Enhancing India's Agri-Exports to Africa

Opportunities and Strategies

Suvangi Rath | Tanay Suntwal | Aarushi Bhargava
Kartik Jain | Ashok Gulati

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List of Abbreviations

AAGR	Average Annual Growth Rate
AfCFTA	African Continental Free Trade Area
APEDA	Agricultural and Processed Food Products Export Development Authority
BRICS	Brazil, Russia, India, China, South Africa
CAGR	Compound Annual Growth Rate
CEN-SAD	Community of Sahel-Saharan States
CEPA	Comprehensive Economic Cooperation and Partnership Agreement
CII	Confederation of Indian Industry
COMESA	Common Market for Eastern and Southern Africa
DGFT	Directorate General of Foreign Trade
DRC	Democratic Republic of Congo
ECCAS	Economic Community of Central African States
ECGC	Export Credit Guarantee Corporation
ECOWAS	Economic Community of West African States
ENA	Extra Neutral Alcohol
EU	European Union
FAO	Food and Agriculture Organisation
FAOSTAT	Food and Agriculture Organization Corporate Statistical Database
FMD	Foot and Mouth Disease
FTA	Free Trade Agreement
GDP	Gross Domestic Product
HSN	Harmonized System of Nomenclature
IBEF	India Brand Equity Foundation
IGAD	Intergovernmental Authority on Development
IMF	International Monetary Fund
ISACC	India-South Africa Chamber of Commerce
ITC	International Trade Centre
JNPT	Jawaharlal Nehru Port Trust
JTC	Joint Trade Commission
KL	Kilo Litre
MFN	Most Favoured Nations
MMT	Million Metric Tons
MOU	Memorandum of Understanding
NAM	Non-Aligned Movement
NES	Not Elsewhere Specified
NTB	Non-Tariff Barriers
OEC	Observatory of Economic Complexity
OIE	World Organisation for Animal Health
PIB	Press Information Bureau
PPP	Purchasing Power Parity
PTA	Preferential Trade Agreement
RCA	Revealed Comparative Advantage
REZ	Regional Economic Zone
SACU	Southern African Customs Union
SADC	Southern African Development Community
SPS	Sanitary and Phytosanitary
TBT	Technical Barriers to Trade
TEU	Twenty-Foot Equivalent Unit
TRQ	Tariff Rate Quota
UAE	United Arab Emirates
UK	United Kingdom
UMA	Arab Maghreb Union
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UPI	Unified Payment Interface
USA	United States of America
UVP	Unit Value Price
WDI	World Development Indicators
WEF	World Economic Forum

Foreword

Africa stands at the cusp of a profound transformation—driven by rapid economic expansion, a young and growing population and increasing global connectivity. As its urban centres grow and consumer preferences evolve, the continent's demand for safe, nutritious and diverse agricultural products is rising swiftly. In this dynamic context, India's longstanding partnership with Africa—shaped by history, shared development priorities and deep cultural ties—offers a compelling foundation for a new era of agri-trade collaboration.

This report, Enhancing India's Agri-Exports to Africa: Opportunities and Strategies, arrives at a pivotal juncture. Developed through the joint efforts of the Indian Council for Research on International Economic Relations (ICRIER) and the Agricultural and Processed Food Products Export Development Authority (APEDA), it offers a rigorous, evidence-based exploration of how India can strategically expand its agricultural footprint across African markets to create a win-win situation for both the regions.

The study provides a comprehensive and nuanced analysis of key African economies, highlighting sectoral demand trends, trade policies and supply chain dynamics. Through detailed country-wise and commodity-specific assessments, it identifies priority markets, pinpoints high-potential products and evaluates the operational and regulatory challenges Indian exporters must navigate. From logistics and tariff structures to standards compliance and market intelligence, the report distills complex realities into actionable insights.

What sets this volume apart is its strategic orientation: it does not merely identify export opportunities but lays out a roadmap for sustainable engagement—rooted in value creation, mutual benefit and long-term resilience. Its recommendations emphasize the importance of institutional coordination, investment in trade facilitation infrastructure, and product innovation tailored to local market needs.

As India deepens its role in global agri-food systems and contributes to broader goals such as food security, climate resilience and South-South cooperation, its trade relationship with Africa must evolve from transactional to transformational. This report is a call to action—for policymakers, businesses and development partners—to invest in enduring, inclusive and future-ready agri-trade partnerships between the two regions.

I commend the authors, researchers and collaborators for this valuable and timely contribution. I trust it will serve as both a strategic guide and a source of inspiration for those shaping the future of India-Africa economic engagement.

Deepak Mishra
Director & Chief Executive,
ICRIER

Abhishek Dev
Chairman
APEDA

Preface

India and Africa share a growing and multifaceted agricultural trade relationship, underpinned by strategic trade agreements and collaborative initiatives aimed at enhancing food security, technology transfer, and sustainable development. Over recent decades, bilateral trade has expanded significantly, with India exporting key agricultural commodities such as rice, bovine meat, sugar, tea, spices, cereals, fruits, and vegetables to African countries. Conversely, India imports raw materials, minerals, and petroleum products from Africa, reflecting a complementary trade pattern.

Trade agreements and regional frameworks play a crucial role in shaping this relationship. Notably, the African Continental Free Trade Area (AfCFTA), launched to create the world's largest free trade zone encompassing 55 African Union countries, offers India enhanced market access opportunities by reducing tariff and non-tariff barriers within Africa. India leverages this by engaging in partnerships that promote agricultural technology, food security, and trade facilitation. Additionally, India-Africa Forum Summits and bilateral agreements have fostered cooperation in agriculture, focusing on improving productivity and value addition.

Despite tariff liberalization efforts, challenges persist, including infrastructural deficits, regulatory hurdles, and non-tariff measures such as sanitary and phytosanitary (SPS) standards, which limit market access. India and Africa are working jointly to address these through capacity building, digital trade facilitation, and harmonization of standards.

The trade volume between India and Africa reached approximately USD 243 billion by 2022-23, with agricultural products constituting a significant share of exports. Post-2020, the trade has grown steadily at a compound annual growth rate (CAGR) of about 6.3 percent, signalling robust potential for further expansion. Indian expertise in agricultural technology and pharmaceuticals complements Africa's development goals, while initiatives like manufacturing in Africa for export aim to boost economic diversification and job creation.

This report, "Enhancing India's Agri-Exports to Africa: Opportunities and Strategies," emerges from the APEDA-ICRIER Knowledge Partnership, representing a focused and detailed exploration of the burgeoning agricultural trade landscape between India and the diverse nations of Africa. In an era where food security and economic cooperation are paramount, this study aims to provide a comprehensive analysis of the opportunities, challenges, and strategic pathways to enhance India's agri-exports to the African continent.

The report is structured to offer a multifaceted understanding of the economic and agricultural diversity within Africa, highlighting key synergies that can bolster India's export competitiveness. It carefully justifies the selection of countries under study based on their market potential, import dependencies, and strategic alignment with India's trade objectives. These countries, spanning different regions of Africa, collectively present a microcosm of the continent's varied demands and trade dynamics.

A significant portion of this report is dedicated to geographical and trade route analyses, emphasizing India's locational advantages and the strategic significance of key African ports. It delves into existing trade flows, dissecting the composition of India's agri-exports to Africa and identifying specific commodities with high growth potential. The analysis incorporates a rigorous examination of import patterns, demand trends, and the competitive landscape in each target market.

Moreover, the report addresses the critical challenges hindering India's agri-exports, such as tariff and non-tariff barriers, sanitary and phytosanitary measures, and infrastructural constraints.

It contrasts these challenges with emerging opportunities stemming from growing consumer demand, rising incomes, and the push for local value addition in African economies. The impact of regional economic communities and trade agreements, including the African Continental Free Trade Area (AfCFTA), is also critically assessed.

The culmination of this study is a set of actionable strategies and policy recommendations tailored for policymakers, exporters, and industry stakeholders. These strategies emphasize improving product quality to meet international standards, diversifying the export basket, strengthening trade facilitation mechanisms, and fostering stronger diplomatic and trade relations. By addressing the identified challenges and capitalizing on the highlighted opportunities, this report aspires to contribute to the sustainable growth of India's agricultural exports to Africa, fostering enhanced economic cooperation and regional development.

We extend our sincere appreciation to the Agricultural and Processed Food Products Export Development Authority (APEDA) for their invaluable support and guidance throughout this project. We are also grateful to the team of researchers and experts whose dedication and expertise have been instrumental in producing this comprehensive analysis. It is our hope that this report will serve as a valuable resource for advancing India's agricultural trade agenda in the dynamic African market.

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We are sincerely thankful to the Agricultural and Processed Food Products Export Development Authority (APEDA) for involving ICRIER as a knowledge partner in this important study. Their support in facilitating meetings with exporters, providing essential data, and patiently addressing our queries, has been invaluable. In particular, we would like to thank Mr. Abhishek Dev, Chairman, APEDA and Dr. Sudhanshu, Secretary, APEDA for their invaluable inputs throughout this report. We are grateful to, Ms. Vinita Sudhanshu, General Manager, Dr. Tarun Bajaj Director, BEDF, Mr. Man Prakash Vijay, Deputy General Manager, Ms. Rajni Arora, Deputy General Manager, Ms. Simi Unnikrishnan, Assistant General Manager, Mr. Harpreet Singh, Assistant General Manager, Dr. Aishwarya Kant Gupta, Consultant, Ms. Aditi Bansal, Associate Trade Analyst, for their timely help and support in making this report successful. We sincerely extend our gratitude to all the exporters and key informants who generously shared their experience and gave us a guided virtual tour of the entire export scenario of the selected commodities in Africa. In particular, we thank Mr. Junaid Khan, and Mr. Boyal for their insights on bovine meat and offal exports. We are grateful to Mr. Rajesh Singh, Mr. Sajid Haridas, Pawan Nagpal from Allied blenders and distillers Ltd who are one of the leading exporters of alcoholic beverages for their cooperation and inputs in getting a clear overview of the alcoholic beverage exports from India to the African nations.

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Executive Summary

1. Introduction

Africa, a continent of 54 countries and 1.5 billion people (2024), holds vast potential for agricultural trade. Agriculture remains the backbone of Africa's economy, employing nearly 50% of the workforce and contributing significantly to GDP in many countries. With economic rebound trends, an expected population surge to 2.5 billion by 2050, and increasing food demand, Africa is poised to become a hub for global trade collaborations. India, with its strong historical ties, sees Africa as a strategic partner for agricultural exports. Bilateral trade between India and Africa stood at USD 83 billion in 2023, and agricultural trade forms a vital component. India's emphasis on economic diplomacy, notably during its G20 presidency in 2023, and initiatives like the African Continental Free Trade Area (AfCFTA), create a conducive environment for deeper agri-trade ties. Given synergies in demographics, food security needs, and agrarian economies, India and Africa present complementary opportunities for enhanced cooperation.

2. Rationale for Selection of the Targeted African Countries:

Ten African countries were selected for analysis based on indicators like per capita GDP (PPP), population size and growth projections, and net agricultural importer status. These are Egypt, South Africa, Kenya, Ethiopia, Morocco, Angola, Tunisia, Algeria, Nigeria, and Ghana. Countries were ranked by economic strength and demand potential. Net importer status indicated strong dependence on external food supplies, making these markets highly promising for Indian exports. With a mix of high purchasing power, growing populations, and import dependencies, these nations offer attractive long-term prospects.

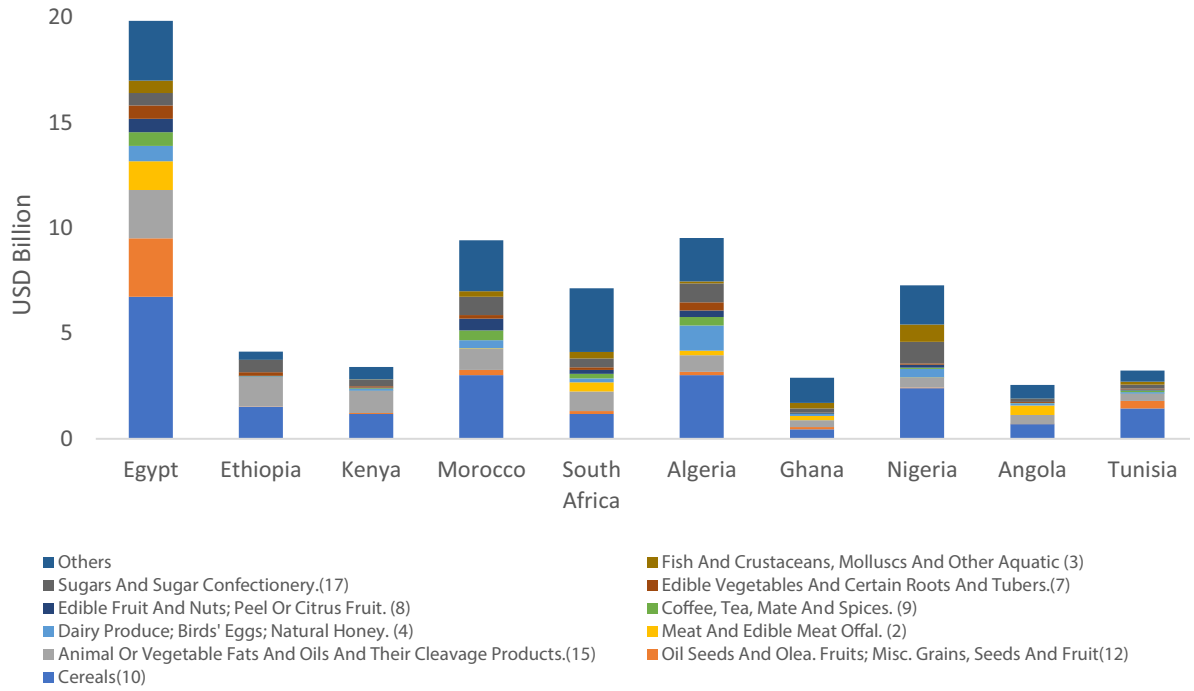
3. Geographical and Trade Route Analysis

India's geographic proximity to Africa offers strategic advantages. The Indian Ocean historically served as a vital link connecting India to East Africa. Current maritime routes, enhanced by major ports like Mombasa (Kenya), Durban (South Africa), and Dar es Salaam (Tanzania), facilitate efficient cargo movement. Proximity reduces freight costs and transit time—critical for perishable commodities like fruits and vegetables. Land and rail connectivity from ports to inland Africa (e.g., Mombasa-Kampala) further boosts trade prospects. Strategic investment in port logistics and cold chain development can solidify India's competitive edge.

4. Trade Aspects

Africa's agricultural imports from the world are substantial, valued at over USD 80 billion in 2023. India's agricultural exports to Africa stood at USD 6.7 billion, contributing nearly 8% of Africa's total agri-imports. Major Indian export items to Africa include rice (USD 2.9 billion), sugar (USD 1.1 billion), meat (USD 800 million), and food preparations (USD 500 million). India's major export destinations within Africa are Nigeria, South Africa, Egypt, and

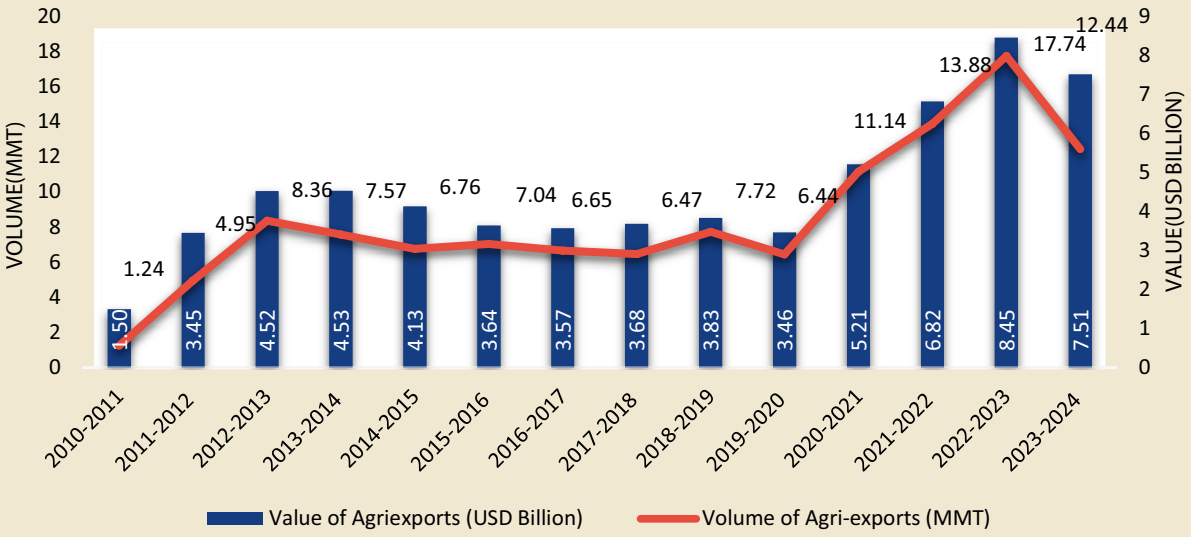
Top Agri-Imports of African Countries from the World (TE23)



*Algeria-TE17

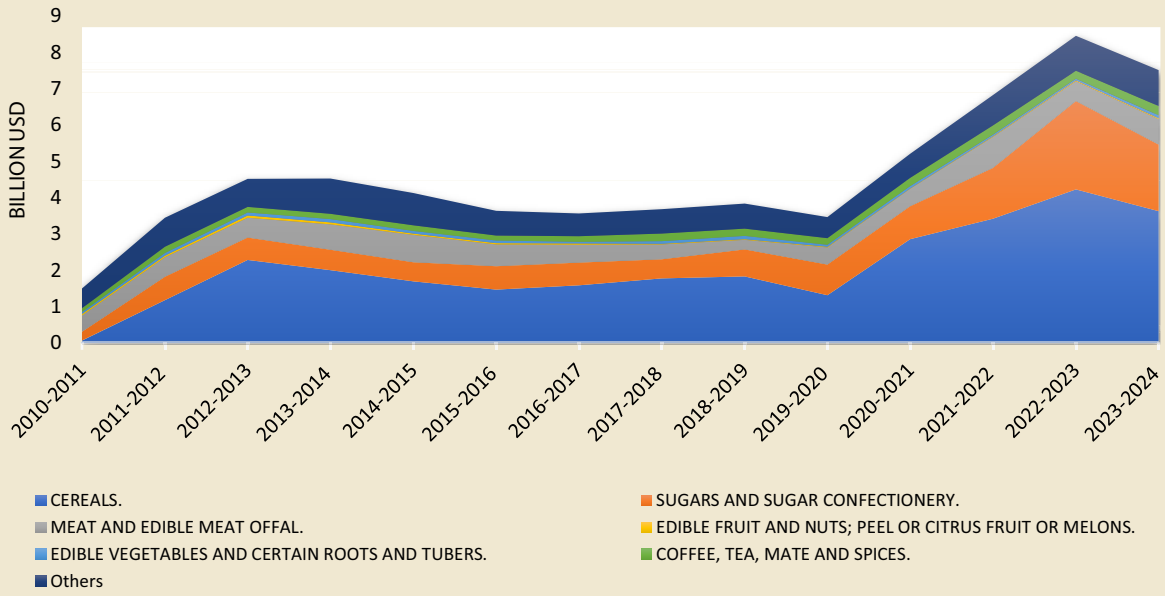
Source: UN Comtrade, 2024

India-Africa Agriculture exports



Source: DGFT, 2024

Major Commodities being exported from India to Africa



Source: DGFT, 2024

Kenya. However, India's share remains modest compared to competitors like Brazil and the EU, suggesting untapped potential in sectors like processed foods, dairy products, and organic foods.

5. Country-Wise Analysis

a) Egypt: A major importer of Indian rice, frozen meat, and food preparations. Potential commodities include sugar, groundnuts, spices, and processed food products. Opportunities also exist in value-added dairy products and ready-to-eat snacks.

b) Ghana: Strong demand for rice and processed foods. India can also export wheat flour, pulses, and ready-to-eat snacks. Other emerging opportunities include tea, confectionery, and spices.

c) Morocco: Imports significant rice and sugar. Potential exports include oilseeds, pulses, beverages, and processed dairy products. Growth prospects exist in food preparations and bakery products.

d) Tunisia: High demand for rice and sugar. India can explore opportunities in spices, tea, and bakery products. There is also scope for beverages, fruit juices, and organic foods.

e) Angola: Predominantly imports rice, poultry, and beverages. Opportunities lie in processed foods, dairy products, and wheat. Indian exporters can also target pulses, edible oils, and tea.

f) South Africa: A major agri-importer. India can expand exports in alcoholic beverages, spices, tea, basmati rice, and bakery goods. Opportunities also exist in organic products, confectionery, and ready meals.

g) Algeria: Significant rice and dairy importer. Potential commodities include spices, pulses, and ready-to-eat food preparations. India can also explore exports of beverages, bakery products, and processed fruits.

h) Nigeria: Huge demand for rice, sugar, and processed foods. India can also target exports of beverages, pulses, and frozen meat products. Additional potential exists in dairy, condiments, and instant foods.

i) Kenya: Steady demand for rice, tea, and horticultural products. Additional opportunities in spices, fruits, and processed food items. Expanding into pulses, edible oils, and fortified cereals can be beneficial.

j) Ethiopia: Imports significant cereals and processed foods. India can boost exports of rice, pulses, edible oils, and spices. Opportunities also lie in food preparations, bakery items, and ready-to-eat products.

6. Challenges and Opportunities

India faces some pertinent challenges that impact its exports to the African region:

a) Tariff and Non-Tariff Barriers (NTBs): Stringent SPS measures and certification requirements.

b) Logistical Constraints: Inadequate cold chain and storage infrastructure in key African markets.

c) Competition: Strong presence of China, EU, Brazil, and ASEAN countries.

d) Market Volatility: Political and economic instability in some regions.

Despite some challenges, India has some good opportunities that can help boost its agri-exports:

a) Cost Competitiveness: India's lower unit value prices make its products attractive.

b) Product Diversification: Shifting from raw commodities to processed, high-value products.

c) Infrastructure Investment: Enhancing port facilities and cold chains.

d) FTA/PTA Negotiations: Building new trade agreements with African REZs (e.g., COMESA, SADC).

e) Leveraging Diaspora: Targeting products preferred by Indian-origin communities.

f) Agri-Export Clusters: Developing clusters focused on Africa-centric commodities.

7. Conclusion and Strategies:

Africa represents an enormous opportunity for India's agricultural exports. To tap into this potential, India must:

a) Expand Product Basket: Beyond staples, focus on processed foods, beverages, and organic products.

b) Enhance Logistics: Invest in cold chain logistics, warehousing, and port facilities.

c) Strengthen Trade Diplomacy: Fast-track PTA/FTA negotiations, reduce NTBs, and align SPS standards.

d) Build Market Intelligence: Develop data on African consumer preferences and emerging trends.

e) Engage Private Sector: Encourage Indian companies to invest in African processing units, branding, and distribution.

f) Focus on Quality: Ensure compliance with African quality standards through certifications and traceability systems.

With strategic interventions, India can scale its agri-exports to Africa substantially, contribute to African food security, and deepen its geopolitical and economic engagement with the continent.

1

Introduction

1.1 Economic diversity of Africa – An overview

With 54 countries, Africa has a population of 1.5 billion as of 2024 (WDI, 2024), a notch higher than India (1.45 billion). By 2050, while India is likely to be 1.67 billion, the African continent will have a population of 2.5 billion, translating into a massive demand for food. Agriculture, trade, industry, and human resources constitute the economic diversity of the continent. Africa has seen an economic rebound due to increased consumption and declining inflation rates. While inflation rates are promoting economic growth, they are on the higher side (9%) (Bolhuis and Kovacs, 2022). Growing debt service obligations, frequent natural disasters, escalating conflict and violence restrain economic growth in the continent and require urgent intervention (Africa Pulse, 2024). Economic diversification is a priority for most of the growing economies, so it will be interesting to see how different dimensions of diversification have different policy implications in the African countries (Usman and Landry, 2021).

Most of the African countries lagged behind the other developed and emerging economies in terms of development. However, as per the International Monetary Fund (IMF) data, Africa will account for 9 of the 20 fastest growing economies of the world in 2025. With a projected real GDP growth rate of 3.8% and 4.2% in 2024 and 2025 respectively, Africa will be the second fastest growing economy after Asia. This is higher than the projected global GDP growth rate (2.9% and 3.2% respectively in 2024 and 2025). This makes Africa a potential hub for global collaborations.

1.2 Agricultural scenario in Africa

At present, agriculture accounts for most of the economic activities in Africa. Except for a few developed countries that have a significant European population viz. South Africa, Kenya, etc., most of the agriculture in the African countries is subsistence agriculture. Accounting for almost two-thirds of the employment of the African population, agriculture contributes the most to the economy of the continent (McMaster et al., 2024).

Cereals, grains, legumes, fodder crops, tubers, fruits and vegetables, beverage crops, fibres and other cash crops are cultivated across the continent. Africa has shown its edge in production of livestock and fishing (McMaster et al., 2024). Being the backbone of the African economy, agriculture contributed to almost one-thirds of the GDP while giving employment to around 50% of the workforce in the continent in 2023. (World Economic Forum, 2024). With its remarkable potential, Africa can be a leading player in the agri-imports and exports in the world, promoting greater economic growth and food security.

1.3 India as a trading partner to Africa

Trade is an integral part of the African economy. The intra-African trade volumes are significantly high; however, the statistics understate the actual data owing to the large amount of smug-

gling between the African nations (McMaster et al., 2024). After World War II, Africa witnessed growing imports from the European Union, Japan, United States, and South Africa.

From being addressed as our "sister country" by Pandit Jawaharlal Nehru to being included as one of the permanent members of G20 under India's presidency, Africa has been an important partner for India in the last 76 years (Nantulya, 2024; Jose and Gulati, 2023). Recognising Africa as one of the major drivers of the Global South, Prime Minister Modi called them India's "Top Priority for developing International Relations". Since 2003, trade between India and Africa has grown by 18% annually. The bilateral trade between India and Africa stands at USD 83 billion with Indian exports at USD 45 billion and imports from Africa at USD 38 billion in 2023, making India the third largest trade partner of Africa after European Union and China. The exported Indian commodities include agricultural products, pharmaceuticals, industrial goods, consumer goods and minerals imported commodities from Africa include metals, crude oil, and diamond (CII report, 2024).

1.4 Enhancing India's agricultural export competitiveness through diplomacy, trade and investment

While India is actively analyzing the export potential in existing and emerging markets, diplomacy is creating a conducive environment between nations to strengthen their ties and increase trade volumes. Economic diplomacy involves using diplomatic efforts to advance a nation's economic interests through trade agreements, investment, and global partnerships to enhance market access, create jobs, and boost international competition.

India positioned itself as a global leader during its G20 presidency in 2023. India's leadership in the G20 affirmed its commitment to bring global harmony, being the 'Voice of Global South'. India took the lead to bring the African union in G20, a landmark movement in global table. In the last few years, India has emerged as an important trader in agri-produce. India's total agriculture exports have increased from USD 15.8 billion in 2009-10 to USD 48.2 bil-

FIGURE 1.1

Prime Minister Modi with the heads of the African countries

Source: PMO

lion in 2023-24, giving an AAGR of 6.54%. Correspondingly, imports of agri-produce have increased from USD 12 billion to USD 32 billion in the same period, giving an AAGR of 6%. Key products like rice (basmati and non-basmati) (USD 10.7 billion), marine products (USD 7.3 billion), sugar and products (USD 3.3 billion) have had a significant growth in 2023, establishing India as a major exporter (DGFT, 2024).

India and Africa are natural partners with historic and cultural ties. They have been supporting each other in trade negotiations, as they account for 1/3rd of the global population (PIB, 2024). Major trade agreements between them include India and Southern African Customs Union (SACU) Preferential Trade Agreements (PTA) to relaunch of PTA negotiations (2020), India Mauritius signed Comprehensive Economic Cooperation and Partnership Agreement (CEPA) (2021) which covers Trade of goods and agricultural commodities, Technical Barriers to Trade (TBT), Sanitary and Phytosanitary (SPS) measures, etc. (DGFT, 2024). Over the past 15 years, India exported USD 65.2 billion and imported USD 31.7 billion, which accounts for nearly 11 percent of total agricultural exports and 10 percent of imports from Africa. Major traded commodities include cereals, oilseeds, animal and vegetable fats, cocoa products, spices, sugar and sugar confectionary, etc. (DGFT, 2024). India and the African Union can focus more on PTAs and FTAs for agricultural trade as it is likely to benefit from them. With bilateral trade of India and Africa reaching USD 100 billion mark, heads of the states are expecting it to touch USD 200 billion by 2030. Agriculture can be an important segment.

Regional Economic Zones (REZs) of Africa

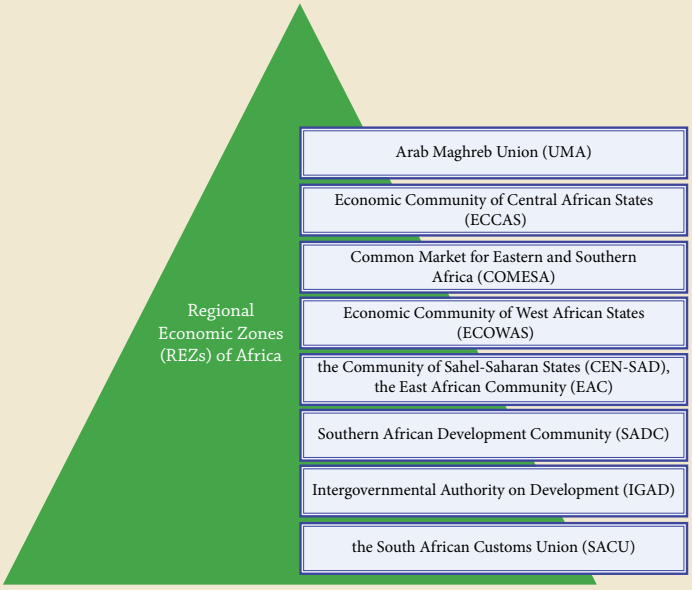
Africa, recognized as the second-largest continent globally, consists of 54 nations. To promote trade within the continent and strengthen connections with international markets, Africa is structured into various Regional Economic Zones (REZs) (Figure 1.2) (Annexure 8.1). For this study, we will focus on the REZs which consist of the countries as identified by APEDA for the analysis.

Common Market for Eastern and Southern Africa (COMESA), Africa's largest regional community consists of 19 member nations. It features crucial countries of our interest such as Egypt, Kenya, and Ethiopia. The global imports of agriculture in COMESA amounted to USD 49.2 billion i.e., 19% of their total world imports in TE23. Most of the imported commodities include durum wheat (USD 4.9 billion), maize (USD 3.6 billion), palm oil (USD 3.3 billion), food preparations n.e.s (USD 1.03 billion), and bovine meat (USD 1.10 billion). Major importing destinations are India, Brazil, Columbia, USA, Russia and EU. Currently, Indian government is negotiating with COMESA for PTAs (Source: *"The African Continental Free Trade Area: Opportunities for India," 2022, p. 12).*

Another regional zone of importance is the SADC with 15 member nations including South Africa and Angola, two key countries of our study. The global imports of agriculture in SADC amounted to USD 21.9 Billion i.e., 10.1% of their total world imports in TE23. Most of the imported commodities include rice (USD 1.5 billion), wheat (USD 1.4 billion), palm oil (USD 1.04 billion), offal (USD 544.8 million), food preparations n.e.s (USD 498 million), and whiskies (USD 227.56 million). Major importing destinations include India, China, ASEAN, USA and EU. On 1 March 2021, SADC's Execu-

FIGURE 1.2

REZs of Africa



Source: Regional Economic Communities | African Union

tive Secretary, Dr. Stergomena Lawrence Tax called for enhanced trade, investment, and development opportunities between India and Southern Africa, urging Indian private sector's engagement in regional integration and industrialization.

Delegates from SADC and India highlighted the importance of innovation, digital technology, and skills development to harness the demographic potential of both regions, while focusing on resilient supply chains, agro-processing, agricultural innovation, and pharmaceutical manufacturing under frameworks like the SADC Vision 2050 and BRICS. SADC and India signed a new MoU on 2 July 2024 to strengthen economic cooperation with special focus on agriculture, sustainable development, trade, industrialisation and digital transformation. This aimed to promote agricultural innovation and food security while enhancing regional value-chains as well (SADC, 2024).

1.5 Synergies between India and Africa

Given the geographical location, climate, lifestyle and natural resources, India and Africa have much in common, making trade prospective between them. Both India and Africa have the world's maximum population comprising the world's youth and employable workforce. Also, rising demands, poverty issues, food and nutrition insecurity have been subjects of concern in India as well as in Africa. India and Africa are agrarian economies; with emerging markets, and rising per capita incomes in both regions, the demand for agricultural commodities within and across the nations is likely to rise and strengthen the trade prospects.

1.6 Why go for trade?

Maritime proximity (via Indian Ocean) and the Indian diaspora have been the driving factors for trade between India and Eastern and Southern Africa. The African Continental Free Trade Area (AfCFTA) has opened up the scope of trade between the regions. With similar challenges, the two nations can come together to broaden their trade with lower tariffs and tariff barriers. Apart from alleviating poverty, trade can enhance job creation and economic diversification. Reducing dependency on farther nations (based on the distance), will help India and Africa minimise their cost and be more competitive in trade.

1.7 Overview of this report

This report highlights the possibility of agricultural trade between India and the ten selected countries of Africa, and discusses the trade routes, exports, imports, challenges, and opportunities in trade. This report also provides key potential strategies to enhance exports of selected agricultural commodities from India to Africa.

2

Rationale for Selection of the Targeted African Countries

The selection of the ten African countries studied in detail in this report was carried out through a methodology involving key demographic and economic indicators. These indicators include per capita GDP in Purchasing Power Parity (PPP) terms, population projections, net importer/exporter status, and overall demand growth potential. By analyzing these factors, we were able to identify the most promising markets for agricultural exports from India to Africa. This section details the rationale for choosing these countries, focusing on their economic strength, population size, and growth rates, which align with India's strategic export goals.

2.1 Per capita GDP in purchasing power parity (PPP) terms

Per capita GDP PPP is a critical indicator since it represents the average income and purchasing power of a country's population. Higher per capita income suggests a greater ability to purchase imported goods, including agricultural commodities. This indicator was sourced from World Bank data (2024).

Purchasing Power ∝ GDP_PPP/Population

Countries were ranked in descending order of GDP per capita, indicating the capacity for demand based on economic strength.

Population projections and growth rates

Population size and growth are crucial for determining the future demand for agricultural goods. Countries with large and rapidly growing populations have the potential for increased demand over time. We considered the 2023 population and projected 2050 population data for this purpose. Countries with higher projected growth rates were prioritized to ensure long-term demand prospects.

Demand Growth Potential ∝ Population_2050 - Population_2023

Countries with a significant population growth, such as Nigeria, Ethiopia, and Tanzania, indicate rising demand, aligning with India's strategic export goals.

2.2 Net importer/exporter status

The net importer or exporter status, derived from the UN Comtrade (2024), reveals the balance between a country's agricultural imports and exports. Net importing countries will need external agricultural supplies, making them likely destinations for Indian agri-exports.

Import Dependency = Imports - Exports

Countries with a net importer status of agricultural commodities were preferred, as they depend on external suppliers to meet their domestic demand.

Selection criteria and methodology

To select the top 10 countries from Africa, the following methodology was applied:

TABLE 2.1

Demographic and economic indicators of selected African countries

1	2	3	4	5	6	7	8	9	10	11	12	13
Region	*Population 2023 (Million)*	*Population projected (Millions) 2050*	*Population growth (% Annual)*	*Current GDP (USD Billion) 2023*	*Current GDP per capita (USD) 2023*	*Current GDP per capita (USD) 2023 PPP*	*Conversion Factor between per capita GDP in USD and in PPP (7/6)*	*Net Trade* of Agri - products (USD Billion)*	*Total Reserves** (Including gold) (USD Billion) 2023*	*Total imports (USD billion) (2023)*	*Import Capacity (%) [(10/11) * 100]*	*Total reserves in months of Imports*
North Africa												
Egypt	113	161	1.5	396	3512	18816	5.4	-10	33	83	39.7	3.9
Morocco	38	43	1.01	141	3672	9743	2.7	-2	36	71	51.0	5.7
Algeria	45	59	1.5	240	5260	17027	3.2	-9	81	46	175.9	16.9
Tunisia	12	13	0.82	49	3895	13682	3.5	-0.92	9	25.9	34.8	4
East Africa												
Kenya	55	83	1.97	107	1950	6323	3.2	0.4	7	19	37.6	3.7
Ethiopia	126	225	2.5	164	1294	3109	2.4	-1	3	17	18.1	2
West Africa												
Nigeria	224	359	2.4	363	1621	6318	3.9	-4	35	65	53.8	4.7
Ghana	34	50	1.9	76	2238	7466	3.3	0.6	3	16	18.3	1.5
Southern Africa												
South Africa	60	79	0.9	378	6253	15847	2.5	6	62	107	57.9	5.3
Angola	36.68	74	3.03	84.72	2310	8041	3.5	-2	14	15.6	89.7	5.1

Source: WDI-World Bank, 2024; UN Comtrade, 2024

* Net Trade of 15 nations and their respective years are as follows (as per the latest available data)
(HSN Chapters: 1-24,5201,5202)
2023: Egypt, Morocco, Kenya, Nigeria, Ghana, South Africa, Angola, Tunisia
2022: Ethiopia
2017: Algeria
** Total Reserves data for Ethiopia are available for 2020
*** Total reserves in months of Imports for Tunisia, Kenya, and Nigeria are for 2022; for Ethiopia is 2020.

Ranking

The 54 African countries were ranked in descending order based on per capita GDP (PPP) and population growth potential for 2050.

Selection

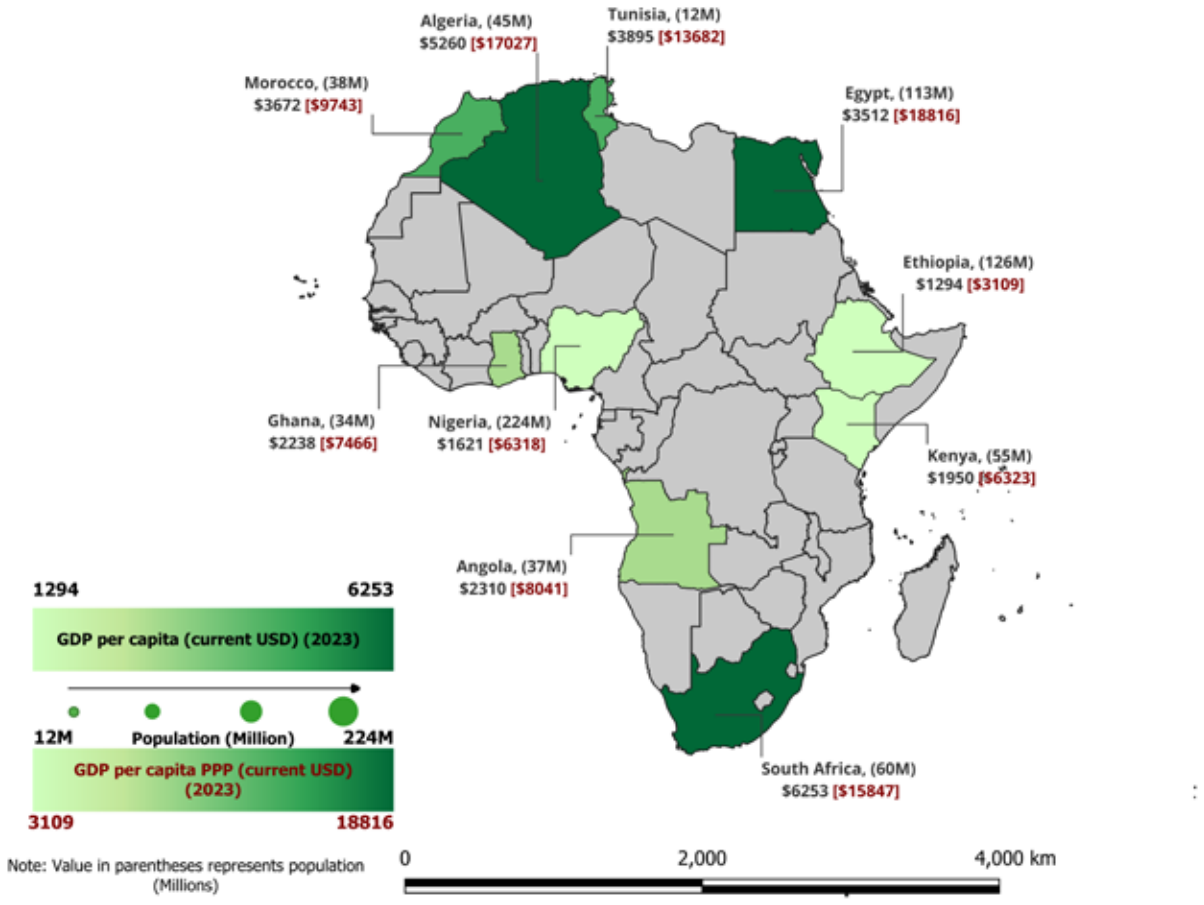
The top 10 countries were chosen, balancing high purchasing power, population size and its growth, and import dependency, ensuring they represent the most promising markets for agricultural exports. The selection was finalized after discussion with APEDA ensuring the inclusion of the countries of their interest.

The selected countries are Egypt, South Africa, Kenya, Ethiopia, Morocco, Angola, Tunisia, Algeria, Nigeria, and Ghana (Figure 2.1).

This multi-factor selection process ensures that the targeted African countries have strong economic indicators for current and future demand, making them potential countries for boosting India's agricultural exports. Insert the whole text given below after Figure 2.1

FIGURE 2.1

Selected African countries for the study



Source: Author's own

2.3: Overview of country profile

Egypt

Egypt, located in Northeast Africa, is the third most populous African country with a population of over 113 million (2023). Its economy is diverse, with services contributing 55 percent of GDP, followed by industry (34 percent) and agriculture (11 percent). Key industries include textiles, food processing, tourism, and hydrocarbons. Despite challenges like inflation and high unemployment, Egypt benefits from remittances, foreign aid, and international financing. The Indian diaspora in Egypt is a small but vibrant community of approximately 3,600 individuals, primarily concentrated in Cairo (2,200), with smaller groups in cities like Alexandria, Port Said, and Ismailia (Embassy of India, Cairo).

The climate is predominantly arid desert, with minimal rainfall concentrated along the Mediterranean coast. The Nile River is vital, providing 95 percent of freshwater for agriculture and drinking water. Climate change exacerbates water scarcity and threatens food security due to declining crop yields and rising temperatures. Agriculture employs 19 percent of the workforce and contributes significantly to exports. Major crops include wheat, cotton, maize, and rice. Projects like the New Delta aim to expand arable land through advanced irrigation (Little et al., 2025).

Culturally, Egypt is predominantly Muslim with a significant Christian minority. Arabic is the official language, reflecting its deep historical roots as a cradle of civilization.

Ghana

Ghana, located in West Africa, has a population of approximately 34 million (2023). Its economy is diverse, with agriculture contributing 20.9 percent of GDP and employing 40 percent of the workforce. Key crops include cocoa, yams, and cassava, while mining (gold, bauxite) and oil production also drive growth. Ghana's economy is recovering from recent challenges, with projected growth rates exceeding 5 percent (2025) due to investment, debt restructuring, and a focus on industrialization (Ghana, n.d.).

The climate is tropical, with a wet season from April to October and a dry season dominated by the Harmattan winds. The southern regions are wetter, while the north experiences savanna conditions.

Culturally, Ghana is a mosaic of over 100 ethnic groups. Festivals like Homowo and Aboakyir celebrate traditional heritage. English is the official language, but local languages like Akan are widely spoken. Ghana is renowned for its vibrant music, dance, and kente cloth traditions. The Indian diaspora in Ghana is a small but influential community, primarily concentrated in cities like Accra, Kumasi, Tema, and Cape Coast.

Morocco

Morocco, located in North Africa, has a population of approximately 38 million (2023). Its economy is diverse, with key sectors including agriculture, mining, tourism, and manufacturing. Agriculture employs 40-45 percent of the population but contributes only 14 percent to GDP due to its dependence on rainfall. Morocco is the world's third-largest producer of phosphates and has a growing automotive and textile industry. Tourism and remittances also play crucial roles in economic stability (World Bank, 2024).

The country has a Mediterranean climate along the coast and a semi-arid to arid climate inland. Rainfall is concentrated in winter, with droughts posing challenges to agriculture and water resources.

Culturally, Morocco is a blend of Arab, Berber, and European influences. Islam is the predominant religion, and Arabic and Berber are official languages. French is widely used in business. Rich traditions in music, cuisine, and architecture reflect Morocco's historical role as a cultural crossroads. The Indian diaspora in Morocco is relatively small but has made cultural and economic contributions. While there is no significant population of Indians living permanently in Morocco, Indian culture is widely appreciated, particularly through Bollywood movies and Indian silk sari fabrics (Dadush et al., 2015).

Tunisia

Tunisia, located in North Africa, has a population of approximately 12 million (2023). Its economy is diverse but faces challenges such as high debt and inflation. Agriculture contributes 11.6 percent of GDP, employing a significant portion of the population, with olives, dates, and citrus fruits as key crops. Industry accounts for 25.7 percent of GDP, focusing on textiles, car parts, and mining (phosphates). Tourism also plays a vital role but has been impacted by political instability and economic reforms (World Bank Group, 2024). The Indian diaspora in Tunisia is small, with estimates suggesting around 120 to 137 individuals, including both Indian citizens and people of Indian origin (India – Tunisia Relations, n.d.).

The climate varies from Mediterranean along the coast to semi-arid and arid in the interior regions. Rainfall is seasonal, with droughts affecting agriculture.

Culturally, Tunisia blends Arab, Berber, and European influences. Arabic is the official language, while French is widely used in business and education. Islam is the predominant religion. Tunisia is renowned for its historical sites like Carthage and Kairouan, vibrant souks, and traditions in music and cuisine.

Angola

Angola, located in Southern Africa, has a population of approximately 37 million (2023). Its economy is heavily reliant on oil, which accounts for over 90 percent of exports and drives GDP growth. Recent reforms have improved macroeconomic stability, while non-oil sectors like agriculture and construction are expanding. Angola is also rich in diamonds, gold, and other minerals. However, high poverty and inequality persist despite economic growth (Angola - Market Overview, 2024). The Indian diaspora in Angola is relatively small, estimated at around 2,500 individuals.

The climate varies from tropical along the coast to semi-arid in the south and central plateau. Rainfall is seasonal, with droughts affecting agriculture. Subsistence farming dominates, with crops like cassava, maize, and millet providing livelihoods for much of the population (BBC News, 2023).

Culturally, Angola reflects a mix of Portuguese colonial influence and indigenous traditions. Portuguese is the official language, while local languages like Umbundu and Kimbundu are widely spoken. Music genres like semba and kizomba, along with traditional dances, are central to Angolan heritage.

South Africa

South Africa is a diverse nation with a mixed economy, varied climate, and rich cultural heritage. Its economy is recovering, driven by political stability and structural reforms in energy and logistics. Real GDP growth is projected at 3.3 percent in 2025, though long-term growth remains modest. The country has a diverse climate, ranging from Mediterranean in the Western Cape to semi-desert in the northwest, influenced by its subtropical location and oceanic surroundings. Agriculture contributes around 2.5 percent to GDP, focusing on crops like grains and fruits, alongside livestock farming. Innovations such as agritech and climate-smart methods are helping address challenges like drought and infrastructure gaps (South African Economic Outlook | Deloitte Africa, 2025).

The Indian diaspora in South Africa is one of the largest and most historically significant Indian communities outside India. It comprises approximately 1.7 million people (about 2.74 percent of South Africa's population as of 2022) (Bamola & Chauhan, 2023). South Africa's culture reflects a blend of African, European, and Asian traditions, with 11 official languages and religious diversity spanning Christianity, Islam, Hinduism, and indigenous beliefs. Its vibrant arts scene and fusion cuisine showcase its multicultural identity (Cultural Overview of South Africa, n.d.).

Algeria

Algeria, the largest country in Africa, is located in North Africa with a population of approximately 45 million (2023). Its economy is heav-

ily reliant on hydrocarbons, which account for 93 percent of export revenues and 19 percent of GDP. Efforts are underway to diversify the economy through investments in agriculture, mining, and renewable energy. Agriculture contributes 13 percent to GDP, with initiatives aimed at self-sufficiency in crops like durum wheat and dairy production (Zaimeche et al., 2025). There are no large-scale Indian settlements or communities in Algeria.

The climate varies from Mediterranean along the northern coast to arid desert conditions in the vast Sahara region. Fertile lands in the north support agriculture, while the south remains largely barren (Zaimeche et al., 2025).

Culturally, Algeria is a blend of Arab, Amazigh (Berber), and French influences. Arabic and Tamazight are official languages, with French widely used. Islam is the dominant religion. The country's rich history includes Islamic dynasties, Ottoman rule, French colonization, and a hard-fought independence in 1962.

Nigeria

Nigeria, Africa's most populous country with over 224 million people (2023), is a federal republic located in West Africa. Its economy is the largest in Africa, driven by petroleum, which accounts for a significant portion of export revenues, alongside agriculture and growing manufacturing sectors. Despite its economic potential, challenges like poverty, unemployment, and insecurity persist (Udo et al., 2025). India and Nigeria share a historic partnership rooted in anti-colonial and anti-apartheid solidarity, further reinforced by the presence of a vibrant Indian diaspora of around 50,000—the largest in West Africa.

Nigeria's climate ranges from arid conditions in the north to humid equatorial climates in the south. The Niger River supports agriculture in fertile regions, while northern areas face desertification and erratic rainfall patterns. Agriculture contributes substantially to Nigeria's GDP, employing a large portion of the population. Key crops include cassava, yams, maize, and rice. However, infrastructure gaps and climate challenges hinder productivity (Chapter 7: Agriculture, Forestry, and Other Land Uses (AFOLU), n.d.).

Culturally, Nigeria is highly diverse, with over 250 ethnic groups and more than 500 languages. Major ethnic groups include Hausa, Yoruba, and Igbo. English is the official language, while Islam and Christianity dominate religious practices

Kenya

Kenya, located in East Africa, has a population of approximately 55 million (2023) and is known for its strategic position as a regional hub. Its economy is the largest in East and Central Africa, driven by agriculture (19 percent of GDP), services (55 percent), and tourism. Agriculture employs two-thirds of the workforce, producing key exports like tea, coffee, and horticultural products. The economy benefits from improved infrastructure and public-private partnerships but faces challenges such as fiscal constraints and debt vulnerabilities. Kenya's climate varies from tropical along the coast to arid in the north and semi-arid in the interior. The fertile highlands support agriculture, while regions like the Great Rift Valley are known for their unique landscapes.

The Indian diaspora in Kenya is a significant and historically rooted community, with approximately 80,000 Indians residing in the country as of 2025. This includes both Persons of Indian Origin (PIOs) and Non-Resident Indians (NRIs) (Rana, 2025). Culturally, Kenya is diverse, with over 40 ethnic groups including Kikuyu, Luo, and Maasai. Swahili and English are official languages. The country is famous for its wildlife safaris, vibrant traditions, and its motto "Harambee," meaning "Let us all pull together" (Sobania, 2003).

Ethiopia

Ethiopia, located in the Horn of Africa, is Africa's second most populous country with 126 million people (2023). Its economy is among the fastest-growing globally, driven by public infrastructure investments and agriculture, which contributes 39 percent to GDP. Coffee, oilseeds, and flowers dominate exports, while light manufacturing in textiles and leather is expanding. Ethiopia aims to achieve lower-

middle-income status by 2025 despite challenges like debt pressures and inflation (Working Paper Series - Ethiopia 2030: A Country Transformed? Options for a Next Generation of Reforms, n.d.).

The climate varies from tropical highlands to arid lowlands. The fertile central plateau supports agriculture, while areas like the Ogaden desert face droughts. Climate change is increasingly impacting development prospects. Agriculture employs most of the population, producing staples like teff and barley alongside cash crops for export. However, productivity is constrained by traditional farming methods and environmental challenges ("Ethiopia," 2024).

The Indian diaspora in Ethiopia is a small but historically significant community, with approximately 8,000 individuals of Indian origin residing in the country today (India and Ethiopia: Historical Relations and Prospects for the Future, 2021). Culturally, Ethiopia is rich in history as one of the world's oldest nations. Amharic is the official language, while Christianity and Islam are dominant religions. Ethiopian traditions in cuisine, music, and art reflect its unique heritage.

3

Geographical and Trade Route Analysis

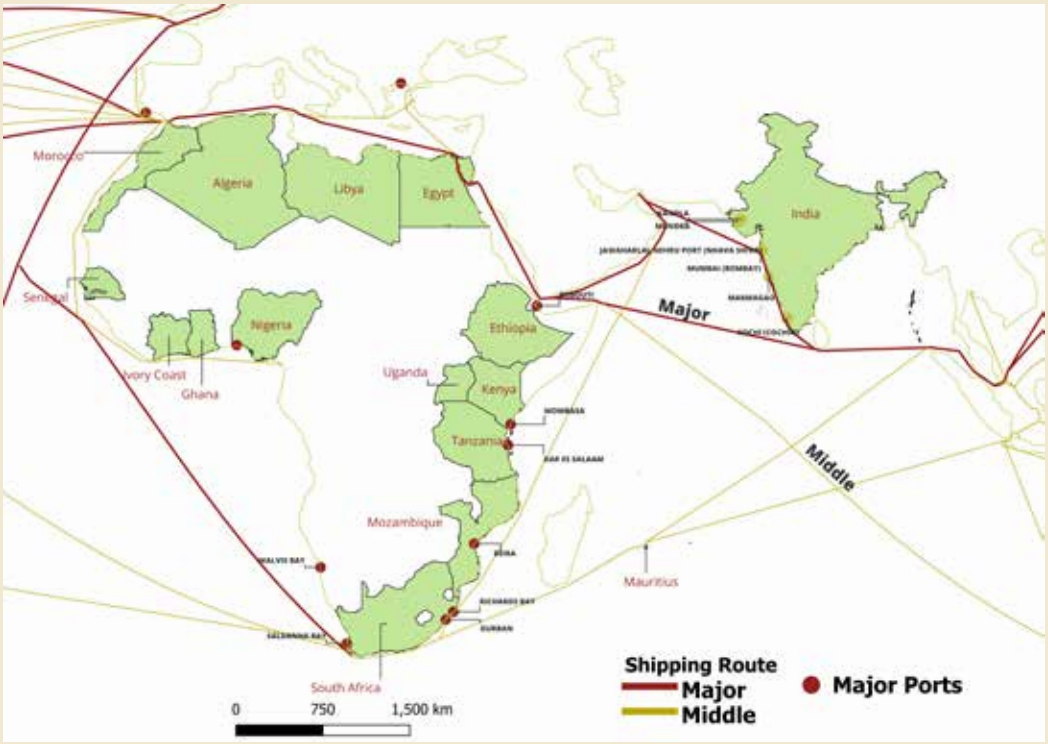
3.1 Strategic trade routes

India has a locational advantage when it comes to trading with Africa. Sea and land routes served as major trade routes since the ancient times. Historically, it was the "Silk route" that connected Asia, Europe, and Africa for international trade. Indian ocean was a key maritime route between 1200 to 1450 (Sherry, 2024) and was a potential route connecting the East African ports and ports in the western coast of India. At present, the maritime routes are used efficiently owing to the availability of 10 major established ports in Africa that could receive imports from India.

Dar es Salaam Port in Tanzania is the prime port that receives agricultural imports. India could explore this for exporting major agricultural commodities to Tanzania and other African countries in the south. Railway connectivity of Kenya - Mombasa Port, Port of Beira, and Djibouti Port will play a major role in establishing land routes for agri-commodities transport from India to other African nations (Table 3.1, Figure 3.1). Richards Bay Port in South Africa

FIGURE 3.1

Visual representation of India-Africa Maps with trade routes*



Source: Author's Own
Note: *Details explained in sections 3.1 and 3.2.

TABLE 3.1

Major ports of Africa

Major Ports in Africa	*Country*	*Handling Capacity*	*Remarks*
Durban Port	South Africa	2.5 million TEUs	Largest shipping terminal of the Sub-Saharan Africa
Richards Bay Port	South Africa	50,000 TEUs	Cargo transport is the main focus; Has great road accessibility as well.
Dar es Salaam Port	Tanzania	590,763 TEUs	Important for most of the agricultural exports. Covers 95% of the international trade of Tanzania and serves Zambia, Congo, Rwanda, Uganda, Malawi, and Burundi.
Kenya - Mombasa Port	Kenya	2.65 million TEUs	Striking feature is the railway connectivity to Kenya, Uganda, and Tanzania. Common port for Uganda, Burundi, Rwanda, and the Democratic Republic of Congo. Important as it connects 80 ports globally.
Saldanha Bay Port	South Africa	NA	This is one of Africa's oldest and most efficient ports. Serves as a point of entry to other continents and countries.
Port Said Port	Egypt	700,000 TEUs	One of the most advanced ports in Africa. Route via "Suez Canal" benefits Egypt and facilitates trade from the Middle East, European Union, and Asia.
Port of Lagos	Nigeria	22,000 TEUs of containerized goods	One of the most well-known ports of West Africa, it facilitates trade in Nigeria and its neighbouring countries.
Walvis Bay port	Namibia	350-750000 TEUs	Busiest, secured and one of the most effective ports in Namibia. Moderate weather conditions are the key advantage for international trade, minimizing delays.
Port of Beira	Mozambique	400,000 TEUs	Good railway connections to Zimbabwe, Congo, Zambia, and Malawi to the port.
Djibouti Port	The Republic of Djibouti	350,000 TEUs	Railway connectivity to Ethiopia. It is a prime import and export transit point.

(*Source*: Ameritrans Freight International, 2024); * TEUs: Twenty-foot equivalent units

is a potential exporting hub due to good connectivity by roads.

3.2 Proximity to India and its advantage

Compared to the rest of the exporting countries like the United States, Brazil, China and other countries in the European Union, India is closer to the African sub-continent. The distance of the 10 selected countries from India is given in Table 3.2. Proximity of African countries to India is a major advantage for both the regions as trade is easier and cost-effective due to lower transportation costs. This is advantageous for trading perishable agricultural commodities like fruits and vegetables that need a shorter transport time and less investment in cold storage facilities.

TABLE 3.2

Distance of the 10 selected countries from India

Country	*Distance from India (km)*
Ethiopia	4299
Egypt	4646
Kenya	5042
Tunisia	6892
Algeria	7159
Angola	7550
Nigeria	7746
South Africa	7793
Morocco	8124
Ghana	8701

Source: ITC trade map, 2024

4

Trade Aspects

4.1 Overview of India's trade with Africa

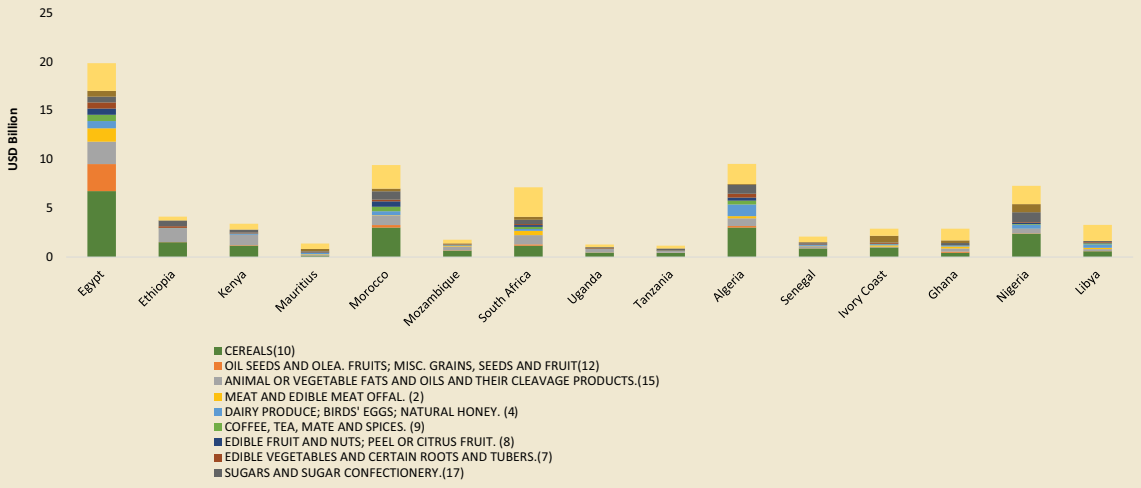
Being the third largest trading partner of Africa, India has played a critical role in exporting a variety of commodities to different parts of Africa. Since the 1990s, India's engagement with Africa has grown significantly. With a couple of big initiatives, "Focus Africa" in 2002-03 and inclusion of Africa as a permanent member of the G20 in 2023, India has strengthened its partnership with Africa in the last three decades. India's expertise in agriculture and agricultural technologies has been instrumental in strengthening Africa's agricultural sector and boosting their production. India's overall trade with Africa stood at USD 97.85 billion in 2022-23 with an 8.87 percent increase in the Compound Annual Growth Rate (CAGR) since 2018. This substantiates India's importance and potential as a trading partner for Africa in the coming years.

4.2 Top agricultural imports of Africa

Africa exported around USD 600.7 billion of total goods to the rest of the world in 2023. The export in agricultural commodities grew by 4 percent between 2018 and 2022. However, the

FIGURE 4.1

Top agri-imports of African countries from the world (TE23)

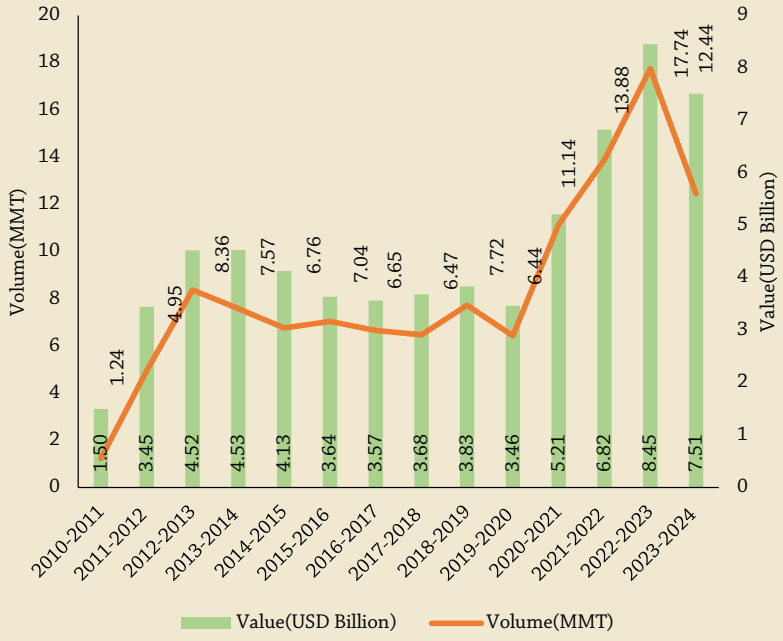


Source: UN Comtrade, 2024

imports surpassed exports, and there was an increase of 7 percent in the agricultural imports since 2018 (Odjo et al., 2024). Africa is a net importer of all agricultural products (trade deficit in 2022 is USD 45.15 million) (FAO, 2023). The total agri-imports of the African region from the rest of the world stands at USD 107.29 billion in 2023 (ITC trade map, 2024). However, Africa is a net exporter of fruits and vegetables (Export value is USD 20.13 million while import value is USD 8.2 million) (FAO, 2023). An overview of the major agricultural commodities imported by Africa are given in Figure 4.2.

FIGURE 4.2

India-Africa agriculture exports



Source: DGFT, 2024

Figure 4.1 shows that Egypt is the top agri-importing country. Cereals occupies the major portion of the agri-imports in the African continent. The commodities in the graph were selected based on the country that is the highest net importer (of agri-products) and has the highest GDP among the 10 countries in the study. Egypt, Algeria, Nigeria, Morocco, and Ethiopia are the top four net agri-importers with net trade worth USD 9.61 billion, USD 9.07 billion, USD 4.45 billion, USD 1.98 billion, and USD 1.18 billion respectively (Year: 2023; Ethiopia-2022). While, sugar, sugar confectionery and animal or vegetable fats and oils are imported by these countries, edible fruits, nuts and vegetables have a considerably less import despite being the source of good nutrition. This is because most of the African countries are net exporters of many fruits and vegetables. India could explore the possibility of exporting processed products of fruits and vegetables to these countries to enhance trade. Meat and meat offal are in a high demand in many African nations. India can expand its meat export to African nations. A more detailed analysis of the 10 selected countries with their respective commodities have been done in the later sections of this report.

4.3 Indian agricultural exports to Africa

The trajectory of agricultural exports from India to Africa has seen an upward trend since the last decade. Between 2015 to 2020, the exports remained more or less stagnant with an average of USD 3 billion worth of agricultural exports sent to the African continent. Post-Covid, there was a significant increase in agri-exports with 2022-24 showing the highest value and volume of exports worth USD 8.45 billion and 17.74 MMT respectively. The trend in the agricultural exports from India to Africa is given below:

India has been exporting a large number of agricultural commodities to Africa ranging from cereals to meat and processed products. However, cereals (especially rice) covered the maximum portion of the exports to Africa followed by meat product. As discussed, fruit and vegetable exports occupy a very little portion of the exports to Africa. India being a major producer of fruits and vegetables, needs to prioritize these sectors to boost bilateral trade with Africa. Our analysis shall focus on the five selected commodities as discussed in section 4.5.

4.4 Export potential of India

Geopolitical tensions, disruptions in supply chains, high shipping costs, and food security concerns in India were some of the major reasons that led to a fall in the exports of com-

modities to Africa in 2023-24 (Figure 4.3). If we see the export potential of India, we realise that most commodities have a high untapped potential that can be accessed with proper strategies and policy frameworks.

Our analysis focusses on the commodities, which are highly imported by the 10 selected African nations (apart from cereals and oils) based on the interests of APEDA.

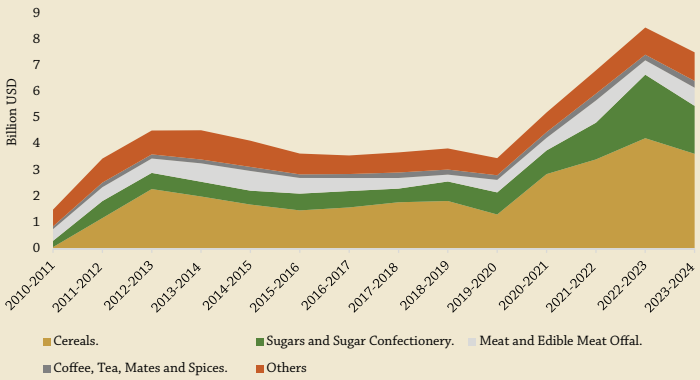
4.5 Selected commodities for analysis

The top 15 agri-imports of the 10 selected African nations in 6-digit HSN codes (TE23) were analyzed (Annexure 8.2). It was observed that wheat and meslin, maize, soybeans, rice (semi or whole milled; broken), sugar and sugar products, and vegetable and palm oils were some of the top imported commodities in Africa. For instance, only durum wheat, maize, soybeans, and palm oil constituted about 52.3 percent of the total agri-imports of Egypt. Similarly, about 62.1 percent of the total agri-imports from Ethiopia were from palm oil, durum wheat, semi-milled or whole-milled rice and raw cane sugar and its products (please refer to Annexure 8.2 for country-wise agri-imports details). However, cereals export from India has been declining since 2023 (in 2022 cereals export was USD 14.1 billion which declined to 11.8 billion USD in 2023) (UN Comtrade) owing to runaway inflation and domestic food security concerns. Also, India is not a major exporter of palm oil and other vegetables oils. Therefore, these commodities were not considered in the analysis.

The APEDA-ICRIER knowledge partnership had 20 commodities viz., banana, mango, potato, cashew nut, foxnut (makhana), pomegranate, pickles and sauces, pineapple, cereal preparations (biscuits, papad, pasta, etc.), ginger, jackfruit (and its value-added products), juices and pulps, chilli, grapes, okra, baby corn, honey, milk products (ghee, paneer), table eggs, and groundnut. But it was surprising to see that the 10 selected African nations are exporters of most of these commodities (especially fruits and vegetables). After discussion with the APEDA team and observing the top

FIGURE 4.3

Major commodities being exported from India to Africa



Source: DGFT, 2024

TABLE 4.1

Commodities and their countries studied

HSN	*Description*	*Countries*
020230	Frozen, boneless meat of bovine animals	Egypt
210690	Food preparations, n.e.s.	Ethiopia, Kenya, South Africa, Algeria, Nigeria
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	Ghana
220830	Whiskies	South Africa
020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus	South Africa, Angola

* No particular commodity was selected for Tunisia and Morocco out of their top 15 imports. Therefore, an overview of the imports has been given for these two countries in the later section of the report.

15 agri-imports of the 10 selected countries, it was decided that 5 commodities are of interest across the 10 African nations (Table 4.1). However, we have analysed rice along with the other commodities (out of the 20 focussed commodities) which have a scope to be exported from India to the 10 African countries.

Country-wise analysis of imported commodities have been done in this report to show where India stands as a major exporting partner to these African nations and what are the challenges faced and strategies to be adopted. To begin with, we have analysed the net trade of these 5 commodities in their country of interest (Table 4.2).

TABLE 4.2

Net trade of selected commodities in the 10 countries (TE23) (Million USD)

Countries	*Selected Commodities*				
	HSN: 020230	*HSN: 210690*	*HSN: 220830*	*HSN: 020714*	*HSN: 220710*
Egypt	-991.16				
Algeria		-220.88*			
Kenya		-39.8			
Ethiopia		-103.12			
Nigeria		-178.19			
Ghana					-47.4
South Africa		-28.01	-134.53	-105.85	
Angola				-259.83	

Source: UN Comtrade

*Algeria data for the HSN:210690 is for the year 2017.

"Minus" sign indicates "Net Importers of those commodities"

5

Country-wise Analysis

5.1 Egypt

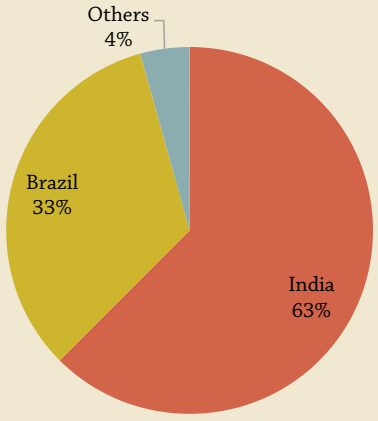
Trade between India and Egypt dates back to the third century B.C. Bilateral trade agreements between these nations have been operational since March 1978 based on the most favoured nations (MFN) status (Embassy of India, Cairo, Egypt). During April 2022 to December 2022, India was the 5th largest trading partner of Egypt with USD 6 billion worth of bilateral trade between the two nations (Egypt Business Directory, 2023). Some of the top exported commodities are Petroleum Oils (14.4 percent), Meat (13.5 percent), Ferro-alloys (5.2 percent), Rice (2.6 percent) and Flat-rolled products of Iron (2.2 percent) (Embassy of India, Cairo, Egypt). Meat is one of the most important exported products from India to Egypt. Egypt imports USD 992.61 million worth of frozen, boneless meat of bovine animals, which comprises 5.05 percent of Egypt's total agri-imports. The share of top agri-imports of Egypt is given in Annexure 8.2, Table i. Bovine meat is one of the highly consumed commodities worldwide. In 2022, the global market for bovine meat reached USD 73.2 billion (APEDA). The global scenario of Bovine meat trade is given in Annexure 8.3, Figure i & ii.

Egypt ranks 5th in the world's bovine meat importers covering 3 percent of the global imports (Annexure 8.3, Figure ii). After cereals and vegetable oils, bovine meat is the most imported agri-commodity in Egypt. It accounts for approximately USD 992.61 million worth of imports in Egypt (ITC trade map, 2024). India is the major exporter of bovine meat to Egypt (620.22 million USD) accounting a remarkable 63% of the total bovine meat imports of the country. The other major exporting nation of bovine meat to Egypt is Brazil, which accounts for 33% of the total bovine meat imports (Figure 5.1). India has a comparative advantage over bovine meat exports (RCA=3.2 in 2018-2022) globally. Also, India has an established market in Egypt as far as bovine meat is concerned. This is facilitated by zero tariff rate, complete market access, and no special SPS standards. India has a far better Unit Value Point (UVP) of 3212.07 USD/MT (TE23) compared to Brazil which has a UVP of 6413.19 USD/MT (TE23) in exporting bovine meat to Egypt.

One of the important reasons for India's large bovine meat exports to Egypt is the shift in the focus of Brazil to China. After acquiring licence

FIGURE 5.1

Major exporters of bovine meat to Egypt (Total Value: USD 992 million; TE23)



Source: UN Comtrade

to export bovine meat to China, Egypt was dependent on India for its bovine meat. Despite complete market access, and no tariffs, one of the major issues and expensive process is the "Halal" certification requirement by Egypt for the bovine meat (USD 2250 for 28 tonnes container load).

Discussion with the exporters revealed that bovine export from India to Egypt is done via sea (JNPT, Mumbai). Uttar Pradesh, Maharashtra, and Telangana are the leading bovine meat producing states of India. Some of the major players (companies) involved in the export of bovine meat in India are Alana, Marhaba, India Frozen, International Agro, Standard Agro, Rustom, Al Dua food processing, Al Hamd agro, Fair Exports India. However, all the exports from India go via the JNPT port located in Mumbai. Other major companies of the world are BRF S.A. (Brazil), Cargill (USA), Clemens group (USA), JBS S.A. (Brazil), and Vion Food Group (Netherlands).

A major challenge is the increase in the freight charges due to the red sea issue. The charges have increased from USD 70-75 per ton to USD 200-225 per ton. This needs to be addressed immediately to avoid any trade disruptions in the bovine meat exports from India to Egypt. Since the purchasing power of the Egyptian population is low compared to the rest of the world, India can benefit from low prices as Egypt has a very price sensitive market. Nevertheless, the devaluation of local currency and non-availability of dollars for non-essential commodities have posed another challenge in the bovine meat imports in Egypt. While India cannot address this issue but possibility of exchanging imports with local currencies may be explored.

Rice

Egypt relies heavily on rice imports to meet domestic demand, with India being its largest supplier, exporting USD 115.26 million worth of semi-milled or wholly milled rice (94,805 metric tons) in 2023. Other key suppliers include China, Thailand, Vietnam, and Pakistan. In 2023, Egypt imported approximately 450,000 metric tons of rice, valued at USD 190 million, making rice the 99th most imported product in the country. Despite India's export ban on non-basmati white rice, Egypt's imports remain stable due to its reliance on basmati and parboiled varieties. Importers have also shown interest in U.S. medium-grain paddy rice for milling and re-exporting, though quarantine concerns limit this option. Demand continues to grow due to high domestic consumption rates. Table 5.1 compares the rice imports of Egypt from some major countries.

TABLE 5.1

Imports of semi-wholly milled rice in Egypt

Total value: USD 102.5 million (TE23)

Country	MFN Duty (%)	Imports (TE23) (USD million)	% Share	Distance (nm)	UVP ($/MT)
India	0	88.1	85.9	3039	1157.1
China	0	7.7	7.5	7142	1196.5
Thailand	0	5.4	5.3	5906	1143.7

(*Source*: ITC trade map, 2024)

Other commodities

India has considerable potential to boost its agricultural exports to Egypt in various commodities where Egypt has a high import demand, but India's current exports are minimal. For instance, in TE23, shelled cashew nuts emerged as a promising opportunity, with Egypt importing USD 24.11 million worth globally. Despite India's robust global exports of USD 372.10 million, its exports to Egypt were only USD 0.30 million. A similar pattern is seen in sweet biscuits, where Egypt's imports were USD 11.07 million, but India's exports to Egypt were negligible, even though its global exports reached USD 264.09 million.

Furthermore, products like grapes, paneer, and baked goods (including bread, pastries, cakes, and biscuits) present opportunities for India to meet Egypt's growing demand, which ranges between USD 10 million and USD 80 million across these categories. Despite India's strong global presence in these segments, its exports to Egypt remain minimal.

Another significant opportunity is in ghee, where India currently exports USD 1.17 million to Egypt, while Egypt's total imports are USD 55.61 million. Given India's global exports of

USD 102.72 million, increasing its market share in Egypt is achievable. Similarly, groundnuts represent an untapped opportunity, as Egypt's total imports are USD 3.96 million, yet India, despite being a major global exporter with USD 758.16 million in exports, supplies only USD 0.10 million to Egypt. By focusing on strategic market expansion, enhancing branding efforts, and improving marketing initiatives, India can significantly increase its presence in these high-demand commodity markets in Egypt. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table i.

5.2 Ghana

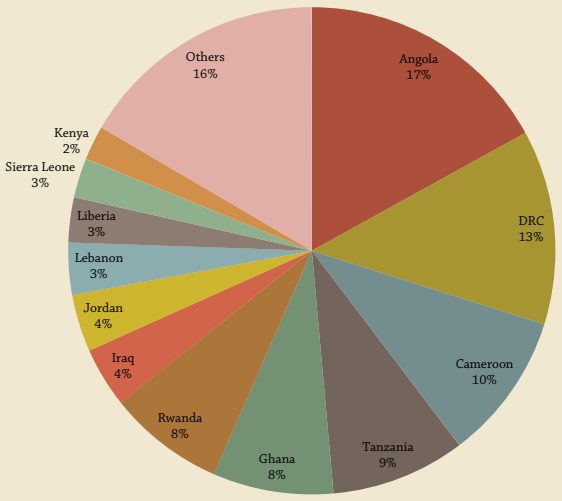
India and Ghana share multifaceted economic relations due to their bilateral trade, investment and cooperation in development. Both countries continue to develop their economic relations and trade under the Joint Trade Commission (JTC) framework. The latest JTC was held at Accra on May 2-3, 2024, which focussed on strengthening the bilateral trade between the two countries. At the recently concluded India-Ghana Business Conclave, the Hon'ble Minister for Trade, Agribusiness and Industry underscored the strategic importance of strengthening economic ties between Ghana and India. She noted that India's demonstrated capabilities in agro-processing and manufacturing position it as an ideal partner in advancing the Government of Ghana's renewed agenda for jobs and prosperity. This agenda emphasizes the need to diversify Ghana's export base by shifting from dependence on raw commodities such as cocoa and gold to value-added products like processed foods, textiles, and manufactured goods. To realize this vision, the Government of Ghana is implementing several flagship programmes that seek collaboration with the Indian government and private sector. Among these, the Accelerated Export Development Programme (AEDP) aims to scale up the non-traditional export sector in terms of volume, value, and job creation. Complementing this, the Feed Industry Programme focuses on boosting the production of local raw materials through commercial contract farming, ensuring a consistent and high-quality supply of agricultural inputs—such as grains, oilseeds, tubers, and meat—as well as non-agricultural raw materials to support both heavy and light manufacturing industries. Bilateral trade between India and Ghana stood at USD 2.5 billion in 2023-2024 (DoC, GOI). India is a net importer when it comes to trade with Ghana, mainly due to gold imports. India exports a lot of commodities to Ghana that includes pharmaceuticals, agricultural machinery, transport vehicles, electrical equipment, plastics, iron and steel, ethyl alcohol beverages and spirits, cereals, and made-up textiles.

Cereals and palm oils are the majorly imported agri-products by Ghana. However, in this analysis we shall deep-dive into Ghana's ethyl alcohol imports.Undenatured ethyl alcohol, of actual alcoholic strength of >= 80% ranks 12th in the total agri-imports of Ghana with an import value of USD 48.14 million. The share of different agri-imports of Ghana is given in Annexure 8.2, Table ii. The global scenario of ethyl alcohol trade is explained in Annexure 8.3, Table iii & iv.

India exports undenatured ethyl alcohol (of actual alcoholic strength of >= 80%) mostly to the African nations like Angola (TE23-USD 15.9 million), DRC, Cameroon, Tanzania, Ghana (TE23- USD 7.59 million), Rwanda, and others. The top nations where India exports undenatured ethyl alcohol with their share is given in Figure 5.2. However, Ghana imports most

FIGURE 5.2

India's undenatured ethyl alcohol exports to the world (Total value: USD 93.7 million; TE23)



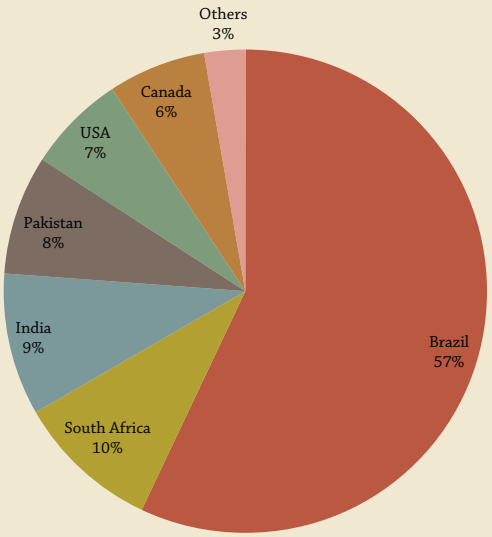
Source: UN Comtrade

of its undenatured ethyl alcohol from Brazil (USD 27.46 million-TE23), followed by South Africa (USD 4.63 million-TE23) and then India (USD 4.58 million-TE23) (Figure 5.3). India is the third largest exporter of the undenatured ethyl alcohol to Ghana after Brazil and South Africa. India has a slightly higher UVP (926.8 USD/Kilo Litre) compared to Brazil (815.5 USD/Kilo Litre) and South Africa (884.5 USD/Kilo Litre). This is an area where India could think of improving its efficiency in expanding its undenatured ethyl alcohol exports to Ghana by reducing the UVP. Also, there is an effective tariff of 15 percent on India's exports of undenatured ethyl alcohol to Ghana (ITC trade map, 2024).

The trade route followed for the export of ethyl alcohol is from JNPT, Mumbai to Tema port of Ghana. Maharashtra, UP, Punjab, Karnataka, Goa and Daman are the major states producing ethyl alcohol. However, an important reason why India is unable to top the list of ethyl alcohol exports to Ghana is the limited supply. The domestic demand and consumption of ethyl alcohol has increased (oil companies for blending petroleum and other domestic consumption) and excise duties are levied even within India from one state to the other.

FIGURE 5.3

Major exporters of undenatured ethyl alcohol to Ghana (Total Value: USD 48.14 Million; TE23)



Source: UN Comtrade

Discussion with the exporters revealed that there is a growing demand for (extra neutral alcohol) (ENA) in Ghana. Brazil and other South American nations are supplying grain ENA in bulk loading facility. This makes their price very competitive and captures the Ghana market. Also, Ghana and other African nations produce ENA but from cassava root which is cheap however, due to low production and high demand, Ghana imports large volume of alcohol from other nations. On the other hand, India produces alcohol from molasses which is much more expensive. The logistics cost increases as the packing includes drum and then containers. Shipping freights are also highly dynamic. It is quite expensive as a 40 feet container has to bear almost USD 2500-3000 freight charges to go from India to Ghana. Other major challenges include devaluation of the local currency, lack of export insurance, and inappropriate excise laws that classifies and regulates exports from a domestic point of view (varying bottle sizes which are not internationally standardized create challenges for the exporters).

Due to high demand and low supply of ethyl alcohol, India has restricted its export to Ghana. There is an urgent need to discuss the challenges in upscaling the ethyl alcohol production in India and shift to single malt whisky, single beer, brandy and gin.

Rice

Ghana heavily relies on rice imports to meet its growing domestic demand, driven by population growth and urbanization. Between October 2023 and September 2024, Ghana imported 24,326 rice shipments, marking a 7 percent year-on-year growth. The leading suppliers are Vietnam (24 percent of imports), India (21 percent), and the United States (20 percent), collectively accounting for 65% of Ghana's total rice imports. Despite efforts to boost local production, Ghana remains only about 40% self-sufficient in rice supply. Demand for imported varieties persists due to their affordability and perceived quality compared to local rice. Additionally, basmati rice imports from India, the UAE, and the UK have seen significant growth, with an 82% increase in shipments between March 2023 and February 2024 (Ghana: Grain and Feed Annual, 2025). Table 5.2 compares the rice imports of Ghana from some major countries.

TABLE 5.2

Imports of semi-wholly milled rice in Ghana

Total value: USD 187.9 million (TE23)					
Country	MFN Duty (%)	Imports (TE23) (USD million)	% Share	Distance (nm)	UVP($/MT)
Vietnam	10	131.9	70.2	9263	485.4
Thailand	10	18.4	9.8	9373	819.9
India	10	16.1	8.6	7803	462.7

(*Source*: ITC trade map, 2024)

Other commodities

India has significant potential to increase its agricultural exports to Ghana in various commodities where Ghana shows strong import demand, but India's current export levels are relatively low. In TE23, fresh guava and mango emerged as promising opportunities, with Ghana importing USD 19.77 million worth globally. Despite India's substantial global exports of USD 186.11 million, its exports to Ghana were only USD 0.14 million.

A similar trend is seen in sweet biscuits, where Ghana's total imports were USD 9.63 million. Although India exported USD 3.30 million worth to Ghana, this is still modest compared to its global exports of USD 264.09 million.

Another notable category is ghee, where India's exports to Ghana are currently just USD 0.06 million, despite Ghana's total ghee imports being USD 4.28 million. Given India's global exports of USD 102.72 million, there is considerable room for growth in this market. By adopting a strategic approach to market expansion, enhancing brand visibility, and improving marketing efforts, India can significantly increase its share in Ghana's high-demand agricultural commodity sectors. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table ii.

5.3 Morocco

Over the years, India and Morocco have experienced cordial relations. India-Morocco ties dates back to the 14th century when the famous writer and traveller Ibn Batuta, came to India. India's support in the Moroccan freedom movement strengthened the ties of both the countries since 1956. India and Morocco have a strong bilateral trade relationship and the bilateral trade in 2022-23 touched USD 3.6 billion (Embassy of India, Rabat, 2023).

An MoU was signed between India and Morocco on 04 May, 2018 to enhance Agricultural Research and Education on Agricultural Cooperation. India exports very meagre amount (USD 115.7 million, 2023) of agricultural products to Morocco. Out of that, coffee, tea, mate, and spices (USD 43.02 million, 2023) and cereals (USD 29.31 million, 2023) are mostly exported from India to Morocco. The total agri-imports of Morocco in TE23 are USD 9510.47 million. Cereals cover the maximum imports of Morocco, followed by oilcakes, tea, and coffee (Annexure 8.2, Table iii). India benefits by expanding its agri-imports in these commodities. Currently, USA is the largest exporter of agri-products to Morocco. India's proximity to Morocco and its historical ties could enhance agricultural trade between the two nations.

Rice

Morocco's rice imports have increased significantly due to a severe drop in domestic production caused by drought. In 2023, Morocco imported USD 56 million worth of rice, primarily from India (USD 33.4 million), Thailand (USD 4.5 million), Spain (USD 3.89 million), Italy (USD 3.19 million), and Turkey (USD 2.93 million). The country has authorized the import of 55,000 tons of rice to stabilize market prices, suspending customs duties and VAT on these imports. Additionally, Morocco imported 200 shipments of Indian rice and 137 shipments of basmati rice between March 2023 and February 2024, reflecting a significant growth in imports (Morocco Rice Imports by Country | 2023 | Data, n.d.). Table 5.3 compares the rice imports of Morocco from some major countries.

Other commodities

India has significant potential to boost its agricultural exports to Morocco in key commodi-

TABLE 5.3

Imports of semi-wholly milled rice in Morocco

Total value: USD 41.1 million (TE23)					
Country	MFN Duty (%)	Imports (TE23) (USD million)	% Share	Distance (nm)	UVP($/MT)
India	50	22.4	54.5	9977	602.7
Thailand	50	7.4	18	11713	732.7
Spain	50	1.6	4	17	863.1

(*Source*: ITC trade map, 2024)

ties where Morocco has strong import demand, but India's current exports are limited. In TE23, shelled cashews emerged as a promising opportunity, with Morocco importing USD 21.01 million globally, while India's exports were negligible despite its global exports of USD 372.10 million. Similarly, Morocco imported USD 34.67 million worth of sweet biscuits, but India's exports were minimal compared to its global exports of USD 264.09 million.

Other opportunities include bananas, guavas, mangoes, paneer, ghee, groundnuts, and various baked goods, with demand ranging between USD 5 million and USD 130 million. Fresh grapes and natural honey also present growth potential, with India's exports to Morocco being significantly lower than its global exports. By adopting targeted trade strategies and enhancing product promotion, India can strengthen its presence in Morocco's high-demand agricultural sectors. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table iii.

5.4 Tunisia

Tunisia is one of the emerging economies of the African sub-continent. Despite having a low population of 12.45 million, it has a high GDP per capita (USD 2895.39) and purchasing power parity (USD 13681.61). This makes Tunisia a perfect hub for global trade. India's bilateral trade with Tunisia has been on a rise at a rate of 8.73 percent an nually from 2017 (USD 308 million) to 2022 (USD 469 million) (OEC, 2024).

Tunisia's total agri-imports for the TE23 are USD 3209.71 million. Out of this, cereals cover the maximum share of agri-imports. The details of top 15 agri-imports of Tunisia are given in Annexure 8.2, Table viii. The total agri-exports from India to Tunisia in 2023 accounted for USD 152.89 million, out of which sugar and sugar confectionaries, were the highest (USD 86.73 million) followed by fish and crustaceans, molluscs and other aquatic invertebrates (USD 43.92 million). With the increasing bilateral trade between India and Tunisia, India could export other agri-products that are of interest to Tunisia.

Rice

Tunisia's rice imports have shown significant growth, with a notable increase in 2024. In 2023, Tunisia imported rice worth USD 9,839.59 thousand, primarily from Thailand (USD 6,046.52 thousand), Pakistan (USD 1,940.27 thousand), and India. Other suppliers include Morocco and Turkey. The imports from Thailand alone accounted for a substantial portion of the total, with 7,861,700 kg imported in 2023. Despite fluctuations in import volumes and values over the years, Tunisia continues to rely heavily on international suppliers to meet its domestic rice demand. The average import price per ton has also seen fluctuations, reflecting global market trends (Tunisia Rice Imports by Country | 2023 | Data, n.d.). Table 5.4 compares the rice imports of Tunisia from some major countries.

Other commodities

India has significant potential to expand its agricultural exports to Tunisia in key commod-

TABLE 5.4

Imports of semi-wholly milled rice in Tunisia

Total value: USD 14.5 million (TE23)					
Country	MFN Duty (%)	Imports (TE23) (USD million)	% Share	Distance (nm)	UVP($/MT)
Thailand	0	10.5	73	39235	767.0
Pakistan	0	2.7	18.6	15276	640.6
India	0	0.5	3.6	14064	654.3

(*Source*: ITC trade map, 2024)

ities where the country has a strong import demand, yet India's current exports remain limited. In TE23, fresh banana emerged as a promising opportunity, with Tunisia importing USD 28.55 million worth of the product globally. However, despite India's significant global exports of USD 185.09 million, its shipments to Tunisia were negligible.

Groundnuts also present a key opportunity, as India currently exports USD 0.04 million to Tunisia, while the country's total imports stand at USD 5.17 million. Given India's global exports of USD 758.16 million, there is ample room for growth. By implementing targeted trade strategies and enhancing product promotion, India can significantly strengthen its foothold in Tunisia's high-demand agricultural sectors. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table iv.

5.5 Angola

India's relations with Angola dates back to the pre-independence era where India showed its solidarity and supported Angola in its freedom struggle against the Portuguese rule. This went up to 1975 when Angola got its freedom. India established diplomatic relations with Angola in 1985 (Embassy of India, Luanda, 2023).

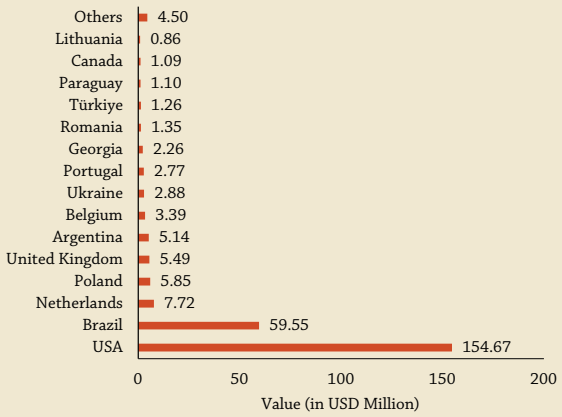
To enhance bilateral trade in different sectors (including agriculture), India and Angola signed an agreement for the establishment of Joint Commission on 30th January 2017. Also, a "Protocol on Foreign Office Consultations" was signed on May 10, 2006 and its first round of consultations was held on August 11 2023 in Luanda. India is the third largest trading partner of Angola and most of the trade is due to the oil imports of India from Angola. The bilateral trade between India and Angola stood at USD 4.2 billion in 2022-23. There is a need to diversify the trade basket to maintain a balance of trade between the two nations.

India's major exports to Angola includes rice (USD 193 million), packaged medicaments (USD 108 million), and special purpose ships (USD 53.2 million). For this analysis, we looked into the prospects of trade in frozen cuts and edible offal of fowls of the species *Gallus domesticus* between India and Angola. Angola's total agri-imports for TE23 were USD 2511.92 million. Frozen cuts and edible offal of fowls of the species *Gallus domesticus* occupy the second position (USD 239.17 million; 10 percent) in the agri-imports of Angola. The share of the top agri-imports of Angola (TE23) are given in Annexure 8.2, Table vii.

The global offal trade scenario is given in Annexure 8.3, Figure v & vi India ranks 66th in the offal exports in the world with only

FIGURE 5.4

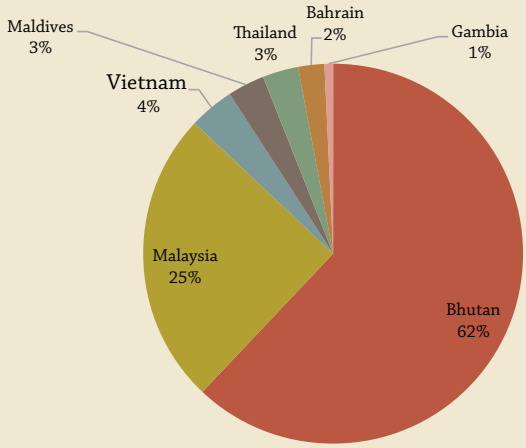
Major exporters of frozen cuts and edible offal of fowls of the species *Gallus domesticus* to Angola (TE23)



Source: UN Comtrade

FIGURE 5.5

India's frozen cuts and edible offal of fowls of the species *Gallus domesticus* exports to the world (Total value: USD 1.92 million; TE23)



Source: UN Comtrade

USD 1.92 million exports. On the other hand, Angola ranks 19th in the total offal imports of the world.

Angola imports frozen cuts and edible offal of fowls of the species *Gallus domesticus* mainly from USA (USD 154.67 million-TE23), Brazil (USD 59.55 million-TE23), and Netherlands (USD 7.72 million-TE23) (Figure 5.4). India's offal exports to Angola are extremely meagre with only USD 0.03 million in TE23. In fact, most of India's offal exports go to Bhutan (62 percent) and Malaysia (25 percent) (Figure 5.5).

It was interesting to see that India has far less UVP (467.7 USD/MT) compared to the USA (1171.1 USD/MT) in exporting offal to Angola. Angola imposes a 10% tariff on India's offal exports.

Rice

Angola relies heavily on rice imports to meet its domestic demand. Over the past four years, Angola has spent approximately USD 1.5 billion on rice imports, with an average annual consumption of about 500,000 metric tons. In 2023, Angola imported rice worth USD 108.65 million from Thailand and USD 118.34 million from India. Historically, Thailand has been a major supplier, accounting for a significant portion of Angola's rice imports, such as USD 228.13 million in 2018. India is also a key supplier, with imports valued at USD 12.05 million in 2018. Angola's rice imports are driven by high domestic demand and limited local production (The Observatory of Economic Complexity, n.d.). Table 5.5 compares the rice imports of Angola from some major countries.

TABLE 5.5

Imports of semi-wholly milled rice in Angola

Total value: USD 260 million (TE23)

Country	MFN Duty (%)	Imports (TE23) (USD million)	% Share	Distance (nm)	UVP($/MT)
India	20	146.7	56.5	8694	626.2
Thailand	20	96.9	37.3	8460	583.0
US	20	2.1	0.8	7467	4525.0

(*Source*: ITC trade map, 2024)

Other commodities

India has considerable potential to boost its agricultural exports to Angola in key commodities where Angola has strong import demand, but India's current export levels are minimal. In TE23, bread, pastries, and other bakery products emerged as a promising opportunity, with Angola importing USD 4.04 million worth globally. Despite India's substantial global exports of USD 163.99 million, its shipments to Angola were negligible. Paneer also presents a notable opportunity, as India's exports to Angola are currently insignificant, while the country's total imports stand at USD 12.14 million. Given India's global exports of USD 29.13 million, there is significant potential for market expansion. By focusing on trade facilitation measures and strengthening bilateral engagements, India can enhance its agricultural exports to Angola and capitalize on the growing demand. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table v.

5.6 South Africa

India and South Africa have been associated with each other since long. Both the nations have developed their relations through different activities like small development projects, disaster relief, military cooperation, capacity-building initiatives, grant support and even in the lines of credit (IBEF, 2024).

India-South Africa completed 30 years of diplomatic relations in 2024. Also, the bilateral trade between the two nations reached USD 19.25 billion in 2023-24. India-South Africa Chamber of Commerce (ISACC) was launched as an important strategic platform to enhance and diversify economic relations and trade between the two countries.

According to the South African Department of Trade and Industry, India is the second-largest exporter to South Africa in 2024, with exports valued at USD 8.7 billion (2023-24) with major exports include mineral products, vehicles, aircraft, transport, chemicals, machinery, metals, textiles, vegetable products, plastics, motor vehicle equipment, and stone, plaster, cement. But for this analysis we shall look into three

potential products viz., frozen cuts and edible offal of fowls of the species *Gallus domesticus*, Whiskies, and Food preparations.

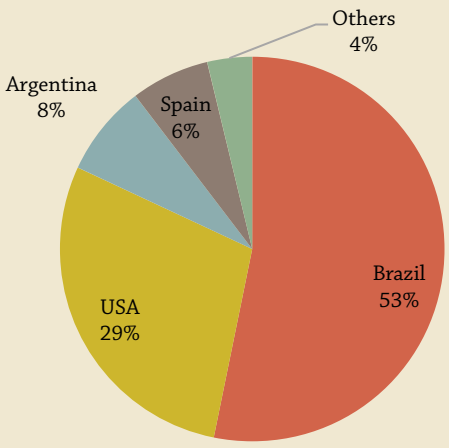
The total agri-imports of South Africa in TE23 were USD 7793.64 million. The top imports of South Africa include cereals, palm oils, food preparations, whiskies and offal. Food preparations rank 5th in the top imports of South Africa (USD 196.31 million-TE23), while whiskies rank 8th with imports worth USD 256.03 million in TE23. Frozen cuts and offal of fowls (*Gallus domesticus*) ranks 9th in the total agri-imports of South Africa in TE23 (USD 144.48 million). The detailed share of top imports of South Africa in TE23 is given in Figure 5.17.

Frozen cuts and offal of fowls (*Gallus domesticus*)

South Africa ranks 28th in the world importers of frozen cuts and offal of fowls (*Gallus domesticus*). The top exporters and importers of frozen cuts and offal of fowls (*Gallus domesticus*) are described in Annexure 8.3, Figure v & vi. It is surprising to see that India does not export any frozen cuts and offal of fowls (*Gallus domesticus*) to South Africa. Brazil (USD 76.6 million-TE23), USA (USD 41.4 million-TE23), and Argentina (USD 11.1 million-TE23) are the top exporters of offal to South Africa (Figure 5.6).

FIGURE 5.6

Major exporters of frozen cuts and edible offal of fowls of the species *Gallus domesticus* to South Africa (Total Value USD 144 million; TE23)



Source: UN Comtrade

South Africa imposes a very high tariff of 42 percent on offal imports from India. This is a potential reason for no market access in this commodity for India. The major challenge in South Africa is meeting the SPS standards for meat and offal. The discussions with the exporters revealed that for any country to export offal, first meat should get approved in terms of taste and quality in the importing country. Only then offal market may be explored. South Africa does not allow meat imports from India due to quality issues therefore, the imports of offal don't exist at all. This needs immediate attention to address the SPS measures of South Africa. India should also explore opportunities to establish preferential trade agreements with South Africa to initiate offal exports.

Whiskies

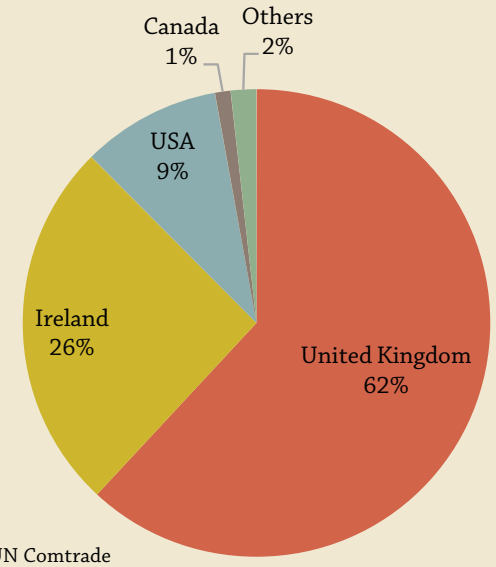
Whisky is another important product with a high demand in the South African market. The total world exports of whiskies stand at USD 14.2 billion (TE23). UK, USA, and Ireland are the top 3 exporters of whiskies in the world with exports worth USD 7.1 billion, USD 1.3 billion, and USD 1.03 billion respectively (TE23). India ranks 14th among the world's top whisky exporters (USD 128.83 million-TE23) (Annexure 8.3, Figure vii).

It was interesting to see that India ranks 9th in the whisky imports with imports worth USD 313.07 million (Annexure 8.3, Figure viii).

South Africa imports whiskies from UK (USD 96.23 million-TE23), Ireland (USD 39.85 million-TE23), and USA (USD 14.93 million-TE23) (Figure 5.7). India exports a less amount of whiskies to South Africa (USD 0.02 million-TE23). South Africa imposes a Tariff Rate Quota (TRQ) on Whiskies, with a limit of 136 cents per liter at a rate of 0.62 percent, and a quantity cap of 9.5 MMT. Once this TRQ limit is reached, a tariff of 24.2 percent will be applied (ITC Trademap, 2024). Therefore, South Africa emerges as a potential export destination for India for whiskies. Consultationwith experts revealed that India has recently penetrated into the exports market of whiskies and the focus is to enhance the bilateral trade among India and South Africa via whiskies. A fund could be developed especially for alcohol and whiskies for increasing the Indian exports in these prod-

FIGURE 5.7

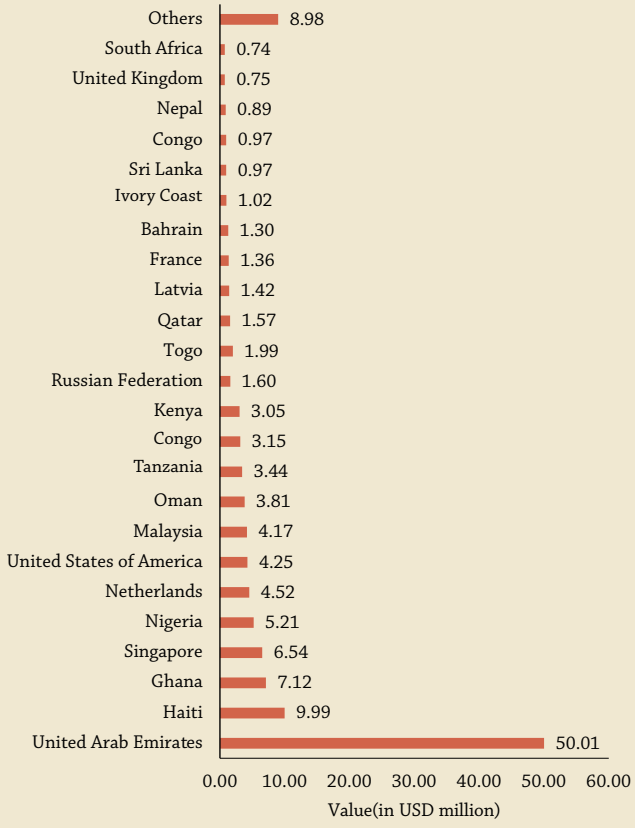
Major Exporters of whiskies to South Africa (Total Value USD 155.4 million; TE23)



Source: UN Comtrade

FIGURE 5.8

India's whiskies exports to the world (Total value: USD 128.83 million; TE23)



Source: ITC trade map

ucts.

India mainly exports its whiskies to the UAE (USD 50.01 million-TE23), Haiti (USD 9.99 million, and Ghana (USD 7.12 million-TE23) (Figure 5.8). Currently, India incurs an extremely high UVP of 86,356.1 USD/KL as compared to UK's 5,371.9 USD/KL in exporting whiskies to South Africa.

Consultations with the exporters revealed that the major constraint in whisky exports from India to South Africa is the quality standards. South Africa follows the EU (European Union) standards which means whisky needs to be qualified as "scotch whisky'. Whiskies in India are not qualified as "whiskies" in South Africa, rather they are just treated as spirits. Moreover, South Africa also has its own distilleries to produce whisky, gin and other alcoholic beverages. "Distil" is one of the major companies producing alcoholic beverages in South Africa. Alcoholic beverages in South Africa are highly concentrated. While spirit and Indian beer are mixed in a ratio of 1:1, the ratio is 1:10 in South Africa and other nations of the EU which limits the acceptance of Indian alcoholic beverages.

India could benefit by marketing its own whisky as "Indian whisky" just as other brands like "Taiwanese whisky", "Canadian whisky" and "American whisky" which have their own taste and quality standards and do not have to adhere to the "scotch whisky". "Single malt whisky" could be another feasible solution for India as malt spirit improves the quality of the whiskies". USL, ABD, Radico, and Carno are some of the top companies involved in the production and export of whiskies from India (via JNPT, Mumbai).

Food preparations, n.e.s.

Food preparations, n.e.s. stand for "food preparations, not elsewhere specified". It includes many products within its basket like soft drink concentrates, sugar syrup, pan masala, protein concentrates and its substances, churna, diabetic food, baby food, others (snacks and anything that do not fall under a specified HSN code). The major importers and exporters of Food preparations, n.e.s, are detailed in Annexure 8.3, Figure ix & x.

Despite a growing market, African nations do not make a significant contribution to the food preparations import in the world. Their ranks as importers of food preparations, n.e.s. are quite behind in the list. This is discussed later in details as we look at each country of our study.

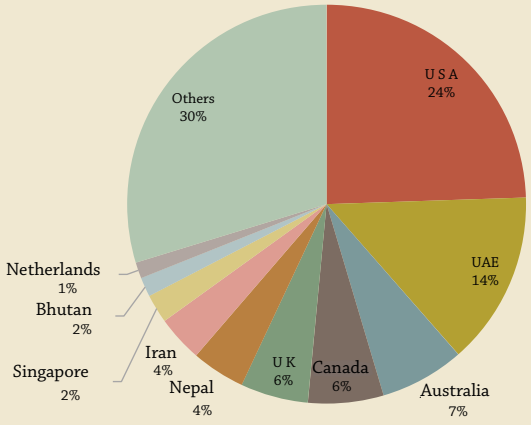
If we explore the trade of food preparations, n.e.s., in India, we can find that India's major export destinations are USA (USD 146.14 million), UAE (USD 84.02 million), Australia (USD 40.88 million), Canada (USD 36.56 million), and U.K. (USD 32.74 million). Figure 5.9 shows the major export destinations of India for food preparations, n.e.s.

India's export of food preparations to the African Nations is very meagre. Mumbai's JNPT is the major port via which food preparations are exported to the African nations. Ghana (USD 5.94 million), Nigeria (USD 2.94 million), and South Africa (USD 2.30 million) are exporting a small amount of these products from India. This necessitates the expansion of the market for India's exports in these regions. After consultation with APEDA, three products under the category of food preparations were of prime focus for India, i.e., soft drink concentrates, sharbat (21069011) and other soft drink concentrates (21069019), sugar-syrups containing added flavouring or colouring matter (21069040), and other food preparation not elsewhere specified (21069099).

The 8-digit HSN codes are country-specific and cannot be generalised for all the countries of the world. Therefore, an overview of the 8-digit HSN codes have been provided from an Indian perspective to explore India's potential in exporting these commodities. Figure 5.10 shows the share of different 8-digit HSN codes being exported from India. Other food preparations, n.e.s, pan masala, and other soft drink concentrates are the top three exported commodities with exports worth USD 499.14 million, USD 33.79 million, and USD 28.92 mil-

FIGURE 5.9

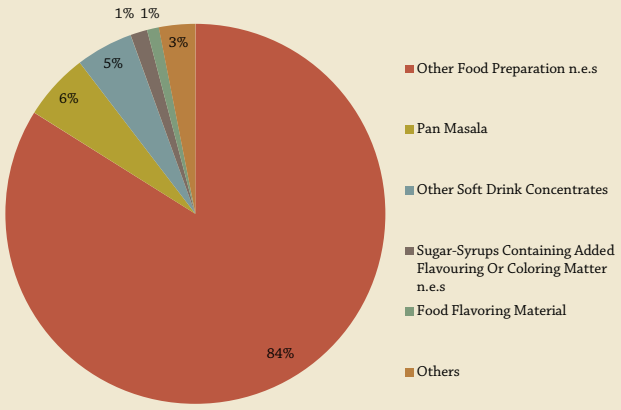
India's food preparations, n.e.s. exports to the world (Total value: USD 0.6 billion; TE23)



Source: DGFT, 2024

FIGURE 5.10

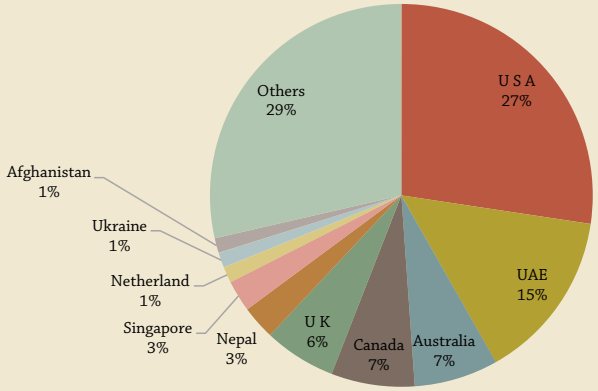
Share of India's food preparations exports in 8-digit HSN codes (TE23)



Source: DGFT, 2024

FIGURE 5.11

India's major exporting destinations for other food preparations, n.e.s (USD 499.1 million-TE23)



Source: DGFT, 2024

lion respectively (TE23). Discussions with the experts revealed that other food preparations, n.e.s include all the commodities that are not covered or that are difficult to classify under a specific HSN code. Moreover, this group mostly includes Indian food processed products like namkeens, bhujia, Indian sweets and others.

India exports other food preparations, n.e.s, mostly to the USA (USD 136.7 million) and UAE (USD 71.9 million). Other export destinations are Australia, Canada, and UK (Figure 5.11).

UAE (USD 0.33 million) is also the largest export destination when it comes to soft drink concentrates, sharbat followed by Canada (USD 0.21 million) and USA (USD 0.21 million) (TE23) (Figure 5.12).

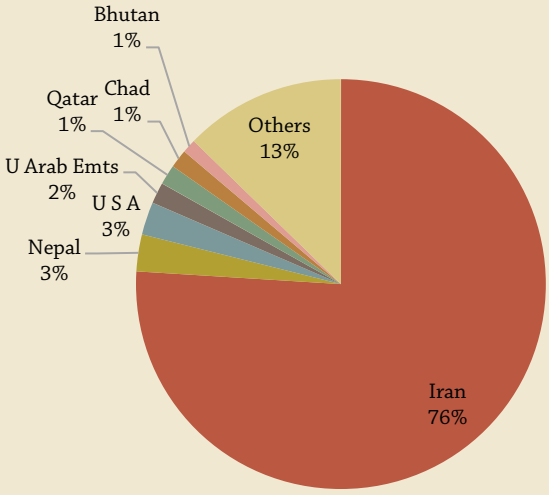
Coming to other soft drink concentrates, Iran occupies most of India's exports (USD 21.95 million) followed by Nepal (USD 0.84 million) and USA (USD 0.75 million) (TE23) (Figure 5.13).

India's total sugar syrup exports was USD 8.5 million (TE23). Nepal and Sri Lanka are the top export destinations with exports worth USD 4.9 million and USD 2.4 million respectively (TE23) (Figure 5.14).

Food preparations, n.e.s. (HSN: 210690) is the 5th largest imported commodity of South Africa with imports worth USD 196.3 million (TE23) (Annexure 8.2, Table vi). Moreover, South Africa ranks 57th in the imports of food preparations in the world. South Africa mainly imports its food preparations from Germany (USD 33.80 million), Netherlands (USD 23.04 million), and USA (USD 21.56 million) (Figure 5.15). It is worth noting that India is the 11th

FIGURE 5.13

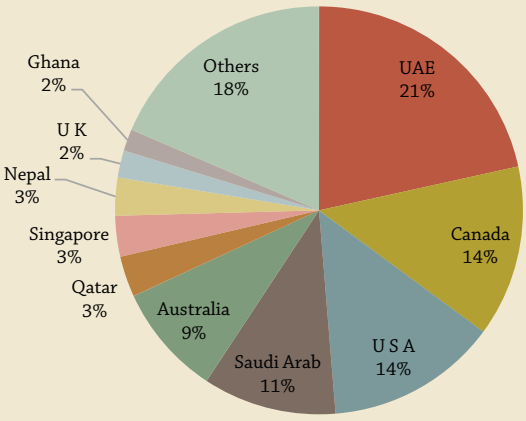
India's major exporting destinations for other soft drink concentrates (USD 28.88 million;TE23)



Source: DGFT, 2024

FIGURE 5.12

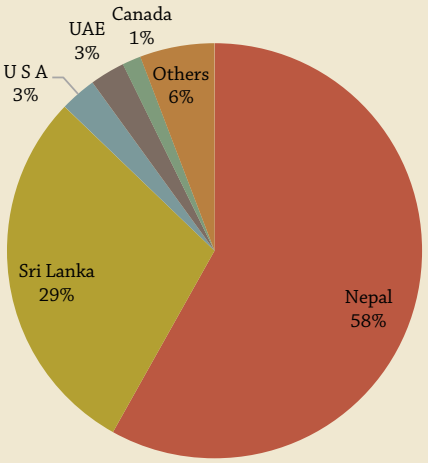
India's major exporting destinations for soft drink concentrates, sharbat (USD 1.55 million; TE23)



Source: DGFT, 2024

FIGURE 5.14

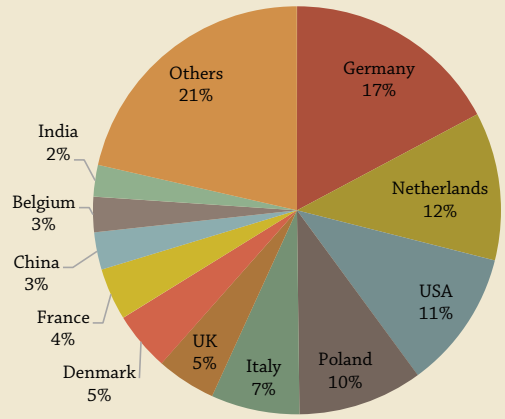
India's major exporting destinations for sugar-syrups containing added flavouring or colouring matter (USD 8.5 million; TE23)



Source: DGFT, 2024

FIGURE 5.15

Major exporters of food preparations, n.e.s. to South Africa (Total Value USD 196.3 million; TE23)



Source: ITC Trade Map

largest exporter of Food preparations, n.e.s to South Africa (USD 4.90 million) (TE23).

Looking into the 8-digit HSN codes of India, other food preparations (HSN: 21069099) are the highest exported commodity from India to South Africa (USD 1.94 million), followed by other soft drink concentrates (HSN:21069019) (USD 0.08 million) and sugar syrups (HSN:21069040) (USD 0.03 million) (TE23). This indicates that Indian snacks is in high demand in South Africa. This sector may be explored to capture the South African market for the existing Indian diaspora and the local population. It is important to recognise that the value of exports is very miniscule from India to South Africa. To capture the South African market, India needs to expand its production and exports in case of food preparations.

Rice

South Africa heavily relies on rice imports, with approximately 90 percent of its rice requirements being met through imports. In 2022, the country imported about 1.1 million metric tons of rice, valued at around USD 955 million. The primary suppliers are Thailand (accounting for about 76.5 percent of imports), India (19.1 percent), Pakistan, Vietnam, and China. In 2023, imports included USD 620 million worth of semi-milled or wholly milled rice, with Thailand providing the largest share. Despite efforts to boost local production, South Africa remains significantly dependent on international suppliers to meet its rice demand (South Africa Rice Imports by Country | 2023 | Data, n.d.). Table 5.6 compares the rice imports of South Africa from some major countries.

Other commodities

India has considerable potential to expand its agricultural exports to South Africa in commodities with high import demand, though current export levels remain low. For instance, South Africa imported USD 15.61 million worth of shelled cashew nuts globally in TE23, but India's exports to South Africa were only USD 1.68 million despite its global exports of USD 372.10 million. Similarly, South Africa imported USD 5.71 million worth of natural honey, yet India's contribution was just USD 0.22 million, despite its strong global presence with exports valued at USD 178.93 million. Additional opportunities exist in grapes, paneer, pasta, and baked goods like bread and biscuits, where South Africa's demand ranges between USD 15 million and USD 35 million annually. Sweet biscuits also present growth potential; India already exports USD 10.88 million to South Africa, while the country's total imports stand at USD 42.31 million. Ground-

TABLE 5.6

Imports of semi-wholly milled rice in South Africa

Total value: USD 523.4 million (TE23)					
Country	MFN Duty (%)	Imports (TE23) (USD million)	Distance (nm)	(%) Share	UVP($/MT)
Thailand	0	389.1	74.4	5834	481.8
India	0	108.1	20.7	4478	486.7
Pakistan	0	8.1	1.6	5655	1071.0

(*Source*: ITC trade map, 2024)

nuts offer further scope for expansion, as South Africa imports USD 29.13 million globally but India supplies only USD 0.56 million despite exporting USD 758.16 million worldwide. Strategic market expansion, improved branding, and targeted marketing can help India increase its share in these high-demand commodities in South Africa. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table vi.

5.7 Algeria

Diplomatic relations spurred between India and Algeria soon after Algeria got its freedom from the French colonial rule, in July 1962. Since then both the countries experienced cordial bilateral and multilateral relations. High-level delegates have also been visiting both the countries for establishing better socio-economic relations between India and Algeria (Embassy of India, Algiers, Algeria). In 2018, the bilateral trade between India and Algeria reached its peak with trade worth USD 2.9 billion. Owing to the impact of COVID-19 and import restrictions of Algeria (due to forex crisis), the trade drastically reduced to USD 1.5 billion in 2021. Nevertheless, 2022 saw a rebound of 24% in the trade between the two nations which reached USD 2.1 billion.

It was good to see that exports from India to Algeria increased from USD 613 million in 2022-23 to USD 848.16 million in 2023-24. Majorly exported products from India to Algeria include rice, pharmaceutical products, polyethylene terephthalate, granite, boneless meat, and others. India mainly imports petroleum oils, LNG, natural calcium phosphates, saturated methanol and urea from Algeria.

Recently in 2024, President Tebboune highlighted the importance of the small yet significant Indian diaspora in Alegria and recognized India as a strong development partner of Algeria (Ministry of External Affairs, GOI). This will open up opportunities for India to further expand its exports in Algeria.

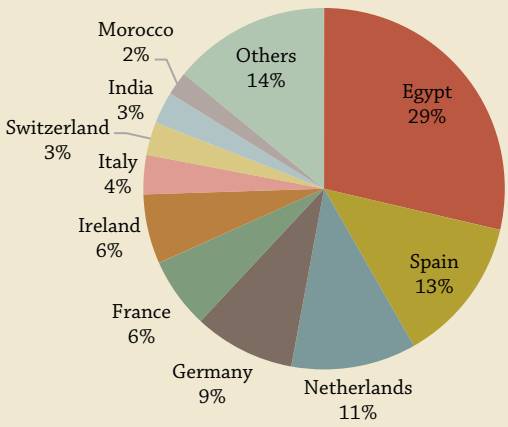
For this analysis, we shall look at the prospects of exporting food preparations, n.e.s. from India to Algeria. Algeria's total agri-imports for TE23 are USD 6.6 billion. Food preparations, n.e.s. occupy the 9th position in the top agri-imports of Algeria with imports worth USD 140.35 million (2%) (TE23). The share of the top 10 agri-imports of Algeria for TE23 is given in Annexure 8.2, Table x.

Algeria ranks 70th in the global importers of food preparations, n.e.s. Major import destinations for Algeria for food preparations are Egypt (USD 63.45 million), Spain (USD 28.95 million), and Netherlands (USD 24.72 million) (TE23) (Figure 5.16).

India occupies 3% (9th rank) of the total food preparation imports of Algeria. However, the import duty levied on India is 40% while Egypt has a preferential trade agreement with Algeria which facilities the imports with zero tariff. With good political relations and socio-cultural similarities, India could benefit by establishing trade agreements for the export of food preparations with Algeria. Other food preparations (HSN: 21069099) are the highest exported commodity from India to Algeria with exports worth USD 1.7 million. However, there is no export of Soft Drink Concentrates, Sharbat (HSN: 21069011) and sugar syrups (HSN:21069040). Other soft drink concentrates (HSN:21069019) have a negligible export (USD 0.02 million). There is an urgent need to

FIGURE 5.16

Major exporters of food preparations, n.e.s. to Algeria
(Total Value: USD 140.35 million; TE23)



Source: ITC Trade Map

explore this market where India could pitch in and benefit from trade.

Rice

Algeria's rice imports have experienced fluctuations over the years. In 2023, Algeria imported rice worth USD 135 million, primarily from India (USD 78.4 million), Thailand (USD 44.5 million), Turkey (USD 12 million), Vietnam, Pakistan (USD 257,000), and Italy (USD 32,500). The average import price per ton increased by 18 percent in 2023 compared to the previous year. Despite a decrease in import volume in 2024, Algeria's rice imports have shown overall growth over the past decade. Basmati rice imports from India and Pakistan are also significant, with Algeria being a major global importer of Basmati rice (Statista, n.d., Rice-Algeria). Table 5.7 compares the rice imports of Algeria from some major countries.

Other commodities

India has significant potential to expand its agricultural exports to Algeria in commodities with high import demand, though current export levels remain limited. For instance, Algeria imported USD 89.32 million worth of groundnuts globally in TE23, but India's exports to Algeria were only USD 3.82 million despite its global exports of USD 758.16 million. Similarly, Algeria imported USD 18.95 million worth of shelled cashew nuts, yet India's contribution was a mere USD 0.10 million, despite global exports of USD 372.10 million. Opportunities also exist in bananas (USD 95.03 million imports), ghee (USD 15.53 million imports), paneer (USD 88.45 million imports), and grapes (USD 19.09 million imports), where India currently has minimal or no exports to Algeria. Strategic market expansion and improved branding could help India increase its share in these high-demand commodities. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table vii.

TABLE 5.7

Imports of semi-wholly milled rice in Algeria

Total value: USD 62.8 million (TE23)

Countryi	MFN Duty (%)	Imports (TE17) (USD million)	% Share	Distance (nm)	UVP($/MT)
India	5	26.1	41.5	5378	645.7
Thailand	5	14.3	22.8	7500	550.8
Viet Nam	5	10.0	16	7251	448

(*Source*: ITC trade map, 2024)

5.8 Nigeria

Just like the other African nations, India and Nigeria have had strong ties since their freedom struggle against colonialism in 1947 and 1960 respectively. Moreover, both nations have been members of Non-Aligned Movement (NAM) and advocated for a world free of geopolitical blocs during the cold war. Furthermore, India is the largest trading partner of Nigeria and despite fluctuations in trade, bilateral trade between the two nations reached USD 7.89 billion in 2023-24 (Punch, 2024). African Continental Free Trade Area (AFCFTA) Agreement which was delayed due to the COVID-19 has now been signed by Nigeria to facilitate trade. The first trade agreement between India and Nigeria was signed in 1983. Again in 2017, Joint Trade Committee (JTC) was agreed upon by both the nations to facilitate bilateral trade (High Commission of India, Abuja, 2023).

It is important to identify that trade between the two nations has fallen due to the decline in the volume of oil purchased by India from Nigeria. Major exports from India to Nigeria include pharmaceuticals, engineering goods, automobiles, agricultural machinery, and even textiles. Nevertheless, in 2016 rice import from India was banned by Nigeria and 70% import duty was levied to boost local cereal production. Restrictions were laid on other agri and allied products including parboiled rice, fish, tomato paste, sugar since 2022. Therefore, there is a need to expand the export basket of India to maintain the agricultural trade between the two nations. Thus, we need to look into the commodities that are majorly imported by

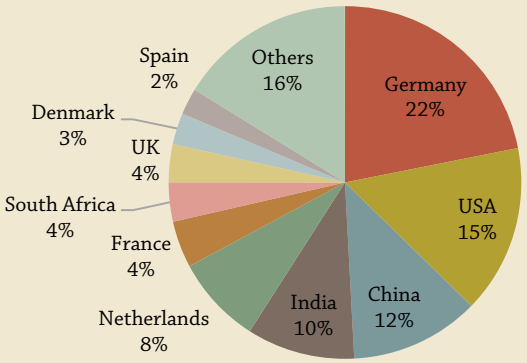
Nigeria and see where India could fit in.

For this study, we shall explore the opportunities of exporting food preparations, n.e.s, from India to Nigeria. If we look into the majorly imported agri-commodities of Nigeria, we can see that durum wheat (USD 2307.93 million-TE23), raw cane sugar (USD 868.2 millon-TE23), and malt extracts (USD 261.95 million) occupy the top three positions. Food preparations are the 4th largest imported commodity in Nigeria with imports worth USD 188.52 million (TE23) (Annexure 8.2, Table ix).

Nigeria ranks 60th in the world food preparation imports. Major countries exporting food preparations to Nigeria are Germany (USD 41.25 million), USA (USD 29.08 million), China (USD 22.37 million), and India (USD 18.63 million). India is the 4th largest exporter of food preparations to Nigeria covering 10% of the imports (Figure 5.17).

FIGURE 5.17

Major exporters of food preparations, n.e.s. to Nigeria (Total Value USD 188.5 million; TE23)



Source: ITC Trade Map

The large Indian diaspora in Nigeria make it a potential market for exporting food preparations successfully. Other food preparations (HSN: 21069099) are the highest exported commodity from India to Nigeria (USD 2.5 million-TE23). Soft Drink Concentrates, sharbat (HSN: 21069011), sugar syrups (HSN:21069040) and other soft drink concentrates (HSN:21069019) have a very less value of imports worth USD 0.02 million, USD 0.01 million, and USD 0.02 million respectively (TE23).

Rice

Nigeria's rice imports have been significant due to a gap between domestic production and demand. Despite government efforts to boost local production, Nigeria still imports substantial amounts of rice. Official data often underreport imports, but estimates suggest around two million tons are imported annually, often through smuggling due to high tariffs and restrictions on imports from neighboring countries. In 2023, Nigeria imported rice primarily from India (USD 5.9 million), United Arab Emirates (USD 743,000), Thailand (USD 307,000), and others. The government has imposed a 70 percent tax on rice imports to encourage local production, but smuggling remains prevalent (Tunji & Tunji, 2023).

Other commodities

India has significant potential to expand its agricultural exports to Nigeria in commodities with high import demand, though current export levels remain low. For example, in TE23, Nigeria imported USD 52.48 million worth of bread, pastries, and biscuits globally, yet India's contribution was only USD 0.29 million despite exporting $163.99 million worldwide. Similarly, Nigeria imported USD 8.24 million worth of natural honey, but India's exports to Nigeria were just USD 0.10 million, despite its global export value of USD 178.93 million. Other products like grapes, fresh or chilled capsicum fruits (chilli), and ghee also offer opportunities for India to grow its market share in Nigeria. Strategic initiatives focusing on market expansion, branding, and marketing can help India capitalize on these high-demand commodities effectively. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table viii.

5.9 Kenya

India is one of the top trading partners of Kenya. The bilateral trade between the two nations stood at USD 3.35 billion in 2023-24. Most of this value was covered by India's exports to Kenya (USD 3.17 billion) while India only imported products worth 176.34 million from Kenya (Embassy of India, Nairobi, 2024).

Major Indian exports include pharmaceuticals, machinery, petroleum products, cereals, sugar and sugar confectionary, plastics and articles, electrical machinery, papers and paperboards, and vehicles. Tea, coffee, soda ash, edible vegetables, copper and articles, fertilisers, metal scrap, miscellaneous chemical products, lead and articles and zinc and articles are the commonly imported products from Kenya.

India and Kenya signed a trade agreement in 1981 under which both countries gave the status of the Most Favoured Nations to each other. At the Ministerial level, even a JTC was set up between both the countries in 1983 and since then both the nations have met nine times (the last meeting was held in August 2019). This facilitates the nations to explore the trade opportunities between them.

In this study, we focus on Kenya's food preparation imports and how India could pitch in as a major exporter of this product. Kenya's top agri-imports include crude palm oil (USD 885.04 million-TE23), wheat and meslin (USD 633.03 million-TE23), and semi-milled or wholly milled rice (USD 304.67 million-TE23). Food preparations, n.e.s., rank as the sixth largest imported agricultural commodity in Kenya (USD 116.2 million) (TE23). Annexure 8.2, Table v shows the major agri-imports of Kenya in TE23.

In the global food preparations, n.e.s. imports, Kenya occupies the 76th position. It is great to see that India is the second largest exporter of food preparations, n.e.s. to Kenya (USD 19.92 million-TE23) after France (USD 39.61 million). Figure 5.18 shows the major exporters of food preparations, n.e.s. to Kenya in TE23.

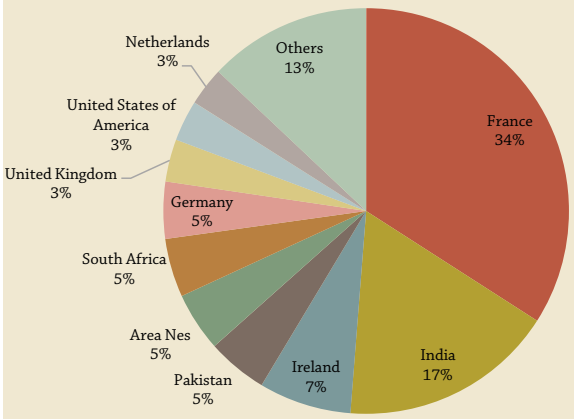
The Indian diaspora in Kenya gives India the opportunity to expand its exports of food preparations successfully. Other food preparations (HSN: 21069099) are the highest exported commodity from India to Kenya (USD 3.7 million-TE23). Soft Drink Concentrates, sharbat (HSN: 21069011), sugar syrups (HSN:21069040) and other soft drink concentrates (HSN:21069019) have a very less value of imports worth USD 0.021 million, USD 0.003 million, and USD 0.01 million respectively (TE23).

Rice

Kenya's rice imports have surged significantly, driven by a substantial gap between domestic production and consumption. In 2023, Kenya imported approximately 935,931 kilograms of rice, valued at USD 389.97 million, with India being the largest supplier at USD 268.68 million, followed by Pakistan at USD 102.16 million. The country's annual rice consumption exceeds one million metric tons, while local production covers only about 20 percent of this demand. In the first half of 2023, rice imports increased by 118.31 percent compared to the same period in 2022, reaching 702,249 metric

FIGURE 5.18

Major exporters of food preparations, n.e.s. to Kenya (Total Value USD 116.2 million; TE23)



Source: ITC Trade Map

TABLE 5.8

Imports of semi-wholly milled rice in Kenya

Total value: USD 62.8 million (TE23)

Country	MFN Duty (%)	Imports (TE17) (USD million)	% Share	Distance (nm)	UVP($/MT)
India	37.61	141.3	46.4	2482	413.5
Pakistan	37.61	105.2	34.6	2872	398.2
Korea	37.61	5.1	1.7	6766	465.1

(*Source*: ITC trade map, 2024)

tons. The government has implemented duty-free import policies to stabilize prices and meet growing demand (Kenya's Rice Imports Surge by Nearly 120 percent in the First Half of 2023, n.d.). Table 5.8 compares the rice imports of Kenya from some major countries.

Other commodities

India has potential to increase its agricultural exports to Kenya in select commodities where Kenya has substantial import demand, but India's current exports remain low. In TE23, Pasta presents an opportunity, while Kenya imports USD 11.22 million from the world, India, despite exporting USD 23.71 million globally, supplies only USD 0.08 million. Similarly, groundnuts offer scope for expansion as Kenya imports from the world stands at USD 8.69 million, while India's global exports are USD 758.16 million, yet it supplies only USD 0.34 million to Kenya. Moreover, products like grapes, orange, Sweet Biscuits and Fruit juices, incl. grape must, and vegetable juices, unfermented also poses opportunity for India to expand its market in Kenya. Focusing on strategic market expansion and improving marketing and branding can help India increase its share in these high-demand commodities in Kenya. The details of imports and exports of different focused commodities are given in Annexure 8.5, Table ix.

5.10 Ethiopia

Trade between India and Ethiopia dates back to 1 century AD during the ancient Axumite Empire. In 6th century AD, silk and spices were traded by the Indian traders in exchange for gold and ivory through the port of Adulis. Time and again India has helped Ethiopia fight the invaders and the colonial rule. Soon after India's independence, diplomatic relations started in 1948 and in 1950 complete diplomatic relations were established between the two nations. India has never been hostile to the interests of Ethiopia and this has been rightly acknowledged and appreciated by Ethiopia. Ethiopia has shown its support in favour of India in various international forums (Embassy of India, Addias, Ababa, 2024).

Trade between India and Ethiopia operates under a Joint Trade Committee and its sixth meeting was held on 6th November 2023 where both the countries discussed and agreed upon expanding and diversifying the trade basket in various sectors including quality assurance, standardization, finance, agriculture, automobile, pharmaceuticals and others. One of the key highlights of this meeting was India's invitation to Ethiopia for collaborating Unified Payment Interface (UPI) with Ethswitch of Ethiopia. A major suggestion from the Indian side was also to explore trade transactions in the local currency to avoid any foreign exchange issues and boost bilateral trade with Ethiopia.

Bilateral trade between the two countries stood at USD 642.59 million in 2022-23 and India is the second largest exporter to Ethiopia. Major commodities exported from India to Ethiopia are packaged medicaments, raw sugar, rice while legumes, soybeans, and oilseed flowers are the commonly imported products from Ethiopia.

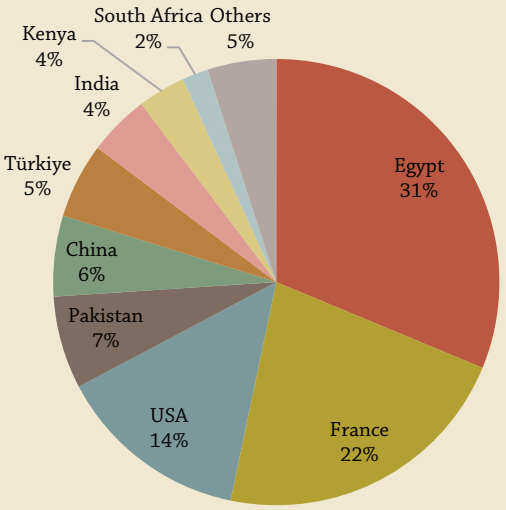
Ethiopia's total agri-imports for TE23 was valued at USD 3605.7 million, out of which palm oil (USD 684.07 million-TE23), durum wheat (USD 528.23 million-TE23), and semi-milled or whole milled rice (USD 376.43 million-TE23) occupied the top three positions. In this study, we shall explore more about the imports of food preparations, n.e.s. which ranks seventh in the majorly imported agri-commodities of Ethiopia (USD 103.5 million-TE23). Annexure 8.2, Table ii highlights the major agri-imports of Ethiopia in TE23.

Ethiopia occupies the 83rd position in the global imports of food preparations, n.e.s. Egypt (USD 32.38 million-TE23), France (USD 22.77 million-TE23) and USA (USD 14.46 million-TE23) are the largest exporters of food preparations, n.e.s to Ethiopia. India is the seventh largest exporter covering 4 percent (USD 4.57 million-TE23) of the total imports of food preparations in Ethiopia (Figure 5.19).

Out of all 8-digit HSN codes under food preparations, India has reported to export only one to Ethiopia, i.e., other Food Preparation (Not Elsewhere Specified) (HSN: 21069099) worth

FIGURE 5.19

Major exporters of food preparations, n.e.s. to Ethiopia (Total Value USD 103.5 million; TE23)



Source: ITC Trade Map

USD 0.57 million (TE23). With trade agreements favouring both the nations and cordial relations and cultural similarity dating back to the past, India can aim to develop taste for other food preparations (Indian snacks) in the Ethiopian population.

Rice

Ethiopia heavily relies on rice imports, with India being the largest supplier. In 2023, Ethiopia imported rice worth USD 184.72 million from India, which accounted for a significant portion of its total rice imports. Other major suppliers include Korea, Pakistan and Turkey, though India dominates the market with over 90 percent of both broken and milled rice imports. In 2023, Ethiopia's total rice imports were valued at USD 226.22 million, with a quantity of 431,346 metric tons. Despite efforts to increase local production, rice imports account for about 76 percent of Ethiopia's rice consumption [Ethiopia (Excludes Eritrea) Rice Imports by Country | 2023 | Data, n.d.; Team, 2022]. Table 5.9 compares the rice imports of Ethiopia from some major countries.

Other commodities

India has potential to increase its agricultural exports to Ethiopia in select commodities where Ethiopia has substantial import demand, but India's current exports remain low. In TE23, products like groundnuts and Fruit juices, incl. grape must, and vegetable juices, unfermented presents opportunity for India to expand its market in Ethiopia. Focusing on strategic market expansion and improving marketing and

TABLE 5.9

Imports of semi-wholly milled rice in Ethiopia

Total value: USD 376.4 million (TE23)					
Country	MFN Duty (%)	Imports (TE23) (USD million)	% Share	Distance (nm)	UVP($/MT)
India	5	355.6	94.5	2561	527.6
Korea	5	9.7	2.6	6475	667.8
Pakistan	5	7.2	1.9	2420	430.2

(*Source*: ITC trade map, 2024)

6

Challenges and Opportunities

6.1 Tariffs and non-tariff barriers

International trade is subject to challenges like high cost and other barriers. One of the most important challenges that makes trade costlier is the tax imposed on imports or exports, known as "tariffs" or what is otherwise called as "import duty". While tariffs make trade difficult for certain countries, they are beneficial in generating revenues, and protecting domestic industries. On the other hand, non-tariff barriers (NTBs) are restrictions other than tariffs that have a significant impact on international trade. They are instrumental in shaping trade and deciding how much of which commodity may be traded by a particular country (UNCTAD, 2024).

Despite being rich in natural resources and possessing vast agricultural lands, Africa lags in global trade due to high import tariffs and other NTBs. Some of the major NTBs include Sanitary and Phytosanitary (SPS) measures, Technical Barriers to Trade (TBT), import licensing, customs procedures, quotas, subsidies, and embargoes. Indian exporters have faced challenges in exporting agricultural commodities to Africa. Some of these are longer distances that increases the transportation cost, reducing the price efficiency. Handling and logistic costs are higher in the African countries. Non-transparent practices and lack of a proper business environment add to the problems of export from India to Africa (Gakhar and Gokarn, 2015).

Our discussion with exporters revealed that a lot of NTBs disrupted trade between the selected African Nations and India. Some of the specific NTBs are listed below:

1. Egypt, Nigeria, Ghana and Angola, are facing high inflation and devaluation of their currency. This is creating issues in payments for their imports. Some African banks (like those in Ghana) have fixed an upper cap of USD 50000 for import payments which make it difficult for those nations to buy foreign commodities. Thus, advance payments are not being made by the African nations.
2. Availability of dollars for non-essential commodities have been restricted which is affecting the trade.
3. Export Credit Guarantee Corporation (ECGC) has designated some countries like Ghana under restricted risk. This creates issues for Indian exporters to supply on a credit basis.
4. Countries like Nigeria are facing constant risk of increased kidnapping, robbery, corruption and other crimes. This disrupts trade as well.
5. Red sea crisis (risk of attack) since 2023 has disturbed the trade routes thereby increasing the logistics cost (to travel through a longer route). This has increased the turnaround time and difficulty in identifying new routes. Again, due to this crisis, even if exporters wish to continue exports via the red sea high-risk zone, the freight charges are quite high, affecting profitability.

6. The Ghana National Chamber of Commerce and Industry (GNCCI) identifies several non-tariff barriers hindering import and export activities. These include:

- Standards and Technical Regulations: Complex and costly compliance with varying product standards, testing, and certification requirements.

- Licensing and Permits: Lengthy and complicated procedures for obtaining necessary trade licenses and permits.

- Administrative Costs and Unofficial Payments: High official fees and the prevalence of unofficial charges increase the cost of doing business.

- Import Restrictions: Restrictions from certain countries on goods imported from Ghana, limiting market access.

- Logistics and Infrastructure Constraints: Poor transport and logistics infrastructure causes inefficiencies and elevated operational costs.

- Sanitary and Phytosanitary (SPS) Measures: Difficulty in meeting diverse and strict health and safety standards.

- Cross-Border Security Issues: Delays and disruptions due to security concerns at border posts.

6.2 Tariff and market access for the selected commodities

A brief analysis of the tariffs, market access, distance for the five commodities is given in Table 6.1.

Bovine meat export to Egypt from India is a success story due to the presence of complete market access, no particular SPS standards and zero tariff rates. Also, ethyl alcohol export to Ghana is high due to limited tariff and complete market access. However, local demand and lack of enough supply, limits India from expanding its ethyl alcohol exports to Ghana. Moreover, exporters revealed that Extra Neutral Alcohol (ENA) is in more demand rather than denatured spirits in Ghana and Nigeria. Nevertheless, frozen cuts and edible offal of fowls of the species *Gallus domesticus* to Angola and South Africa are very limited. The main reason is South Africa has stringent standards in accordance with the EU that does not allow meat imports from India thereby restricting offal.

TABLE 6.1

Tariff, market access, and SPS for selected commodities

			Tariff (%)				
Country	*Market Access*	*SPS*	*Frozen, boneless meat of bovine animals*	*Food preparations, n.e.s.*	*Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%*	*Frozen cuts and edible offal of fowls of the species Gallus domesticus*	*Whiskies*
Egypt	Full	NA	0				
Algeria	NA	NA		60			
Kenya	NA	NA		25			
Ethiopia	NA	NA		30			
Nigeria	NA	NA		20			
Ghana	Full	NA			15		
South Africa	Full (in Whiskies) No (offals)			20		42	0.81
Angola	No	NA				10	

Source: ITC trade map, 2024

Food preparations do not have any specific SPS standards or tariffs (in 6-digit HSN). These are the processed food products that have a high potential to be expanded in the African nations (particularly with high Indian diaspora). Some of the African nations like Algeria, South Africa, and Ethiopia have PTAs with the other nations (European Union Nations and African Nations) which waives off their import duty on food preparations facilitating trade. India should explore on establishing such agreements for the enhanced export of food preparations, n.e.s.

6.3 Opportunities to strengthen bilateral trade

India has an agreement for exporting food, engineering goods, chemicals (organic and inorganic), consumer goods, jewellery, drugs and pharmaceuticals, medical equipment, pesticides, fertilizers, textiles, handicrafts, beverages, hardware, agricultural products, and other varieties of commodities to Africa. Various trade agreements have existed between India and Angola, Botswana, Cameroon, Cote D Ivory, Ghana, Liberia, Mauritius, Mozambique, Nigeria, Rwanda, Senegal, Seychelles, South Africa, Swaziland, Tanzania, Uganda, Zaira, Zambia, and Zimbabwe.

Nigeria and South Africa have emerged as the top two trading partners of India (Bagwandeen, 2020). A total of USD 10 billion worth of trade happened between India and these two nations as of 2019. Some of the successful initiatives to augment international trade are India-South Africa Business Summit, the Invest in India Business Forum, and, the Joint Working Group on Trade and Investment that resulted in an MoU between Invest South Africa and Invest India, in 2019. India-Africa Forum summit started in 2008 focuses on enhancing trade and reducing the challenges in tariffs and NTBs. Such agreements and initiatives can combat the rising prices and promote free trade between the two nations. The historic move of including Africa as a permanent member in the G20 during India's G20 presidency will initiate better trade relations between the two biggest emerging economies of the Global South.

At present, there are a number of provisions in Africa that India could use to access the African market. Some of them are:

- African Continental Free Trade Area (AfCFTA)
- The NTBs online reporting mechanism

India could use the available resources and identify the potential areas where free trade can be carried out. The Indian diaspora in Africa could play a significant role in understanding the demand of the different areas in Africa. This could target the right audience at the right time. Regular India-Africa Forum summits are useful to discuss the issues in bilateral trade and suggest the suitable way forward. Creation of an African Growth Fund would attract African nations to invest in India.

Agri-Value Chain Potential in Ghana:

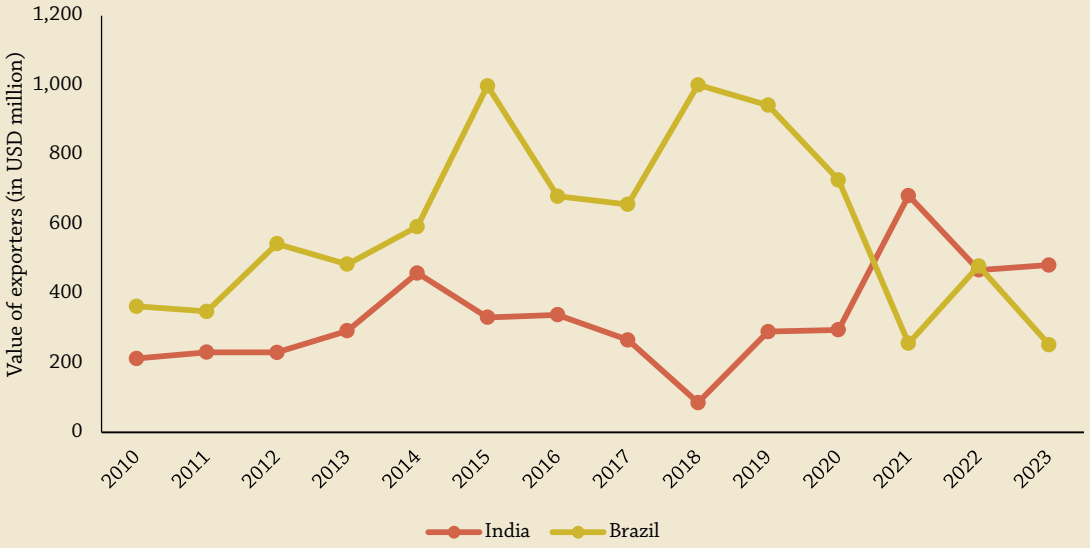
There is a growing demand in Ghana for processed food products such as rice, wheat flour, tomato paste, spices, and ready-to-eat items. To enhance agricultural productivity and value addition, Ghana also seeks access to agricultural equipment including farm machinery, irrigation systems, and post-harvest technologies—areas where India holds considerable expertise. Additionally, there is a strong need for technical know-how, training programs, and consultancy services to support capacity building in the agribusiness sector. Another emerging opportunity lies in the processing of Ghanaian raw materials in India, with the aim of re-exporting them as high-value products to regional and global markets.

Promotion of OIE standards in Bovine meat can boost India's exports sharply

Bovine meat export of Brazil to China is a typical example of export by promotion of OIE standards despite having the famous mad-cow disease. Brazil was previously the top exporter of bovine meat to the Egypt, however, since 2021, China has allowed bovine meat imports from Brazil due to which India was able to capture the bovine meat market in Egypt (Figure 6.1).

FIGURE 6.1

Comparison of bovine meat exports of India and Brazil to Egypt



Following China's approval of Brazilian bovine meat exports, Brazil redirected its shipments from Egypt to China. In response, India seized the opportunity and redirected approximately 20% of its bovine meat exports to Egypt. Figure 6.1 compares the 10-year Aver- age Annual Growth Rate (AAGR) of both Brazil and India's exports. India's AAGR stands at 24.7 percent, significantly higher than Brazil's 7.3 percent. This divergence reflects the shifting dynamics in the global bovine meat market, with India capitalizing on new export opportunities while Brazil diversifies its trade partnerships.

This is a model for India, in order to promote its bovine meat despite the FMD issues by following the OIE guidelines which says that "deboned, deblended and frozen meat" can be sent to any country without the risk of disease transmission. This is important to capture the market of South Africa which doesn't allow Indian meat imports due to its SPS standards thereby restricting the offal imports.

Indian diaspora and the local community in Africa create a potential market for food preparations

Most of the food preparations exported from India include Indian snacks. This puts India in an advantageous position in Africa as most of the nations have a sizeable Indian diaspora in them. This is both an opportunity as well as a challenge because the food preparations export is still very less and there is scope to target the entire Indian population in the African nations. But the challenge is to develop taste among the African population which could fetch better profitability and expand India's food preparation exports. Box 1 describes the specific food preparations exported by India and the commodities imported by some African nations. This analysis highlights the commodities where Indian can expand its scope of exports to Africa.

Regional Economic Zones (REZs) offer a potential opportunity to boost India's agri-trade to Africa

In continuation with section 1.4, we find that COMESA and SADC are particularly significant due to their impressive trade volumes with India. The total imports of COMESA in TE23 were USD 16.6 billion with agricultural imports from India accounting for USD 4.6 billion (TE23) (28.2 percent). Key imports from India include rice (USD 1.2 billion), sugar (USD 1.3 billion), bovine meat (USD 642 million), and food preparations n.e.s (USD 43.5 million), indicating a strong regional demand for these products. Similarly, SADC has significant bilateral trade with India, with imports worth USD

Box 1

Exploring India's opportunity in exporting Food preparations, n.e.s. to Africa

India's exports of food preparations under HSN 210690 at the 8-digit level encompass a wide variety of products with differing export trends. The leading product is "Other food preparation nes" (21069099), averaging USD 499.69 million in exports over the past three years, showing steady growth. "Pan-masala including scented supari" (21069020) follows as the second highest, with an average export value of USD 33.81 million. Soft drinks other than sharbat (21069019) average USD 28.90 million, while sugar syrups with flavoring/coloring (21069040), food flavoring materials (21069060), and other diabetic foods (21069091) have seen moderate growth, averaging USD 8.37 million, USD 6.05 million, and USD 4.76 million respectively. Overall, India's food preparation exports demonstrate a robust market for general food preparations, with niche segments showing varied trends over the last three years.

India has the potential to expand its food preparation exports under HSN 210690 to several African markets. In TE23, South Africa, with an average import of USD 149.79 million for general food preparations (21069090) and around USD 3 million for golden and maple syrup (21069020), presents a promising market. Nigeria's demand for extracts, essences, and flavoring products (21069092) averaged USD 82 million, while other food preparations (21069099) stood at USD 38.06 million, indicating potential for India's food ingredients sector. Kenya has shown a significant increase in imports of food preparations (21069090), reaching USD 73.83 million in 2023, with another category (21069099) averaging USD 32.52 million. Ethiopia also has a steady demand, importing food preparations (21069090) worth USD 45.79 million on average and powder soft drinks (21069040) at USD 3.77 million.

Morocco's demand for other food preparations reached USD 76.78 million, while its imports of flavored and colored sugar syrup stood at USD 2.07 million, highlighting a potential market for India's food products. Similarly, Angola imported USD 17.73 million worth of other food preparations, offering India an opportunity to strengthen its presence and expand its market share in the region. These figures highlight the scope for Indian exporters in these categories to tap into such markets with value-added processed food exports. The details of India's exports and some selected African countries' imports of food preparations, n.e.s., are mentioned in Annexure 8.6.

Way forward: To enhance its presence in these countries, India should adopt a targeted approach through marketing, branding, and active participation in trade fairs, buyer-seller meets (BSMs), and industry events. Organizing product tasting events and collaborations with major retailers and malls in these importing countries can increase the visibility of Indian food preparations. Additionally, customized strategies for each country, such as promoting golden syrup and maple syrup in South Africa, extracts and flavoring products in Nigeria, and soft drinks in Ethiopia, can help in penetration and strengthen India's presence. By leveraging these promotional activities and building trade linkages, India can boost its exports of food preparations and establish a stronger footprint in these potential markets.

14.8 billion (TE23). Agricultural products from India amount to USD 1.22 billion, (8.2 percent) with sugar (USD 696 million), rice (USD 49.18 million), food Preparations n.e.s (USD 17.6 million), and bovine meat (USD 18.01 million) being the most sought-after items (Annexure 8.3).

These trade relationships are bolstered by agreements such as the COMESA Free Trade Area (FTA), the Preferential Trade Area (PTA), and the SADC FTA. These frameworks help lower tariffs, enhance market access, and lay the groundwork for expanding agricultural trade. By facilitating entry into African markets, these agreements can create significant opportunities for growth in India's vital agricultural sectors, fostering stronger economic connections and promoting sustainable development between India and African countries. Looking at the global imports and India's exports to these REZs, we can conclude that India has a significant potential to export these aligned commodities as their exports has been rising year on year basis. By acting upon significant PTAs or FTAs between India and REZs, India could benefit in expanding and diversifying its trade basket to the African nations.

Another REZ of our Interest is Arab Maghreb Union (AMU). AMU consists of 5 African nations which are in the north and are closely situated to middle-east nations. Among the five nations under consideration, our primary focus is on Morocco, Algeria, and Tunisia. However, these countries do not possess the key commodities of interest to our objectives, which limits the strategic focus on this region. Nevertheless, we could also establish trade agreements with AMU to boost agri-trade in other commodities in the future.

7

Conclusion and Strategies

India and Africa are associated with each other since ancient times due to their freedom struggle and socio-cultural and geographic similarities (section 1.3 and 1.5). Africa with its burgeoning population has a potential market for Indian exporters to expand their trade basket. With a value of USD 7.59 Billion in TE23-24 (DGFT, 2024), India currently covers only 7.5% of the total agri-imports of Africa. Following, India's historic decision of including Africa as a permanent member of the G20-G21 (section 1.4), there is a scope for the two regions to team up for expanding their bilateral trade. India's average annual growth rate (AAGR) stands at 8.9% which highlights India's potential to expand its agri-exports to Africa in the near future.

However, with bans on cereals export and no scope for export of fruits and vegetables (section 4.5), it's the time for India to explore its competitiveness in other commodities that are of interest to the African nations (section 4.5).

Addressing the challenges identified in the African nations (section 6), and following short-term, medium-term, and long-term strategies, India can penetrate into the African market. Some of the action points for boosting India's agri-exports to Africa are given below:

Short Term Recommendations

1. *India lacks export insurance and excise laws specific to international standards. There is an urgent need for introducing these policies to boost trade.*

Rationale: Devaluation of currency in Africa poses a threat to the international trade (section 5.1, 6.1). Corruption and other non-tariff barriers make it difficult for Indian exporters to recover their payments. Following the red sea crisis, the risk of exports to Africa have increased. Countries like Brazil (which is one of the largest exporters of agri-commodities to Africa) has export credits and credit insurance programmes and companies (Brazilian Export Credit Insurance Company-SBCE) which protects the exporters from risks and uncertainties of international trade. India could follow a similar strategy to motivate the exporters against any losses while trading with Africa. When it comes to the excise laws of alcoholic beverages, the bottle sizes adhere to the domestic standards that are different from the international ones.

Recommendation: **Export insurance and risk aversion policies should be framed and implemented along with excise law modifications that adhere to global standards.**

2. *India is lagging behind in the exports of certain commodities to Africa and requires policy intervention in terms of tariffs and trade agreements.*

Rationale: India is facing high tariffs for exporting food preparations and offals to Africa (table 6.1). At present, the exports of these commodities from India to the concerned countries is less than 1 percent (section 5.5-5.10). To boost exports of these commodities, trade agreements are essential. It is important to acknowledge that establishing bilateral

trade agreements will be time consuming and resource-intensive from an Indian perspective. Targeting the regional economic zones could serve the purpose as many African countries will come under a single umbrella and this could boost India's scope in expanding its commodities to many African regions.

Recommendation: **Preferential trade agreements between India and the different regional economic zones like COMESA and SADC (section 6.3) should be prioritized to reduce tariffs and enhance market access.**

3. *India like the entire world is facing issues in the trade route via the red sea. Alternate trade routes and subsidies will avoid delay or disruptions in trade with African nations.*

Rationale: The red sea crisis has emerged since October 2023 and created potential threats to the ships due to attacks after the Israel-Hamas war, Iran-Israel and Iran-USA proxy conflicts and Yemeni crisis. This has diverted the shipping routes from the red sea and most of the ships go via South Africa which has potentially increased the logistics cost and the turn-around time (section 5.1). Alternate shipping routes via Tanzania and Djibouti (figure 3.1) could reduce the turn-around time till the red sea crisis is solved. However, assistance in terms of subsidies on freights will be required to encourage the exporters to adopt the new route.

Recommendation: **Freight subsidies for exports via Djibouti port and Dar es Salaam port should be given to the Indian exporters to cope up with the increased logistics cost and reduce the turn-around time till the red sea crisis is solved.**

Medium Term Recommendations

1. *India faces challenges in exporting bovine meat and offal to different nations primarily due to foot and mouth disease (FMD) and other diseases. This makes it difficult for India to meet the SPS standards especially for countries like South Africa. However, there are ways to export these commodities without affecting the quality and health of the consumers.*

Rationale: The World Organisation of Animal Health (WOAH) has set up OIE standards which allows the export of meat and offals without the risk of transmission of diseases (section 6.3). This was followed by Brazil to enter the China market in case of bovine meat (despite having the issue of mad-cow disease). India should follow and promote OIE standards for its bovine meat and offal exports.

Recommendation: **Promotion of certified bovine meat with OIE guidelines (deboned, deblended, frozen) and creation of disease-free zones and clusters (at Aligarh, Meerut, Agra, Mumbai, Pune, Nagpur) for meat and offals. India should participate in meat pavilions and set up meat expos internationally to develop the taste of Indian meat in the foreign consumers.**

2. *Indian is unable to meet the European standards of alcohol. Moreover, when it comes to other food preparations, the taste has not reached the larger section of consumers. Branding and marketing are extremely essential to address these issues.*

Rationale: Whiskey in India is exported as "spirit" and not as "whiskey" because it doesn't adhere to the standards of "scotch whiskey". Therefore, rebranding and relabelling Indian alcohols are essential to develop taste and acceptance of Indian alcoholic beverages which are less-aged and thus affordable. Indian diaspora in Africa is still not completely covered when we talk of food preparation exports. Also, creating a taste for Indian snacks and food preparations among the local African community could enhance the food preparation exports significantly.

Recommendation: **Production, branding and promotion of "Indian alcoholic beverages". Free tasting campaigns in super marts and free samples with other commodities could increase the visibility and awareness about Indian commodities in the African market.**

Long Term Recommendations

1. *Africa has a growing population and in the near future demand for food and other agri-commodities will increase manifold. Food security concerns will also increase thereby*

placing India in a position to export its agri-commodities to different African nations.

Rationale: Currently India exports its bovine meat mostly to Egypt. Countries like Nigeria, South Africa, and Angola are yet to develop a taste for Indian bovine meat. However, India could promote its bovine meat and other offals to many of the African nations in the long run to meet their food demands. A recent case in Namibia showed that the local community consumed their own buffaloes to meet their hunger. Exports from India also prove to be less expensive for African nations as compared to the exports from America and Europe.

Recommendation: **Expansion and gradual export of different agri-commodities to potential African nations for developing the taste and acquaintance with Indian food products.**

Some commodity-specific strategies

Cashew

Africa offers a strong market for Indian cashew exports, driven by a rising middle class and increasing demand for snacks.

Recommendations

- Partnering with high-end retail outlets can help position Indian cashews as an easy-to-get product, appealing to both the Indian diaspora and local consumers.
- Roasted cashews with Indian flavours can attract new buyers, while participation in trade fairs, buyer-seller meets, and tasting events can enhance visibility for brand India.
- Innovative marketing strategies, social media campaign can engage African food influencers and chefs, generating buzz and consumer interest.
- The "Cashew Connoisseur Program" for hotels and fine-dining restaurants can boost brand visibility, while tie-ups with high-end bars to pair cashews with craft cocktails can further drive demand.

These efforts will strengthen India's cashew exports to Africa through branding, promotions, and strategic collaborations.

Cucumber and Gherkins

Recommendations

- To increase market penetration in Africa, Indian exporters should focus on specific branding and marketing strategies, positioning Indian gherkins as high-quality, reasonable and reliable alternatives to seasonal supplies from other countries.
- Participation in trade fairs, buyer-seller meets, and supermarket tie-ups can enhance visibility.
- African consumers can also be introduced to innovative gherkin-based recipes to align with local taste preferences.
- Retail-sized packaging and collaborations with supermarkets can further boost consumer interest, helping India establish a strong footprint in Africa's growing processed food market.

Groundnuts

Africa presents opportunity for Indian groundnut exports, given the rising health-conscious consumer base and demand for nutritious snacks.

Recommendations

- A targeted marketing campaign emphasizing the nutritional benefits of Indian groundnuts can boost awareness and demand.
- Social media influencers and food bloggers can help position Indian groundnuts as a superfood, while participation in trade fairs and exhibitions will showcase their diverse applications, from peanut butter to roasted snacks.
- Additionally, tourism-based marketing, such as guided factory tours for key stakeholders, can highlight India's advanced processing infrastructure and stringent quality standards, improving trust and attracting new buyers.
- To further strengthen exports, Indian groundnut exporters can collaborate with African hospitality chains, restaurants, and cafes to introduce high-quality peanut products as premium snacks.

- Organizing cooking competitions featuring Indian peanut butter as a key ingredient can generate consumer interest and highlight product versatility.

- Retail partnerships and supermarket collaborations will also enhance brand presence, ensuring that Indian groundnuts gain a competitive edge in African markets.

Sweet Biscuits

Africa presents a market for Indian biscuit exports, particularly in the health-conscious and snack segments.

Recommendations

- By collaborating with dietician associations, Indian exporters can promote millet-based biscuits as a nutritious snacking option, tapping into the growing demand for healthy alternatives.

- Product sampling campaigns through health professionals can drive consumer trust, positive reviews, boosting exports.

- Indian biscuit manufacturers can partner with successful pastry chains and renowned chefs of Indian origin to integrate biscuits into popular desserts like cheesecakes and tiramisu, enhancing brand visibility and demand in African markets.

- To further strengthen exports, Indian biscuit brands can leverage influencer marketing and sponsorship of food and culinary events.

- Engaging social media influencers, food bloggers, and chefs can create buzz around Indian biscuits, highlighting their unique flavors and high-quality ingredients.

- Sponsoring international food festivals, baking competitions, and chef workshops can provide Indian manufacturers a platform to showcase their products and network with key buyers.

India's strategic location and agricultural strength offer significant potential to enhance trade with Africa, a region with rising demand for food and agricultural imports. To unlock this potential, India must address key challenges such as the lack of export insurance and excise policies aligned with international standards, delays caused by disruptions in trade routes like the red sea, and non-compliance with sanitary and phytosanitary (SPS) norms for specific commodities. Targeted interventions, including policy reforms, alternate trade routes, improved branding, and long-term strategies to address Africa's growing food security needs, can position India as a major supplier of agricultural commodities to African nations.

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Annexures

ANNEXURE 8.1

Regional economic zones in Africa

	UMA	*COMESA*	*CEN–SAD*	*EAC*	*ECCAS*	*ECOWAS*	*IGAD*	*SADC*	*SACU*
Egypt		✓	✓						
Morocco	✓		✓						
Algeria	✓								
Tunisia	✓		✓						
Kenya		✓							
Ethiopia		✓					✓		
Nigeria			✓			✓			
Ghana			✓			✓			
South Africa								✓	✓
Angola					✓			✓	

Note: Full Forms of the REZs are:

i. Arab Maghreb Union (UMA)
ii. Common Market for Eastern and Southern Africa (COMESA)
iii. Community of Sahel–Saharan States (CEN–SAD)
iv. East African Community (EAC)
v. Economic Community of Central African States (ECCAS)
vi. Economic Community of West African States (ECOWAS)
vii. Intergovernmental Authority on Development (IGAD)
viii. Southern African Development Community (SADC)
ix. South Africa Customs Union (SACU)

ANNEXURE 8.2

Top 15 agricultural imports of 10 selected African countries

Table i: Egypt (Population: 113 million; GDP per capita: 3512 USD; GDP per capita in PPP: 18816; Total Imports: USD 89518.01 Million)

HSN	*Description*	*TE23 (million USD)*	*% Share*
'100119	Durum wheat (excl. seed for sowing)	3738.63	19.01
'100590	Maize (excl. seed for sowing)	2780.91	14.14
'120190	Soya beans, whether or not broken (excl. seed for sowing)	2406.39	12.24
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	1364.97	6.94
'020230	Frozen, boneless meat of bovine animals	992.61	5.05
'151211	Crude sunflower-seed or safflower oil	401.87	2.04
'080810	Fresh apples	346.04	1.76
'210690	Food preparations, n.e.s.	323.55	1.65
'071350	Dried, shelled broad beans "Vicia faba var. major" and horse beans.	308.97	1.57
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	295.04	1.50
'150710	Crude soya-bean oil, whether or not degummed	292.15	1.49
'090240	Black fermented tea and partly fermented tea, whether or not flavoured.	274.74	1.40
'520100	Cotton, neither carded nor combed	273.76	1.39
'040210	Milk and cream in solid forms, of a fat content by weight of <= 1,5%	249.25	1.27
'010229	Live cattle (excl. pure-bred for breeding)	223.85	1.14
	Total agri-imports	**19666.35**	**72.59**
	Total imports (agri+non-agri)	**89518.01**	
	percent share of agri-imports from total imports	**22**	

Table ii: Ethiopia (Population: 126 million; GDP per capita: 1294 USD; GDP per capita in PPP: 3109; Total Imports: USD 16290.28 million)

HSN	*Description*	*TE23 (million USD)*	*% share*
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	684.07	18.97
'100119	Durum wheat (excl. seed for sowing)	528.23	14.65
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	376.43	10.44
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	361.68	10.03
'151219	Sunflower-seed or safflower oil and their fractions, whether or not refined.	317.59	8.81
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	178.83	4.96
'210690	Food preparations, n.e.s.	103.50	2.87
'071310	Dried, shelled peas "Pisum sativum", whether or not skinned or split	101.46	2.81
'110100	Wheat or meslin flour	87.92	2.44
'100640	Broken rice	77.39	2.15
'151110	Crude palm oil	72.01	2.00
'071340	Dried, shelled lentils, whether or not skinned or split	64.18	1.78
'170199	Cane or beet sugar and chemically pure sucrose, in solid form (excl. cane and beet sugar).	61.36	1.70
'190190	Malt extract; food preparations of flour, groats, meal,starch or malt extract.	42.30	1.17
'170112	Raw beet sugar (excl. added flavouring or colouring)	38.15	1.06
	Total agri-imports	**3605.70**	**85.84**
	Total imports (agri+non-agri)	**16290.28**	
	percent share of agri-imports from total imports	**22**	

Table iii: Morocco (Population: 38 million; GDP per capita: 3672 USD; GDP per capita in PPP: 9743; Total imports: USD 67390.58 million)

HSN	*Description*	*TE23 (million USD)*	*% share*
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	1591.45	16.73
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	811.11	8.53
'100590	Maize (excl. seed for sowing)	715.43	7.52
'150710	Crude soya-bean oil, whether or not degummed	681.91	7.17
'100119	Durum wheat (excl. seed for sowing)	423.12	4.45
'230400	Oilcake and other solid residues, whether or not ground or in the form of pellets.	338.12	3.56
'100390	Barley (excl. seed for sowing)	226.20	2.38
'080410	Fresh or dried dates	218.34	2.30
'090220	Green tea in immediate packings of > 3 kg	207.24	2.18
'240220	Cigarettes, containing tobacco	127.75	1.34
'040690	Cheese (excl. fresh cheese, incl. whey cheese, curd,processed cheese and blue-veined cheese.	127.59	1.34
'210690	Food preparations, n.e.s.	119.40	1.26
'230630	Oilcake and other solid residues, whether or not ground or in the form of pellets.	119.31	1.25
'080212	Fresh or dried almonds, shelled	117.95	1.24
'090111	Coffee (excl. roasted and decaffeinated)	117.19	1.23
	Total agri-imports	**9510.47**	**62.48**
	Total imports (agri+non-agri)	**67390.58**	
	percent share of agri-imports from total imports	**14.1**	

Table iv: Ghana (Population: 34 million; GDP per capita: 2238 USD; GDP per capita in PPP: 7466; Total imports: USD 17905.43 million)

HSN	*Description*	*TE23 (million USD)*	*% share*
'110429	Grains of cereals, hulled, pearled, sliced, kibbled or otherwise worked.	252.19	9.45
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	204.56	7.67
'100640	Broken rice	190.24	7.13
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	187.93	7.04
'050400	Guts, bladders and stomachs of animals (other than fish).	163.29	6.12
'170199	Cane or beet sugar and chemically pure sucrose, in solid form (excl. cane and beet sugar).	163.16	6.12
'020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus	150.34	5.63
'120799	Oil seeds and oleaginous fruits, whether or not broken (excl. edible nuts, olives and soya beans).	106.86	4.01
'210690	Food preparations, n.e.s.	74.65	2.80
'230400	Oilcake and other solid residues, whether or not ground or in the form of pellets).	50.52	1.89
'230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	48.20	1.81
'220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	48.14	1.80
'200290	Tomatoes, prepared or preserved otherwise than by vinegar or acetic acid.	44.39	1.66
'220299	Non-alcoholic beverages (excl. water, fruit or vegetable juices, milk and beer)	37.50	1.41
'190190	Malt extract; food preparations of flour, groats, meal, starch or malt extract.	36.38	1.36
	Total agri-imports	**2668.04**	**65.90**
	Total imports (agri+non-agri)	**17905.43**	
	percent share of agri-imports from total imports	**14.9**	

Table v: Kenya (Population: 55 million; GDP per capita: 1950 USD; GDP per capita in PPP: 6323; Total imports: USD 19707.14 million)

HSN	*Description*	*TE23 (million USD)*	*% share*
'151110	Crude palm oil	885.04	24.84
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	633.03	17.77
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	304.67	8.55
'170199	Cane or beet sugar and chemically pure sucrose, in solid form.	248.02	6.96
'100590	Maize (excl. seed for sowing)	149.10	4.18
'210690	Food preparations, n.e.s.	116.20	3.26
'330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions.	87.33	2.45
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	86.29	2.42
'382319	Fatty acids, industrial, monocarboxylic; acid oils from refining.	49.28	1.38
'040120	Milk and cream of a fat content by weight of > 1% but <= 6%.	45.42	1.27
'100790	Grain sorghum (excl. for sowing)	44.17	1.24
'071310	Dried, shelled peas "Pisum sativum", whether or not skinned or split	41.08	1.15
'040210	Milk and cream in solid forms, of a fat content by weight of <= 1,5%	39.06	1.10
'230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	30.39	0.85
'240120	Tobacco, partly or wholly stemmed or stripped, otherwise unmanufactured	29.22	0.82
	Total agri-imports	**3562.87**	**78.24**
	Total imports (agri+non-agri)	**19707.14**	
	percent share of agri-imports from total imports	**18**	

Table vi: South Africa (Population: 60 million; GDP per capita: 6253 USD; GDP per capita in PPP: 15847; Total imports: USD 104252.2 million)

HSN	*Description*	*TE23 (million USD)*	*% share*
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	571.79	7.34
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	539.29	6.92
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	523.42	6.72
'330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions.	452.02	5.80
'210690	Food preparations, n.e.s.	196.31	2.52
'170113	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	191.75	2.46
'151211	Crude sunflower-seed or safflower oil	168.89	2.17
'220830	Whiskies	156.03	2.00
'020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus	144.48	1.85
'010229	Live cattle (excl. pure-bred for breeding)	143.75	1.84
'220300	Beer made from malt	134.06	1.72
'230400	Oilcake and other solid residues, whether or not ground or in the form of pellets.	128.41	1.65
'020712	Frozen fowls of the species Gallus domesticus, not cut in pieces	122.88	1.58
'050400	Guts, bladders and stomachs of animals (other than fish), whole and pieces.	121.99	1.57
'330290	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions.	110.25	1.41
	Total agri-imports	**7793.64**	**47.55**
	Total imports (agri+non-agri)	**104252.2**	
	percent share of agri-imports from total imports	**7.5**	

Table vii: Angola (Population: 36.68 million; GDP per capita: 2309.52 USD; GDP per capita in PPP: 8040.54; Total imports: USD 13846.2 million)

HSN	*Description*	*TE23 (million USD)*	*% share*
'100119	Durum wheat (excl. seed for sowing)	307.92	12.26
'020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus	239.17	9.52
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	238.87	9.51
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	196.67	7.83
'150790	Soya-bean oil and its fractions, whether or not refined (excl. chemically modified and crude)	127.60	5.08
'170199	Cane or beet sugar and chemically pure sucrose, in solid form (excl. cane and beet sugar).	99.77	3.97
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	93.65	3.73
'110710	Malt (excl. roasted)	59.43	2.37
'160100	Sausages and similar products, of meat, meat offal, blood or insects.	53.23	2.12
'020329	Frozen meat of swine (excl. carcases and half-carcases, and hams, shoulders and cuts.	47.82	1.90
'020712	Frozen fowls of the species Gallus domesticus, not cut in pieces	40.17	1.60
'110311	Groats and meal of wheat	39.70	1.58
'100590	Maize (excl. seed for sowing)	34.91	1.39
'210690	Food preparations, n.e.s.	33.68	1.34
'220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	33.67	1.34
	Total agri-imports	**2511.92**	**65.54**
	Total imports (agri+non-agri)	**13846.2**	
	percent share of agri-imports from total imports	**18.1**	

Table viii: Tunisia (Population: 12.45 million; GDP per capita: 3895.39 USD; GDP per capita in PPP: USD 13681.61; Total imports: 24805.04 million USD)

HSN	*Description*	*TE23 (million USD)*	*% share*
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	440.10	13.71
'100390	Barley (excl. seed for sowing)	350.24	10.91
'100119	Durum wheat (excl. seed for sowing)	323.20	10.07
'120190	Soya beans, whether or not broken (excl. seed for sowing)	304.17	9.48
'100590	Maize (excl. seed for sowing)	284.62	8.87
'170199	Cane or beet sugar and chemically pure sucrose, in solid form.	105.98	3.30
'240220	Cigarettes, containing tobacco	102.89	3.21
'150710	Crude soya-bean oil, whether or not degummed	98.79	3.08
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	85.44	2.66
'090111	Coffee (excl. roasted and decaffeinated)	61.62	1.92
'151521	Crude maize oil	59.52	1.85
'230400	Oilcake and other solid residues, whether or not ground or in the form of pellets.	54.26	1.69
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	44.93	1.40
'151211	Crude sunflower-seed or safflower oil	41.82	1.30
'230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	41.82	1.30
	Total agri-imports	**3209.71**	**74.75**
	Total imports (agri+non-agri)	**24805.04**	
	percent share of agri-imports from total imports	**12.9**	

Table ix: Nigeria (Population: 224 Million; GDP per capita: USD 1621; GDP per capita in PPP: USD 6318; Total imports: USD 57834.75 million)

HSN	*Description*	*TE23 (million USD)*	*% share*
100119	Durum wheat (excl. seed for sowing)	2307.93	33.60
170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	868.20	12.64
190190	Malt extract; food preparations of flour, groats, meal, starch or malt extract.	261.95	3.81
210690	Food preparations, n.e.s.	188.52	2.74
40210	Milk and cream in solid forms, of a fat content by weight of <= 1,5%	183.08	2.67
40221	Milk and cream in solid forms, of a fat content by weight of > 1,5%, unsweetened	166.60	2.43
151110	Crude palm oil	159.70	2.33
330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions.	148.02	2.16
151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	145.82	2.12
110710	Malt (excl. roasted)	138.21	2.01
220720	Denatured ethyl alcohol and other spirits of any strength	113.92	1.66
330290	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions.	100.39	1.46
240120	Tobacco, partly or wholly stemmed or stripped, otherwise unmanufactured	95.60	1.39
30572	Fish heads, tails and maws, smoked, dried, salted or in brine	95.43	1.39
230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	72.47	1.06
	Total agri-imports	**6868.11**	**73.47**
	Total imports (agri+non-agri)	**57834.75**	
	percent share of agri-imports from total imports		

Table x: Algeria (Population: 45 million; GDP per capita: 5260 USD; GDP per capita in PPP: 17027; Total imports: USD 36689.18 million)

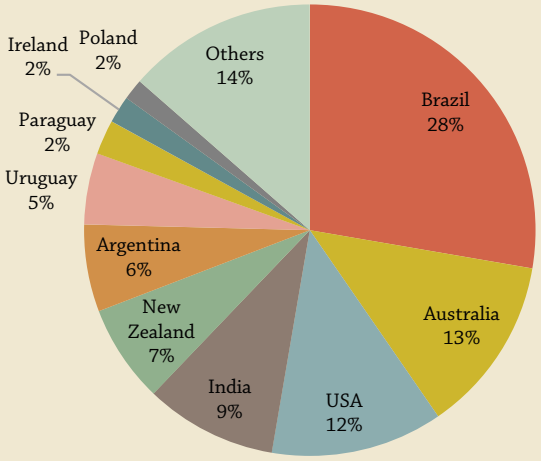
HSN	*Description*	*TE23 (million USD)*	*% share*
'040221	Milk and cream in solid forms, of a fat content by weight of > 1,5%, unsweetened	871.85	13.15
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	751.91	11.34
'120190	Soya beans, whether or not broken (excl. seed for sowing)	735.39	11.09
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	594.95	8.97
'150710	Crude soya-bean oil, whether or not degummed	400.11	6.03
'040210	Milk and cream in solid forms, of a fat content by weight of <= 1,5%	386.01	5.82
'100590	Maize (excl. seed for sowing)	368.00	5.55
'240319	Smoking tobacco, whether or not containing tobacco substitutes in any proportion.	293.31	4.42
'210690	Food preparations, n.e.s.	140.35	2.12
'100119	Durum wheat (excl. seed for sowing)	125.27	1.89
'151620	Vegetable fats and oils and their fractions, partly or wholly hydrogenated.	118.20	1.78
'190110	Food preparations for infant use, put up for retail-sale, of flour, groats and meals.	114.71	1.73
'080390	Fresh or dried bananas (excl. plantains)	95.03	1.43
'071340	Dried, shelled lentils, whether or not skinned or split	94.85	1.43
'010229	Live cattle (excl. pure-bred for breeding)	92.88	1.40
	Total agri-imports	**6631.82**	**78.15**
	Total imports (agri+non-agri)	**36689.18**	
	percent share of agri-imports from total imports	**18.1**	

ANNEXURE 8.3

Global trade scenario of selected commodities in the study

FIGURE i

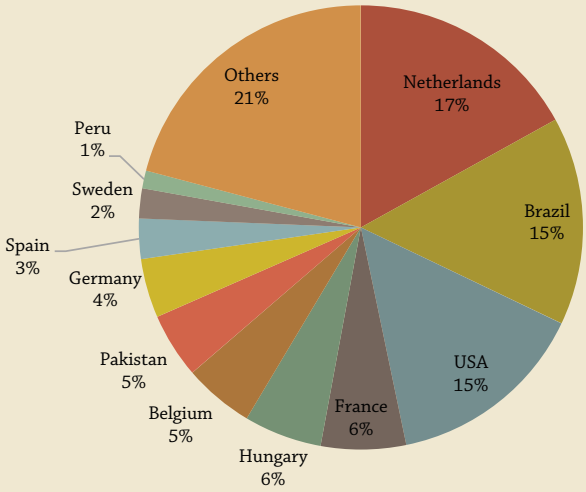
Top exporters of bovine meat in the world (Total Exports: USD 31.2 billion-TE23)



Source: UN Comtrade

FIGURE iii

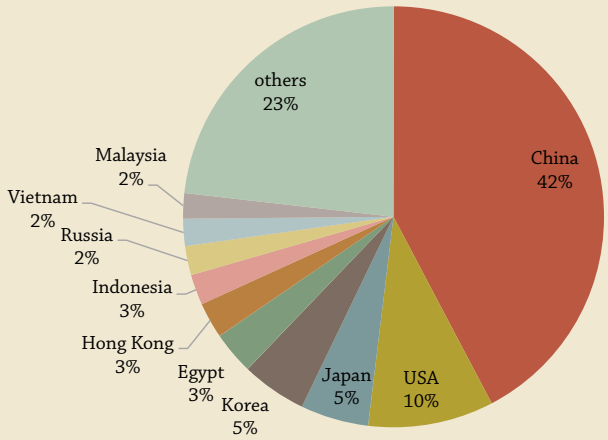
Top exporters of undenatured ethyl alcohol in the world (Total Exports: USD 9.6 billion-TE23)



Source: UN Comtrade

FIGURE ii

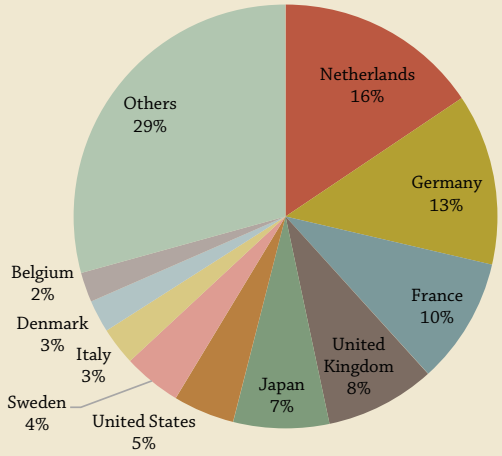
Top importers of bovine meat in the world (Total Imports: USD 30.2 billion-TE23)



Source: UN Comtrade

FIGURE iv

Top importers of undenatured ethyl alcohol in the world (Total Exports: USD 8.9 billion-TE23)



Source: UN Comtrade

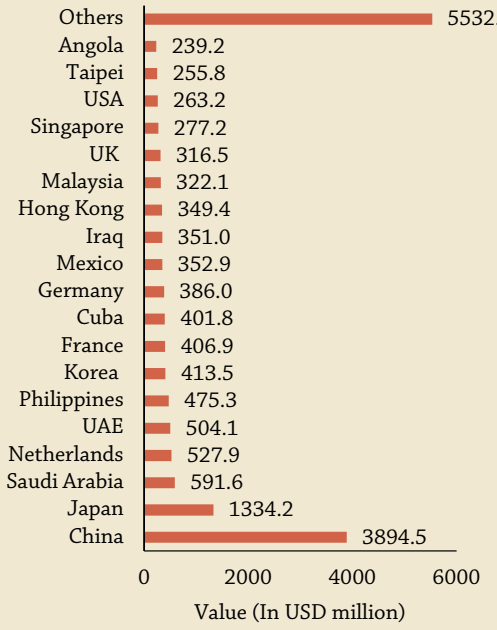
FIGURE v

Top exporters of frozen cuts and edible offal of fowls of the species *Gallus domesticus* in the world (Total Exports: USD 17.3 billion-TE23)

Source: UN Comtrade

FIGURE vi

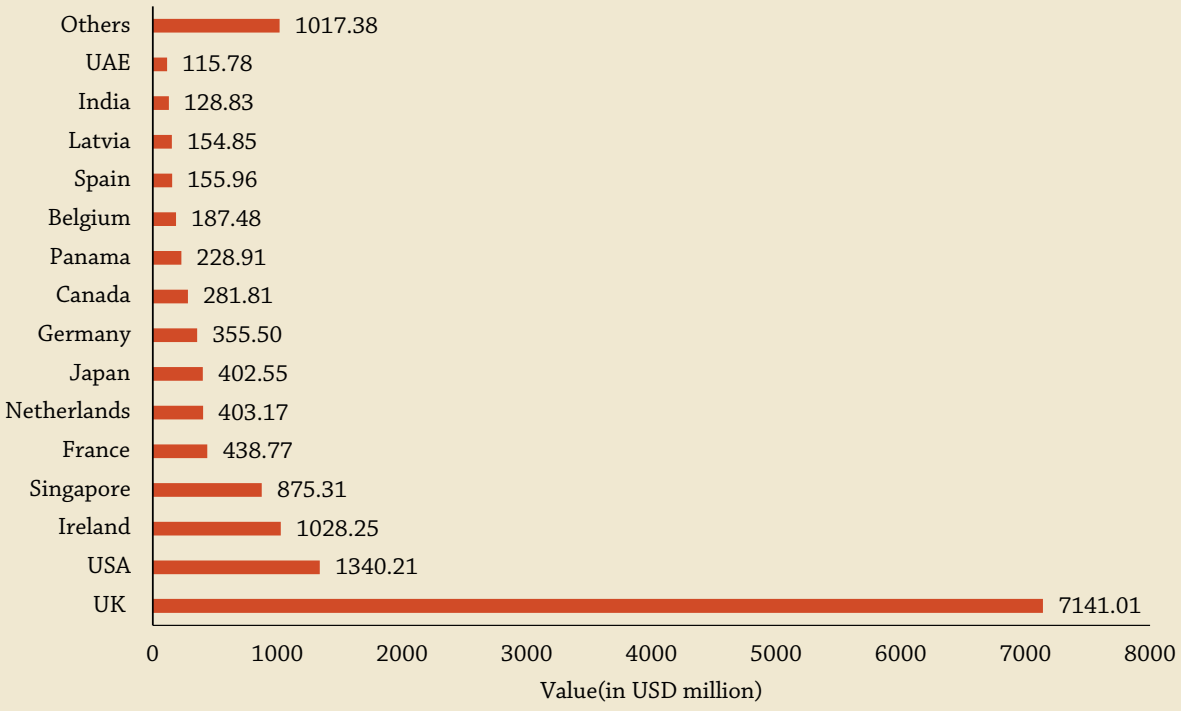
Top importers of frozen cuts and edible offal of fowls of the species *Gallus domesticus* in the world (Total Exports: USD 17.2 billion-TE23)



Source: UN Comtrade

FIGURE vii

Top exporters of whiskies in the world (Total Exports: USD 14.2 billion-TE23)



Source: UN Comtrade

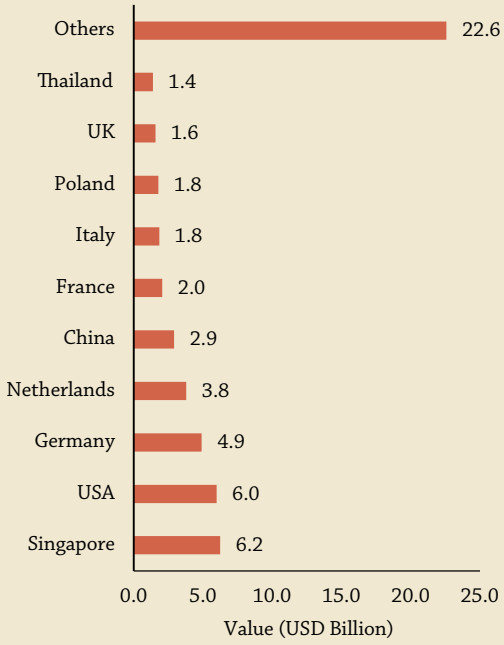
FIGURE viii

Top importers of whiskies in the world (Total Exports: USD 13.1 billion-TE23)

Source: UN Comtrade

FIGURE ix

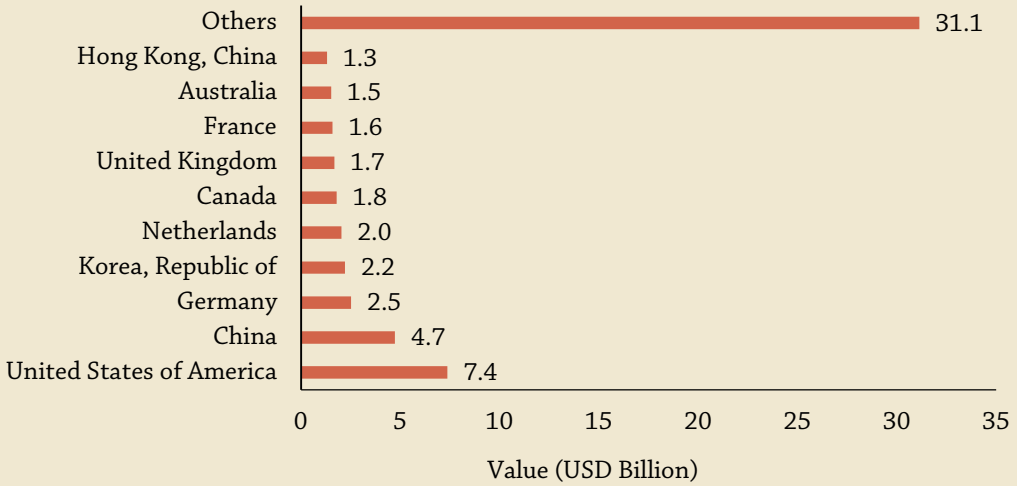
Top exporters of food preparations in the world (Total Exports: USD 54.9 billion-TE23)



Source: ITC Trade Map

FIGURE x

Top importers of food preparations in the world (Total Exports: USD 57.8 billion-TE23)



Source: ITC Trade Map

ANNEXURE 8.4

Top 25 Agri-imports of COMESA and SADC

COMESA		
HSN Codes	*Description*	*TE23 (Mn USD)*
'100119	Durum wheat (excl. seed for sowing)	4997.74
'100590	Maize (excl. seed for sowing)	3605.33
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	3358.65
'120190	Soya beans, whether or not broken (excl. seed for sowing)	2741.13
'170199	Cane or beet sugar and chemically pure sucrose, in solid form.	2274.42
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	2258.76
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	1907.18
'151110	Crude palm oil	1257.14
'020230	Frozen, boneless meat of bovine animals	1108.41
'240220	Cigarettes, containing tobacco	1062.50
'210690	Food preparations, n.e.s.	1036.17
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	1003.79
'151219	Sunflower-seed or safflower oil and their fractions, whether or not refined.	844.46
'150710	Crude soya-bean oil, whether or not degummed	771.47
'110100	Wheat or meslin flour	648.52
'330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions.	581.26
'151211	Crude sunflower-seed or safflower oil	575.75
'100390	Barley (excl. seed for sowing)	483.31
'230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	479.82
'230400	Oilcake and other solid residues, whether or not ground or in the form of pellets.	447.48
'040221	Milk and cream in solid forms, of a fat content by weight of > 1,5%, unsweetened	447.05
'040210	Milk and cream in solid forms, of a fat content by weight of <= 1,5%	442.96
'080810	Fresh apples	425.00
'090111	Coffee (excl. roasted and decaffeinated)	419.95
'160414	Prepared or preserved tunas, skipjack and Atlantic bonito, whole or in pieces (excl. minced)	402.71
	Total agri imports	**49257.43**

SADC		
HSN code	*Description*	*TE23 (Mn USD)*
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	1574.46
'100199	Wheat and meslin (excl. seed for sowing, and durum wheat)	1465.39
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	1044.97
'330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions.	775.70
'100119	Durum wheat (excl. seed for sowing)	589.83
'020714	Frozen cuts and edible offal of fowls of the species *(Gallus domesticus)*	544.87
'210690	Food preparations, n.e.s.	498.01
'151110	Crude palm oil	489.58
'150710	Crude soya-bean oil, whether or not degummed	472.19
'170199	Cane or beet sugar and chemically pure sucrose, in solid form.	451.99
'100590	Maize (excl. seed for sowing)	402.54
'230990	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	322.74
'220300	Beer made from malt	308.31
'230400	Oilcake and other solid residues, whether or not ground or in the form of pellets.	305.93
'240220	Cigarettes, containing tobacco	291.76
'220210	Waters, incl. mineral and aerated, with added sugar, sweetener or flavour, for direct consumption.	275.40
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	274.37
'020712	Frozen fowls of the species Gallus domesticus, not cut in pieces	229.85
'220830	Whiskies	227.56
'100640	Broken rice	224.37
'151211	Crude sunflower-seed or safflower oil	220.06
'150790	Soya-bean oil and its fractions, whether or not refined (excl. chemically modified and crude)	213.50
'170113	Raw cane sugar, in solid form, not containing added flavouring or colouring matter.	213.23
'110710	Malt (excl. roasted)	208.44
'110100	Wheat or meslin flour	186.96
	Total agri imports	**21914.92**

ANNEXURE 8.5

India's exports and imports of African countries for some selected commodities (in USD million, TE23)

(Table i: Egypt)

HSN	Description	Egypts M from the world (US Million) Average (2021-2023)	Indias X to Egypt (US Million) Average (2021-2023)	Indias X to the world (US Million) Average (2021-2023)	% Of Indias X to Egypt
80390	Fresh or dried bananas (excl. plantains)	4.25	0.00	185.09	0.0
80450	Fresh or dried guavas, mangoes and mangosteens	0.04	0.07	186.66	173.5
80131	Fresh or dried cashew nuts, in shell	0.19	0.00	22.16	0.0
80132	Fresh or dried cashew nuts, shelled	24.11	0.30	372.10	1.3
70190	Fresh or chilled potatoes (excl. seed)	0.29	0.00	89.32	0.0
70110	Seed potatoes	113.49	0.06	0.53	0.1
81090	Other fruits (Includes Pomegranate and Jackfruit)	0.74	0.82	84.34	110.7
80430	Fresh or dried pineapples	5.09	0.00	4.25	0.0
190531	Sweet biscuits	11.07	0.00	264.09	0.0
190590	Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa.	8.89	0.01	163.99	0.1
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	0.76	0.07	23.71	8.8
70700	Cucumbers and gherkins, fresh or chilled	0.00	0.00	0.92	0.0
80510	Fresh or dried oranges	0.12	0.00	36.20	0.0
70960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.00	0.00	48.15	0.0
806	Grapes, fresh or dried	10.54	0.01	357.52	0.1
40900	Natural honey	0.82	0.00	178.93	0.0
40590	Ghee	55.61	1.17	102.72	2.1
40690	Paneer	80.97	0.00	29.13	0.0
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	3.96	0.10	758.16	2.6
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	21.35	0.00	15.34	0.0
407	Birds eggs, in shell, fresh, preserved or cooked	0.00	0.00	59.40	0.0
Sum of commodities		342.27	2.61	2982.70	0.76
Total Agri products		19095.92	775.55	45229.67	4.06
Share of the commodities		1.79	0.34	6.81	

(*Source:* ITC trade map, 2024)

Table ii: Ghana

HSN	Description	Ghana M from the world (US Million) Average (2021-2023)	Indias X to Ghana (US Million)	Indias X to the world (US Million)	% Of Indias X to Ghana
80390	Fresh or dried bananas (excl. plantains)	0.06	0.00	185.09	0.00
80450	Fresh or dried guavas, mangoes and mangosteens	19.77	0.14	186.66	0.70
80131	Fresh or dried cashew nuts, in shell	0.02	0.00	22.16	0.00
80132	Fresh or dried cashew nuts, shelled	0.03	0.00	372.10	2.13
70190	Fresh or chilled potatoes (excl. seed)	0.77	0.01	89.32	0.87
70110	Seed potatoes	0.00	0.00	0.53	0.00
81090	Other fruits (Includes Pomegranate and Jackfruit)	0.64	0.00	84.34	0.00
80430	Fresh or dried pineapples	0.54	0.00	4.25	0.00
190531	Sweet biscuits	9.63	3.30	264.09	34.28
190590	Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa.	1.98	0.05	163.99	2.65
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	20.68	0.01	23.71	0.06
70700	Cucumbers and gherkins, fresh or chilled	0.02	0.00	0.92	0.00
80510	Fresh or dried oranges	0.24	0.00	36.20	0.00
70960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.46	0.00	48.15	0.00
806	Grapes, fresh or dried	1.73	0.00	357.52	0.10
40900	Natural honey	0.12	0.02	178.93	17.81
40590	Ghee	4.28	0.06	102.72	1.40
40690	Paneer	1.65	0.00	29.13	0.02
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	0.04	0.00	758.16	0.00
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	31.30	0.01	15.34	0.02
407	Birds eggs, in shell, fresh, preserved or cooked	0.40	0.00	59.40	0.33
Sum of commodities		94.37	3.60	2982.70	3.82
Total Agri products		2598.49	124.84	45229.67	4.80
Share of the commodities		3.63	2.89	6.59	

(*Source*: ITC trade map, 2024)

Table iii: Morocco

HSN	Description	Morocco M from the world (US Million) Average (2021-2023)	Indias X to Morocco (US Million)	Indias X to the world (US Million)	% Of Indias X to Morocco
80390	Fresh or dried bananas (excl. plantains)	12.21	0.00	185.09	0.00
80450	Fresh or dried guavas, mangoes and mangosteens	9.15	0.13	186.66	1.44
80131	Fresh or dried cashew nuts, in shell	0.05	0.00	22.16	0.00
80132	Fresh or dried cashew nuts, shelled	21.01	0.00	372.10	0.00
70190	Fresh or chilled potatoes (excl. seed)	0.94	0.00	89.32	0.00
70110	Seed potatoes	33.23	0.00	0.53	0.00
81090	Other fruits (Includes Pomegranate and Jackfruit)	0.99	0.00	84.34	0.00
80430	Fresh or dried pineapples	6.68	0.00	4.25	0.00
190531	Sweet biscuits	34.67	0.00	264.09	0.01
190590	Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa.	71.15	0.07	163.99	0.10
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	3.75	0.00	23.71	0.00
70700	Cucumbers and gherkins, fresh or chilled	0.00	0.00	0.92	0.00
80510	Fresh or dried oranges	0.02	0.00	36.20	0.00
70960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.03	0.00	48.15	0.00
806	Grapes, fresh or dried	21.53	4.64	357.52	21.54
40900	Natural honey	9.21	1.69	178.93	18.32
40590	Ghee	2.14	0.00	102.72	0.00
40690	Paneer	127.59	0.00	29.13	0.00
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	10.78	0.02	758.16	0.20
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	15.07	0.00	15.34	0.00
407	Birds eggs, in shell, fresh, preserved or cooked	1.11	0.00	59.40	0.00
Sum of commodities		381.29	6.55	2982.70	1.72
Total Agri products		9196.17	92.68	45229.67	1.01
Share of the commodities		4.15	7.07	6.59	

(*Source*: ITC trade map, 2024)

Table iv: Tunisia

HSN	Description	Tunisia M from the world (US Million) Average (2021-2023)	Indias X to Tunisia (US Million)	Indias X to the world (US Million)	% Of Indias X to Tunisia
80390	Fresh or dried bananas (excl. plantains)	28.55	0.00	185.09	0.00
80450	Fresh or dried guavas, mangoes and mangosteens	0.06	0.39	186.66	687.06
80131	Fresh or dried cashew nuts, in shell	NA	0.00	22.16	NA
80132	Fresh or dried cashew nuts, shelled	1.55	0.00	372.10	0.00
70190	Fresh or chilled potatoes (excl. seed)	2.83	0.00	89.32	0.00
70110	Seed potatoes	13.70	0.00	0.53	0.00
81090	Other fruits (Includes Pomegranate and Jackfruit)	0.01	0.00	84.34	0.00
80430	Fresh or dried pineapples	0.87	0.00	4.25	0.00
190531	Sweet biscuits	2.39	0.00	264.09	0.00
190590	Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa.	3.61	0.01	163.99	0.23
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	0.51	0.00	23.71	0.00
70700	Cucumbers and gherkins, fresh or chilled	0.01	0.00	0.92	0.00
80510	Fresh or dried oranges	0.00	0.00	36.20	0.00
70960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.11	0.00	48.15	0.00
806	Grapes, fresh or dried	1.18	0.03	357.52	2.34
40900	Natural honey	1.88	0.13	178.93	7.15
40590	Ghee	0.57	0.00	102.72	0.00
40690	Paneer	16.10	0.00	29.13	0.00
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	5.17	0.04	758.16	0.79
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	4.27	0.00	15.34	0.00
407	Birds eggs, in shell, fresh, preserved or cooked	0.16	0.00	59.40	0.00
Sum of commodities		83.53	0.60	2982.70	0.72
Total Agri products		3152.15	65.89	45229.67	2.09
Share of the commodities		2.65	0.91	6.59	

(*Source*: ITC trade map, 2024)

Table v: Angola

HSN	Description	Angola M from the world (US Million) Average (2021-2023)	Indias X to Angola (US Million)	Indias X to the world (US Million)	% Of Indias X to Angola
80390	Fresh or dried bananas (excl. plantains)	0.04	0.00	185.09	0.00
80450	Fresh or dried guavas, mangoes and mangosteens	0.06	0.70	186.66	1277.58
80131	Fresh or dried cashew nuts, in shell	0.01	0.01	22.16	95.83
80132	Fresh or dried cashew nuts, shelled	0.26	0.01	372.10	3.96
70190	Fresh or chilled potatoes (excl. seed)	1.32	0.16	89.32	11.75
70110	Seed potatoes	0.75	0.00	0.53	0.00
81090	Other fruits (Includes Pomegranate and Jackfruit)	0.14	0.00	84.34	1.71
80430	Fresh or dried pineapples	0.00	0.00	4.25	0.00
190531	Sweet biscuits	15.08	13.59	264.09	90.13
190590	Bread, pastry, cakes, biscuits and other bakers wares, whether or not containing cocoa.	4.04	0.29	163.99	7.08
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	1.15	0.02	23.71	1.68
70700	Cucumbers and gherkins, fresh or chilled	0.01	0.00	0.92	0.00
80510	Fresh or dried oranges	1.10	0.00	36.20	0.00
70960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.06	0.00	48.15	0.00
806	Grapes, fresh or dried	0.62	0.00	357.52	0.43
40900	Natural honey	0.21	0.01	178.93	3.97
40590	Ghee	1.33	0.05	102.72	3.72
40690	Paneer	12.14	0.00	29.13	0.02
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	0.83	0.00	758.16	0.00
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	4.40	0.00	15.34	0.03
407	Birds eggs, in shell, fresh, preserved or cooked	0.39	0.00	59.40	0.00
Sum of commodities		43.93	14.84	2982.70	33.77
Total Agri products		2530.96	163.69	45229.67	6.47
Share of the commodities		1.74	9.06	6.59	

(*Source*: ITC trade map, 2024)

Table vi: South Africa

HSN	Description	South Africa's M from the world	India's X to South Africa	India's X to the world	% Of India's X to South Africa
`080390	Fresh or dried bananas (excl. plantains)	46.70	0.00	185.09	0.00
`080450	Fresh or dried guavas, mangoes and mangosteens	1.88	0.14	186.66	7.47
`080131	Fresh or dried cashew nuts, in shell	0.47	0.00	22.16	0.00
`080132	Fresh or dried cashew nuts, shelled	15.61	1.68	372.10	10.74
`070190	Fresh or chilled potatoes (excl. seed)	0.01	0.00	89.32	0.00
`070110	Seed potatoes	0.23	0.00	0.53	0.00
`081090	Other fruits (Includes Pomegranate and Jackfruit)	2.26	0.04	84.34	1.57
`080430	Fresh or dried pineapples	0.19	0.00	4.25	0.00
190531	Sweet biscuits	42.31	10.88	264.09	25.71
190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa.	39.29	1.36	163.99	3.46
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	17.68	0.11	23.71	0.62
`070700	Cucumbers and gherkins, fresh or chilled	0.03	0.00	0.92	0.00
`080510	Fresh or dried oranges	1.03	0.00	36.20	0.00
`070960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	2.48	0.00	48.15	0.00
`0806	Grapes, fresh or dried	18.38	0.00	357.52	0.00
`040900	Natural honey	5.71	0.22	178.93	3.92
`040590	Ghee	0.02	0.01	102.72	50.00
`040690	Paneer	16.90	0.02	29.13	0.11
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	29.13	0.56	758.16	1.92
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	115.48	0.00	15.34	0.00
`0407	Birds' eggs, in shell, fresh, preserved or cooked	4.64	0.00	59.40	0.00
Sum of commodities		360.40	15.01	2982.70	4.16
Total Agri products		7003.70	231.66	45229.67	3.31
Share of the commodities		5.15%	6.48%	6.59%	

(*Source*: ITC trade map, 2024)

Table vii: Algeria

HSN	Description	Algeria's M from the world	India's X to Algeria	India's X to the world	% Of India's X to Algeria
`080390	Fresh or dried bananas (excl. plantains)	95.03	0.00	185.09	0.00
`080450	Fresh or dried guavas, mangoes and mangosteens	0.58	0.50	186.66	87.11
`080131	Fresh or dried cashew nuts, in shell	2.46	0.00	22.16	0.00
`080132	Fresh or dried cashew nuts, shelled	18.95	0.10	372.10	0.54
`070190	Fresh or chilled potatoes (excl. seed)	0.06	0.00	89.32	0.00
`070110	Seed potatoes	61.93	0.00	0.53	0.00
`081090	Other fruits (Includes Pomegranate and Jackfruit)	0.03	0.00	84.34	0.00
`080430	Fresh or dried pineapples	0.15	0.00	4.25	0.00
190531	Sweet biscuits	4.67	0.00	264.09	0.00
190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa.	4.99	0.00	163.99	0.00
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	0.09	0.00	23.71	0.00
`070700	Cucumbers and gherkins, fresh or chilled	0.01	0.00	0.92	0.00
`080510	Fresh or dried oranges	0.01	0.00	36.20	0.00
`070960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.02	0.00	48.15	0.00
`0806	Grapes, fresh or dried	19.09	0.69	357.52	3.61
`040900	Natural honey	0.75	0.00	178.93	0.00
`040590	Ghee	15.53	0.00	102.72	0.00
`040690	Paneer	88.45	0.00	29.13	0.00
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	89.32	3.82	758.16	4.28
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	13.97	0.00	15.34	0.00
`0407	Birds' eggs, in shell, fresh, preserved or cooked	1.62	0.00	59.40	0.00
Sum of commodities		417.69	5.12	2982.70	1.22
Total Agri products		10100.69	126.65	45229.67	1.25
Share of the commodities		4.14	4.04	6.59	

(*Source*: ITC trade map, 2024)

Table viii: Nigeria

HSN	Description	Nigeria's M from the world	India's X to Nigeria	India's X to the world	% Of India's X to Nigeria
`080390	Fresh or dried bananas (excl. plantains)	0.00	0.00	185.09	NA
`080450	Fresh or dried guavas, mangoes and mangosteens	0.89	0.01	186.66	0.60
`080131	Fresh or dried cashew nuts, in shell	0.00	0.00	22.16	NA
`080132	Fresh or dried cashew nuts, shelled	0.01	0.00	372.10	0.00
`070190	Fresh or chilled potatoes (excl. seed)	3.06	0.00	89.32	0.00
`070110	Seed potatoes	0.47	0.00	0.53	0.00
`081090	Other fruits (Includes Pomegranate and Jackfruit)	1.66	0.00	84.34	0.00
`080430	Fresh or dried pineapples	0.05	0.00	4.25	0.00
190531	Sweet biscuits	4.04	0.95	264.09	23.63
190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa.	52.48	0.29	163.99	0.56
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	0.03	0.02	23.71	66.33
`070700	Cucumbers and gherkins, fresh or chilled	0.00	0.00	0.92	NA
`080510	Fresh or dried oranges	0.18	0.00	36.20	0.00
`070960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	5.52	0.00	48.15	0.00
`0806	Grapes, fresh or dried	5.53	0.32	357.52	5.79
`040900	Natural honey	8.24	0.10	178.93	1.23
`040590	Ghee	5.52	0.00	102.72	0.00
`040690	Paneer	0.13	0.03	29.13	23.75
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	0.39	0.00	758.16	0.00
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	37.16	0.00	15.34	0.00
`0407	Birds' eggs, in shell, fresh, preserved or cooked	0.72	0.00	59.40	0.00
Sum of commodities		126.08	1.73	2982.70	1.37
Total Agri products		6477.58	116.85	45229.67	1.80
Share of the commodities		1.95	1.48	6.59	

(*Source*: ITC trade map, 2024)

Table ix: Kenya

HSN	Description	Kenya's M from the world	India's X to Kenya	India's X to the world	% Of India's X to Kenya
`080390	Fresh or dried bananas (excl. plantains)	0.00	0.00	185.09	0.00
`080450	Fresh or dried guavas, mangoes and mangosteens	0.31	0.29	186.66	93.68
`080131	Fresh or dried cashew nuts, in shell	0.11	0.00	22.16	0.00
`080132	Fresh or dried cashew nuts, shelled	0.10	0.00	372.10	0.00
`070190	Fresh or chilled potatoes (excl. seed)	0.00	0.00	89.32	0.00
`070110	Seed potatoes	0.16	0.00	0.53	0.00
`081090	Other fruits (Includes Pomegranate and Jackfruit)	0.31	0.00	84.34	0.00
`080430	Fresh or dried pineapples	0.08	0.00	4.25	0.00
190531	Sweet biscuits	4.29	2.85	264.09	66.43
190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa.	2.92	0.42	163.99	14.55
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	11.22	0.08	23.71	0.73
`070700	Cucumbers and gherkins, fresh or chilled	0.00	0.00	0.92	0.00
`080510	Fresh or dried oranges	5.39	0.00	36.20	0.00
`070960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.00	0.00	48.15	NA
`0806	Grapes, fresh or dried	5.76	0.08	357.52	1.39
`040900	Natural honey	0.51	0.18	178.93	34.91
`040590	Ghee	1.02	0.00	102.72	0.00
`040690	Paneer	0.25	0.00	29.13	0.00
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	8.69	0.34	758.16	3.91
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	6.30	0.00	15.34	0.00
`0407	Birds' eggs, in shell, fresh, preserved or cooked	1.39	0.00	59.40	0.00
Sum of commodities		48.82	4.24	2982.70	8.69
Total Agri products		3408.24	346.33	45229.67	10.16
Share of the commodities		1.43	1.23	6.59	

(*Source*: ITC trade map, 2024)

Table x: Ethiopia

HSN	Description	Ethiopia's M from the world	India's X to Ethiopia	India's X to the world	% Of India's X to Ethiopia
`080390	Fresh or dried bananas (excl. plantains)	0.03	0.00	185.09	0.00
`080450	Fresh or dried guavas, mangoes and mangosteens	0.22	0.00	186.66	0.00
`080131	Fresh or dried cashew nuts, in shell	0.01	0.00	22.16	0.00
`080132	Fresh or dried cashew nuts, shelled	0.01	0.00	372.10	0.00
`070190	Fresh or chilled potatoes (excl. seed)	0.00	0.00	89.32	NA
`070110	Seed potatoes	0.00	0.00	0.53	NA
`081090	Other fruits (Includes Pomegranate and Jackfruit)	0.05	0.00	84.34	0.00
`080430	Fresh or dried pineapples	0.02	0.00	4.25	0.00
190531	Sweet biscuits	1.80	0.46	264.09	25.52
190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa.	1.40	0.00	163.99	0.00
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	0.47	0.00	23.71	0.00
`070700	Cucumbers and gherkins, fresh or chilled	0.00	0.00	0.92	NA
`080510	Fresh or dried oranges	0.90	0.00	36.20	0.00
`070960	Fresh or chilled fruits of the genus Capsicum or Pimenta (Chilli)	0.00	0.00	48.15	0.00
`0806	Grapes, fresh or dried	1.44	0.00	357.52	0.00
`040900	Natural honey	0.02	0.00	178.93	0.00
`040590	Ghee	0.02	0.00	102.72	0.00
`040690	Paneer	0.51	0.00	29.13	0.00
1202	Groundnuts, whether or not shelled or broken (excl. roasted or otherwise cooked)	3.90	0.97	758.16	24.87
2009	Fruit juices, incl. grape must, and vegetable juices, unfermented.	4.46	0.00	15.34	0.00
`0407	Birds' eggs, in shell, fresh, preserved or cooked	0.12	0.00	59.40	0.00
Sum of commodities		15.38	1.43	2982.70	9.29
Total Agri products		3547.09	40.38	45229.67	1.14
Share of the commodities		0.43	3.54	6.59	

(*Source*: ITC trade map, 2024)

ANNEXURE 8.6

India's exports and Africa's imports of food preparations, n.e.s.

Table i: India's exports of food preparation, n.e.s., to the world

HS Code	Product label	Value of Imports (USD million) in TE23
21069099	Food preparations, n.e.s.: Other food preparation nes	499.69
21069020	Food preparations, n.e.s.: Pan-masala including scented supari (betel spices prepared)	33.81
21069019	Food preparations, n.e.s.: Soft drink - other than sharbat	28.90
21069091	Food preparations, n.e.s.: Other diabetic foods	4.76
21069060	Food preparations, n.e.s.: Food flavouring material	6.05
21069040	Food preparations, n.e.s.: Sugr-syrp contng flavrng/colrng mtrl nes	8.37
21069050	Food preparations, n.e.s.: Compnd prpns for mkng bevergs(non-alcohlc)	4.14
21069030	Food preparations, n.e.s.: Betel nut product known as supari	4.52
21069092	Food preparations, n.e.s.: Other sterilised or pasturised millstone	1.49
21069011	Food preparations, n.e.s.: Soft drink -sharbat	1.59
21069070	Food preparations, n.e.s.: Churna for pan	0.78
21069080	Food preparations, n.e.s.: Custard powder	1.03

(Source: ITC trade map, 2024)

Table ii: Morocco's imports of food preparation, n.e.s., from the world

HS Code	Product label	Value of Imports (USD million) in TE23
'2106909098	Other food preparations n.e.s.	76.78
'2106904099	Other flavored or colored sugar syrups	2.07
'2106906000	Other food tablets with flavors (vanilla, etc.)	0.72

(Source: ITC trade map, 2024)

Table iii: Angola's imports of food preparation, n.e.s., from the world

HS Code	Product label	Value of Imports (USD million) in TE23
'21069090	Food preparations, n.e.s: other unspecified food preparations	17.73
'21069020	Food preparations, n.e.s: concentrated beverages in industrial packaging exceeding 10 kg	14.88
'21069010	Food preparations, n.e.s: compound alcoholic preparations of a kind used in the manufacture ...	2.69

(Source: ITC trade map, 2024)

Table iv: South Africa's imports of food preparation, n.e.s., from the world

HS Code	Product label	Value of Imports (USD million) in TE23
21069090	Food preparations, nes: other	149.79
21069050	Food preparations, n.e.s: mixtures of chemicals and foodstuffs of a kind used in the preparation ...	26.32
21069020	Food preparations, n.e.s: golden syrup and maple syrup	2.50
21069025	Food preparations, n.e.s: syrups (excluding syrups with a basis of fruit juice)	3.12
21069067	Food preparations, n.e.s: compound alcoholic preparations of a kind used for the manufacture ...	11.11
21069035	Food prep., n.e.s.	2.07
21069022	Food preparations, n.e.s: syrups and other concentrates or preparations for making beverages, ...	0.79
21069017	Food preparations, n.e.s: disaccharide free infants' food, in powder form	0.09
21069013	Food preparations, n.e.s. (detailed label not available)	0.00
21069069	Food preparations, n.e.s: drinking straws, containing flavouring preparations	0.07

(Source: ITC trade map, 2024)

Table v: Nigeria's imports of food preparation, n.e.s., from the world

HS Code	Product label	Value of Imports (USD million) in TE23
21069092	Extracts, essences and flavouring products of a kind used in the drink industries	82.00
21069096	Food supplements	46.13
21069099	Other Food preparations not elsewhere specified or included.	38.06
21069094	Powders for the instant preparation of drinks	4.87
21069091	Stock powder	4.17
21069093	Breadimprovers	3.08
21069095	Preparations for herbal tea	0.39
21069010	Other food preparations not elsewhere specified specially prepared for infants	3.51

(Source: ITC trade map, 2024)

Table vi: Kenya's imports of food preparation, n.e.s., from the world

HS Code	Product label	Value of Imports (USD million) in TE23
21069090	Food preparations, n.e.s.: Other	24.61
21069099	Food preparations, n.e.s.	32.52
21069010	Food preparations, n.e.s.: Specially prepared for infants	20.77
21069020	Food preparations, n.e.s.: Preparations of a kind used in manufacturing of beverages	17.68
21069030	Food preparations, n.e.s. (detailed label not available)	2.78
21069091	Food preparations, n.e.s.	11.21
21069092	Mineral premix used in fortification.	5.20

(Source: ITC trade map, 2024)

Table vii: Ethiopia's imports of food preparation, n.e.s., from the world

HS Code	Product label	Value of Imports (USD million) in TE23
21069090	Food preparations, n.e.s.: other	45.79
i21069030	Food preparations, n.e.s.: of a kind used in alcoholic drinks industries	31.63
21069020	Food preparations, n.e.s.: of a kind used in non alcolic drinks indust.or preparing or flav.food	19.54
21069040	Food preparations, n.e.s.: powder soft drinks	3.77

(Source: ITC trade map, 2024)