Arctic coast (The World Bank, 2023). Russia's diverse climate has led to varied food preferences across the country, with a cuisine that reflects centuries of natural and cultural influences. Rich in raw materials drawn from forests, rivers, and fields, it features staples like fish, fowl, mushrooms, berries, and a variety of grains such as rye, oats, wheat, barley, millet, and buckwheat. Dairy, meat, and fish are often prepared or preserved, with sour cream and cottage cheese being notable dairy staples. Potatoes, now essential, became widespread only in the 18th century. Vodka, introduced in the 14th century, later became a cultural mainstay. While foreign influences like tea, dumplings, and borscht were absorbed, Russian cuisine remains rooted in hearty, seasonal, and homegrown traditions (Myachikova & Shamtsyan, 2022).

FIGURE 2: TRENDS IN RUSSIA'S GLOBAL TRADE



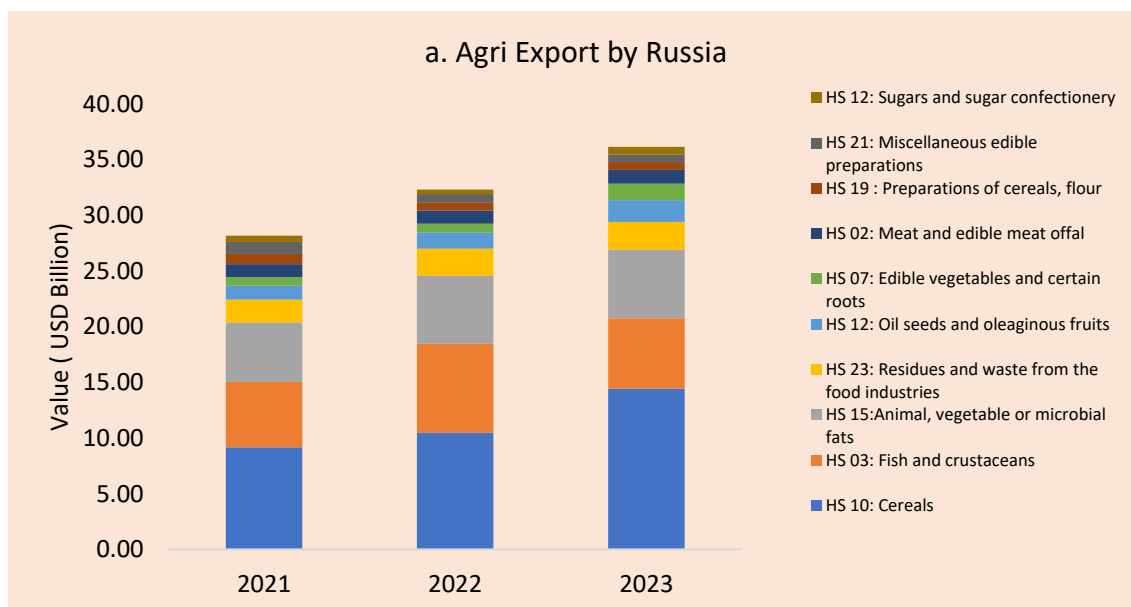
Source: ITC Trade Map, * note data for 2022 & 2023 are mirror data

In TE2023, Russia's merchandise imports were valued at USD 237 billion, while its exports amounted to USD 500 billion. This resulted in a substantial trade balance of USD 263 billion during this period. Russia's major import items included pharmaceuticals, telephone equipment, smartphones, motor cars, data processing machines, immunological products, and aluminium oxide. These products had a share of about 65 per cent of the country's overall imports. On the export front, Russia was a dominant supplier of energy products such as crude oil, petroleum products, coal, and natural gas. Additionally, it exported commodities like gold, wheat and meslin, iron, various mineral products, and urea, contributing to its strong trade surplus (ITC Trademap, 2025a).

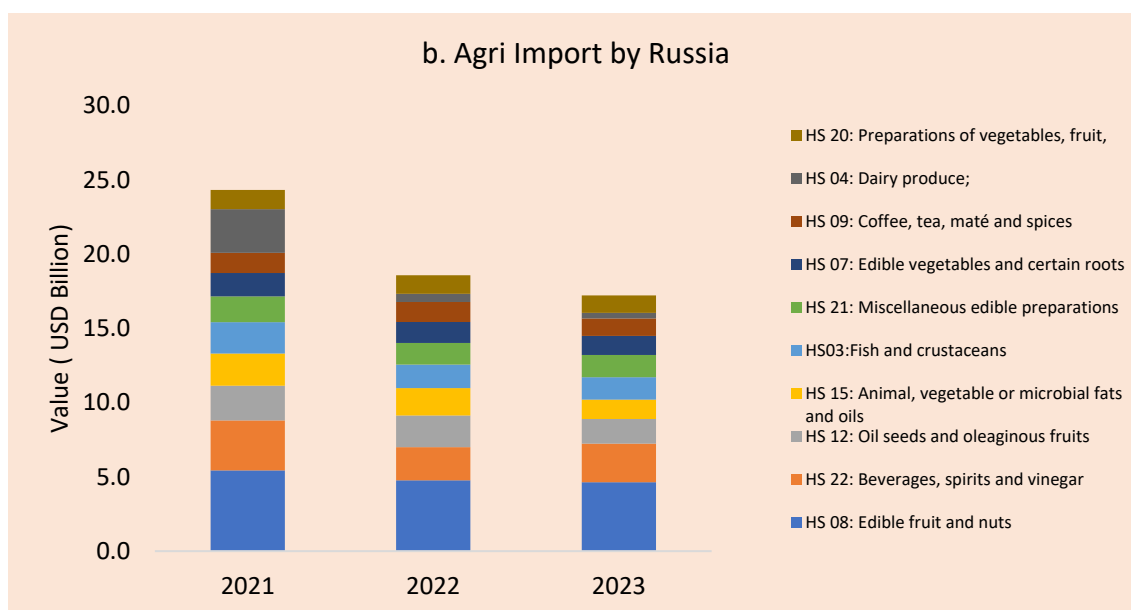
Agriculture in Russia has seen a relative decline in its contribution to the national economy, with its share of GDP falling from 5.8 per cent in 2000 to 3.7 per cent in 2023. Similarly, employment in the sector has dropped significantly, from 14.5 per cent to just 5.5 per cent. Despite this decline, Russia is one of the world’s leading producers and exporters of key crops such as wheat, barley, corn, and oilseeds like sunflower seeds and soybeans. Additionally, Russia plays a crucial role in the global fertilizer market, especially in nitrogen and phosphate-based fertilizers. Its agricultural exports, ranging from grains and sunflower oil to fertilizers are primarily directed toward the Middle East, Asia, and Europe. Given Russia's scale of production and market influence, developments in its agricultural sector can have considerable ripple effects across global markets, including in the United States.

In TE 2023, Russia’s agricultural imports were worth USD 33 billion, and exports were worth USD 35 billion which were 14 per cent and 7 per cent of total imports and exports, respectively. Russia’s major imports included edible fruits and nuts (15 per cent), beverages (8 per cent), oilseeds (6 per cent), animal or vegetables oils (5 per cent), fish & crustaceans (5 per cent), miscellaneous edible preparation (5%), edible vegetables (4%), coffee & tea (4%), dairy products (4%) and preparation of vegetables (4%) accounting for 58 per cent of total Russian agri imports from the world. In case of exports, major agricultural exports from Russia are cereals (31 per cent), fish & crustaceans (18 per cent), animal/vegetable fats and oils (16 per cent), residues and waste (6 per cent) and oilseed (5 per cent) accounting for 90 per cent of total agri exports from Russia¹ (ITC Trademap, 2025a).

FIGURE 3: RUSSIA'S IMPORTS AND EXPORTS OF AGRICULTURAL COMMODITIES



¹ ITC Trade database does not include HS3 fish and crustaceans in agricultural products category.



Source: ITC Trademap

OVERVIEW OF MAJOR PORTS IN RUSSIA

Russia has three major seaports, Novorossiysk, St. Petersburg, and Vladivostok which play distinct roles in the country’s maritime logistics, each with unique capacities and geographic advantages. These ports together form the backbone of Russia’s maritime trade, offering diverse entry points for different regions of the world to Russia as well as other CIS countries.

i. Novorossiysk Port

Novorossiysk, located on the Black Sea, is one of Russia’s most important ports in terms of overall cargo handling. It covers a land area of 95 hectares and has an estimated port capacity of 200 million tonnes per annum (m.tpa), making it the largest among the three. It handles oil, grain, containers, and other bulk cargo. In terms of container handling, Novorossiysk’s container terminals can process up to 1.6 million TEU annually. A critical export hub for Russian energy and agriculture, it exports Russian crude oil, fertilizers, and metals to India. Its integration with Russian Railways enhances inland connectivity and links India via the International North-South Transport Corridor (INSTC) through Iran and the Caspian Sea (Bandar Abbas, Iran → Anzali, Iran → Astrakhan, Russia → Novorossiysk, Russia) (CAREC, 2021)

Its growing relevance due to sanctions on Russia is redirecting trade from Europe to Asia.

ii. St. Petersburg Port

St. Petersburg, situated on the Baltic Sea, is Russia’s primary container port and benefits from year-round navigation. Spanning approximately 415 hectares, it has a combined port capacity of around 80 m.tpa. Its five container terminals together offer a substantial annual capacity of 4.2 million TEU, making it the primary node for trade with Europe and the Nordic region

(CAREC, 2021). It used to be more active before the Ukraine conflict with its usage declining due to sanctions and longer maritime routes. It handles container and breakbulk cargo with occasional Indian exports/imports.

iii. Vladivostok Port

Vladivostok, positioned on the Pacific coast, is Russia's strategic hub for trade with the Asia-Pacific region. Despite having a smaller land area of 55.2 hectares, the port is operational year-round and handles an estimated 12 m.tpa. Its container terminal supports a capacity of 820,000 TEU annually, playing a vital role in connecting Russia's Far East with global shipping networks (CAREC, 2021). It is integrated with the Trans-Siberian Railway and the Primorye corridors, boosting overland cargo flows with China. It plays a vital role in the Russian Far East's logistics and regional development plans. Vladivostok is currently used mainly for handling bulk commodities such as coal, energy-related cargo, timber, seafood, and limited container traffic linked to Asia-facing trade. India has begun exploring the Chennai–Vladivostok maritime corridor in order to reduce transit time for goods between South India and the Russian Far East. It is not a major channel, but a strategic future route, with MoUs already in place with pilot shipments planned. Following President Putin's recent visit to India, cooperation on the corridor has further gained momentum.

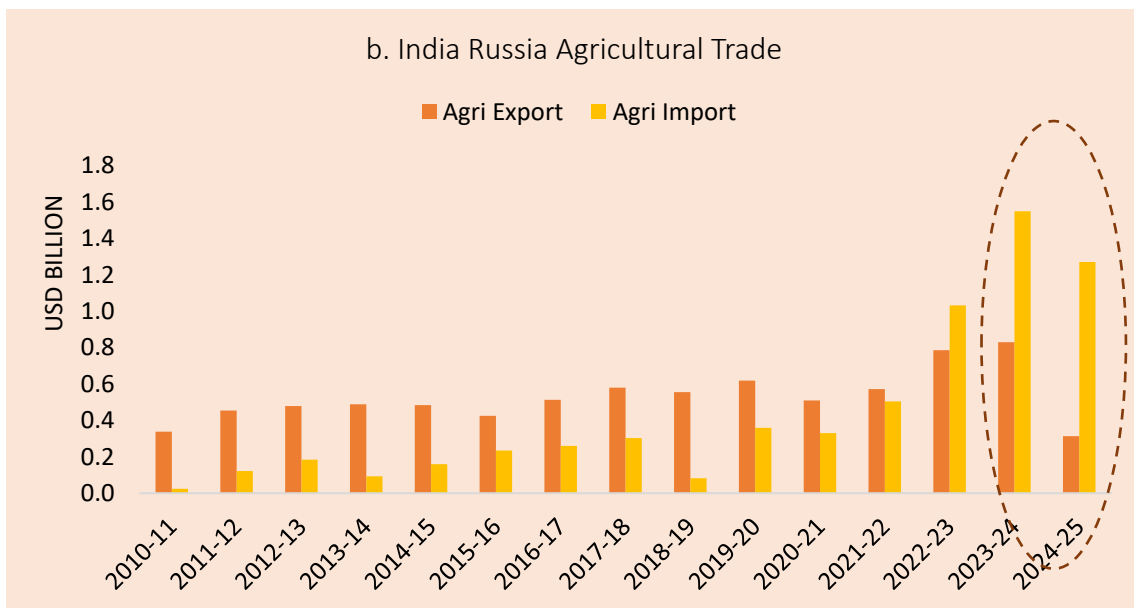
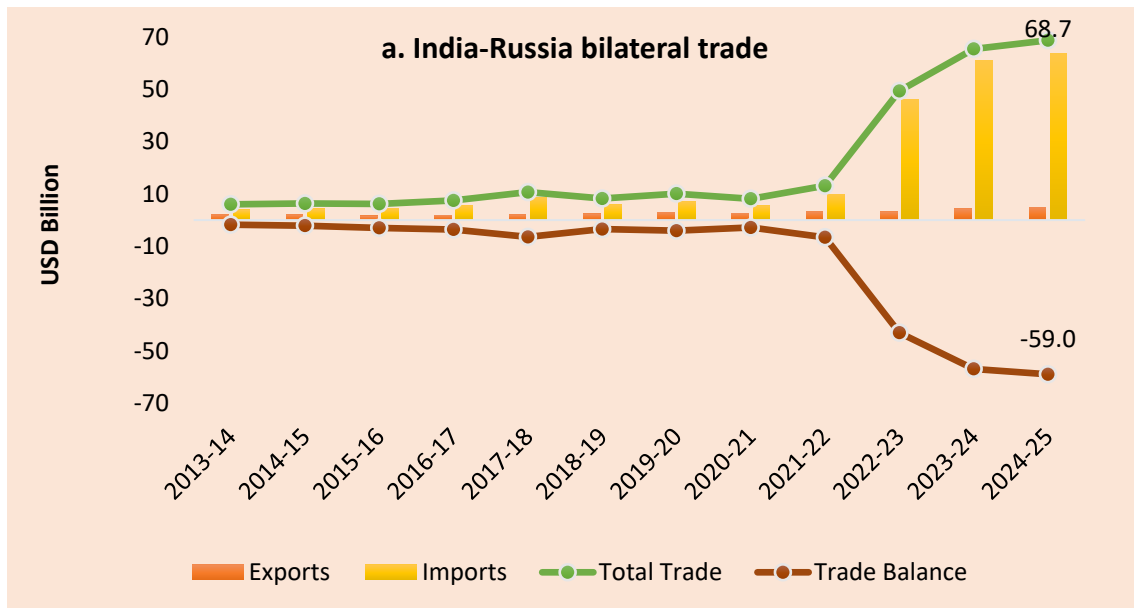
INDIA-RUSSIA BILATERAL RELATIONS

India and Russia have maintained long-standing historical ties since 1947, marked by robust defence cooperation and energy collaboration. This relationship was elevated to a 'Special and Privileged Strategic Partnership' in 2010, reflecting the depth of their strategic engagement. The two nations have consistently engaged at the highest levels, with 21 Annual Summits, regular Foreign and Defence Ministers' meetings, and participation in major international platforms such as the United Nations Summits, G20, BRICS, and the Shanghai Cooperation Organisation (SCO). India-Russia cultural relations date back centuries, with deep ties through trade, literature, art, philosophy and films. Today, they thrive through cultural exchanges, festivals, yoga, and educational collaborations, strengthening people-to-people bonds (Embassy of India in Russia, 2024). Currently, the number of overseas Indians in Russia stand at 62,825 consisting of businessmen, working professionals and students (MEA, 2025).

Russia is India's fourth-largest trading partner in value terms, following the USA, China, and the UAE, and the second-largest in volume terms after China. On the other hand, India is Russia's second-largest trading partner. Bilateral trade between the two nations reached an unprecedented peak of USD 68.7 billion in 2024-25, a remarkable increase from merely USD 6.3 billion ten years back., primarily driven by Russia's oil exports to India at discounted prices following the Ukraine conflict. India's exports to Russia stood at USD 4.9 billion, whereas imports from Russia reached USD 63.8 billion. This imbalance has resulted in a staggering

trade deficit of USD 59 billion, underscoring the urgent need for a more diversified trade strategy to improve the trade balance in India's favour (ITC Trademap, 2025) (Lopez, 2024).

FIGURE 4: INDIA'S TRADE SCENARIO WITH RUSSIA



Source: DGFT

In case of agriculture trade, India has become a net importer of agricultural products from Russia over the last three years. The major commodities exported from India to Russia include bovine meat, grapes, shrimps, tobacco, tea, and coffee. On the other hand, key agricultural imports from Russia to India primarily consist of sunflower oil and white peas.

2.2 KAZAKHSTAN

COUNTRY PROFILE

Kazakhstan is the second-largest country in the CIS region and the ninth-largest in the world. A landlocked country with a western boundary along the Caspian Sea, it spans Central Asia and a portion of Eastern Europe, covering approximately 2.72 million square km. With about 20 million people, it has the third largest population in CIS after Russia and Uzbekistan and one of the lowest population densities in the world. Around 57 per cent of the population live in urban areas (CISSTAT, 2025).

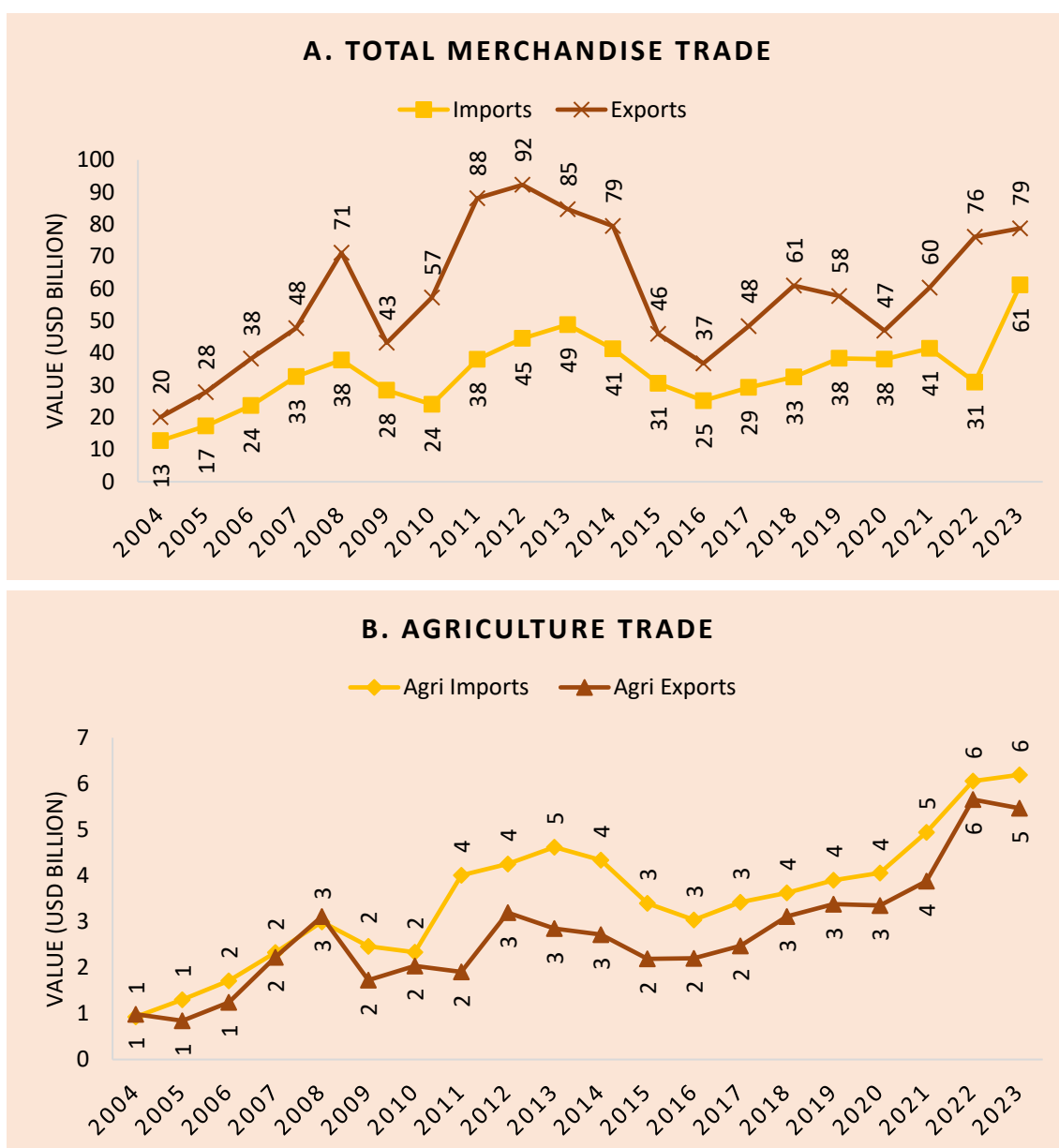
Kazakhstan experiences an extreme continental climate, with long, hot summers and harsh, cold winters. Temperatures in the north can drop to -52°C, while summers can reach 29°C in the south. Being a landlocked country, Kazakhstan sees wide daily and seasonal temperature swings and generally experiences low precipitation (The World Bank and ADB, 2021a).

Classified as an upper middle-income country, Kazakhstan is the second-largest economy in the CIS after Russia, with a GDP dominated by its mineral wealth, particularly oil, gas, uranium, and metals. The energy sector alone accounted for 21 per cent of GDP and service sector comprised 55.5 per cent of GDP in 2019. Like Russia, agriculture played a smaller role, contributing just 6.7 per cent to GDP and employing 20 per cent of the labour force. Still, over 70 per cent of Kazakhstan's land is used for crop cultivation and livestock farming, giving it the highest cropland area per capita in the world at 1.54 hectares (CISSTAT, 2025) (The World Bank and ADB, 2021a).

KAZAKHSTAN TRADE LANDSCAPE

In TE2023, it exported merchandise products worth USD 72 billion and imported USD 45 billion worth of products. This resulted in a substantial trade balance of USD 27 billion during this period. Its primary exports include crude petroleum, natural uranium, copper, ferro-chromium and natural gas with key trade partners such as Italy, Netherlands, Romania, Greece and Turkey. Its primary imports include nuclear reactor, vehicles electrical machinery, iron & steel and plastic & its parts sourced mostly from China, Russia, and USA (ITC Trademap, 2025a).

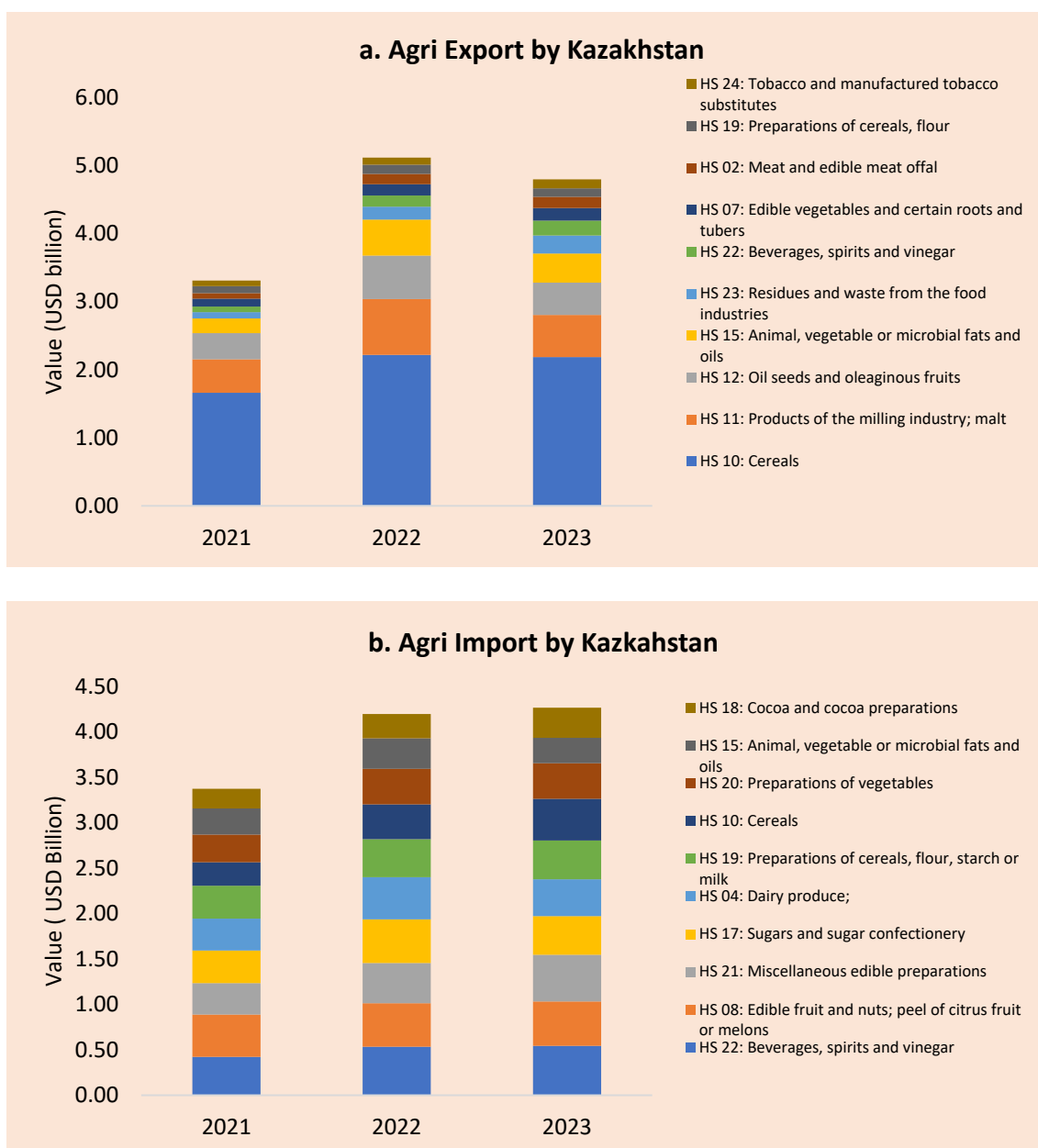
FIGURE 5: TRENDS IN KAZAKHSTAN'S GLOBAL TRADE



Source: ITC Trademap

In TE2023, Kazakhstan imported commodities worth USD 6 billion and exported USD 5 billion worth of commodities in TE2023. Kazakhstan is a major supplier of wheat (33 per cent), wheat and meslin flour (12 per cent), oil seed (6 per cent), barley (4 per cent), linseed (4 per cent), and cotton (2 per cent). Key imports include wheat (4 per cent), food preparations nes (4 per cent), sugar (3 per cent), frozen offals (3 per cent), chocolates, bread, pastries, cakes (2 per cent), and biscuits (2 per cent) (ITC Trademap, 2025a).

FIGURE 6: KAZAKHSTAN'S IMPORTS AND EXPORTS OF AGRICULTURAL COMMODITIES



Source: ITC Trademap

OVERVIEW OF MAJOR PORTS IN KAZAKHSTAN

Kazakhstan’s maritime infrastructure along the Caspian Sea plays a growing role in diversifying Central Asia’s trade routes, particularly through the Trans-Caspian International Transport Route (TITR) and the International North-South Transport Corridor (INSTC). The country's two major ports, Aktau and Kuryk serve as critical gateways linking Central Asia with Europe, the Caucasus, and South Asia.

i. Aktau Port

Aktau Port is Kazakhstan's principal port on the Caspian Sea and a key node in the Trans-Caspian International Transport Route (TITR). Strategically located and directly connected to the national rail network, Aktau supports trade diversification away from northern corridors through Russia. With a modest land area of 7.97 hectares (within a total port area of 100 hectares), Aktau has a port capacity of 15 million tonnes per annum (m.tpa). While the port currently has no dedicated container terminal, it managed a containerized throughput of 14,324 TEU in 2019, with an annual handling capacity of up to 25,000 TEU (CAREC, 2021). Aktau plays a vital role in moving Indian pharmaceuticals, machinery, and tea into Central Asia, while exporting oil, uranium, and wheat.

ii. Kuryk Port

Kuryk Port, situated just south of Aktau, is a newer deep-sea facility designed to handle Ro-Ro and ferry cargo, and it complements Aktau by enhancing the efficiency of trans-Caspian logistics. Initially commissioned on 23 hectares, Kuryk's total area is expected to expand to 65 hectares by 2030. With a port capacity of 6 m.tpa, it is smaller than Aktau but features a higher nominal container capacity of 100,000 TEU per annum, despite also lacking a dedicated container terminal. Integrated with new rail links and connected to dry ports like Khorgos, Kuryk is increasingly important in the Belt and Road Initiative (BRI) and India-Central Asia trade under the INSTC (CAREC, 2021).

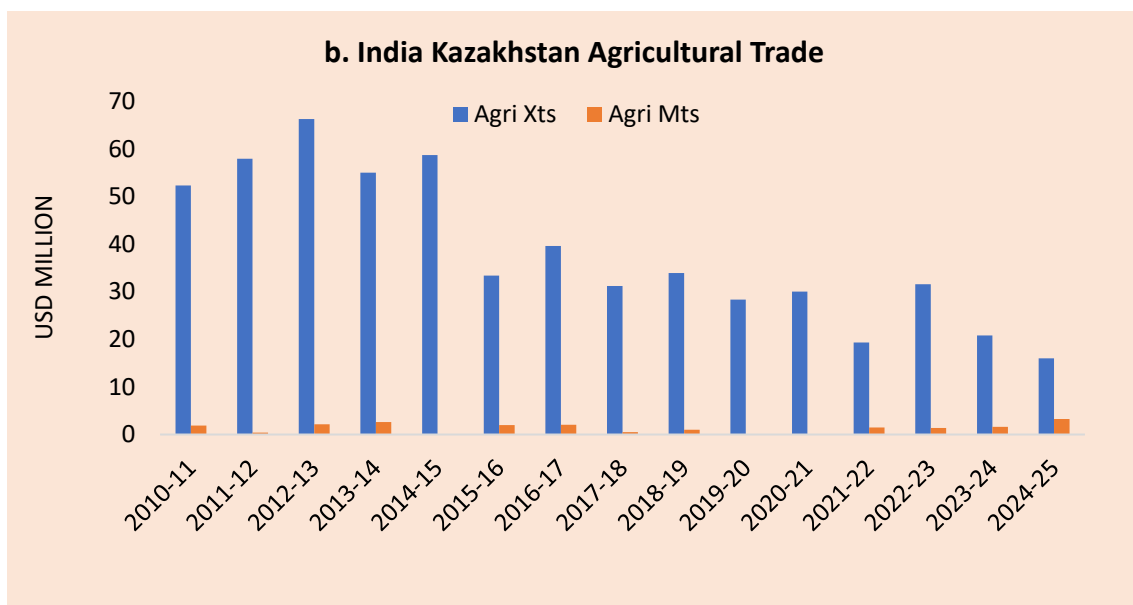
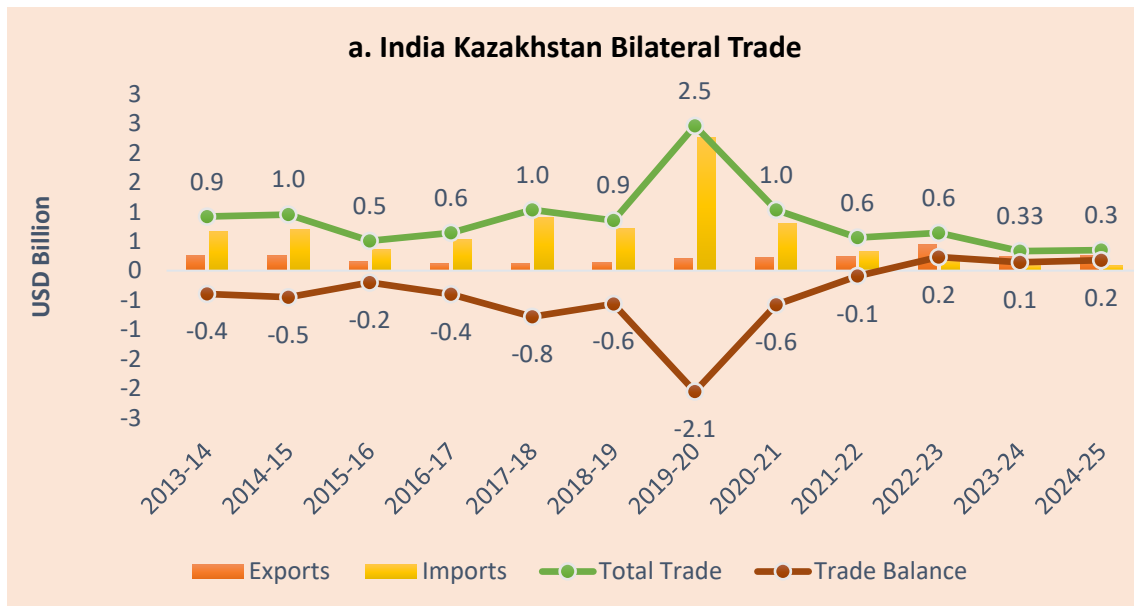
INDIA-KAZAKHSTAN BILATERAL RELATIONS

India and Kazakhstan share ancient and historical ties, dating back over 2000 years. These relations have been marked by continuous exchanges in goods, ideas, and cultural influences. Over the years, high-level visits have reinforced political ties, with participation in multilateral forums such as the Shanghai Cooperation Organization (SCO), the Conference on Interaction and Confidence-Building Measures in Asia (CICA), and the United Nations (Embassy of India in Kazakhstan, 2024). The India-Kazakhstan Inter-Governmental Commission (IGC) and various Joint Working Groups (JWGs) facilitate cooperation in areas such as counter-terrorism, trade, defence, hydrocarbons, and connectivity. An Indian diaspora of approximately 10,235, including students and professionals, further strengthens people-to-people connections (MEA, 2024).

Kazakhstan is India's largest trade and investment partner in Central Asia, with bilateral trade displaying significant fluctuations since 2013-14. Trade peaked in 2019-20 at around USD 2.5 billion, primarily driven by India's imports of petroleum oils, radioactive chemical elements, asbestos, and titanium from Kazakhstan. In the same year, Indian exports to Kazakhstan stood at approximately USD 562.8 million. Kazakhstan's role as a key supplier of natural uranium is strategically important for India's energy security, making this partnership critical beyond just commercial considerations.

Following 2021-22, there was a marked decrease in petroleum imports from Kazakhstan, which led to a sharp decline in total bilateral trade, reducing it to less than USD 1 billion in recent years. Despite this, the export side has remained relatively robust. Indian exports to Kazakhstan, while modest in comparison to imports, have shown notable growth, especially in 2022-23 when exports surged to USD 437 million. This upward trend reflects India’s growing emphasis on diversifying export commodities and strengthening market presence in the region.

FIGURE 7: INDIA’S TRADE SCENARIO WITH KAZAKHSTAN



Source: DGFT

Historically, the trade balance has been in favour of Kazakhstan, with India consistently running a trade deficit driven largely by high-value energy and mineral imports. For instance, imports peaked at USD 2.26 billion in 2019-20, which resulted in a trade deficit of USD -2.1 billion that year. However, recent data indicates a shift in this pattern. A steady rise in Indian exports coupled with significant reductions in imports has led to a narrowing of this deficit. Notably, India registered trade surpluses since 2022-23, signalling a positive development towards more balanced trade relations (DGFT, 2025).

Agricultural trade between the two countries, while relatively limited, has shown encouraging signs of growth. India's agricultural exports to Kazakhstan, including oilseeds, tea, and processed agri-products, have increased, particularly between 2022-23 and 2024-25. Meanwhile, agricultural imports from Kazakhstan to India remain modest and largely stable, consisting mainly of minor volumes of cereals and oilseeds. This highlights potential for further expansion of agricultural trade as a vehicle for diversifying bilateral commerce.

Looking ahead, both countries are seeking to deepen economic cooperation by expanding agricultural trade, enhancing connectivity via trade corridors and logistics, and diversifying sectoral partnerships beyond traditional energy imports. Strengthening private sector engagement, fostering joint ventures, and leveraging existing bilateral platforms can build on recent positive developments in trade balance. This strategic reorientation aims to foster a more balanced, diversified, and mutually beneficial economic partnership between India and Kazakhstan.

2.3 UZBEKISTAN

COUNTRY PROFILE

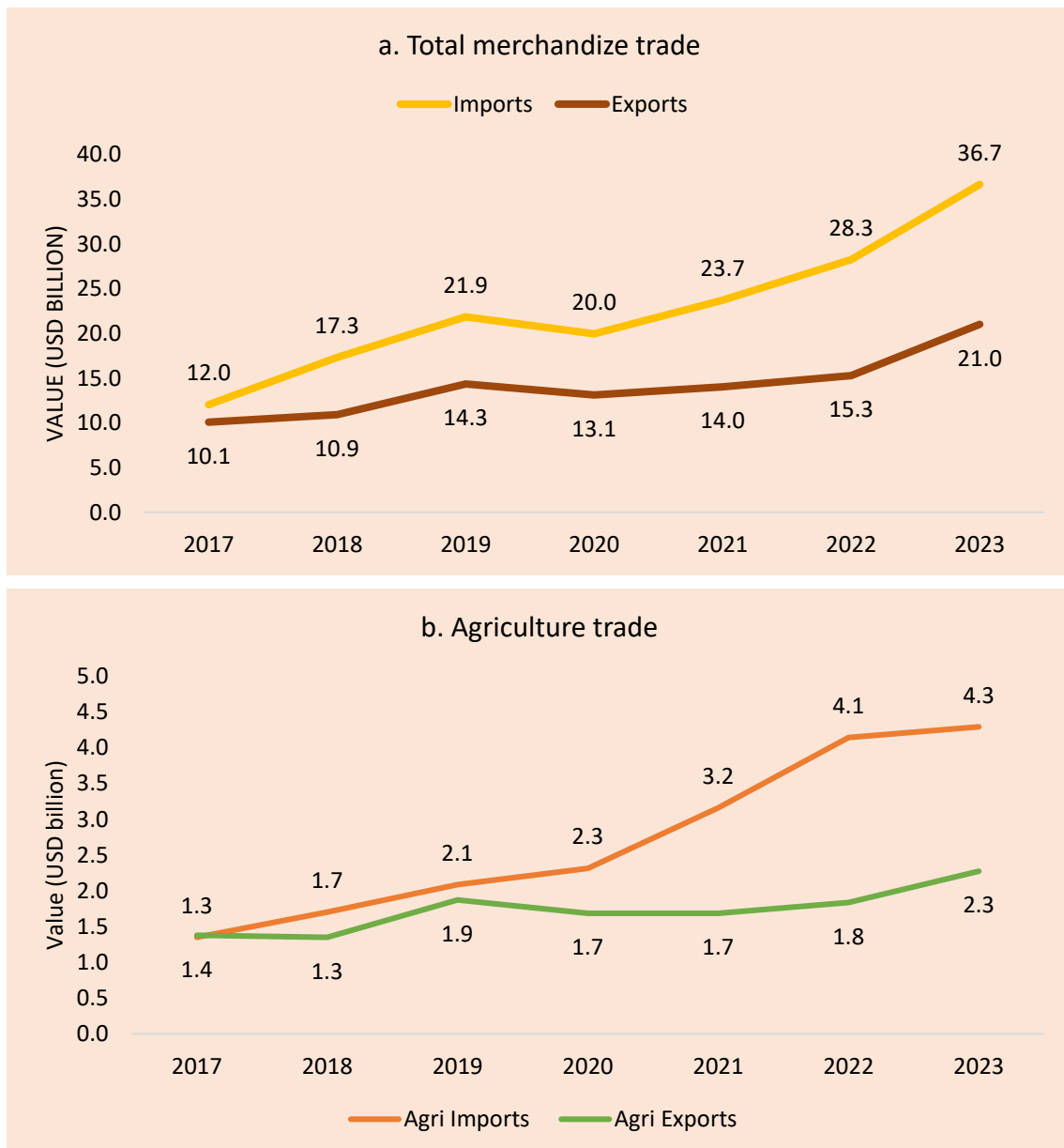
Uzbekistan is a doubly landlocked country in the heart of Central Asia, bordered by Kazakhstan, Turkmenistan, Afghanistan, Tajikistan, and Kyrgyzstan. Covering an area of around 449,000 square km, it is the third-largest country in Central Asia and the second most populous in the CIS region after Russia, with a population of about 36 million in 2023. Although classified as a lower middle-income country, Uzbekistan is one of the fastest-growing economies, with a GDP of USD 102 billion in 2023 and a per capita income of USD 2,850. The economy is heavily reliant on primary sector exports, particularly cotton, gold, copper, zinc, and natural gas. Uzbekistan's economic and trade relations are influenced by its geographic location at the crossroads of important trade routes, linking Central Asia with Europe, the Middle East, and East Asia (CISSTAT, 2025) (WDI, 2025).

Uzbekistan has an arid continental climate with hot, dry summers and cold winters. marked by sharp temperature fluctuations both daily and seasonally. Temperatures can reach 35°C in summer and drop to -3°C in winter. About 79 per cent of the country is covered by flat semi-desert steppes and desert zones, with rainfall varying from less than 100 mm in the west to up to 900 mm in the eastern and south-eastern regions. (The World Bank and ADB, 2021b).

UZBEKISTAN TRADE LANDSCAPE

In TE2023, Uzbekistan exported USD 16.8 billion worth of goods and imported USD 29.5 billion worth of goods. Its primary exports include gold (32 per cent), natural gas (4 per cent), copper (3 per cent), cotton yarn (3 per cent), and wheat flour (2 per cent) to key trade partners such as Russia, China, Kazakhstan, and Türkiye. Its primary imports include, medicaments (3 per cent), wheat (2 per cent), petroleum products (2 per cent), motor car (1 per cent), aeroplane and aircraft parts (1 per cent). (ITC Trademap, 2025a).

FIGURE 8: TRENDS IN UZBEKISTAN'S GLOBAL TRADE

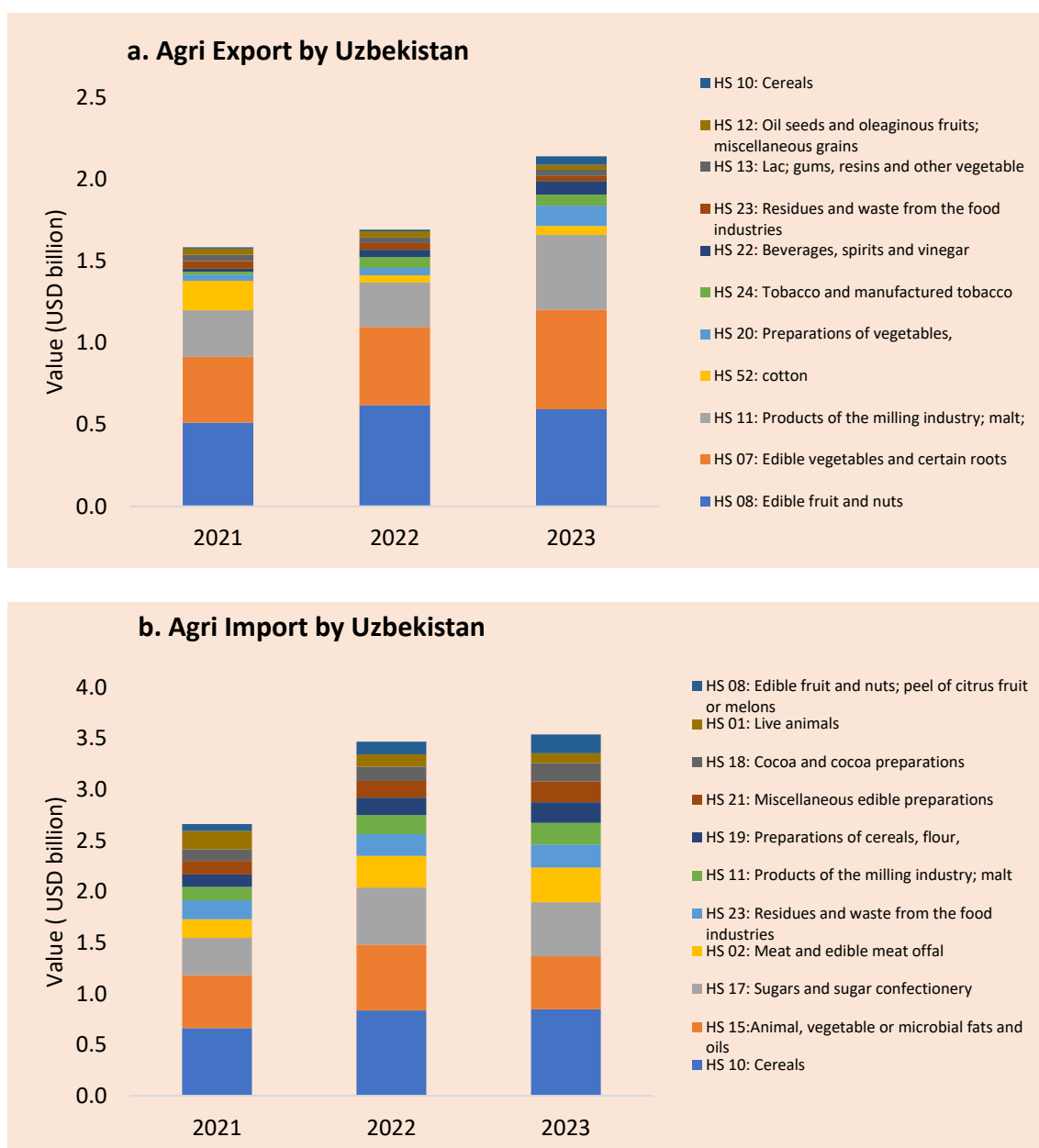


Source: ITC Trademap

In TE2023, Uzbekistan's agricultural imports were worth USD 5.4 billion and exports were worth USD 1.82 billion which were 14 per cent and 11 per cent of total imports and exports, respectively. Uzbekistan's major exports included edible fruits and nuts (30 per cent), edible

vegetables (26 per cent), products of milling industry (17 per cent), cotton (5 per cent) preparations of vegetables, fruits and nuts (4 per cent), tobacco (3 per cent), and beverages (3 per cent) accounting for 82 per cent of total Uzbekistan’s agri imports from the world. In case of exports, major agricultural imports from Uzbekistan are cereals (17per cent), animal/vegetable fats (12 per cent), sugars and sugar confectionary (10 per cent), meat and offal (6 per cent), residues and waste from food industry (4 per cent) and products of milling industry (3 per cent) accounting for 64 per cent of total agri exports from Uzbekistan (ITC Trademap, 2025a).

FIGURE 9: UZBEKISTAN'S IMPORTS AND EXPORTS OF AGRICULTURAL COMMODITIES



Source: ITC Trademap

OVERVIEW OF MAJOR PORTS IN UZBEKISTAN

As a doubly landlocked country, Uzbekistan has no access to sea ports. It relies heavily on inland logistics infrastructure to access international trade routes. This lack of direct connectivity between Uzbekistan and India has hampered its potential (Wani & Singh, 2024). Two critical hubs, Tashkent Dry Port and the Termez River Port is helping anchor the country's efforts to strengthen its role in transcontinental connectivity through corridors like the Trans-Caspian International Transport Route (TITR) and the International North-South Transport Corridor (INSTC).

i. Tashkent Dry Port

The Tashkent Dry Port with a total area of 184 sq. Km is located in Tashkent and integrated with the Tashkent International Logistics Centre. It functions as Uzbekistan's principal inland intermodal hub. Though it lacks direct sea access, its strategic position connects rail corridors from China and Kazakhstan with outbound routes to Europe, the Caucasus, and South Asia. It plays a pivotal role in containerized trade, acting as a consolidation point for freight transitioning between the TITR and INSTC (Vinokurov, et al., 2022). This dry port enhances Uzbekistan's logistical leverage by streamlining customs processes and reducing transit times, especially for Indian and Chinese goods moving across Central Asia (The World Bank, 2019).

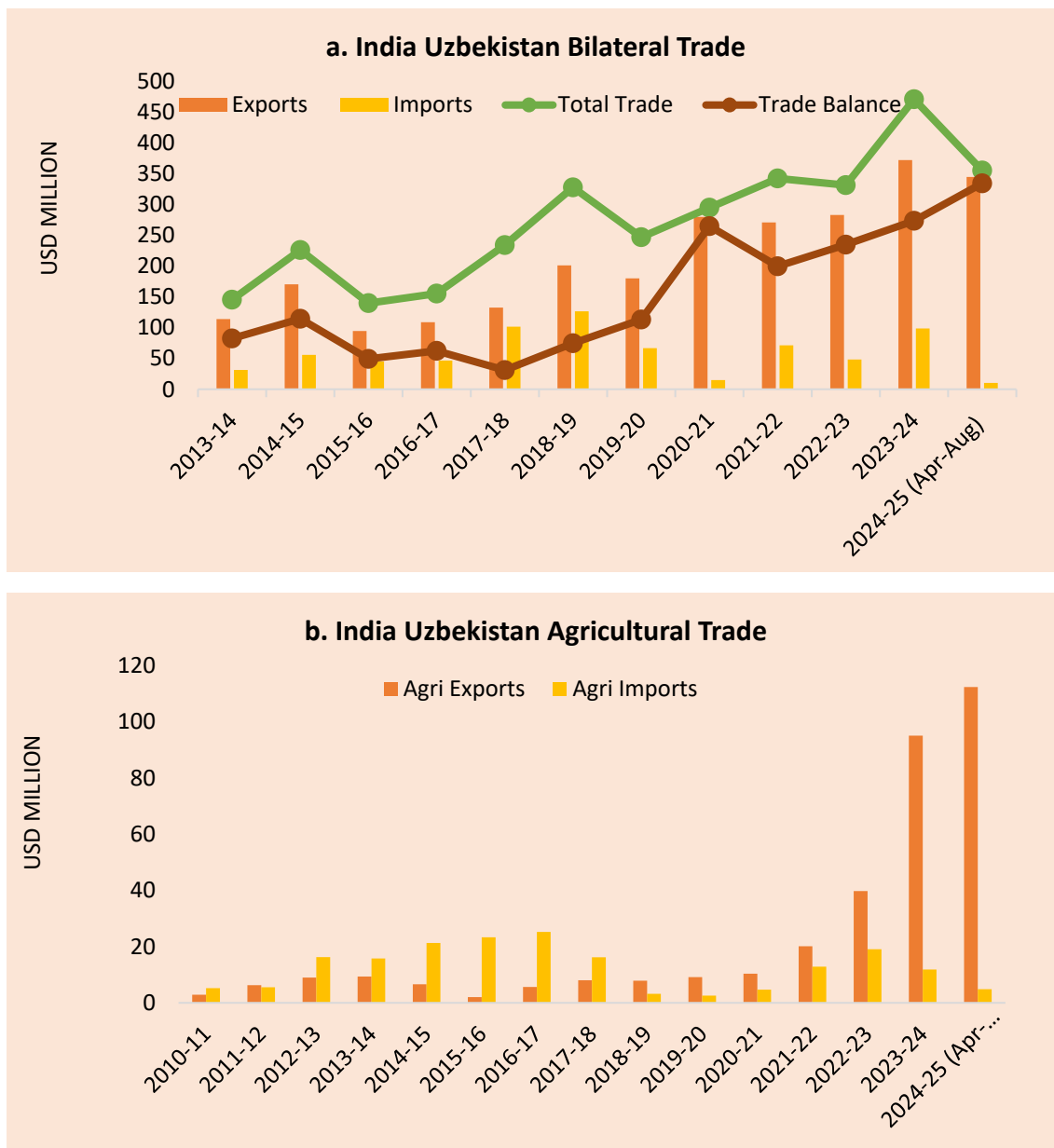
ii. Termez River Port

The Termez River Port, situated in Surkhandarya region near the Afghanistan border, is crucial for Uzbekistan's southern trade and humanitarian logistics. Though limited by its status as a river port, Termez is vital for bilateral trade with Afghanistan and is increasingly seen as a gateway for southward connectivity. With ongoing efforts to integrate it into broader transit networks like the INSTC, Termez is expected to support cargo flows between South Asia, Central Asia, and the Middle East, reinforcing Uzbekistan's ambition to serve as a land bridge in regional trade (Logistics cluster, 2025) (The World Bank, 2019).

INDIA-UZBEKISTAN BILATERAL RELATIONS

India and Uzbekistan share a deep historical and cultural connection dating back to the ancient Silk Route which facilitated exchanges of culture, knowledge, and trade. Over the years, India has positioned itself as a key partner for Uzbekistan, engaging across multiple platforms such as the United Nations, BRICS, SCO, and the India-Central Asia framework. Diplomatic visits by leaders of both countries, as well as their officials, have reinforced these ties (Embassy of India in Uzbekistan, 2024). The Indian diaspora in Uzbekistan is estimated at 14,000 and consists of persons engaged in diverse sectors like business (pharmaceuticals, textiles, granite, and tiles) and multinational companies, along with students (MEA, 2025).

FIGURE 10: INDIA'S TRADE SCENARIO WITH UZBEKISTAN



Source: DGFT

Bilateral trade between India and Uzbekistan increased from USD 81.1 million in 2010-11 to USD 532.4 million in 2024-25 (DGFT, 2025). In 2024-25 India's merchandise exports to Uzbekistan were worth USD 518 million and its imports were worth USD 15 million. The trade balance has remained largely positive for India, with an increasing surplus in recent years. In 2024-25, India's trade surplus stood at USD 503 million, indicating robust export performance. India is among the top 10 trade partners of Uzbekistan, with exports consisting primarily of pharmaceuticals, mechanical equipment, vehicle parts, mobile phones, and optical instruments (MEA, 2024). In return, India imports agricultural products, fertilizers, juices, and lubricants from Uzbekistan. India has also made significant investments in sectors like pharmaceuticals, automobile components, and hospitality, contributing to the growing economic cooperation.

In case of agricultural trade, exports from India increased from USD 2.9 million in 2010-11 to USD 188 million in 2024-25. In contrast, India's agricultural imports from Uzbekistan have followed a more uneven trajectory. Imports increased from around USD 5 million in 2010-11 to a peak of over USD 25 million in 2016-17, before moderating in subsequent years and declining to about USD 12 million in 2023-24 and USD 6 million in 2024-25. While imports remain relatively limited compared to exports, they have been driven by specific commodities, including spices, which have seen a noticeable rise in recent years. In the context of India's agricultural exports, there has been significant growth in exports to Uzbekistan, especially in buffalo meat, fruits, sugar, spices, oil meals, tea, coffee, and various processed food products.

3

EXPORT POTENTIAL COMMODITIES FOR CIS

This section will discuss major commodities where there is high potential to boost agri exports. The commodities selected for the study (discussed in section 1.3) have been grouped under major heads of products of animal origin, fruits and vegetables, beverages and juices, groundnut, bakery and cereal preparations and miscellaneous food preparations not elsewhere specified.

3.1 PRODUCTS OF ANIMAL ORIGIN

BOVINE MEAT

India exports both frozen boneless bovine meat (HS code 020230) as well as offals of bovine meat (HS Code: 0206). However, the bulk of trade is concentrated in frozen boneless bovine meat under HS code 020230.

In TE 2023, for frozen, boneless bovine meat, major markets include Egypt (USD 543.7 million), Malaysia (USD 473.1 million), Vietnam (USD 458.4 million), and Indonesia (USD 302.4 million). Among the three CIS countries covered in this report, India exports to Russia (USD 35 million) and Uzbekistan (USD 14.2 million), representing just 1 per cent and 0.5 per cent of India's total bovine meat exports, respectively. A negligible quantity is also exported to Kazakhstan (USD 1.7 million).

Russia's domestic buffalo sector remains largely focused on dairy production, with bovine meat being a by-product of milk production (FAO, 2014). As a result, Russia relies heavily on imports to meet domestic demand, with its net imports in TE2021² at USD 720 million.

The largest frozen boneless bovine meat exporter to Russia is Paraguay, accounting for 39 per cent (USD 278 million) of the total USD 720 million exports, followed by Brazil (24 per cent) and Belarus (19 per cent) (TE2021). Brazil has the highest UVP at USD 3,796/MT, reflecting premium quality and strong branding, while India, Argentina, and Uruguay have the lowest UVPs, which suggests cost-competitiveness. Like other CIS countries, Belarus benefits from a 0 per cent applied MFN tariff, whereas other key exporters including India face a 15 per cent applied MFN tariff.

² For HS 020230 (frozen boneless bovine meat), we have used data for TE2021 because of limitations in data availability on ITC Trade Map.

India's share in the Russian market remains modest at just 6 per cent, despite being a major global exporter of bovine meat. This is primarily due to Foot and Mouth Disease (FMD) related restrictions, which limit the number of approved Indian plants allowed to export to Russia (Bajaj & Ranjhan, 2020). Currently, only a few processing plants located in Maharashtra have been approved by Russian authorities.

Additionally, Kazakhstan and Tajikistan, despite being part of the Eurasian Customs Union, continue to maintain informal restrictions on imports from Indian plants, even those approved by Russia.

The shortage of veterinary doctors, limited infrastructure, and high compliance costs further affect India's ability to meet Russia's stringent sanitary and phytosanitary (SPS) standards. Russia's meat imports are highly regulated with a flat tariff rate of 15 per cent on all importers, including India. However, Indian exporters have suggested that India should negotiate with Russia to reduce these tariff restrictions.

Despite India's relative proximity to Russia, it faces higher trade logistics costs compared to countries like Brazil, due to fewer direct shipping routes, lower container utilisation on return legs, and inadequate cold chain infrastructure. Further compounding the problem, exporters face significant delays in receiving payments when shipments transit through Bandar Abbas port. Even though documentation clearly specifies that the final destination is a CIS country, some Indian banks treat these shipments with caution due to sanctions-related sensitivities, delaying transaction clearance.

If India can negotiate lower tariffs and address these logistical challenges, it can strengthen its competitiveness and ensure a more reliable supply chain for the Russian market.

TABLE 3: RUSSIA'S MAJOR IMPORT SOURCES FOR BOVINE MEAT

Exporting Country	TE 2021 Value (USD Mn)	UVP (USD/MT)	MFN Tariffs (%)
World	720 (100%)	3688	-
Paraguay	278 (39%)	3695	15
Belarus	137 (19%)	3680	0
Brazil	171 (24%)	3796	15
Colombia	34 (5%)	3721	15
India	46 (6%)	3587	15
Argentina	42 (6%)	3515	15
Uruguay	8 (1%)	3496	15

Source: ITC Trademap

In case of Uzbekistan, India’s frozen bovine meat exports have seen a remarkable rise, jumping from USD 1.8 million in 2021 to USD 9.3 million in 2022, and further surging to USD 31.5 million in 2023. India accounts for 57 per cent of Uzbekistan’s total frozen bovine meat imports in TE2023, competing primarily with Brazil and Russia.

TABLE 4: UZBEKISTAN’S MAJOR IMPORT SOURCES FOR BOVINE MEAT

Frozen, boneless bovine meat (TE2023)				Offals of bovine meat (TE2023)			
Exporting Country	Value (USD Mn)	UVP (USD/MT)	Tariffs (%)	Exporting Country	Value (USD Mn)	UVP (USD/MT)	Tariffs (%)
World	36.1 (100%)	4152	-	World	1.7 (100%)	1,557	-
India	20.6 (57%)	3288	0	India	0.59 (34%)	2,014	10
Russia	7.0 (19%)	6119	0	Brazil	0.57 (33%)	2,260	20
Brazil	3.6 (10%)	4989	0	Kazakhstan	0.23 (13%)	274	0
Ukraine	1.3 (4%)	3421	0	Belarus	0.13 (8%)	2,560	0
Pakistan	0.77 (2%)	3551	0	Germany	0.11 (6%)	782	10
Kazakhstan	0.67 (2%)	7160	0	Pakistan	0.11 (6%)	3,002	10
Georgia	0.38 (1%)	3506	0	Russia	0.06 (3%)	2,454	0

Source: ITC Trademap

In the edible offals segment, India holds a 34 per cent share in Uzbekistan’s total imports (USD 0.6 million), closely followed by Brazil (33 per cent) and Kazakhstan (13 per cent). Products like liver, kidneys, and hearts are widely consumed across CIS countries, both in traditional cuisines and the processed meat industry. While India leads in bovine offal exports to Uzbekistan (57 per cent), its presence in other CIS markets remains limited. Given India’s cost advantage in meat production, there is significant potential to expand frozen offal exports to these regions at competitive prices. However, Indian exporters must ensure compliance with Eurasian Economic Union (EAEU) veterinary and sanitary regulations and tap into niche markets for processed offal products.

A key factor driving this growth is India’s streamlined halal certification process, implemented by the Ministry of Commerce and Industry (MoC&I, 2024b). Since halal certification is mandatory in Uzbekistan, this reform has directly boosted India’s bovine meat and offal exports (USDA, 2023).

Brazil, India's primary competitor in the CIS region, has developed a globally competitive bovine meat sector through rigorous animal welfare standards, integrated traceability, and strong institutional coordination. Its approach is guided by internationally recognized protocols from the World Organisation for Animal Health (OIE) and the Food and Agriculture Organization (FAO), with close engagement with major trading partners such as the EU (OIE, 2024; FAO, 2023). The Brazilian Ministry of Agriculture ensures strict oversight, routine inspections, and continuous capacity building, enabling compliance with evolving sanitary and sustainability guidelines (MAPA, 2024).

Brazil benefits from natural climatic advantages, allowing year-round pasture grazing that enhances animal welfare and meat quality. This is complemented by precision livestock farming tools, such as sensor-based health monitoring and integrated livestock-forestry systems, which improve disease prevention and environmental outcomes (OECD-FAO, 2023). Genetic improvements and advanced nutrition programs further support Brazil's reputation for high-quality, hormone-free beef.

A key strength is Brazil's technology-driven traceability system, such as AgriTrace, which tracks animal movements, sanitary compliance, and farm-level data. This ensures transparency, facilitates rapid disease control, and builds trust with importers. It also enables Brazil to access premium markets that demand verified origin and quality standards. For India, these practices highlight three priorities: (i) creating integrated governance mechanisms, (ii) investing in traceability and animal welfare systems, and (iii) adopting branding strategies to shift from cost-based competition to value-driven exports. Such measures can enhance India's access and competitiveness in CIS markets, particularly Russia and Uzbekistan.

EGGS

Russia is one of the largest consumers of eggs in the world, with demand remaining consistently high throughout the year. However, domestic egg production exhibits seasonal volatility and has recently come under strain due to a combination of factors such as rising feed costs, inflationary pressures, and Western sanctions resulting in increased dependence on imports. These structural disruptions have widened the gap between domestic supply and demand, compelling Russia to turn to external markets to stabilize egg availability and prices.

As per ITC trademap data, Russia's total egg-related imports classified under HS codes 040721, 040719, 040729, 040711, and 040790 stood at USD 226 million in TE2023 with Netherlands, France, Belarus, Germany, and the Czech Republic collectively accounting for nearly 65 per cent of Russia's egg imports. Yet, recent geopolitical developments have disturbed traditional supply chains, creating an opening for new exporters to enter the Russian market. India already exports a significant volume of fresh eggs and egg powder to the Middle East and Africa, but its presence in Russia has been negligible. In fact, reports indicate that Russia has begun exploring egg imports from India to mitigate its domestic egg

crisis (Jacob & Nandi, 2024). However, Indian exporters have highlighted that they have not yet been able to secure market access for table eggs in shell, despite strong demand in Russia. When Russia temporarily opened table egg imports between January and June 2024, Indian exporters made repeated requests through the government to gain access but were unsuccessful.

This presents a timely opportunity for India to expand its portfolio to include not only fresh table eggs but also value-added products such as liquid eggs and dried egg powder especially relevant for Russia's growing food processing sector. Currently, India exports egg powder, particularly egg yolk powder used in the mayonnaise industry in Russia. In order to tap the opportunity for Indian poultry products there is a need to negotiate with Russia and other CIS countries.

One of the key hurdles is the lack of official recognition of India's Avian Influenza (AI)-free zones, a prerequisite for egg imports under Russian veterinary and sanitary norms. Without this certification, bulk shipments remain restricted. Additionally, Russia maintains strict hygiene, quality, and traceability requirements for egg imports, especially for table eggs and value-added products like liquid eggs or dried egg powder, which are widely used in Russia's growing food processing sector.

India's absence in Russia's egg import data is particularly notable. Despite global exports worth USD 59 million in 2023, India did not register any egg exports to Russia during this period. This gap suggests an untapped opportunity for India to initiate strategic trade engagement. Bilateral efforts at the government level through sanitary protocol alignment, export certification, and long-term trade agreements could facilitate India's entry into the Russian egg market. Bilateral efforts focused on sanitary protocol alignment, official recognition of AI-free zones, and tariff negotiations on egg products will be critical to securing market access and making Indian exports more competitive. Given the structural demand in Russia and India's comparative advantage in egg production, a targeted export strategy could yield significant benefits for Indian poultry exporters.

The Netherlands is among the world's largest exporters of eggs, accounting for over 18 per cent of global egg exports and serving as a key supplier to the European Union and CIS region (FAO, 2023; ITC Trade Map, 2024). Its leadership in the global egg trade is built on highly efficient, technology-driven production systems. Dutch poultry farms employ climate-controlled housing, automated feeding systems, and advanced biosecurity measures, which allow year-round production with minimal seasonal volatility (Van Horne & Bondt, 2021). Layer hens are raised under strict welfare guidelines such as those set by the European Food Safety Authority (EFSA), ensuring compliance with stringent sanitary and sustainability norms required in export markets.

Processing facilities in the Netherlands are highly mechanized and integrated, covering grading, washing, disinfection, and traceability through automated batch coding and digital tracking platforms. This enables compliance with importers' veterinary and sanitary standards, including those enforced by Russia. Packaging innovation is a hallmark of Dutch egg exports, with a strong shift towards sustainable, eco-friendly cartons and molded pulp packaging. Multilingual labelling, traceability QR codes, and date coding are standard, ensuring consumer confidence and facilitating retail distribution across diverse markets (Future Market Insights, 2025). Branding strategies emphasize premium, organic, and specialty eggs, often marketed under health and sustainability narratives. The Dutch industry leverages strong government and industry collaboration, with agencies like the Netherlands Enterprise Agency (RVO) supporting exporters through certifications, quality audits, and participation in international trade fairs.

For market access to Russia and CIS, the Netherlands utilizes efficient logistics via European road networks and sea routes through Baltic and Black Sea ports. Long-standing commercial relationships and consistent quality have positioned Dutch exporters as reliable suppliers, even amid shifting geopolitical trade dynamics.

OTHER PRODUCTS (PANEER AND GHEE)

Other products such as paneer and ghee offer niche opportunities in the CIS region owing to several health benefits and presence of South Asian diaspora. Currently, India has negligible paneer exports to this region, primarily due to limited awareness, short shelf life and regulatory entry barriers. However, with growing demand for high protein vegetarian food and expanding frozen food segment, there is a potential to introduce frozen paneer, ready-to-cook paneer products, and paneer-based snacks to retail and foodservice markets. To establish a foothold, Indian exporters should focus on targeting ethnic as well as local consumers, branding paneer as a high-protein dairy product, and partnering with modern retail chains.

Similarly, ghee has strong potential in Kazakhstan, Russia, and Uzbekistan, where demand for dairy fats is growing. While the region's dairy fat market is currently dominated by butter imports from Belarus and Ukraine, but Indian ghee can be positioned as a healthier, lactose-free alternative.

However, regulatory barriers such as plant approval and product registration must be addressed. With only a few Indian dairy companies currently approved for export to Russia, expanding market presence will depend on broader veterinary compliance and cold-chain investments.

To build visibility, Indian exporters should target premium and ethnic retail chains, engage with e-commerce platforms, and leverage digital branding to reach both diaspora and

mainstream segments. Continued engagement with Russian authorities for expanded plant listings and streamlined import procedures will be key to scaling up these exports.

3.2 FRESH FRUITS AND VEGETABLES

India, as a leading producer of a wide variety of fresh and processed fruits and vegetables, has significant potential to expand its exports to Russia. With ongoing geopolitical tensions and trade realignments, Russia is actively seeking alternative suppliers, and India is well-positioned to capitalize on this shift. By tapping into Russia's demand for both fresh and processed agricultural products, India can strengthen its trade ties and increase its market share.

However, access to the Russian market for fresh fruits and vegetables, is contingent on compliance with stringent phytosanitary requirements. Russia mandates pest-free or low-pest prevalence certification zones for specific commodities, in line with the sanitary and phytosanitary standards of the Eurasian Economic Union (EAEU). Strengthening regulatory systems and certification infrastructure will be key to realising this export potential.

POTATOES

Russia: One of the key vegetables with strong export potential is potatoes, a staple in Russian households and an essential ingredient in vodka production. In TE2023, Russia's import of potato from world was valued at USD 170 million. On the other hand, India's export of potato to world was valued at USD 90 million. Currently, Egypt (54 per cent) and Azerbaijan (21 per cent) dominate Russia's potato market, and are key competitors of India. Their established trade relationships and favourable geographic proximity provide them with an advantage. However, India's vast production capacity and commitment to meeting phytosanitary requirements could help it gain a foothold in the Russian market.

India, as the second-largest producer of potatoes globally, can leverage its production strength to meet Russia's growing demand. Competitive pricing, consistent quality, and improved supply chain mechanisms can help Indian potatoes gain a stronger foothold in the Russian market. India's potato exports to Russia have remained negligible, despite the country being the world's second-largest potato producer. Limited market access and stringent Russian phytosanitary regulations have restricted India's presence in this sector. However, ongoing efforts to meet Russian import standards present an opportunity for India to establish itself as a reliable supplier (Wardhan, Suntwal, Bansal, Laxmikant, & Gulati, 2025).

The major challenge for Indian potato exports is compliance with Russia's strict quarantine regulations. Rosselkhoznadzor (The Federal Service for Veterinary and Phytosanitary Supervision) mandates rigorous pest-free standards, requiring exporters to adopt advanced pest management strategies. The Indian Ministry of Commerce and Industry is working to

align domestic regulations with these requirements, ensuring that production volumes, cultivation practices, and quarantine measures meet Russian standards (RFG, 2025).

Given the relatively low unit value of primary produce, there is scope for exploring value-added pathways, including joint ventures with Russian firms for downstream processing such as vodka production, as well as exports of processed potato products such as flakes and French fries. Such approaches could complement fresh produce trade, support diversification of supply chains, and contribute to deeper bilateral cooperation in agri-food value chains.

Uzbekistan: Uzbekistan's market for potatoes is smaller than the Russian market. However, India can still explore opportunities in Uzbekistan. In TE2023, Uzbekistan's potato imports from the world were valued at USD 63 million. Kazakhstan and Pakistan are the main suppliers of potatoes to Uzbekistan. During the same period, India's potato exports to Uzbekistan were zero, even though India's total potato exports to the world were valued at USD 90 million. This shows that India has good potential to enter and grow in the Uzbekistan market.

BANANAS

Russia: Russia is the third-largest importer of bananas globally and relies almost entirely on imports to meet domestic demand. The Russian banana market is valued at approximately USD 1 billion, presenting a lucrative avenue for Indian exporters. India, as the world's largest producer of bananas, is well positioned to tap into this demand. However, India's presence in the Russian banana market remains negligible, with Ecuador continuing to dominate Russia's imports. to serve Russia, which has traditionally imported from Ecuador.

Traditionally, Ecuador has been the dominant supplier of bananas to Russia, consistently accounting for over 96 per cent of its total imports. This dominance is underpinned by several structural advantages. Ecuador has built a highly integrated supply chain for bananas, with large exporters managing production, packaging, and cold chain logistics end-to-end. The country has also invested significantly in temperature-controlled infrastructure, ensuring that bananas are pre-cooled at the farm level, transported in refrigerated containers, and handled at modern port facilities equipped to preserve quality. Moreover, Ecuador has developed direct and reliable shipping routes to Russian ports, such as St. Petersburg and Novorossiysk, with protocols tailored to the cold chain and phytosanitary standards required by Russian authorities.

In contrast, India's banana exports to Russia remain underdeveloped due to a number of logistical and regulatory constraints. Bananas are a highly perishable commodity, requiring consistent temperature control throughout the supply chain. India faces significant cold chain gaps, particularly at ports and in inland logistics, which limit its capacity to export bananas over long distances.

Despite these challenges, certain factors could work in India's favour. The ongoing geopolitical uncertainties and potential disruptions in supply chains create a timely opportunity for India to emerge as a reliable alternative. India's strategic geographical proximity to Russia, approximately 6,000–7,000 km by sea from ports such as JNPT (Mumbai) and Mundra to St. Petersburg and Novorossiysk, offers clear logistical advantages in terms of both reduced shipping costs and shorter transit time. This not only ensures fresher, better-quality deliveries but also strengthens price competitiveness. Further, seasonal price fluctuations in Ecuador, particularly the upward movement in banana prices during December, create a window for Indian bananas to enter the market more competitively. Leveraging this seasonal gap can help Indian exporters establish a consistent presence in the Russian market (Juneja, Adhikary, Bansal, Laxmikant, & Gulati, 2025).

Uzbekistan: Unlike Russia which has negligible exports of bananas from India, India exported bananas worth USD 12.23 million to Uzbekistan in TE2023, accounting for nearly 20 per cent of Uzbekistan's total banana imports. This makes India a key supplier, with potential to further consolidate its position in the CIS market.

Kazakhstan: The market size /demand for bananas in Kazakhstan is smaller than in Russia and Uzbekistan. In the three years ending in 2023 (TE 2023), Kazakhstan's banana imports from the world were valued at USD 56 million. However, India's banana exports to Kazakhstan were zero during this period, even though India exports a good number of bananas to other countries. This shows that India has good potential to increase its banana exports to Kazakhstan. Indian exporters are currently facing logistics challenges in reaching Kazakhstan. The International North-South Transport Corridor (INSTC) could be a good option to solve these issues. Additionally, strong branding and marketing efforts can help Indian exporters tap into the market potential.

GRAPES

India is a notable player in the global grape export market, accounting for 4.1 per cent of total global grape exports, which averaged 4.9 million tonnes in the triennium ending 2023 (TE2023). The leading exporters during this period were Peru with an 18.1 per cent share, followed by the Netherlands (11.8 per cent) and Italy (10.6 per cent).

India exported an average of 276 thousand tonnes of grapes globally, with its shipments largely concentrated in a few major markets. The Netherlands emerged as the top destination, absorbing 76 thousand tonnes, or 30 per cent of India's total grape exports, showing the dual role of Netherlands as a key European consumer and a re-export hub. Russia was the fifth largest importer, accounting for 18.13 thousand tonnes (7 per cent), followed by the United Arab Emirates at 17 thousand tonnes (6 per cent), underlining the growing demand from the Gulf region.

India's competitiveness is especially evident during seasonal supply windows, making it a strong supplier to markets in the Middle East and Southeast Asia. In TE2021, Russia imported USD 379.82 million worth of grapes. Türkiye was the largest supplier, exporting grapes worth USD 117.62 million and facing a 5 per cent tariff. Other major exporters included Uzbekistan (USD 66.76 million) and Egypt (USD 30.32 million). India exported USD 41.75 million worth of grapes to Russia, capturing an 11.3 per cent share, also under a 5 per cent tariff, highlighting the country's competitive positioning and the opportunity to expand further in the Russian market.

Peru's share in global grape exports has risen sharply from 3.2 per cent in 2010 to 16.1 per cent in 2024, recording an impressive average annual growth rate (AAGR) of 18 per cent during this period (ITC Trademap, 2024). This remarkable expansion reflects a combination of strategic innovation, technological adoption, and strong public-private collaboration, positioning Peru among the world's leading suppliers of table grapes.

A key driver of Peru's success has been its shift towards high-value, patented seedless varieties such as Sweet Globe and Autumn Crisp. These varieties align with modern consumer preferences in global markets and command premium prices, enabling Peru to capture lucrative segments (PROVID, 2024). Alongside varietal diversification, Peru has leveraged precision agriculture techniques, notably drip irrigation and fertigation, to transform arid coastal regions like Ica and Piura into highly productive vineyards. This has provided Peru with a unique production window that complements other global suppliers, ensuring year-round availability in major markets (FAO, 2023). Additionally, the adoption of Integrated Pest Management (IPM) practices has strengthened compliance with stringent international phytosanitary standards while minimizing chemical use and promoting sustainability (SENASA, 2024).

Institutional support has been pivotal to sustaining this growth. SENASA, Peru's National Agricultural Health Service, ensures rigorous inspection and certification of exports, which has been essential in accessing demanding markets such as the US, EU, and Asia. PromPerú, the country's export promotion agency, has complemented these efforts through trade fairs, buyer-seller meets, and targeted marketing campaigns, building the "Grapes from Peru" brand globally. Meanwhile, PROVID, the Association of Table Grape Producers, brings together growers to share knowledge, coordinate strategies, and work with government agencies to overcome challenges and secure long-term market access.

For India, Peru offers important lessons on how varietal innovation, precision farming, and robust institutional coordination can transform a crop into a globally competitive export commodity within a short span of time.

MANGOES

India's mango exports to the world were valued at USD 49.82 million during TE 2023. Indian mangoes were exported to 48 countries, mainly to UAE, UK, USA, Kuwait, and Qatar. Russia imported mangoes worth about USD 100 million in the same period, but India's exports to Russia were only USD 2.26 million. With Russia charging only a 3 per cent tariff on Indian mangoes (ITC Trademap, 2025b), there is a good chance for India to increase mango exports to Russia. Kazakhstan and Uzbekistan currently import very little mango, highlighting Russia as the main potential market. India can therefore benefit greatly by promoting mangoes specifically in Russia.

Russia imports mangoes primarily from Peru, Brazil, China, and Egypt. The average export prices from these countries to the Russian market range between USD 1,932 and USD 2,131 per ton. Specifically, Peru offers at USD 2,006/ton, Brazil at USD 1,932/ton, China at USD 2,054/ton, and Egypt at USD 2,131/ton. In contrast, India's export price is significantly higher, averaging around USD 5,000 per ton (ITC Trademap, 2025b)

POMEGRANATE

India exported pomegranates worth USD 71.36 million globally in TE 2023, reaching over 40 countries, including UAE, Bangladesh, Nepal, the Netherlands, and Switzerland. Russia imported pomegranates valued at USD 130 million, mostly from Azerbaijan, Turkey, Peru, Egypt and Belarus. India has not exported pomegranates to Russia since 2020, although earlier exports ranged from USD 1-2 million each year (DGCIS, 2023). Russia applies a 4 per cent tariff on Indian pomegranates, which is higher than the 1.9 per cent tariff charged to other major suppliers (ITC Trademap, 2025a). Kazakhstan imported pomegranates worth USD 1.3 million, and Uzbekistan imported USD 0.12 million. This shows that Russia is an important potential market for Indian pomegranates, and India should explore ways to re-enter this market, possibly by negotiating lower tariffs.

Major suppliers such as Azerbaijan, Turkey, Peru, Egypt, and Belarus were exporting pomegranates to Russia at average prices of USD 1,779/MT, USD 975/MT, USD 2,149/MT, USD 997/MT, and USD 548/MT respectively. In comparison, India offered pomegranates to the global market at an average price of USD 950/MT. This indicates that Indian pomegranates could be price-competitive in the Russian market. However, to establish a consistent presence and command premium pricing, India needs to address quality, branding, and marketing gaps.

Azerbaijan provides a strong benchmark for India to emulate in pomegranate. The country has built a robust export ecosystem around its Goychay region, known for GI-protected pomegranates cultivated using low-cost organic practices, which appeal to health-conscious consumers. Azerbaijan has also developed processing infrastructure for juice, arils, and concentrate production, leveraging aseptic packaging technologies to ensure extended shelf life and product safety. In terms of packaging, exporters focus on aril trays, bottled juices, and

attractively branded export cartons, each carrying the Goychay story to highlight origin and quality. Marketing is driven by strong diplomatic and cultural ties with Russia, backed by state marketing boards that facilitate trade fairs, B2B connections, and promotional campaigns. Flagship events like the “Azerbaijan Pomegranate Festival” have created a distinctive brand identity across the CIS region and Gulf markets.

For India, adopting similar practices would mean organizing pomegranate clusters with strict quality control, developing processing and packaging hubs, and building traceable value chains to meet Russian and CIS market preferences. Additionally, targeted branding and promotion, supported by APEDA and state governments, could help position Indian pomegranates as both affordable and high-quality, enabling India to regain market share and move towards premium exports over time.

ORANGES

India exported oranges valued at USD 36 million to world in TE 2023 but did not export any to Russia, Kazakhstan and Uzbekistan. Russia imported oranges worth USD 263 million from Egypt, South Africa, Turkey, Argentina, and Morocco. India faces a 3.5 per cent tariff on oranges in Russia, similar to other major suppliers (ITC Trademap, 2025a). Additionally, Kazakhstan imported oranges worth USD 5 million, and Uzbekistan imported USD 51 million. These markets also show potential for Indian oranges. By improving quality and promoting the product, India can enter and expand its orange exports in Russia.

In terms of average unit price, the major suppliers of oranges to the Russian market include Egypt, South Africa, Turkey, Argentina, and Morocco, with prices at USD 604/ton, USD 927/ton, USD 674/ton, USD 955/ton, and USD 899/ton respectively. In contrast, India’s average global export price for oranges was USD 376/ton, making Indian oranges more price-competitive in the Russian market.

Egypt serves as an excellent benchmark for India, given its success in becoming Russia’s top orange supplier. Egyptian production is concentrated in the Nile Delta region, where climatic conditions favour the cultivation of Navel and Valencia varieties at low production costs, supported by proximity to key export markets. Post-harvest practices are highly standardized, with waxing, degreening, and cold chain integration ensuring fruit quality and extended shelf life during long shipments. Packaging is another area where Egypt excels branded cartons with barcodes and QR codes are used to guarantee traceability and brand recognition. On the marketing front, Egypt has strategically positioned its citrus through the “Egyptian Citrus” campaign, managed by the Food Export Council, which provides exporters with promotional kits, B2B networking platforms, and participation in trade fairs. Moreover, Egypt has negotiated favourable trade terms with Russia and invested in year-round marketing efforts, ensuring consistent visibility and demand for its oranges.

For India, entering the Russian and CIS markets will require upgrading post-harvest infrastructure, including scientific grading, waxing, and cold chain logistics, to meet the quality expectations of Russian buyers. Establishing traceable supply chains and branded packaging will help differentiate Indian oranges, while collaborative marketing campaigns supported by APEDA and state horticulture boards can build consumer trust and awareness. By combining its natural price advantage with Egypt-inspired best practices in quality control, branding, and promotion, India can unlock its potential as a competitive supplier of oranges to Russia and neighbouring markets.

3.3 PROCESSED FRUITS AND VEGETABLES

PROCESSED AND FROZEN VEGETABLES

India is one of the world's leading producers of vegetables and also has processing capabilities across a range of vegetable products. The processed vegetable portfolio includes dehydrated onions and garlic (flakes and powder), preserved cucumber and gherkins, mushrooms, green pepper in brine, dried potatoes and peas, asparagus, pulses, as well as frozen and canned sweet corn and peas. Processing hubs are spread across Gujarat, Maharashtra, and Karnataka, and parts of North India emerging as important clusters. These regions provide both raw material strength and industrial capacity, enabling India to cater to global demand for different processed forms, dehydrated, frozen, canned, brined, and IQF (individually quick frozen).

In terms of export performance, India shipped around 537 thousand MT of processed vegetables worth USD 787 million in 2023-24. The major markets for these exports included the USA, Philippines, UK, Thailand, and UAE. In 2024-25, exports stood at about 342.4 thousand MT valued at nearly USD 544 million, with the USA, UK, UAE, Indonesia, Germany, Saudi Arabia, Thailand, Canada, and Malaysia being the leading destinations. This steady diversification of markets highlights India's growing strength in processed vegetables, supported by APEDA's export promotion schemes, which provide assistance for infrastructure, quality certification, and participation in international food fairs.

When it comes to the CIS region, however, India's presence is limited. Russia is currently the only significant market where small volumes of Indian gherkins, garlic, frozen sweet corn and certain other processed vegetables find entry. In TE2024, India exported dried onions (HS 071220) worth USD 186.7 million worldwide, with major markets including the United States (11 per cent), Brazil (11 per cent), Germany (11 per cent), and Russia (5 per cent), highlighting a presence in the Russian Federation but substantial scope for expansion within the CIS region. Kazakhstan and Uzbekistan, despite showing rising demand for frozen and processed foods, remain largely untapped for Indian suppliers. The demand potential in these markets is evident. Russia has a well-developed retail and HoReCa (Hotel, Restaurant, Catering) sector that relies heavily on imported frozen peas, French fries, mushrooms, garlic, and mixed

vegetables due to long winters and domestic production shortfalls. Similarly, Kazakhstan and Uzbekistan are undergoing dietary transitions, with rising urban populations and greater retail penetration fuelling demand for convenience-oriented processed and frozen food products. Their harsh climatic conditions and seasonal limitations in vegetable production make them structurally dependent on imports to meet year-round demand.

Additional product-level initiatives and high-potential exports:

- **Frozen peas, sweet corn, and mixed vegetables** are key demand drivers in CIS retail and foodservice sectors, fueled by consumer preference for year-round fresh-like convenience and domestic supply gaps due to climatic challenges. Indian IQF technology can meet the quality and volume requirements of these segments.
- **Dehydrated onions and garlic**, significant in India's export basket, present further growth opportunities in CIS markets through strengthened cold chain logistics and regulatory compliance.
- **Preserved cucumbers and gherkins**, with India being a dominant supplier to Russia, can see expanded exports to Kazakhstan and Uzbekistan through market-specific product differentiation and packaging adaptation.
- **Dried potatoes and mushrooms as well as frozen French fries and vegetable snacks** are emerging products meeting evolving CIS consumer tastes for convenience and healthier eating, representing valuable niches to exploit.

At present, CIS countries source a large proportion of their processed and frozen vegetables from China, Turkey, Iran, and parts of the European Union. These suppliers have an advantage in proximity and logistics, especially Turkey and Iran, which have overland and sea routes feeding Central Asia. Nevertheless, India has a unique value proposition. Indian products are cost-competitive, benefit from a large and diversified production base, and offer tropical and subtropical varieties that are absent in competing suppliers' portfolios. Moreover, Indian processors have developed capabilities in multiple formats: dehydrated, brined, frozen, and IQF, that can cater to the differentiated needs of CIS distributors, retailers, and food processors.

Despite these advantages, several constraints have held back India's growth in the CIS market. The most significant challenge is the lack of direct and reliable logistics and cold-chain connectivity to Central Asia. The overland route via the International North-South Transport Corridor (INSTC) or through Iran remains underdeveloped, making shipments costlier and less competitive compared to Turkey or China. In addition, Indian exporters have had limited engagement with CIS buyers, distributors, and retail chains, restricting business-to-business linkages. Regulatory and procedural barriers also play a role: divergent sanitary and

phytosanitary (SPS) requirements, mandatory labelling in Russian or local languages, and complex customs procedures increase compliance costs for exporters.

Nevertheless, the potential is considerable. With urbanization rising and consumer preferences shifting towards packaged, ready-to-use, and convenient food products, demand in Russia, Kazakhstan, and Uzbekistan is expected to continue growing. For India, this presents an opportunity to diversify its export basket and reduce overdependence on existing destinations like the USA and the Middle East. A focused strategy for CIS could include participation in regional food exhibitions, trade delegations, and targeted buyer-seller meets to build visibility. Developing cold-chain corridors via INSTC and strengthening maritime links through Iran could significantly reduce logistics costs and improve reliability. Furthermore, Indian exporters could work with APEDA and local partners to adapt packaging, labelling, and certification standards to CIS requirements, thereby easing market entry.

CUCUMBERS AND GHERKINS

India is the largest exporter of processed gherkins, under HS Codes 071140 (bulk, preserved in vinegar) and 200110 (ready-to-eat, in jars/cans), supplying 23 per cent of the world's gherkin demand. In TE2021, Russia imported USD 13.4 million under HSN 071140, with India holding a dominant 98 per cent share. Exports in this category grew remarkably from USD 0.01 million in 2003 to USD 17.2 million in 2021, recording an AAGR of 193 per cent.

Under HSN 200110, Russia imported USD 30 million in 2021. Germany led with a 32 per cent share, followed by India (24 per cent, USD 7.1 million), Vietnam (15 per cent), Belarus (12 per cent), and Turkey (7 per cent). India's exports here increased from USD 6.1 million in 2003 to USD 8.7 million in 2021, with an AAGR of 18 per cent. With India being a key player in Russia's gherkin market, it should also diversify its exports to other CIS countries (ITC Trademap, 2025).

Turkey has emerged as a key competitor in the CIS region's gherkin market, leveraging a combination of localized product development and efficient logistics to strengthen its position. Unlike many other exporters, Turkey has built a reputation for niche product innovation, particularly baby gherkins and spiced pickles that cater to specific ethnic and regional taste preferences in markets such as Russia, Kazakhstan, and Uzbekistan (ITC Trademap, 2024). This targeted product differentiation has allowed Turkish exporters to capture premium segments and establish strong brand loyalty. Another unique feature of Turkey's strategy is its localized packaging approach. Products are labelled directly in Russian, Kazakh, and Uzbek languages, enhancing consumer trust and meeting regulatory requirements in importing countries (Turkish Exporters Assembly, 2024). This attention to language and labelling compliance provides Turkish producers with a competitive edge in retail distribution.

Turkey also benefits from its strategic geographical position and well-developed regional logistics hubs, particularly in Istanbul and Mersin, which serve as gateways for consolidated shipments to the CIS region. This proximity enables shorter transit times, reduced freight costs, and reliable delivery schedules, critical factors for perishable products like ready-to-eat gherkins (UN COMTRADE, 2024). These distinctive practices, niche product development, localized labelling, and logistics efficiency, have collectively enabled Turkey to strengthen its presence in CIS markets and compete effectively against other suppliers. For India, these strategies highlight the importance of tailoring products to regional consumer preferences and leveraging efficient trade routes to enhance competitiveness.

PROCESSED, FROZEN, AND DRIED FRUITS

India produced a wide variety of fruits such as mango, banana, guava, pineapple, papaya, pomegranate, and apple. These are processed into multiple value-added forms including mango pulp and juice, dried bananas, fruit chips, jams and jellies, apple juice, tomato-based products, and blended fruit juices. However, India's fruit processing industry is highly decentralized, due to the country's vast agro-climatic diversity. India's processed fruit exports reached 489,216 MT valued at USD 682.6 million in 2023-24, with key destinations being the USA, Netherlands, Saudi Arabia, UAE, and Russia (APEDA 2025). Indian processed fruit products are globally recognized for their rich taste, especially mango pulp from Alphonso and Totapuri varieties with high brix levels, year-round availability, and competitive pricing.

In Russia, demand for tropical and subtropical processed fruits is significant, especially in the juice, confectionery, dairy, and HoReCa sectors. The market for mango pulp, banana-based snacks, dried fruits, and fruit concentrates is expanding due to increasing health consciousness and consumer preference for convenience foods. Kazakhstan and Uzbekistan, traditionally major consumers of dried fruits such as raisins, apricots, and prunes, are now diversifying their consumption to include tropical processed products like mango puree, dried mango, banana chips, and blended fruit beverages. This presents a unique opportunity for India to position itself as a reliable supplier of both tropical and conventional processed fruit products.

- **Mango Pulp and Concentrates:** India is the world's largest producer and exporter of mango pulp, especially from prized Alphonso and Totapuri varieties. Mango pulp is highly regarded across global markets for its rich taste, high sugar content, and year-round availability. In the CIS, demand from the juice, confectionery, and HoReCa sectors for high-quality mango pulp and concentrates is steadily rising. This demand is driven by consumers' growing preference for tropical fruit flavors and natural fruit ingredients in processed food and beverages. The market potential is particularly strong in Russia, Kazakhstan, and Uzbekistan.

- **Dried Mango and Banana Snacks:** With increasing health consciousness and the popularity of convenient snack foods in CIS countries, dried mango slices and banana chips are emerging as attractive categories. These products cater to consumers seeking natural, tropical, and nutritious snacks. India's competitive production capabilities and established supply chains position it favorably to scale exports of these dried fruits, which also benefit from relatively low transport costs compared to fresh fruit.
- **Blended Fruit Beverages and Jams:** Blended fruit juices, jams, and jellies made from tropical fruits are witnessing growing demand in CIS countries' dairy, bakery, and breakfast sectors. India's wide variety of tropical fruit purees and preserves provide ample raw material for value addition. This segment offers an expanding opportunity for Indian processors to supply health-conscious and convenience-driven consumers in CIS markets.
- **Other Processed Tropical Fruits:** In addition to mango and banana, other tropical processed fruits like papaya, pineapple, and guava are increasingly being accepted in CIS markets. These fruits are exported in forms such as dried chips, puree, and canned products, and collectively represent an emerging segment that can boost India's diversified processed fruit exports to the region.

Despite these opportunities, India's current presence in the region especially in Kazakhstan and Uzbekistan remains minimal. While Russia features among India's top 10 export destinations for processed fruits and juices, volumes remain small relative to the country's overall import potential. The limited market penetration is due to several factors, including lack of promotional efforts, weak trade linkages, logistical hurdles, and absence of customized packaging and product labelling for local consumers.

To realize the full export potential in these markets, India must proactively address these gaps. There is a need to promote Indian processed fruits through retail sampling, food exhibitions, and strategic collaborations with local juice manufacturers, bakeries, and food processors. Exporters should consider investing in bilingual (Russian/local) packaging and labelling, obtain region-specific certifications, and develop value propositions that highlight the health benefits and taste superiority of Indian fruits. In the longer term, establishing joint ventures for repacking or semi-processing in CIS countries, particularly in special economic zones or agro-processing clusters, could significantly enhance India's presence and competitiveness.

3.4 BEVERAGES AND JUICES

WHISKY

Russia: The Russian whisky market has historically been dominated by producers from the USA, UK, and EU, particularly known for their single malt and blended whiskies made from malted barley in line with EU and Scotch whisky standards. However, recent geopolitical landscape has created opportunities for non-traditional suppliers like India.

Indian whisky, however, does not typically meet the EU definition of "whisky." Much of the whisky produced in India is blended using neutral spirits derived from molasses, combined with grain spirits or flavouring agents. As a result, in several markets like Russia, Indian whisky is not legally recognized as whisky but is classified as a generic spirit. This regulatory misalignment limits its acceptance in premium whisky markets that require strict adherence to traditional production methods and minimum ageing standards. Nonetheless, India has the opportunity to position its products under the label of "Indian whisky," similar to how other countries market their whiskies.

Given the rising alcohol consumption in Russia, Indian whisky brands have a chance to fill the supply gap left by Western companies. India's whisky exports have strong potential for growth in Russia, particularly in light of Western sanctions that have led to the withdrawal of well-known Scotch whisky brands. Currently, Indian whisky exports are concentrated in markets such as the UAE (USD 50 million), Haiti (USD 9.99 million), and Ghana (USD 7.12 million). However, in Russia, India's market share remains negligible at just 0.02 per cent, with total exports valued at only USD 0.1 million (TE2021).

Indian whisky is competitively priced, with a unit value price (UVP) of USD 10,000 per cubic meter, and it faces a tariff of 39.47 per cent, making it moderately accessible in the Russian market. However, to gain a stronger foothold, India needs to push for lower tariffs and improved trade agreements. Indian manufacturers, such as Allied Blenders and Distillers, have already started expanding their presence in Russia, positioning themselves to capture a growing share of the market (Sharma, 2023). By leveraging their cost advantage and ensuring consistent supply, Indian whisky brands can cater to Russian consumers seeking quality alternatives to Scotch and other premium Western brands.

TABLE 5: RUSSIA'S MAJOR IMPORT SOURCES FOR WHISKEY

Exporting Country	Value TE2021 (USD Million)	Share (%)	UVP (USD/m3)	Tariffs (%)
World	402	100%	5073	
UK	276	69%	4844	39.47
USA	65	16%	6051	39.47
Ireland	53	13%	5601	39.47
Japan	4	0.9%	16476	39.47
France	0.7	0.2%	3005	39.47
Canada	1.2	0.3%	3963	39.47
Armenia	0.8	0.2%	1304	0

Belarus	0.4	0.1%	1966	0
Taipei, Chinese	0.4	0.1%	22860	39.47
Italy	0.8	0.2%	2721	39.47
Slovakia	0.2	0.1%	1645	39.47
Sweden	0.1	0.0%	16500	39.47
Germany	0.2	0.1%	2705	39.47
Israel	0.1	0.02%	21000	39.47
India	0.1	0.02%	10000	39.47

Source: ITC Trademap

Kazakhstan: India’s presence in Kazakhstan’s whiskey market remains negligible, with exports valued at just USD 3,000 in TE2023. However, unlike Russia where India faced 39.47 per cent tariff, India faced lower tariffs (5.03 per cent) in Kazakhstan.

In TE2023, Kazakhstan imported whiskey worth USD 38.8 million, with the UK leading as the top supplier, accounting for 56 per cent of the market, followed by Ireland (32 per cent) and the USA (10 per cent). Despite higher unit value prices, these three countries dominate the market, all facing a uniform tariff of 5.03 per cent. In contrast, Russia, though a marginal player in Kazakhstan’s whiskey imports, benefits from zero tariffs, due to their regional trade agreements.

TABLE 6: KAZAKHSTAN’S MAJOR IMPORT SOURCES FOR WHISKEY

Exporting Country	Value TE2023 (USD Million)	Share (%)	UVP (USD/m ³)	Tariffs (%)
World	38.8	100%	6342	
UK	21.8	56%	5891	5.03
Ireland	12.4	32%	7167	5.03
USA	3.8	10%	8262	5.03
Russia	0.2	1%	2716	0.0
India	0.003	0%	3917	5.03

Source: ITC Trademap

India can build a distinct identity for Indian whiskey, invest in high-quality packaging, and target the CIS market with premium positioning and festive-oriented marketing strategies. Looking at the example of Scotch whisky, Scotland has built a globally recognized whiskey industry by combining heritage-driven storytelling with strict quality and authenticity standards. Its strict adherence to traditional malting and distillation techniques are protected under Geographical Indication (GI) status. This not only preserves authenticity but also

ensures premium positioning in global markets, including the CIS region (Scotch Whisky Association, 2024).

A key differentiator is the aging process, where whiskey is matured in oak barrels, imparting distinctive flavours and creating a strong narrative of craftsmanship and heritage. Scotland's focus on "single malt" identity has allowed it to appeal to discerning consumers seeking exclusivity and authenticity (Euromonitor, 2024). Scottish brands invest heavily in premium packaging that uses glass bottles, tamper-proof seals, and vintage-style labelling, reinforcing perceptions of luxury and quality (Intel, 2024). Scotland also excels in global branding and marketing, with campaigns like "Scotch Whisky-Made to be Savoured" that highlight tradition, craftsmanship, and lifestyle. Through strategic promotions and storytelling, Scottish producers have successfully created a premium global image, enabling them to command higher prices and establish strong consumer loyalty.

JUICE

While India's global juice exports stand at USD 15.3 million its exports to Russia are only USD 25 thousand capturing 0.0 per cent of Russia's USD 260.2 million juice imports. Similarly, India does not export juices to Kazakhstan, despite its USD 58.5 million juice imports, and has only a 0.1 per cent share in Uzbekistan's USD 7.4 juice market (Annex 5). This indicates a vast untapped market where India can increase its footprint by offering competitive pricing, tropical fruit juices (such as mango, guava, or pomegranate), and customized packaging. Strengthening trade agreements, improving supply chains, and targeting Russia's large demand as a key entry point into the CIS market could significantly boost India's juice exports in the region.

3.5 GROUNDNUT

India is the largest exporter of groundnuts globally, holding 17.8 per cent share of total world exports in TE2023. Russia is the 7th largest export destination for Indian groundnut. Russia imported groundnuts worth USD 202.10 million, with Brazil emerging as the leading exporter, contributing USD 122.41 million at a 0 per cent tariff followed by Argentina with USD 45.18 million worth of exports (TE2021). India ranked third in groundnut exports to Russia with USD 18.27 million worth of exports, accounting for 9.27 per cent of Russia's total imports.

Russia has been identified as the most stable and reliable export destination for Indian groundnuts, boasting a 38.1 per cent retention probability, as estimated through a Markov chain analysis of trade flow from 2008-09 to 2017-18 (Gondalia, Macwan, & Jadav, 2020). This stability underscores the opportunity for India to expand its groundnut exports to Russia. However, groundnut exports from India face challenges due to high moisture content in it and aflatoxin issue in the consignment. Russia's permissible aflatoxin levels for groundnut imports are capped at 5 µg/kg with a maximum moisture content of 7 per cent (APEDA, 2025) in line with EAEU regulations. Non-compliance with these strict standards often leads to

shipment rejections, undermining India's competitiveness. Additionally, India has scope to diversify its groundnut exports to include peanut snacks and other value-added groundnut products, which could further strengthen its position in the global market.

Brazil's experience offers a strong case study for India to emulate. Over the past decade, Brazil has transformed its groundnut sector by investing in quality enhancement, post-harvest management, and regulatory reforms. Initiatives such as the Pró-Amendoim program have helped standardize practices across the supply chain, from the use of certified seeds and farmer training to scientific drying techniques and modern storage infrastructure. These measures have significantly reduced aflatoxin contamination, to the point where in 2022, the EU removed Brazilian peanuts from its list of high-risk commodities. Additionally, Brazil has built a reputation for reliability through robust traceability systems, residue monitoring, and alignment with international food safety norms. Its strategy also includes a strong focus on value-added products and market diversification, allowing it to serve both premium markets like the EU and growing demand centres in Asia, the Middle East, and Africa.

In contrast, while India enjoys a large production base, it faces structural disadvantages in competing with Brazil and Argentina in the Russian market. Brazil and Argentina benefit from well-developed transatlantic sea routes, preferential tariffs through free trade agreements (FTAs), and efficient B2B linkages supported by government-backed export facilitation infrastructure, including cold storage and port facilities. India, on the other hand, faces higher shipping costs due to longer sea routes via the Suez Canal, lacks preferential access because it does not have an FTA with the EAEU, and has limited dedicated logistics infrastructure for perishable trade with Russia. Addressing these gaps while adopting Brazil's best practices in quality control and value addition could help India strengthen its position in Russia and other emerging markets.

3.6 BAKERY AND CEREAL PREPARATIONS

SWEET BISCUITS

India's major export destinations for sweet biscuits are primarily concentrated in Africa and the United States. Western Africa tops the list, importing 39.4 million tonnes, accounting for 14 per cent of India's sweet biscuit exports, followed by USA at 37.8 million tonnes (13.8 per cent), and Eastern Africa at 37 million tonnes (13.5 per cent). Other destinations include Central Africa (30.3 million tonnes, 11 per cent), Yemen (13.7 million tonnes, 5 per cent), and Southern Africa (12.1 million tonnes, 4 per cent) with negligible exports to CIS region, despite the region showing steady mass-market demand for affordable sweet biscuits and growing urban snack consumption.

Uzbekistan: Among CIS region, Uzbekistan imported sweet biscuits worth USD 18.14 million from the world (in TE2023), with Russia contributing the largest share at 68 per cent, amounting to USD 12.31 million. Russian exports benefited from zero tariffs and competitive

average pricing, particularly in the mass consumption biscuit segment. Other notable suppliers such as Ukraine and Kazakhstan exported comparatively smaller volumes, but also enjoyed duty-free access, which supports their presence in the market despite lower trade values. In contrast, European countries, Turkey and India face a 20 per cent tariff which constrains price competitiveness despite rising consumer interest in diversified and premium biscuit offerings.

TABLE 7: UZBEKISTAN’S MAJOR IMPORT SOURCES FOR SWEET BISCUITS

Exporting Country	Value TE 2023 (USD Million)	Share (%)	Unit Price (USD/ton)	Tariffs (%)
World	18.14	100.0%	2271	
Russia	12.31	67.9%	2307	0%
Ukraine	1.51	8.3%	2156	0%
Germany	0.85	4.7%	2923	20%
Kazakhstan	0.83	4.6%	1588	0%
Netherlands	0.67	3.7%	3599	20%
Italy	0.43	2.4%	2581	20%
Türkiye	0.37	2.0%	1665	20%
Poland	0.26	1.4%	2150	20%
Czech Republic	0.25	1.4%	4377	20%
Spain	0.20	1.1%	3571	20%
India	0.00	0.0%	0	20%

Source: ITC Trademap

Russia: In TE 2021 Russia imported sweet biscuits worth USD 72.21 million from world. Poland emerging as the top exporter, accounting for 22 per cent of the total imports (USD 16.07 million), despite facing a 4.47 per cent tariff and relatively higher unit price of USD 2,802/ton. Italy followed with a 14 per cent share, also subject to the same tariff but at an even higher unit price of USD 3,295/ton. Belarus and Kazakhstan, on the other hand, benefited from zero tariffs, making their products more price-competitive, with unit prices at USD 1,334/ton and USD 1,552/ton respectively. Although their export values were lower than Poland and Italy, they still held an 8 per cent market share each. Other notable exporters included Spain, Germany, China, and South Korea, all subject to the standard 4.47 per cent tariff, with varying price points. India's presence was minimal, with exports valued at only USD 0.13 million, though it offered the lowest unit price at USD 1,225/ton suggesting scope to tap into Russia’s

large, resilient demand for everyday sweet biscuits alongside emerging premium and health-oriented segments.

While India's current exports of sweet biscuits to the CIS region remain minimal, the market holds significant untapped potential. Sweet biscuits encounter no major tariff or non-tariff barriers in CIS countries, offering a favourable environment for Indian exporters. Despite CIS region having substantial wheat production, there is ample opportunity for India to enhance its sweet biscuit exports to CIS. Production and branding strategies can strengthen these exports and could enable Indian firms to establish a strong foothold in the CIS confectionery market.

BREAD, PASTRY, CAKES, BISCUITS AND OTHER BAKERS' WARES

India exported USD 163.9 million worth of bakery products under HSN 190590 in TE2023, with USA emerging as its top destination, accounting for 29 per cent of total exports. This was followed by UK with 15 per cent, and UAE with 8 per cent. Other significant importers include Australia (6 per cent), Canada (5 per cent), Nepal, and Saudi Arabia (4 per cent each). India primarily exports sweet biscuits, cookies, rusks, cream biscuits, glucose biscuits, and other shelf-stable bakery products under HSN 190590. While India has an export footprint in both Western and Gulf markets, highlighting robust demand across both these regions, there are minimal exports to CIS.

Russia: In Russia, bakery imports stood at USD 252.85 million in TE2021, making it a significant global market yet untapped by India. Poland led with 35 per cent share (USD 87.4 million) at a competitive unit price of USD 2,476 per ton, while Germany (22 per cent) and Italy (12 per cent) supplied at notably higher prices. Belarus, with 7 per cent share and a low price of USD 1,196 per ton, benefitted from zero tariffs, unlike most other suppliers who faced a 10 per cent duty. India's share was extremely small, about USD 1.03 million, with a price of USD 3,211 per ton, also under 10 per cent

Kazakhstan: In Kazakhstan, bakery imports reached USD 134.15 million in TE2023. The Russian Federation dominated with 77 per cent share (USD 102.95 million) at a unit price of USD 2,210 per ton and zero tariff access. Kyrgyzstan contributed 14 per cent at a much higher price point (USD 6,805 per ton), also enjoying zero tariff treatment. Other suppliers like Ukraine, Italy, Poland, and Türkiye had smaller shares, with unit prices ranging from USD 2,268 to USD 5,754 per ton. India recorded no exports to Kazakhstan during this period, though its global average unit price of USD 2,000 per ton and comparable tariff profile suggest it could enter competitively.

Uzbekistan: In Uzbekistan, imports of bakery products under HSN 190590 averaged USD 29.5 million in TE2023. The Russian Federation was the dominant supplier, contributing nearly 66 per cent (USD 19.7 million), reflecting strong logistical and trade linkages. Belarus (8.3 per cent) and Poland (5.3 per cent) followed, while other regional suppliers like Kazakhstan,

Ukraine, and Türkiye held modest shares. Despite growing consumption and diversified sourcing, India's exports to Uzbekistan were negligible at USD 11 thousand during this period, suggesting vast untapped potential.

While India has established strong bakery exports to traditional partners in the West and Gulf, its presence in Russia, Kazakhstan, and Uzbekistan remains marginal to negligible. Given India's price competitiveness, product diversity, and growing packaged food industry, these markets offer substantial export potential, especially if supported by strategic outreach, tariff negotiations, and meeting region-specific demand.

3.7 MISCELLANEOUS FOOD PREPARATIONS NES

Food Preparations, n.e.s. (not elsewhere specified) under HS Code 210690 covers a broad range of processed food products that do not fall under any specific category. This category includes items such as protein supplements, vitamin and mineral-enriched food preparations, flavoured syrups, food flavouring agents, confectionery mixes, soft drinks, and other specialized food products. India's exports of food preparations under HSN 210690 at the 8-digit level reflect a broad spectrum of products with differing export trends. The leading category is "Other food preparation nes" (21069099), which averaged USD 499.69 million in export value over the past three years, showing steady growth. The second-largest category, "Pan-masala including scented supari" (21069020), had an average export value of USD 33.81 million over the same period. "Soft drinks other than sharbat" (21069019) followed with an average of USD 28.90 million, while sugar syrups with flavouring or colouring (21069040), food flavouring substances (21069060), and other diabetic foods (21069091) saw moderate increases, with average values of \$8.37 million, \$6.05 million, and \$4.76 million, respectively. Overall, the data underscores a strong export performance in general food preparations, with varying trends in specialized categories over the last three years.

India currently exports these products to major destinations like USA (USD 146.14 million), UAE (USD 84.02 million), Australia (USD 40.8 million), and Canada (USD 36.56 million). However, its presence in Russia and other CIS countries remains limited. In Russia, India's exports stood at USD 8 million, capturing just 1 per cent of the market. Similarly, India accounted for only 1 per cent of Kazakhstan's market with USD 2.5 million in exports and 3 per cent of Uzbekistan's market with USD 3.1 million in exports.

The composition of food imports under HS 210690 varies across Russia, Kazakhstan, and Uzbekistan. Russia imports significant volumes of protein-based nutritional supplements, coloured and flavoured sugar syrups, and bakery/confectionery preparations, segments where India's current export offerings under this HS code are only partially aligned. Kazakhstan's imports focus on soft drinks, confectionery items, and vitamin-enriched mixes. Uzbekistan, on the other hand, imports significant quantities of food additives, processed food products, and snacks. Despite these differences, a common trend is the growing reliance

on imported food preparations due to expanding food processing industries, changing consumer preferences, and disruptions in traditional supply chains. India, with its well-developed food processing sector, can tap into this demand by targeting specific product segments in each country.

With the EU, USA, and UK being major suppliers, Western sanctions have disrupted their trade with Russia, creating a gap that Indian exporters can fill. India's Unit Value Price (UVP) is USD 15,928 per metric ton, and tariffs stand at 9.25 per cent, offering room for price-based competition. By leveraging local partnerships, distribution networks, and targeted branding, India can increase its visibility and acceptance in Russia.

Russia: Russia's imports under HS 210690 exceeded USD 600 million in TE 2021, with significant demand for food flavourings, sugar syrups, and health-oriented food preparations. India can leverage its strengths in food flavouring materials (HS 21069060), diabetic-friendly foods (HS 21069091), and soft drinks (HS 21069019) to enter the Russian market. In TE21, Russia, imported USD 499.07 million worth of other foodstuffs not elsewhere named or included (2106909809) and USD 18.75 million for flavoured or coloured sugar syrups (2106905900). However, these product lines differ from India's dominant exports under the same code, which include food flavouring materials (HS 21069060), diabetic-friendly foods (HS 21069091), and soft drinks (HS 21069019). India's current export value to Russia in these categories, USD 3.86 million and USD 9 million respectively suggests untapped potential and room for significant growth. With major suppliers like the EU, USA, and UK constrained by sanctions, Russia is seeking alternative sources. This presents an opening for India to strengthen its presence, especially in segments where product fit exists such as flavouring agents, herbal drinks, and diabetic-friendly formulations. However, market penetration requires navigating Russia's strict food safety and regulatory landscape, including EAEU-compliant certifications, Russian-language labelling, and technical documentation. With applied MFN rates of 12 per cent and 10 per cent the Russian market holds promise for India's processed food and specialty ingredient sectors, especially with strategic pricing and positioning.

TABLE 8: RUSSIA'S MAJOR IMPORT SOURCES FOR FOOD PREPARATION NES

Exporting Country	Value (TE21) (USD Million)	Share (%)	UVP (USD/MT)	Tariffs (%)
World	748	100%	5788	
Germany	193	26%	7135	9.25
USA	88	12%	22679	9.25
Belarus	33	4%	2254	0
UK	39	5%	10923	9.25
Austria	37	5%	8277	9.25

China	30	4%	2536	9.25
France	30	4%	3637	9.25
Hungary	23	3%	9877	9.25
South Korea	25	3%	2242	9.25
Italy	22	3%	23338	9.25
Poland	25	3%	6141	9.25
Netherlands	17	2%	7132	9.25
Malaysia	19	2%	2030	9.25
Spain	13	2%	14967	9.25
Switzerland	15	2%	9551	9.25
Türkiye	14	2%	6142	9.25
Brazil	12	2%	8246	9.25
India	8	1%	15928	9.25

Source: ITC Trademap

Kazakhstan: Kazakhstan’s imports of food preparations nes under HS 210690 in TE2023 was valued at USD 225 million and further reached USD 347.8 million in 2024, with soft drinks (USD 47.02 million) and vitamin-enriched food mixes (USD 6.78 million) being among the top imported products. Given India’s competitive advantage in affordable and high-quality functional beverages, flavoured syrups, and confectionery items, it can expand its presence in Kazakhstan’s growing market. However, branding and halal certification will be crucial, as Kazakhstan has a sizable consumer base. India's strategy should focus on premium and health-conscious food categories, such as fortified snacks and sugar-free syrups, while engaging in promotional campaigns to build consumer trust.

Uzbekistan: Uzbekistan’s estimated food preparations import under HS 210690 stand at USD 75 million in TE 2023 and further increased by USD 147 million in 2024, with a strong demand for food additives, processed foods, and confectionery mixes. India can focus on exporting protein supplements, vitamin-enriched food products, and Indian snacks, which are gaining popularity due to the rise in health awareness and urbanization. However, Uzbekistan has strict import regulations, making government-level trade discussions and local partnerships essential for market entry. Establishing a robust distribution network and educating consumers on the benefits of Indian food preparations can enhance India's market share.

To strengthen its footprint in these CIS countries, India needs to implement a focused strategy involving marketing, branding, and active involvement in trade fairs, buyer-seller meets (BSMs), and industry exhibitions. This can boost the visibility of Indian food preparations.

4

CHALLENGES TO BOOSTING AGRICULTURAL EXPORTS IN CIS

Despite having immense potential for expanding India's agricultural exports to CIS countries, particularly Russia, Kazakhstan, and Uzbekistan, due to growing food demand and India's diverse agricultural produce, several challenges remain that hinder the growth of agricultural trade with these nations. These challenges relate to SPS restrictions and trade barriers to logistical issues and geopolitical tensions.

i. SANITARY AND PHYTOSANITARY (SPS) BARRIERS

Pest-Free Area Requirement for Fresh Produce: Russia mandates a pest-free area declaration for certain fresh fruits and vegetables. India has communicated that some of the pests cited in these requirements are not reported domestically; however, additional pest-free assurances are still sought by the importing authorities. Despite India's request for alternative approaches such as consignment-wise or systems-based pest-risk management certification, these have not yet been formally considered, resulting in continued restrictions on imports based on pest-related concerns. The stringent regulatory requirements constrain access to the Russian market for selected Indian agricultural exports, particularly within fresh produce segments subject to higher phytosanitary scrutiny.

While Russia applies differentiated SPS requirements across product categories, the need for additional documentation and certifications for certain high-value or sensitive products can become a significant obstacle. These non-tariff measures increase compliance costs for exporters and affect India's relative competitiveness in the Russian market compared to other suppliers.

Registration and Certification of Animal-Based Products: Indian exporters of bovine meat, eggs, dairy, and marine products face challenges in registration and listing with the Federal Service for Veterinary and Phytosanitary Surveillance (FSVPS). Several Indian enterprises listed on the FSVPS website are placed under "Special Requirements," which allow them to export only to Russia and not to other EAEU countries. FSVPS's insistence on conducting physical inspections for establishments already approved by the Export Inspection Council (EIC) adds unnecessary costs and delays, contravening the principles of the WTO SPS Agreement. Furthermore, rejection notifications do not specify reasons, test methods, or contaminants found, leading to temporary suspension of processing units without clarity. The

test methods for microbiological parameters and reporting formats are also not shared with Indian authorities or exporters.

Barriers in Kazakhstan and Uzbekistan: Even in Kazakhstan and Uzbekistan, which are less stringent than Russia in their SPS requirements, Indian agricultural exports face barriers like high import duties, limited access to distribution networks, and a lack of market intelligence regarding consumer preferences. These barriers limit the scope for Indian agricultural exports and reduce their growth potential in these markets.

ii. FINANCIAL SANCTIONS

The sanctions imposed on Russia have complicated financial and trade logistics for Indian exporters. Restrictions on banking and payment systems have made it more difficult to process financial transactions, increasing uncertainty for Indian exporters and raising the risks of non-payment. This is more challenging for sectors like agriculture, where transactions are often time-sensitive. Additionally, the sanctions have restricted Russian access to international markets, affecting demand for agricultural products. This leads to Indian exporters facing payment issues due to the lack of reliable financial channels. Many international banks and payment systems no longer facilitate transactions involving Russia, which creates payment delays and potential risks. This reduces the ease of doing business and makes the process more cumbersome for Indian exporters, increasing the cost of trade with Russia.

iii. LOGISTICAL CHALLENGES AND HIGH COSTS

The long distance between India and CIS countries, particularly Russia, increases transportation costs. While maritime shipping is a common mode of transport, the extended transit times, combined with the added costs of land transit across Central Asia, elevate logistics expenses. The traditional routes often involve complicated border procedures and significant delays, which are problematic for perishable agricultural goods like fruits and vegetables. While major ports in Russia and Kazakhstan are developed, the logistical infrastructure for handling and transporting agricultural goods remains inadequate, especially in remote regions. Insufficient cold storage and inadequate road infrastructure lead to spoilage and additional transportation costs, making Indian products less competitive compared to regional suppliers. The lack of efficient transportation infrastructure also leads to delays, reducing the quality of fresh produce on arrival.

iv. HIGH IMPORT TARIFFS AND LIMITED MARKET ACCESS

While India enjoys strong and constructive trade relations with Russia and other CIS countries, the absence of a comprehensive free trade or preferential trade arrangement means that Indian agricultural products are often subject to relatively higher applied import tariffs. In comparison, some competing suppliers, such as China, benefit from established trade

agreements that provide preferential market access. As a result, Indian exports face modest competitiveness constraints in these markets. Advancing discussions on tariff liberalisation through an FTA or similar framework could help India more effectively respond to growing demand in the CIS region and expand its agricultural export presence.

The Eurasian market has high potential for Indian products, not only in agriculture but also in sectors such as textiles, electronics, and pharmaceuticals. However, despite these complementarities, Indian exporters face significant hurdles due to the lack of direct and regulated access to CIS markets, compared to countries like China. Countries such as China have long-standing trade ties with Russia and Kazakhstan, and their goods are often preferred due to better familiarity and established logistical networks. India, on the other hand, lacks comprehensive trade agreements with CIS countries, making it harder to secure competitive market positions. The absence of a comprehensive trade agreement between India and the Eurasian Economic Union (EAEU) further limits India's ability to compete on an equal footing, leaving its exporters without the duty incentives and protections that competitors enjoy.

v. INTRA-CIS TRADE

The geopolitical dynamics in the CIS region add a layer of uncertainty to trade relations. The influence of Russian politics in Central Asia affects trade between India and these countries. Periodic political instability, especially in countries like Kazakhstan, where governance and reforms are still ongoing, can disrupt the flow of agricultural exports from India. Many CIS countries, particularly Kazakhstan and Uzbekistan, are highly dependent on Russia for their agri-food exports. This reliance often limits their willingness to engage with other suppliers, like India, as Russia's domestic policies and trade restrictions heavily influence the agricultural trade flows in Central Asia.

5

ENABLERS AND OPPORTUNITIES FOR BOOSTING AGRICULTURAL EXPORTS

The CIS region has largely remained an untapped market for Indian agricultural exports, despite its significant potential. While exporters face challenges related to logistics, financial transactions, and limited market access, several emerging opportunities and enablers are creating a favourable environment for expanding India's agricultural exports to the three key CIS nations.

i. EXPANDING BILATERAL TRADE

India and Russia have set an ambitious target to increase bilateral trade from USD 65 billion to USD 100 billion by the end of this decade. This growth will open new avenues for Indian agricultural exports, as Russia seeks to diversify its import sources amid shifting geopolitical realities. Indian agri-products, including tea, coffee, spices, fruits, vegetables, dairy, and processed food, can benefit from this expanding trade relationship. The rising Russian demand for organic and high-quality agri-produce presents a key opportunity for Indian exporters to enhance their market presence. The demand for Indian agri products is expected to rise, especially as Russia looks to secure its food supply from friendly trading partners. Additionally, Indian sugar, edible oils, and animal feed have strong potential in the Russian market, given its need for diversified food imports.

India and Uzbekistan are aiming to boost bilateral trade, with a goal to increase it to USD 1 billion in the coming years. India and Kazakhstan are also actively seeking to increase trade and economic cooperation, with a focus on utilizing the International North-South Transport Corridor (INSTC) to facilitate trade and strengthen bilateral ties.

ii. IMPROVED CONNECTIVITY THROUGH INSTC, EASTERN MARITIME CORRIDOR, AND ARCTIC ROUTES

The enhanced connectivity between India and Russia, Kazakhstan, and Uzbekistan is significantly improving logistics and reducing barriers to trade, especially for agricultural exports. The development of key trade corridors and improved shipping routes presents substantial opportunities for Indian agricultural products to penetrate these markets more efficiently.

- **International North-South Transport Corridor (INSTC):** The INSTC was proposed in 2000 to connect India, Russia, and Iran, bypassing the Suez Canal. With increased trade between India and Russia, the INSTC is now being leveraged to enhance efficiency in the movement of goods. Following recent visit of Russian President Putin to India, the corridor has gained renewed political and operational momentum. The operational route combines rail, road, and sea transport through Iran and Central Asia, reducing freight costs by up to 30 per cent and cutting down transit times from 50-60 days to 20-25 days. Despite ongoing geopolitical tensions and logistics issues, commercial shipments have been steadily increasing since 2022, making it a viable channel for agricultural exports (Wani, 2024).
- **Chennai-Vladivostok Eastern Maritime Corridor (EMC):** The Chennai-Vladivostok EMC, a 10,300 km maritime route, is now operational and plays a crucial role in boosting maritime trade between India and Russia, facilitating the movement of crude oil, metals, and textiles. The corridor will help in a significant reduction in time from 40 days to 24 days and up to 40 per cent reduction in distance. This will help benefit agricultural exports such as fruits, and vegetables, reducing shipping times significantly. The Eastern Maritime Corridor also aligns with the Northern Sea Route (NSR), which will open up more efficient pathways for India to expand its trade with Russia and beyond, especially in the Arctic region (PIB, 2024).
- **Northern Sea Route (NSR):** The NSR, which is emerging as a crucial shipping route connecting Asia and Europe, allows trade between the two regions to be completed in 10-14 fewer days, significantly benefiting the perishable goods trade. India and Russia have committed to further collaboration in the development of the NSR and Chennai-Vladivostok route to improve connectivity. These routes can help boost exports of perishable goods like dairy, vegetables, and fruits to Russia and other Eurasian markets. However, further investment in Arctic infrastructure and ice-breaking vessels is essential to unlock the full potential of these routes (Parnerkar, 2024).

FIGURE 11: TRADITIONAL AND NEW TRADE ROUTES FROM INDIA TO RUSSIA



Disclaimer: Map is not to scale. The sea routes shown are indicative and intended for illustrative purposes only; they may not represent exact shipping paths or navigational routes.

Source: Authors' Creation

iii. TRADE IN LOCAL CURRENCIES

A significant development in India-Russia trade has been the increased use of local currencies in rupees and rubles for cross-border transactions. This shift aims to reduce reliance on the US dollar, cut currency conversion costs, and minimize foreign exchange risks. For Indian exporters, particularly in the agricultural sector, this mechanism allows them to receive payments in rupees, streamlining financial transactions and reducing the likelihood of delays caused by currency volatility or sanctions-related restrictions.

To support this new arrangement, the Reserve Bank of India (RBI) introduced a framework for international trade settlements in Indian rupees in July 2022. The move was designed to facilitate trade with countries facing sanctions or those interested in moving away from dollar-denominated transactions. Under this framework, Indian banks can open Special Rupee Vostro Accounts (SRVAs) for correspondent banks of partner countries, enabling settlements in rupees. Since the announcement, more than 20 Indian banks have received

RBI approval to open over 60 Vostro accounts with partner banks from various countries, including Russia. This includes major Indian public and private sector banks entering into arrangements with foreign banks to operationalize the rupee trade mechanism. In the context of India-Russia trade, two major Russian banks, Sberbank and VTB Bank have opened Vostro accounts at their respective Indian branches to enable rupee-denominated trade. Sberbank, which has had a presence in India since 2010, expanded operations in 2023 by opening a Mumbai branch and establishing an IT centre in Bengaluru. Meanwhile, VTB Bank, which had earlier closed its branch in India in 2017 as part of cost restructuring, announced the reopening of operations with a Vostro account in 2023 to re-engage with the Indian market.

These developments are expected to benefit Indian agricultural exporters by improving payment efficiency, lowering transaction costs, and offering a more predictable settlement environment. In sectors such as grains, tea, spices, and fresh produce, where profit margins can be thin, reduced forex-related expenses can enhance competitiveness in global markets. Additionally, the removal of dollar-based banking hurdles is likely to lead to faster payment cycles and improved cash flow, which are critical for small and medium-sized agri-exporters. As India continues to diversify its trade settlement mechanisms, the rupee-ruble route could serve as a model for similar arrangements with other countries, promoting financial resilience and greater autonomy in global trade.

iv. REDUCED TARIFFS AND POTENTIAL FREE TRADE AGREEMENT (FTA) WITH EAEU

India and Russia are actively working on reducing tariffs and streamlining customs procedures, which will significantly boost the ease of doing business for agricultural exporters. Efforts to simplify phytosanitary regulations will further ease the process for India's farm products to enter Russian and Central Asian markets.

Additionally, ongoing discussions around a Free Trade Agreement (FTA) between India and the Eurasian Economic Union (EAEU), which includes Russia, Kazakhstan, Belarus, Armenia, and Kyrgyzstan could further lower trade barriers. If implemented, this FTA would eliminate high import duties on Indian agricultural products, making them more price-competitive in Russia and Central Asia.

Kazakhstan and Uzbekistan, being key food importers, would become lucrative markets for Indian products as reduced tariffs make Indian exports more attractive. Processed food products, including spices, ready-to-eat meals, and packaged snacks, could also see increased demand in these regions. The FTA could boost dairy exports, as Kazakhstan and Uzbekistan rely heavily on imports for their growing dairy consumption.

In case of Uzbekistan, bilateral trade figures with India are expected to keep rising, with the signing of trade agreements and initiatives such as the Preferential Trade Agreement (PTA), which aims to increase trade and joint business activities.

v. ENGAGEMENT OPPORTUNITIES FOR MAJOR IMPORTING MNCS AND RETAIL CHAINS IN CIS MARKETS:

A critical aspect for boosting Indian agricultural exports to CIS countries, especially Russia, Kazakhstan, and Uzbekistan, is the engagement of major multinational corporations (MNCs) and retail chains that dominate food imports and distribution in these markets. Establishing direct relationships with such entities can enable Indian exporters to navigate complex distribution networks, enhance product visibility, and tailor offerings to regional consumer preferences.

Russia: In Russia, several large retail chains and distributors shape the processed fruit and vegetable markets:

- **X5 Retail Group:** X5 Group is Russia's largest food retailer and a dominant market force, operating under well-known banners such as Pyaterochka (proximity stores), Perekrestok (supermarkets), and Karusel (hypermarkets) (Visit Russia, 2025). The company's strategy involves a clear move towards direct import and distribution for specific product categories like fresh produce and confectionery, a move aimed at enhancing gross margins and improving product quality. X5 Group is also heavily invested in technological innovation, including automated quality and freshness control for food products and "smart shelving". This indicates that they are a modern, forward-thinking partner. The company places a strong emphasis on a responsible supply chain, actively engaging with suppliers on sustainability, packaging, and voluntary certifications (WBA, 2025).
- **Magnit:** It is a leading Russian food retailer, and its acquisition of Dixy, the country's fifth-largest grocery retailer, has significantly strengthened its market position. This consolidation is expected to generate "material synergies" in procurement and direct import operations by combining purchasing power with both national and local suppliers (Magnit, 2025). A key illustration of this strategy is Magnit's direct engagement in Uzbekistan. The company has a dedicated commercial procurement office in Tashkent and has reported a doubling of its fruit and vegetable imports from Uzbekistan in 2022. This direct channel is a clear avenue for Indian exporters of products such as grapes, persimmons, plums, and other stone fruits that are in high demand in Russia (East Fruit, 2025).
- **Auchan Russia:** The French retail giant Auchan operates in Russia and has a substantial presence with 230 stores and a reported revenue of 237 billion rubles in 2022. A major strategic development for Auchan in Russia is its focus on private-label products. The company has announced plans to open new stores that will sell a product assortment consisting of approximately 90 per cent food products under its own private brands. This pivot creates a significant opportunity for Indian exporters to partner on private-

label manufacturing and supply, providing a stable, high-volume channel for products that align with Auchan's brand (Auchan, 2025).

- **Lenta:** Lenta is a major multi-format retail chain and one of the largest hypermarket chains in Russia, with a wide network of hypermarkets and supermarkets across the country. The company is recognized by its suppliers for its strong relationships, ranking highly in surveys on strategy, information sharing, and trust (Visit Russia, 2025). However, the company's corporate information indicates a strong focus on domestic sourcing, with a statement that 100 per cent of products are sourced from Russian suppliers and 20 per cent are sourced locally (Lenta Corp, 2025). This suggests that direct import opportunities may be limited unless a product is unavailable from domestic channels.
- **METRO Cash & Carry:** METRO's business model is distinct from the other profiled retailers. It operates as a leading international food wholesaler specializing in "HoReCa" (hotels, restaurants, and cafés) and traders. This makes METRO a prime partner for bulk or business-to-business agri-exports, such as providing ingredients to restaurants or supplying small, independent retailers through its franchise format (Metro, 2025).

Kazakhstan: The retail and distribution sector in Kazakhstan is dominated by Russian supermarket chains like X5 and Dixy through cross-border operations, alongside local chains such as Magnum Cash & Carry. According to surveys, Russian-origin food products maintain a significant share (30–50 per cent) of Kazakhstani grocery assortments, often supplying through local importers and wholesalers. While Kazakhstan's food retail network is less consolidated compared to Russia, strong demand for processed and frozen vegetables and fruits in urban centres suggests ample room for Indian brands to connect via these channels (Magnum, 2025).

Uzbekistan: Uzbekistan's retail sector is rapidly expanding, with entry and growth of several Russian chains such as Svetofor and Dobrocen, alongside regional players and international chains like Carrefour and Magnum. The sector is characterized by a mix of modern supermarkets and traditional markets, with increasing consumer preferences for packaged, processed, and convenience foods. Indian exporters could explore distribution partnerships and joint ventures in this evolving retail ecosystem to enhance reach.

6

STRATEGIES AND POLICY IMPLICATIONS

India and CIS countries share long-standing diplomatic relations and growing trade partnerships. With the CIS region's reliance on imports for a wide range of agricultural products, India's diverse agri-base offers significant potential to expand exports. Western sanctions on Russia have disrupted traditional supply chains, increasing its reliance on trusted partners like India for essential food imports. While Russia is already a key destination, Kazakhstan and Uzbekistan remain underexplored markets for several agricultural products.

However, India faces key hurdles, including high tariffs, regulatory barriers, logistics challenges, and limited brand awareness. Addressing these through a focused short-, medium-, and long-term strategy is critical to improving market access, ensuring product compliance, and strengthening India's footprint in the CIS agri-food sector.

6.1 FOCUSED STRATEGIES

STRENGTHEN COMPLIANCE WITH RUSSIAN FOOD SAFETY AND ANIMAL HEALTH STANDARDS

Rationale: India's agricultural exports to CIS, particularly Russia, face frequent rejections due to phytosanitary (SPS) and animal health concerns for fruits, vegetables, poultry, and bovine meat. Russia's requirement for pest-free declarations for fresh produce and the lack of formal recognition of India's FMD control measures for bovine meat exports have limited India's market access. Compliance with Rosselkhoznadzor's standards will be key to reducing rejections and improving trust in Indian products.

Action Points:

- **Establish a Joint Working Group (JWG):** Form a dedicated JWG between India and Russia, involving Rosselkhoznadzor, Indian regulatory bodies and exporters to regularly resolve SPS and veterinary issues. The JWG should address market access concerns for both plant-based and animal products, streamline documentation, and facilitate mutual recognition of certifications.
- **Expand pest surveillance and Zonal Certification:** Implement pest-free surveillance zones in coordination with state governments and ICAR. Facilitate on-site inspections by Russian

and other CIS regulatory authorities, similar to the model used for mango irradiation certification by US authorities, to build confidence and secure official recognition of these zones. Focus on relevant production clusters identified for export development. Seek consignment-wise pest-free certification and engage in technical and diplomatic dialogue for formal recognition of these zones by importing countries, including Russia.

- **Harmonize veterinary protocols for bovine meat:** Engage Rosselkhoznadzor to review and acknowledge its Foot-and-Mouth Disease (FMD) control measures under the National Animal Disease Control Programme (NADCP). A key step would be proposing site-specific quarantine and export certification models, beginning with FMD-controlled processing facilities in major bovine meat producing states such as Uttar Pradesh, Maharashtra, and Andhra Pradesh. Additionally, strengthening robust hygiene certification will help build confidence among Russian buyers and regulators.

PURSUE FREE TRADE AGREEMENT (FTA)

Rationale: India faces moderate to high tariffs on many agri-products in the CIS region, especially on goods like bovine meat, whiskey, and processed foods, undermining price competitiveness. An FTA or trade facilitation agreement with EAEU and other regional blocs can significantly improve India's export prospects.

Action points:

- **Negotiate with regional blocs like EAEU, BRICS, SCO for FTA:** Fast-track negotiations on the India-EAEU Free Trade Agreement which can reduce import duty on Indian agriculture products in Russia and Kazakhstan and use existing diplomatic platforms such as BRICS and SCO to advocate for faster FTA progress and raise trade facilitation concerns.
- **Tariff reductions:** There is a need to identify priority tariff lines where India has export potential and push for immediate tariff reductions or quotas. Bilaterally negotiate tariff reductions for key Indian exports and develop mutual recognition agreements to streamline customs and quality checks. To start with, advocate for reduced duties on Indian whiskies, food preparations nes products, sweet biscuits and bakery products.

ENHANCE BRANDING AND MARKETING STRATEGIES

Rationale: Indian agri-products lack visibility and distinct branding in the CIS region. Without strong marketing, even high-quality products struggle to capture market share from competitors like China, Turkey, and Iran. India can leverage the strong cultural relations dating back to centuries through art, music and films to promote Indian agricultural products.

Action points:

- **Digital and offline branding efforts:** India must invest in sustained digital and offline brand-building efforts through coordinated campaigns across major Russian cities, featuring social media promotions, supermarket demos, food festivals, and B2B roadshows. These can be led by Indian embassies in partnership with APEDA and local distributors. These efforts can be amplified through Indian as well as Russian influencers, to create relatable, localized messaging around Indian food culture.
- **Product specific campaigns:** Dedicated campaigns via bloggers and influencers can help increase visibility of flagship Indian products such as spices, basmati rice, and organic agri-products. Positioning them as premium offerings supported by international certifications and compliance standards will build trust with buyers while allowing exporters to tailor strategies based on nuanced consumer preferences. For processed and ready-to-eat foods, India should position them as premium and convenience options at Russian supermarkets and food expos. Sweet biscuits and bakery products can be marketed as healthy tea-time snacks, highlighting low-sugar, millet-based, or multigrain formulations in line with emerging Russian health trends. Branding efforts should focus on authenticity, quality, and wellness attributes, using culturally relevant themes and local language messaging to build consumer trust and connect with Russian preferences. These campaigns should be tailored to resonate with health-conscious and urban segments, especially within premium retail spaces.
- **Expand trade delegations and deepen institutional engagement:** Increase the number of trade delegations, including exporters, agri-business representatives, and policymakers, to participate in major CIS trade fairs and exhibitions, thereby enhancing B2B linkages and buyer confidence. Simultaneously, organize agriculture-sector-focused ministerial-level events in India for Central Asian Republics (CAR) countries. Regular contacts between ministries are essential for trust-building, facilitating follow-up on MoUs, and promoting cooperation in capacity building, agricultural research, and education.

6.2 OTHER STRATEGIES

DEVELOP EXPORT ZONES FOR QUALITY ASSURANCE

Rationale: India's agricultural exports to the CIS region, especially to Russia, Kazakhstan, and Uzbekistan, are hindered by the absence of region-specific infrastructure aligned with Russian quality and safety standards. Establishing certified export-oriented agri-clusters will not only ensure consistent quality but also enable faster inspections and smoother market access, particularly crucial for perishables like fresh fruits, vegetables and processed foods.

Action points:

- **Specialized export zones:** India should develop specialized agri-export zones for high-potential commodities on the lines of grapes in Maharashtra. Potato zones in Agra, Uttar Pradesh and Banaskantha, Gujarat, bovine meat zone in Maharashtra and Andhra Pradesh, and egg production zones in Namakkal, Tamil Nadu can be developed. Additionally, India should leverage bilateral arrangements to establish dedicated Indian agri-logistics facilities and cold chain infrastructure at strategic ports such as Chabahar and Bandar Abbas in Iran to serve as logistical gateways to the CIS markets. Multi-modal cold chain corridors, combining rail, road, and air routes must also be developed to ensure reliable and timely movement of perishables to destinations like Tashkent, thereby improving India's competitiveness across the region.
- **Cluster level infrastructure:** State Governments, along with ICAR should collaborate to record farm practices, pesticide usage, and quality assessments. For commodities like cucumber, gherkins, and groundnut, contract farming models should be promoted to ensure pesticide control, uniform grading, and residue compliance. Cold rooms and grading centres at village collection points can reduce spoilage and maintain export standards. In Namakkal, a major egg-exporting hub, investments in AI-free certification systems, automated grading lines, and hygienic packaging will help position Indian eggs as a reliable supply option to Kazakhstan and Russia. These interventions would also support the creation of pest free production areas, addressing Russia's regulatory requirements and enhancing market access.

STRENGTHEN AGRICULTURAL VALUE CHAINS

Rationale: India's fragmented supply chains increase post-harvest losses and affect product quality. Integrated value chains are critical for perishable goods to meet Russian quality expectations. India needs to build comprehensive agri-export infrastructure from pre-harvest improvements to post-harvest logistics.

Action points:

- **Build farmer capacity for export-readiness:** To meet CIS market expectations, India must invest in building the technical capacity of its agri-export stakeholders. Training programs for farmers and FPOs should focus on safe pesticide usage, post-harvest handling, and export-standard packaging. These interventions will enhance product quality making Indian produce more reliable for CIS buyers. Enhancing agricultural productivity will be critical for expanding India's exports to the CIS. Investment in seed R&D, and micro-irrigation systems across key agri-clusters will boost yields, ensure better quality, and reduce inconsistencies in exports. For example, promoting drought-resistant and low-aflatoxin groundnut varieties can increase acceptability in CIS markets. These productivity improvements will directly feed into higher export readiness for a range of commodities.

- **Enhance commodity-specific post-harvest practices:** For specific commodities, customized infrastructure and handling methods are vital. In the case of grapes, on-farm cold rooms combined with sulphur-free preservation techniques and controlled-atmosphere packaging can significantly increase shelf life. Potato exports can be boosted by promoting disease-free seed development and packing in moisture- and pest-resistant sacks, which reduce transit losses and maintain quality in colder climates. For groundnuts, compliance monitoring and testing infrastructure must be strengthened at the pre-export stage to align with Russia’s regulatory threshold of 5 µg/kg for aflatoxin. Setting up shelling and grading units near Gujarat ports, alongside aflatoxin testing labs to meet Russian and Kazakh import standards. Vegetables like cucumber, gherkins, and potatoes require controlled-atmosphere containers to retain freshness and prevent spoilage over longer sea routes. For eggs and meat, invest in blast freezing facilities and temperature-controlled export centres, especially in hubs like Namakkal and Maharashtra, to comply with veterinary and SPS norms in the CIS region.

ENHANCE TRADE CONNECTIVITY AND REDUCE LOGISTICS COSTS

Rationale: High transportation costs and logistical delays undermine India’s competitiveness in the CIS region. The landlocked geography of Central Asia and Russia demands optimized multimodal trade corridors that reduce costs and transit times. Currently, Indian products face higher landing costs in Kazakhstan compared to competitors like Russia and China, partly due to limited and irregular connectivity. Kazakhstan aims to become the regional logistics hub for Central Asia, making improved and scheduled connectivity essential.

Action points:

- **Operationalize strategic multimodal corridors:** India should focus on making the International North–South Transport Corridor (INSTC) a commercially viable route for trade with Russia, Kazakhstan, and other CIS markets. This includes committing regular cargo volumes from Indian exporters, streamlining customs and documentation procedures with partner countries, and supporting bonded warehousing and cold-chain logistics for perishables. The pending Joint Working Group (JWG) meetings on Connectivity & Logistics (requested by Kazakhstan) and on Chabahar port should be convened at the earliest to resolve customs, documentation, and transit coordination bottlenecks. In parallel, India should also explore emerging maritime routes such as the Chennai–Vladivostok Maritime Corridor and the Northern Sea Route, leveraging recent India–Russia logistics cooperation under RELOS (Reciprocal Exchange of Logistics Support), which offer alternative pathways for non-perishable goods like biscuits, bakery products, pulps, juices, and other food preparations.
- **Engage with stakeholders to reduce trade costs:** India should collaborate actively with Kazakhstan and other INSTC member countries to reduce high landing and logistical costs

that limit product competitiveness. Kazakhstan's vision to be a regional hub calls for better infrastructure, transparent scheduling, customs facilitation, and regional cooperation. These efforts must focus on operational efficiency to make Indian exports cost-competitive compared to Russia and China.

- **Develop commodity-specific logistics solutions:** Tailored logistics designs are crucial to meet agricultural export requirements. Reefer container shipments on the INSTC should be enhanced to ensure freshness of fruits and vegetables. Aggregation centres at dry ports can facilitate container train shipments of processed foods to western seaports. For premium spirits and sweet biscuits, promote less-than-container-load (LCL) shipments and cross-border e-commerce to enable smaller Russian and Kazakh distributors to access Indian products without the need for full container loads.

ANNEXURES

ANNEX 1: BILATERAL TRADE BETWEEN INDIA AND CIS COUNTRIES

Year	Exports	Imports	Total Trade	% Growth of Total Trade	Trade Balance	India's total Exports	India's total Imports	% Share of CIS Exports	% Share of CIS Imports
2016-17	2.8	9.3	12.1	28.0	-6.5	275.9	384.4	1.0%	2.4%
2017-18	3.0	12.9	15.9	31.1	-9.9	303.5	465.6	1.0%	2.8%
2018-19	3.5	9.4	12.9	-18.7	-6.0	330.1	514.1	1.1%	1.8%
2019-20	4.2	11.9	16.1	24.8	-7.7	313.4	474.7	1.3%	2.5%
2020-21	4.1	9.2	13.2	-18.0	-5.1	291.8	394.4	1.4%	2.3%
2021-22	4.7	14.0	18.7	41.8	-9.3	422.0	613.1	1.1%	2.3%
2022-23	4.7	48.0	52.7	181.4	-43.4	451.1	716.0	1.0%	6.7%
2023-24	5.6	62.7	68.3	29.6	-57.1	437.1	678.2	1.3%	9.2%

Source: DGFT, Ministry of Commerce

**ANNEX 2: TOP 50 AGRICULTURAL COMMODITIES IMPORTED BY RUSSIA (TE2023) IN USD
MILLION**

S. No.	Product code	Product label	Russian Imports from World	India's Exports to Russia	% India's Exports to Russia	India's Exports to World
1	151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	1133	0.0	0.0%	8
2	120190	Soya beans, whether or not broken (excl. seed for sowing)	979	0.0	0.0%	28
3	080390	Fresh or dried bananas (excl. plantains)	878	0.0	0.0%	185
4	210690	Food preparations, n.e.s.	834	4.1	0.5%	592
5	220421	Wine of fresh grapes, incl. fortified wines, and grape must whose fermentation has been arrested ...	714	0.0	0.0%	1
6	020230	Frozen, boneless meat of bovine animals	539	35.6	6.6%	2994
7	230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	478	2.1	0.4%	274
8	080521	Fresh or dried mandarins incl. tangerines and satsumas (excl. clementine's)	446	0.0	0.0%	0
9	090111	Coffee (excl. roasted and decaffeinated)	441	9.3	2.1%	707
10	220820	Spirits obtained by distilling grape wine or grape marc	410	0.0	0.0%	20
11	330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, with a basis of ...	410	0.0	0.0%	98
12	070200	Tomatoes, fresh or chilled	378	0.0	0.0%	25
13	080610	Fresh grapes	371	25.1	6.8%	320
14	040690	Cheese (excl. fresh cheese, incl. whey cheese, curd, processed cheese, blue-veined cheese and ...)	362	0.0	0.0%	29
15	030617	Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns in ...	358	128.6	35.9%	4755
16	230910	Dog or cat food, put up for retail sale	334	0.0	0.0%	60
17	240120	Tobacco, partly or wholly stemmed or stripped, otherwise unmanufactured	331	48.8	14.7%	714
18	080810	Fresh apples	329	0.0	0.0%	15

S. No.	Product code	Product label	Russian Imports from World	India's Exports to Russia	% India's Exports to Russia	India's Exports to World
19	220300	Beer made from malt	312	0.0	0.0%	40
20	080930	Fresh peaches, incl. nectarines	294	0.0	0.0%	0
21	090240	Black fermented tea and partly fermented tea, whether or not flavoured, in immediate packings ...	293	79.0	27.0%	603
22	220410	Sparkling wine of fresh grapes	287	0.0	0.0%	3
23	330290	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, based on one or ...	287	0.3	0.1%	291
24	210111	Extracts, essences and concentrates, of coffee	285	69.4	24.4%	374
25	220830	Whiskies	273	1.6	0.6%	129
26	120600	Sunflower seeds, whether or not broken	270	0	0.0%	2
27	180690	Chocolate and other preparations containing cocoa, in containers or immediate packings of <= ...	268	0	0.0%	103
28	080510	Fresh or dried oranges	258	0	0.0%	36
29	090121	Roasted coffee (excl. decaffeinated)	240	0	0.0%	2
30	240412	Products containing nicotine, intended for inhalation without combustion (excl. containing ...	240	0	0.0%	0
31	040510	Butter (excl. dehydrated butter and ghee)	237	0	0.0%	55
32	190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion	217	1	0.4%	164
33	170490	Sugar confectionery not containing cocoa, incl. white chocolate (excl. chewing gum)	213	0	0.2%	169
34	210390	Preparations for sauces and prepared sauces; mixed condiments and seasonings (excl. soya sauce, ...	206	0	0.0%	84
35	180632	Chocolate and other preparations containing cocoa, in blocks, slabs or bars of <= 2 kg (excl. ...	189	0	0.0%	11
36	230400	Oilcake and other solid residues, whether or not ground or in the form of pellets, resulting ...	189	0	0.0%	864
37	120242	Groundnuts, shelled, whether or not broken (excl. seed for sowing, roasted or otherwise cooked)	184	10	5.6%	743

S. No.	Product code	Product label	Russian Imports from World	India's Exports to Russia	% India's Exports to Russia	India's Exports to World
38	220210	Waters, incl. mineral and aerated, with added sugar, sweetener or flavour, for direct consumption ...	183	0	0.0%	24
39	080550	Fresh or dried lemons "Citrus limon, Citrus limonum" and limes "Citrus aurantifolia, Citrus ...	178	0	0.0%	7
40	070190	Fresh or chilled potatoes (excl. seed)	171	0	0.0%	89
41	040711	Fertilised eggs for incubation, of domestic fowls	163	0	0.0%	17
42	190190	Malt extract; food preparations of flour, groats, meal, starch or malt extract, not containing ...	151	0	0.1%	96
43	180400	Cocoa butter, fat and oil	149	0	0.0%	38
44	020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus	146	0	0.0%	2
45	081070	Fresh persimmons	144	0	0.0%	0
46	080830	Fresh pears	143	0	0.0%	0
47	190110	Food preparations for infant use, put up for retail sale, of flour, groats, meal, starch or ...	142	0	0.0%	25
48	180500	Cocoa powder, not containing added sugar or other sweetening matter	140	0	0.0%	1
49	070960	Fresh or chilled fruits of the genus Capsicum or Pimenta	137	0	0.0%	48
50	080440	Fresh or dried avocados	134	0	0.0%	0
		Sum of 50 commodities	16450	416	2.5%	14842
		Total Agri Products	26702	725	2.7%	51656
		Share of 50 commodities in Total	62%			29%

**ANNEX 3: TOP 50 AGRICULTURAL COMMODITIES IMPORTED BY KAZAKHSTAN (TE2023) IN
USD MILLION**

S. No.	Product code	Product label	Kzk imports from World	Ind exports to Kzk	% India's exports to Kzk	India's exports to World
1	100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	239	0	0%	1291
2	210690	Food preparations, n.e.s.	225	1	1%	592
3	170199	Cane or beet sugar and chemically pure sucrose, in solid form (excl. cane and beet sugar containing ...)	201	0	0%	2587
4	220210	Waters, incl. mineral and aerated, with added sugar, sweetener or flavour, for direct consumption ...	192	0	0%	24
5	020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus	173	0	0%	2
6	180690	Chocolate and other preparations containing cocoa, in containers or immediate packings of <= ...	153	0	0%	103
7	190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa;	134	0	0%	164
8	160100	Sausages and similar products, of meat, meat offal, blood or insects; food preparations based ...	117	0	0%	1
9	170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter (excl. cane ...)	108	0	0%	1723
10	170490	Sugar confectionery not containing cocoa, incl. white chocolate (excl. chewing gum)	103	0	0%	169
11	120600	Sunflower seeds, whether or not broken	101	0	0%	2
12	151790	Edible mixtures or preparations of animal or vegetable fats or oils and edible fractions of ...	87	0	0%	10
13	240220	Cigarettes, containing tobacco	86	0	0%	93
14	210390	Preparations for sauces and prepared sauces; mixed condiments and seasonings (excl. soya sauce, ...)	77	0	0%	84
15	090240	Black fermented tea and partly fermented tea, whether or not flavoured, in immediate packings ...	76	18	23%	603

S. No.	Product code	Product label	Kzk imports from World	Ind exports to Kzk	% India's exports to Kzk	India's exports to World
16	200819	Nuts and other seeds, incl. mixtures, prepared or preserved (excl. prepared or preserved with ...	74	0	0%	95
17	040690	Cheese (excl. fresh cheese, incl. whey cheese, curd, processed cheese, blue-veined cheese and ...	67	0	0%	29
18	040210	Milk and cream in solid forms, of a fat content by weight of <= 1,5%	61	0	0%	76
19	230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	60	0	0%	274
20	200520	Potatoes, prepared or preserved otherwise than by vinegar or acetic acid (excl. frozen)	59	0	0%	3
21	151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	59	0	0%	8
22	030313	Frozen, Atlantic salmon "Salmo salar" and Danube salmon "Hucho"	57	0	0%	0
23	151219	Sunflower-seed or safflower oil and their fractions, whether or not refined, but not chemically ...	57	0	0%	14
24	151211	Crude sunflower-seed or safflower oil	56	0	0%	1
25	080390	Fresh or dried bananas (excl. plantains)	56	0	0%	185
26	220860	Vodka	55	0	0%	10
27	230910	Dog or cat food, put up for retail sale	51	0	0%	60
28	190531	Sweet biscuits	50	0	0%	264
29	100191	Seed of wheat and meslin, for sowing (excl. durum)	50	0	0%	1
30	040610	Fresh cheese "unripened or uncured cheese", incl. whey cheese, and curd	49	0	0%	2
31	080610	Fresh grapes	47	0	0%	320
32	070200	Tomatoes, fresh or chilled	47	0	0%	25
33	080521	Fresh or dried mandarins incl. tangerines and satsumas (excl. clementines)	46	0	0%	0

S. No.	Product code	Product label	Kzk imports from World	Ind exports to Kzk	% India's exports to Kzk	India's exports to World
34	230400	Oilcake and other solid residues, whether or not ground or in the form of pellets, resulting ...	46	0	0%	864
35	190110	Food preparations for infant use, put up for retail sale, of flour, groats, meal, starch or ...	46	0	0%	25
36	190190	Malt extract; food preparations of flour, groats, meal, starch or malt extract, not containing ...	44	0	0%	96
37	240399	Chewing tobacco, snuff and other manufactured tobacco and manufactured tobacco substitutes, ...	43	0	0%	246
38	220300	Beer made from malt	43	0	0%	40
39	040390	Buttermilk, curdled milk and cream, kephir and other fermented or acidified milk and cream, ...	41	0	0%	2
40	180631	Chocolate and other preparations containing cocoa, in blocks, slabs or bars of <= 2 kg, filled	41	0	0%	4
41	080810	Fresh apples	41	0	0%	15
42	220830	Whiskies	39	0	0%	129
43	190532	Waffles and wafers	38	0	0%	26
44	190230	Pasta, cooked or otherwise prepared (excl. stuffed)	38	0	0%	24
45	220421	Wine of fresh grapes, incl. fortified wines, and grape must whose fermentation has been arrested ...	37	0	0%	1
46	240412	Products containing nicotine, intended for inhalation without combustion (excl. containing ...	36	0	0%	0
47	060311	Fresh cut roses and buds, of a kind suitable for bouquets or for ornamental purposes	33	0	0%	6
48	220299	Non-alcoholic beverages (excl. water, fruit or vegetable juices, milk and beer)	33	0	0%	26
49	100390	Barley (excl. seed for sowing)	31	0	0%	1
50	220820	Spirits obtained by distilling grape wine or grape marc	31	0	0%	20

		Sum of 50 commodities	3734	20	0.5%	10339
		Total Agri Products	5681	25	0.4%	50581
		Share of 50 commodities in Total	65.7%			20.4%

Source: ITC Trademap

**ANNEX 4: TOP 50 AGRICULTURAL COMMODITIES IMPORTED BY UZBEKISTAN (TE2023) IN
USD MILLION**

S. No.	Product code	Product label	Uzb imports from World	India's exports to Uzb	% India's exports to Uzb	India's exports to World
1	100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	711	0	0%	1291
2	170113	Raw cane sugar, in solid form, not containing added flavouring or colouring matter, obtained ...	387	0	0%	29
3	151219	Sunflower-seed or safflower oil and their fractions, whether or not refined, but not chemically ...	196	0	0%	14
4	110100	Wheat or meslin flour	133	0	0%	172
5	230400	Oilcake and other solid residues, whether or not ground or in the form of pellets, resulting ...	131	1	1%	864
6	020120	Fresh or chilled bovine cuts, with bone in (excl. carcasses and 1/2 carcasses)	131	0	0%	0
7	151790	Edible mixtures or preparations of animal or vegetable fats or oils and edible fractions of ...	116	0	0%	10
8	151620	Vegetable fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified, ...	86	0	0%	114
9	180690	Chocolate and other preparations containing cocoa, in containers or immediate packings of <= ...	80	0	0%	103
10	210690	Food preparations, n.e.s.	75	3	3%	592
11	151211	Crude sunflower-seed or safflower oil	72	0	0%	1
12	190110	Food preparations for infant use, put up for retail sale, of flour, groats, meal, starch or ...	68	0	0%	25
13	220210	Waters, incl. mineral and aerated, with added sugar, sweetener or flavour, for direct cons...	64	0	0%	24
14	070190	Fresh or chilled potatoes (excl. seed)	64	0	0%	89
15	080390	Fresh or dried bananas (excl. plantains)	62	12	20%	185
16	120600	Sunflower seeds, whether or not broken	53	0	0%	2

S. No.	Product code	Product label	Uzb imports from World	India's exports to Uzb	% India's exports to Uzb	India's exports to World
17	170199	Cane or beet sugar and chemically pure sucrose, in solid form (excl. cane and beet sugar...	51	0	0%	2587
18	020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus	50	0	0%	2
19	010221	Pure-bred cattle for breeding	48	0	0%	0
20	230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	37	0	0%	274
21	020230	Frozen, boneless meat of bovine animals	36	14	39%	2994
22	170490	Sugar confectionery not containing cocoa, incl. white chocolate (excl. chewing gum)	34	0	0%	169
23	151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	33	0	0%	8
24	010410	Live sheep	32	0	0%	0
25	090220	Green tea in immediate packings of > 3 kg	29	0	0%	14
26	151710	Margarine (excl. liquid)	29	0	0%	1
27	210390	Preparations for sauces and prepared sauces; mixed condiments and seasonings	26	0	1%	84
28	180631	Chocolate and other preparations containing cocoa, in blocks, slabs or bars of <= 2 kg, filled	24	0	0%	4
29	180632	Chocolate and other preparations containing cocoa, in blocks, slabs or bars of <= 2 kg (excl.	23	0	0%	11
30	240120	Tobacco, partly or wholly stemmed or stripped, otherwise unmanufactured	21	1	6%	714
31	100390	Barley (excl. seed for sowing)	20	0	0%	1
32	210111	Extracts, essences and concentrates, of coffee	20	1	4%	374
33	190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa;..	19	0	0%	164
34	060290	Live plants, incl. their roots, and mushroom spawn (excl. bulbs, tubers, tuberous roots, corms,	19	0	0%	27

S. No.	Product code	Product label	Uzb imports from World	India's exports to Uzb	% India's exports to Uzb	India's exports to World
35	190230	Pasta, cooked or otherwise prepared (excl. stuffed)	19	0	0%	24
36	200520	Potatoes, prepared or preserved otherwise than by vinegar or acetic acid (excl. frozen)	19	0	0%	3
37	190531	Sweet biscuits	18	0	0%	264
38	230630	Oilcake and other solid residues, whether or not ground or in the form of pellets, resulting ...	17	0	0%	0
39	080521	Fresh or dried mandarins incl. tangerines and satsumas (excl. clementines)	16	0	0%	0
40	240399	Chewing tobacco, snuff and other manufactured tobacco and manufactured tobacco substitutes,	15	0	0%	246
41	020421	Fresh or chilled sheep carcasses and half-carcasses (excl. lambs)	15	0	0%	52
42	120991	Vegetable seeds, for sowing	15	0	0%	96
43	040510	Butter (excl. dehydrated butter and ghee)	14	0	0%	55
44	180500	Cocoa powder, not containing added sugar or other sweetening matter	14	0	0%	1
45	120190	Soya beans, whether or not broken (excl. seed for sowing)	14	0	0%	28
46	190532	Waffles and wafers	14	0	0%	26
47	210112	Preparations with a basis of extracts, essences or concentrates of coffee or with a basis of ...	14	0	0%	9
48	100630	Semi-milled or wholly milled rice, whether or not polished or glazed	13	0	1%	9228
49	100590	Maize (excl. seed for sowing)	13	0	0%	865
50	100510	Maize seed for sowing	13	0	0%	54
		Sum of 50 commodities	3224	32	1%	21892
		Total Agri Products	3824	40	1%	50581
		Share of 50 commodities in Total	84.3%			43.3%

ANNEX 5: SELECTED COMMODITIES FOR CIS COUNTRIES AS PER APEDA'S STRATEGIC INTEREST

HS Codes	Commodity	CIS Country
020230	Frozen, boneless meat of bovine animals	Russia, Uzbekistan
0206	Offal of bovine	Uzbekistan
190590	Bread, pastry, cakes, biscuits and others	Kazakhstan
190531	Sweet Biscuits	Uzbekistan
220830	Whiskies	Russia, Kazakhstan
190110	Food Preparations for Infant use	Uzbekistan
210690	Food Preparations, n.e.s	Russia, Uzbekistan, Kazakhstan

**ANNEX 6: LIST OF COMMODITIES SELECTED FOR APEDA-ICRIER KNOWLEDGE
PARTNERSHIP PROJECT**

Product code	Commodity	India's X to world	India's X to Russia	Russia M from world	% Share	India's X to Kzk	Kzk M from world	% Share	India's X to Uzb	Uzb M from world	% Share
080390	Banana	185086	0	878851	0.0%	3	55926	0.0%	12230	62290	19.6%
080450	Mango	186656	2259	100906	2.2%	4	1362	0.3%	1	153	0.9%
070190	Potato	89320	0	170678	0.0%	0	8292	0.0%	0	63540	0.0%
110813	Potato starch	2084	201	13869	1.4%	0	3348	0.0%	1	3906	0.0%
080132	Cashew	372098	301	55562	0.5%	0	5214	0.0%	0	576	0.0%
080131	Cashew RCN	22160	0	13	0.0%	0	390	0.0%	0	0	-
081090	Pomegranate	84341	0	130727	0.0%	0	6549	0.0%	0	121	0.0%
080430	Pineapples	4254	0	48426	0.0%	0	1979	0.0%	0	864	0.0%
190531	Sweet biscuits	264085	99	65370	0.2%	0	50465	0.0%	0	18137	0.0%
190590	Bakery products	163989	797	218471	0.4%	1	134154	0.0%	0	19393	0.0%
190230	Pasta	23707	0	66004	0.0%	3	37620	0.0%	0	18925	0.0%
070700	Cucumber & gherkins (F)	916	0	42046	0.0%	0	9115	0.0%	0	1	0.0%
071140	Cucumber & gherkins (P)	77106	13147	13634	96.4%	384	719	53.4%	0	0	-
200110	Cucumber & gherkins (P)	139394	1292	38139	3.4%	270	5358	5.0%	0	155	0.0%
080510	Oranges	36202	0	263145	0.0%	0	5832	0.0%	0	6467	0.0%
070960	Chillies	48153	0	155751	0.0%	0	17909	0.0%	0	305	0.0%
080610	Fresh grapes	319811	25104	397391	6.3%	0	47364	0.0%	0	149	0.0%
080620	Dried grapes	37713	1863	35858	5.2%	0	15510	0.0%	0	1131	0.0%
040900	Natural honey	178934	0	536	0.0%	0	672	0.0%	0	323	0.0%

040590	Ghee	102719	0	19148	0.0%	2	1403	0.1%	1	52	1.3%
040690	Paneer	29125	0	363202	0.0%	0	67231	0.0%	0	8724	0.0%
1202	Groundnuts	758159	10601	186266	5.7%	114	11478	1.0%	67	109	61.2%
2009	Juices	15335	25	260259	0.0%	0	58505	0.0%	8	7473	0.1%
0407	Eggs	59404	72	226219	0.0%	0	38271	0.0%	0	3927	0.0%

Source: Compiled by authors using data from ITC Trademap

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