



**DGCI&S, Ministry of Commerce & Industry
Commercial Intelligence (CI) Division**

**A Brief Export-Import Analysis of Select
Commercial Crops:
Edible Oils, Sugar and Cotton**

**(This analytical report is an updated version of work done by DGCI&S Intern Ms.
Khushi Gupta during internship period May 1st – 31st, 2025 at DGCI&S)**

ABSTRACT

Commercial crops are those crops which are grown primarily for sale in the market rather than solely for subsistence purposes. In India, a wide array of commercial crops are cultivated, playing a major role in both the agricultural economy and industrial activities. The percentage share of the total commercial crops in the total agricultural production of India is 28.37%.

1. **Edible Oils-** India is one of the largest consumers and importers of Edible oils in the world. Major oilseed crops include mustard, Coconut, soybean, palm, sunflower, and sesame. These are processed into edible oils and subsequently used for cooking and food processing. India relies heavily on imports, especially for palm oil, to meet its domestic demand. Government of India is promoting oilseed cultivation and processing through the National Mission on Oilseeds and Oil Palm (NMOOP) to reduce import dependency and boost domestic production lead self-reliance.
2. **Sugar-** Sugarcane is the key raw material for sugar production and is grown mainly in Uttar Pradesh, Maharashtra, and Karnataka. India is the second largest sugarcane producer in the world and a major consumer of sugar. The sugar industry supports millions of farmers and thousands of workers. However, it faces challenges, water-intensive cultivation practices, and price volatility, such as delayed payments to farmers etc.
3. **Cotton-** India is among the largest producers and exporters of cotton globally. It supports a vast textile and garment industry, which is a major contributor to exports and employment. Cotton in India is cultivated under different cropping systems and plays a vital role in rural livelihoods.

These crops are vital to India's agricultural trade, rural income, and agro-industrial development, and also require continuous policy support, efficient market systems, and sustainable practices to ensure long-term viability and sustenance.

The **Harmonized System (HS)** is an international coding system used to classify all categories of traded goods and **Principal Commodity (PC)** codes are standardised classifications used in India to group similar traded items under broad commodity groups. This study uses HS Codes and PC Codes to analyse and compare India's import and export trends of commercial crops like Edible oils, sugar, and cotton..

The study focuses on trade trends of the above mentioned crops over a short time frame of the last three financial years **FY2022-23 to FY2024-25**.

Note: All monetary values in this report are expressed in MUSD (Million US Dollars), and quantities are presented in Lakh Tonnes, unless otherwise specified.

SECTION A: EDIBLE OILS (CHAPTER 15)

HS 15 refers to Chapter 15 of the Harmonized System, which covers animal and vegetable fats and oils, including their crude, refined, or modified forms. This chapter includes products like coconut oil, palm oil, soybean oil, and butter, used in food, industry, and bio-fuels. The study focuses mainly on palm oil, sunflower oil, soybean oil, coconut oil, mustard oil and rapeseed oil.

A.I: Year wise share percentage of Edible Oils in Total Import basket of India

Year wise Share Percentage of Edible Oils in Total Import			
Financial Year	Import value of HS-15 in (MUSD)	Total Annual Import (in MUSD)	Share Percentage in Total Import Value
2022-23	21122.31	715968.90	2.95
2023-24	15059.47	678214.77	2.22
2024-25	17591.64	721320.47	2.44

Source:-DGCI&S

- The above table presents the year-wise share percentage of edible oils (HS Code 15) in the total import value over three financial years—2022–23, 2023–24, and 2024–25.
- In FY 2022–23, the import value of edible oils stood at 21122.31 million USD, constituting 2.95% of the total annual import value of 715968.90 million USD.
- In 2023–24, the import value dropped significantly to 15059.47 million USD, with a reduced share of 2.22% in total amount import value of 678214.77 million USD. This decline reflects a considerable contraction in both the absolute value of edible oils imports and its share in overall imports.
- However, in 2024–25, there was a rebound, as the import value of edible oils increased to 17591.64 million USD, and the share in total imports rose to 2.44%, of the 721320.47 million USD worth of total imports.

A.II: Year wise Share of percentage of edible oils in Total Export basket of India

Year wise Share Percentage of Edible Oils in Total Export			
Financial Year	Export value of HS-15 in (MUSD)	Total Annual Export (in MUSD)	Share Percentage in Total Export Value
2022-23	2063.64	451070.00	0.46
2023-24	1824.86	437072.03	0.42
2024-25	2040.43	437511.75	0.47

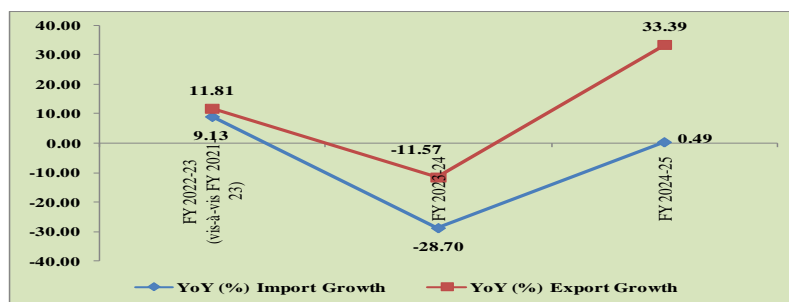
Source:-DGCI&S

The above table exhibits year wise share percentage of Edible oils exports in total exports of the country for the financial years FY 2022–23 to FY 2024–25.

- In FY 2022–23 the export value of edible oils was 2063.64 million USD, contributing 0.46% to the total export value of 451070 million USD.
- During FY 2023–24 exports of edible oils declined to 1824.86 million USD, and the shares in total exports also dropped to 0.42%, however, overall exports also reduced 437072.03 million USD.
- In FY 2024–25 the edible oils export value increased to 2040.43 million USD, and its share in total exports rose to 0.47%, although total exports remained at level at 437511.75 million USD..
- In above data terms the export values of edible oils of FY 2022-23 and FY 2024-25 were quite close.

A.III: Growth of Export and Import on YoY basis

Financial Year	YoY (%) Import Growth	YoY (%) Export Growth
FY 2022-23(vis-à-vis FY 2021-22)	↑ 9.13	↑ 11.81
FY 2023-24	↓ -28.70	↓ -11.57
FY 2024-25	↑ 0.49	↑ 33.39



Source:-DGCI&S

The above table highlights the percentage growth in imports and exports of edible oils on a year-on-year (YoY) basis over three financial years. Overall, the data reflects a fluctuating trade pattern over the three years, with a significant recovery in FY 2024-25.

Chapter 15 of the Harmonized System (HS) code pertains to "**Animal or Vegetable Fats and Oils and their Cleavage Products; Prepared Edible Fats; Animal or Vegetable Waxes**". This chapter covers a wide range of products derived from animal and vegetable sources, including fats, oils, and waxes, as well as processed forms like margarine. For the purpose of this report, the focus will be limited to edible oils like Coconut oil(1513), sunflower oil(1512), soyabean oil(1507) mustard oil/rapeseed(1514) and palm oil(1511). In some scenario, the export import trade values of few of these edible oils are very less which are excluded from some section of this report. We have taken only the leading commodity groups under PC code B8(Edible oil).

Export Scenario

A.IV: Export Performance of Edible oils, at HS-4 Digit Level

PC Code	4-Digit HS Code	Commodity Group	Export value (MUSD) in FY 2023-24	Export value (MUSD) in FY 2024-25	Share % of Edible oil in Total Export value in FY 2024-25	YoY (%) Growth
B8 (Edible Oil)	1513	Coconut (Copra), Palm Kernel Or Babassu Oil And Fractions	43.63	53.22	2.61	↑ 22.00
	1512	Sunflower Seed, Safflower Or Cotton Seed Oil And Their Frac	25.03	38.69	1.90	↑ 54.58
	1507	Soya Bean Oil And Its Fractns W/N Refind But Not Chemical	20.85	25.72	1.26	↑ 23.34
	1514	Rape Colza/Mustard Oil And Its Fractns W/N Refined, But	23.33	25.26	1.24	↑ 8.26
	1511	Palm Oil And Its Fractions, Whether Or Not Refined, But Not	4.72	3.51	0.17	↓ -25.58

#Note:- "Rapeseed" and "Rape colza" are essentially the same things, both refer to the plant species *Brassica napus* from which a valuable oils is extracted. "Colza" is an older term, sometimes used interchangeably with rapeseed, especially when referring to the oil. The export values of rapeseed/mustard oils are considered same in HS-4 Digit level (source:-DGCI&S).

The above table presents detailed export data for various types of edible oils for the FY 2023-24 and FY 2024-25. It includes the share percentage of edible oils in the total export value for FY 2024-25, and the year-on-year (YoY) growth percentages.

- **Coconut (Copra), Palm Kernel or Babassu Oil and Fractions (HS 1513):** Exports increased from 43.63 million USD in FY 2023-24 to 53.22 million USD in FY 2024-25, registering a 22% growth. This category contributed 2.61% to the total edible oil exports.
- **Sunflower Seed, Safflower or Cotton Seed Oil and Their Fractions (HS 1512):** Exports grew significantly from 25.03 million USD to 38.69 million USD, marking a sharp 54.58% growth, with a 1.90% share in total exports.
- **Soya Bean Oil and Its Fractions (HS 1507):** Exports increased from 20.85 million USD to 25.72 million USD, showing 23.34% growth, contributing 1.26% to overall edible oil exports.

- **Rape, Colza/Mustard Oil and Its Fractions (HS 1514):** Exports recorded a modest growth of 8.26%, rising from 23.33 million USD to 25.26 million USD, with a 1.24% share in total edible oil exports.
- **Palm Oil and Its Fractions (HS 1511):** Unlike other categories, palm oil exports witnessed a decline of 25.58%, falling from 4.72 million USD in FY 2023-24 to 3.51 million USD in FY 2024-25. Its contribution to overall edible oil exports stood at 0.17%.

Overall, the edible oils segment reflects positive growth for most commodities, with particularly strong increases in sunflower seed oils and coconut-based oils, while palm oil exports notably decreased.

A.V: 8-Digit level Commodities of Edible oils exported during 2024-25

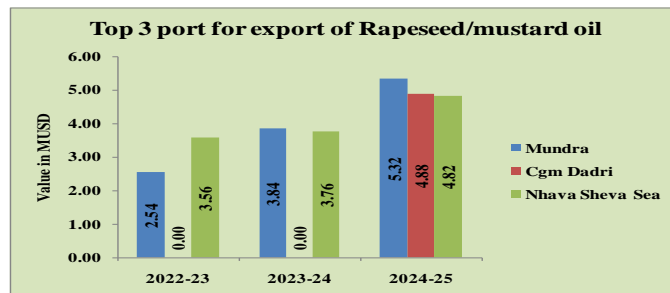
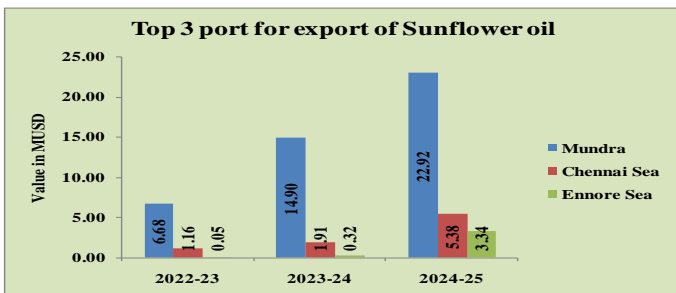
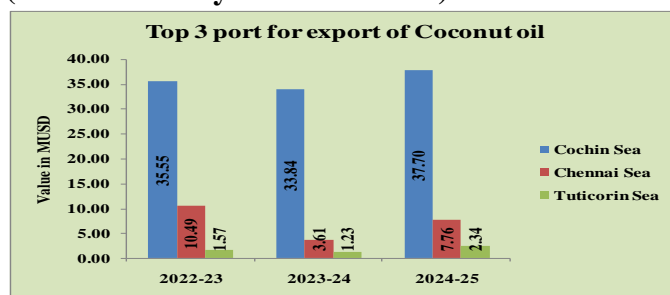
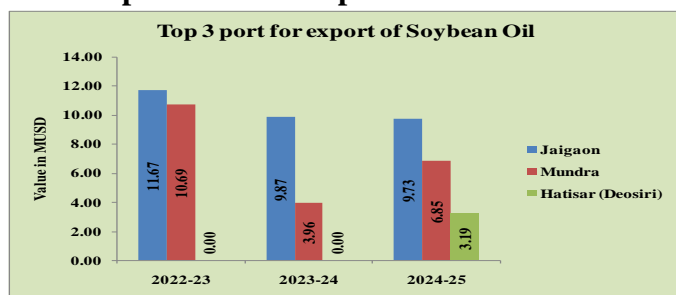
HS 8-Digit level Commodities of Edible oils Exported from 2022-23 to 2024-25							
8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
15131900	Coconut (Copra) Refined Oil And Fractions	0.17	43.50	0.02	40.35	0.16	46.67
15121910	Sunflower Oil Edible Grade	0.05	13.31	0.02	23.37	0.28	36.07
15079010	Soya Bean Oil Of Edible Grade	0.15	29.57	0.02	19.79	0.17	24.55

Source:-DGCI&S

The above table highlights the top three 8-digit HS Code commodities of edible oils exported from FY 2022-23 to FY 2024-25, focusing on quantity in lakh tonnes and export value in million USD (MUSD) for each year.

- **Coconut (Copra) Refined Oil and Fractions (HS Code 15131900):** Quantity exported was 0.17 lakh tonnes in 2022-23, which decreased sharply to 0.02 lakh tonnes in 2023-24 but rebounded to 0.16 lakh tonnes in 2024-25. Export value stayed relatively stable, 43.50 million USD in 2022-23 to 46.67 million USD in 2024-25, despite the quantity fluctuations.
- **Sunflower Oil Edible Grade (HS Code 15121910):** Quantity showed significant growth from 0.05 lakh tonnes in 2022-23 to 0.28 lakh tonnes in 2024-25. Correspondingly, export value rose from 13.31 million USD in 2022-23 to 36.07 million USD in 2024-25, indicating increasing demand and export activity.
- **Soya Bean Oil Edible Grade (HS Code 15079010):** Export quantities hovered around 0.15 lakh tonnes in 2022-23, dipped to 0.02 lakh tonnes in 2023-24, and rose again to 0.17 lakh tonnes in 2024-25. Export value followed a similar trend, decreasing to 19.79 million USD in 2023-24 and increasing to 24.55 million USD in 2024-25.

A.VI : Top 3 Ports for Export for various Edible oils (Focused mainly on FY 2024-25)

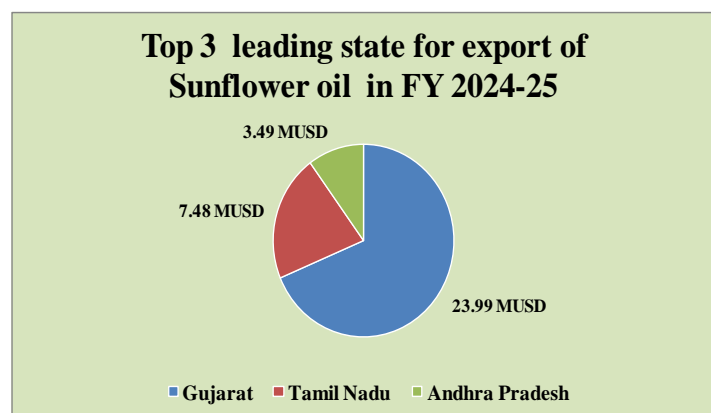
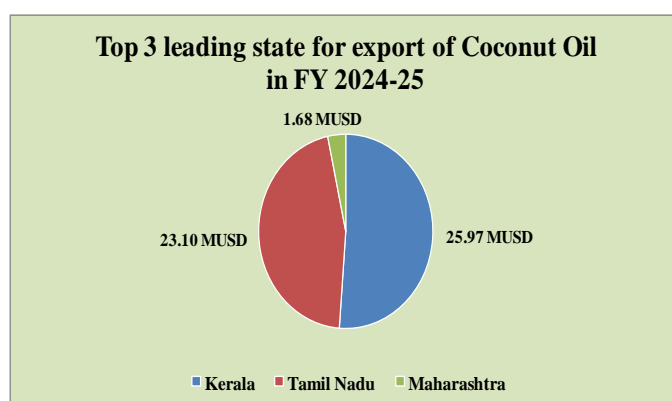
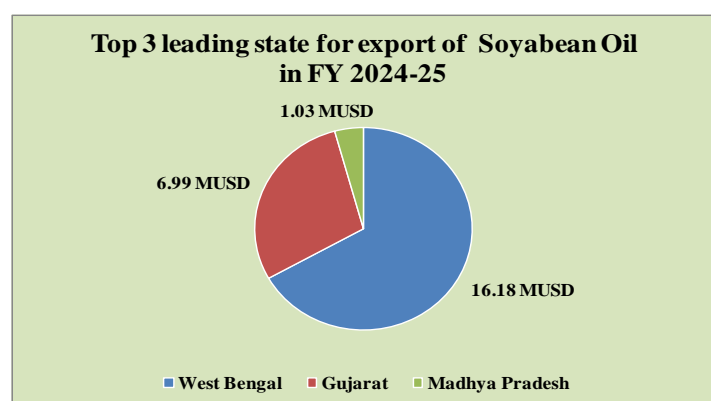


Source-DGCI&S

The above clustered column graphs exhibits the Top 3 leading ports for export of various edible oils in FY 2024-25. The pie chart shows the export values in million USD.

- In case of Soyabean oil, Jaigon port emerged as the leading port for export of soyabean oil in FY 2024-25 with export value of 9.73 million USD followed by Mundra and Hatisar (Deosiri) with 6.85 MUSD and 3.19MUSD,
- In case of Coconut oil, Cochin sea Port led with the highest export value of 37.70 MUSD, followed by Chennai sea at 7.76 MUSD, and Tuticorin sea port at 2.35 MUSD.
- For Rapeseed/mustard oil, Mundra port reported as the leading port with export value of 5.32 MUSD. Cgm Dadri is the second leading port for export of this edible oil amounting 4.88 MUSD export value. This port is followed by Nhava Sheva sea port with 4.82 MUSD export value. In FY 2022-23 and FY 2023-24 the export value of these commercial crop was very minimal.
- As regards sunflower oil, Mudra port is the leading port with export value of 22.92 MUSD, followed by Chennai sea port and Ennore sea port.

A.VII: State wise Export Scenario of Edible oils in FY 2024-25.



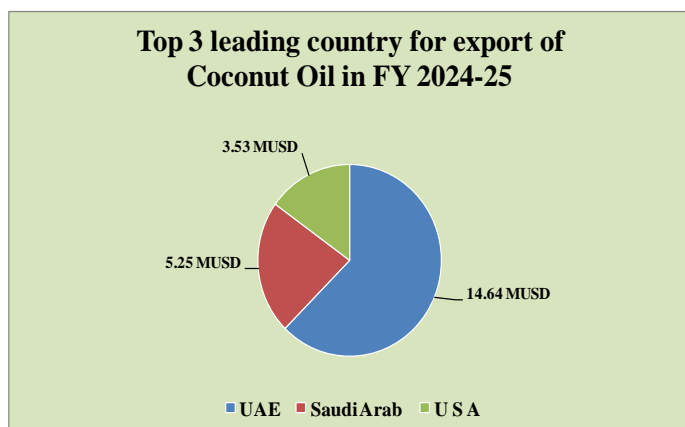
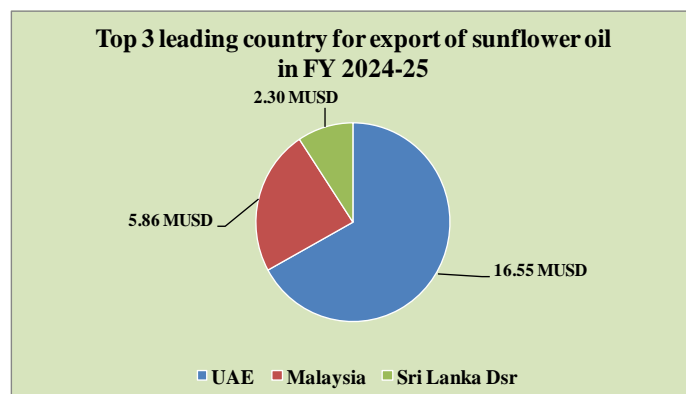
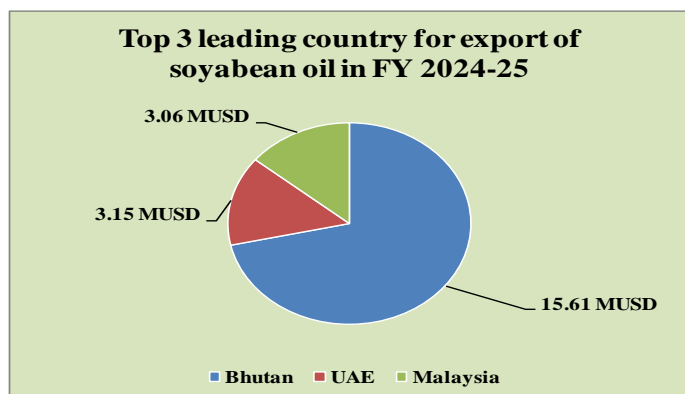
Source:-DGCI&S

The above Pie-charts illustrates the top 3 leading states exporting edible oils in FY 2024–25, along with their respective export values in million USD (MUSD).

- In the FY 2024–25, West Bengal emerged as the top state in soyabean oil exports, contributing the highest share of 16.18 million USD (MUSD). Gujarat ranked second with soyabean oil exports worth 6.99MUSD, followed by Madhya Pradesh, which contributed 1.03MUSD in the export value.
- In case of Coconut Oil, Kerela led the nation in coconut oil exports, contributing the highest export value of 25.97 MUSD. This strong performance reaffirms Kerala's dominance in coconut-based products, aligning with its well-established production base. Tamil Nadu followed closely with exports valued at 23.10 MUSD, highlighting its growing role in the coconut oil export sector. Maharashtra, contributed a smaller share of 1.68 MUSD.

- For Sunflower Oil, Gujarat emerged as the leading exporter of sunflower oil among Indian states in FY 2024-25, contributing 23.99 million USD to the total export value. This dominant share reflects Gujarat's robust agro-processing and port infrastructure that supports large-scale oil exports. Tamil Nadu secured the second position with exports worth 7.48 MUSD. Andhra Pradesh, while third in the ranking, contributed a smaller share of 3.49 MUSD, highlighting its growing role in the sector.

A.VIII: Country wise export scenario of Edible oils in FY 2024-25.



Source:-DGCI&S

The above pie charts illustrates the top three leading countries for the export of various edible Oils in FY 2024-25, with export values represented in Million USD (MUSD).

- In case of soyabean oil**, Bhutan emerged as the top importer, accounting the largest share of soyabean oil exports, valued at 15.61 MUSD. UAE ranks second, importing 3.15 MUSD worth of soyabean oil. Although much smaller than Bhutan's share, it still represents a notable portion of exports. Malaysia in third place, with imports amounting to 3.06 MUSD.
- For sunflower oil**, UAE (United Arab Emirates) is the largest importer, with an import value of 16.55 MUSD. This makes it the dominant market among the three, accounting for the bulk of the exports. Malaysia ranks second, importing 5.86 MUSD worth of sunflower oil. Sri Lanka Dsr follows in third place with an import value of 2.30 MUSD, contributing a smaller yet notable portion of the total exports.
- In case of coconut oil**, UAE is the top importer, receiving coconut oil exports worth 14.64 MUSD. Saudi Arabia ranks second, importing 5.25 MUSD worth of coconut oil. USA follows in third place with an import value of 3.53 MUSD.

Import Scenario

A.IX: Import Performance of Edible oils, at HS-4 Digit Level

PC Code	4-Digit HS-Code	Commodity Group	Total Import value (MUSD) in FY 2023-24	Total Import value (MUSD) in FY 2024-25	Share % of Edible oil in Import value in FY 2024-25	YoY (%) Growth
B8 (Edible Oil)	1511	Palm Oil And Its Fractions, Whether Or Not Refined, But Not	8230.43	8325.71	47.33	↑ 1.16
	1507	Soya Bean Oil And Its Fractns W/N Refind But Not Chemical	3301.89	5049.66	28.70	↑ 52.93
	1512	Sunflower Seed, Safflower Or Cotton Seed Oil And Their Frac	3184.37	3721.16	21.15	↑ 16.86

#Note:-The Import values of rapeseed/mustard oils are considered same in HS-4 Digit level (source:-DGCI&S).

The above table highlights the year-on-year (YoY) import performance of major edible oils commodity groups under the principal HS Code B8 during FY 2023–24 and FY 2024–25, including their respective contributions to the total edible oils import value.

- Palm Oil and its fractions (HS Code 1511) remained the largest contributor, accounting for 47.33% of total edible oil imports, with import value rising slightly from USD 8,230.43 million in FY 2023-24 to USD 8,325.71 million, reflecting a modest 1.16% year-on-year (YoY) growth.
- Soya Bean Oil and its fractions (HS Code 1507) recorded a significant surge of 52.93%, with import values increasing from USD 3,301.89 million in FY 2023-24 to USD 5,049.66 million in FY 2024-25, recorded 28.70% of the edible oil import share.
- Imports of Sunflower Seed, Safflower, or Cotton Seed Oil and their fractions (HS Code 1512) grew by 16.86%, from USD 3,184.37 million in FY 2023-24 to USD 3,721.16 million FY 2024-25, representing 21.15% of the total share.

A.X: 8- Digit HS Code level Commodities of Edible oils Imported during FY 2022-23 to FY 2024-25

Top 3 8-Digit Commodities of Edible Oils Imported from 2022-23 to 2024-25							
8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
15079010	Soya Bean Oil Of Edible Grade	0.51	94.54	0.04	6.83	2.63	386.27
15121910	Sunflower Oil Edible Grade	0.04	8.14	0.02	3.81	0.38	54.72
15119010	Refined Bleached Deodrsed Palm Oil	74.64	202.34	0.17	15.34	0.12	14.16

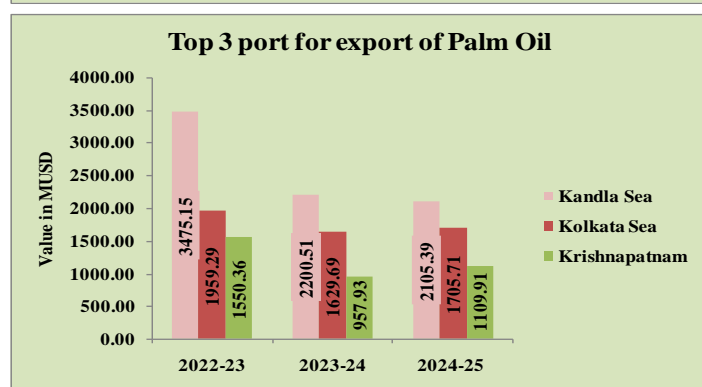
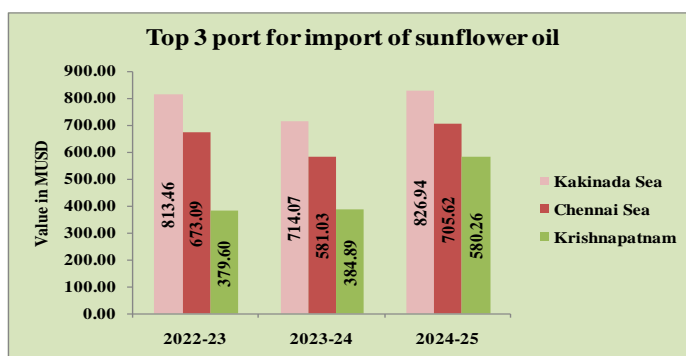
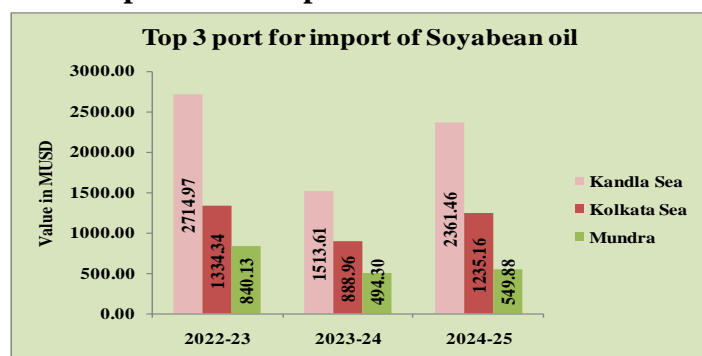
Source:-DGCI&S

The above table shows the top three 8-Digit commodities of Edible oils imported from FY 2022–23 to FY 2024–25.

- **Soya Bean Oil of Edible Grade (HS Code 15079010)** saw a sharp change in trade volume and value. While imports dropped drastically in quantity from 0.51 lakh tonnes in FY 2022-23 to 0.04 lakh tonnes in FY 2023-24, they surged to 2.63 lakh tonnes in FY 2024-25. Correspondingly, the value declined from USD 94.54 million in FY 2022-23 to USD 6.83 million in FY 2023-24 before rising sharply to USD 386.27 million in FY 2024-25.
- **Sunflower Oil of Edible Grade (HS Code 15121910)** recorded moderate but consistent growth. Import volumes rose from 0.04 lakh tonnes in FY 2022-23 to 0.38 lakh tonnes in FY 2024-25, with values increasing from USD 8.14 million to USD 54.72 million over the same period.

- **Refined Bleached Deodorised Palm Oil (HS Code 15119010)** experienced a continuous decline in quantity from 74.64 lakh tonnes in FY 2022-23 to just 0.12 lakh tonnes in FY 2024-25 alongside a steep fall in value from USD 202.34 million in FY 2022-23 to USD 14.16 million in FY 2024-25

A.XI: Top Ports of Import

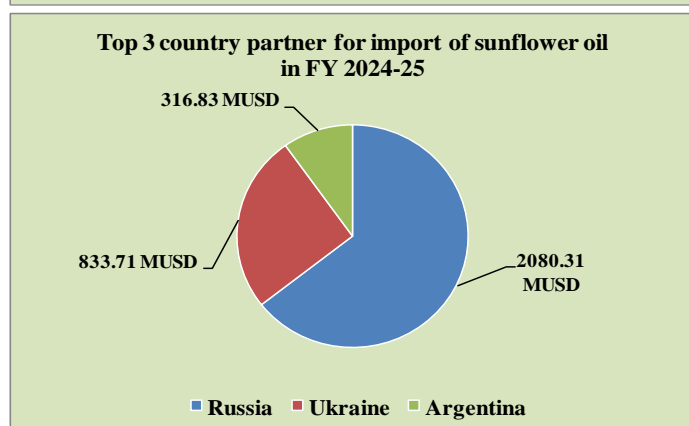
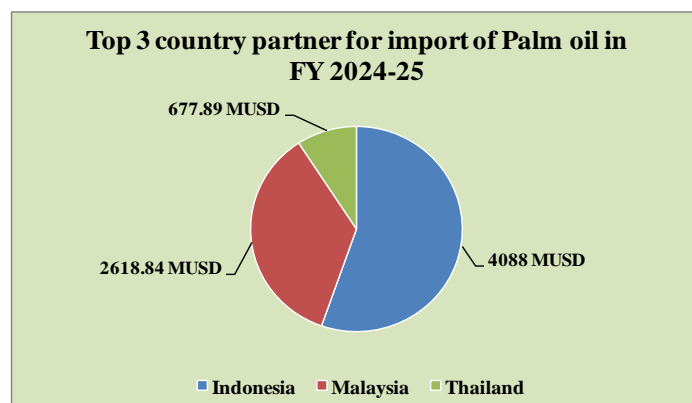
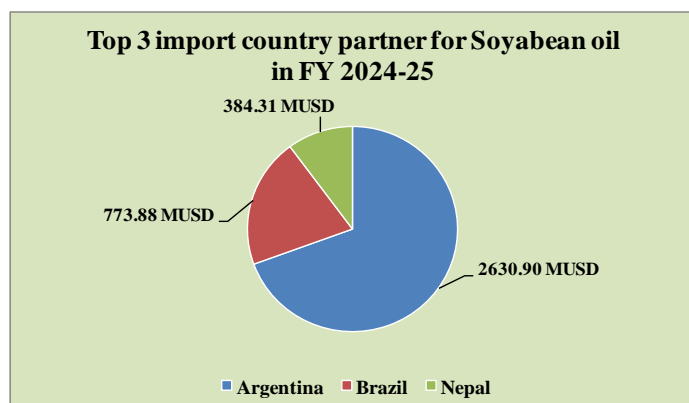


Source:-DGCI&S

The above clustered column graphs represents the import values (in million USD) of edible oils handled by the top three Indian ports in previous three financial years from FY 2022-23 to FY 2024-25

- **For Soyabean Oil, Kandla Sea** port consistently ranked as the top port for soybean oil imports across all three years. Although there was a significant dip in FY 2023-24, imports through Kandla rebounded strongly in FY 2024-25. **Kolkata Sea** port hold the second position with import value 1235.16 in FY 2024-25. **Mundra** port consistently ranked third in soybean oil imports Although the values are considerably lower than the other two ports, **Mundra** port showed a slight increase in FY 2024-25 after a decline in the previous year.
- **In Case of sunflower oil, Kakinada Sea** has consistently been the leading port for sunflower oil imports. Imports stood at 813.46 MUSD in 2022-23, dipped to 714.07 MUSD in 2023-24, but increased again to 826.94 MUSD in 2024-25. **Chennai Sea** port is the second-largest port. Imports were 673.09 MUSD in 2022-23, declined to 581.03 MUSD in 2023-24, and rose to 705.62 MUSD in 2024-25. Krishnapatnam ranked third with relatively lower import values compared to the other two ports. Imports were 379.60 MUSD in 2022-23, slightly increased to 384.89 MUSD in 2023-24, and surged significantly to 580.26 MUSD in 2024-25.
- **For import of palm oil, Kandla Sea** port remains the leading port for palm oil exports throughout the three year. While exports from Kandla have declined over time, it continues to hold the top position by a significant margin. **Kolkata Sea** port ranked second in FY 2024-25 with import value 1705.71 MUSD After a dip in FY 2023-24, exports slightly increased in FY 2024-25, showing signs of stabilization. **Krishnapatnam** port remains in third place, but with fluctuating performance. The port saw a sharp drop in FY 2023-24 but partially recovered in FY 2024-25.

A.XII: Import country partner for edible oils in FY 2024-25.



Source:-DGCI&S

The above pie-charts show the top 3 import country partners of edible oils in FY 2024–25.

- Argentina is the largest import partner for soyabean oil in FY 2024-25 with import value 2630.90 MUSD. This accounted for the majority share of soybean oil imports in FY 2024-25. Brazil ranked second with import value 773.88 MUSD. Nepal came third with import value of 384.31 MUSD
- Indonesia is the largest supplier of palm oil in FY 2024-25 with import value of 4088 MUSD. It contributed the major share of palm oil imports, underscoring Indonesia's dominant position in global palm oil exports. Malaysia ranked as the second largest source of palm oil with Import value 2618.84 MUSD in FY 2024-25. Thailand is the third-largest import partner of palm oil with import value 677.89 MUSD.
- Russia is the largest supplier of sunflower oil with Import value of 2080.31 MUSD in FY 2024-25. Russia holds the major share, contributing over 60% of total sunflower oil imports among the top three countries, indicating its strong dominance in this segment. The sunflower oil import market is heavily concentrated in Eastern Europe, with Russia and Ukraine collectively accounting for the majority of imports.

Production Insights

- Edible oils are processed from seeds through a series of steps involving preparation, extraction, and refining. Initially, seeds are cleaned, dried, and sometimes de-hulled to remove impurities and prepare them for oil extraction. Oil extraction can be achieved through mechanical pressing or solvent extraction (often using hexane). Finally, the extracted crude oil undergoes refining to remove undesirable compounds, resulting in a clear, bland, and stable oil suitable for consumption
- India's production of soybean, palm oil and sunflower oilseeds is limited and insufficient to meet domestic demand. While soybean Palm is mainly grown in **Andhra Pradesh, Telangana and Kerela**, soyabean is mainly grown in **Madhya Pradesh, Maharashtra, and Rajasthan**, and sunflower in **Karnataka** and parts of southern India, overall output remains low. Poor yield, limited acreage, and low oil recovery contribute to the shortfall. As a result, India relies heavily on imports of both soybean and sunflower oils, primarily from Argentina, Brazil, Russia, and Ukraine and palm oil from Indonesia, Malaysia and Thailand. Increasing self-sufficiency requires long-term investments in farming practices, better seeds, and supportive policies. India produces small amounts of palm oil, however no reliable production data has been found.
 - ❖ India's palm oil production is relatively small compared to its consumption, with a significant reliance on imports. The country aims to increase domestic production through the [National Mission on Edible Oils \(NMEO\)](#), targeting a substantial increase in both area under cultivation and crude palm oil (CPO) production by 2025-26.
 - Current Production and Consumption:-India is the world's second-largest consumer of palm oil, with a large portion used for food and cooking. India imports roughly 15 million tons of palm oil annually to meet domestic demand. Approximately 90% of India's palm oil production currently comes from Andhra Pradesh.
- ❖ India is a significant producer of soybeans and soybean oil, with production reaching 12.6 million tonnes in the recent kharif season. While India ranks fifth globally in soybean production, it relies on imports for a substantial portion of its edible oil needs, particularly palm oil.
 - Production Volume:- The Soybean Processors Association of India (SOPA) estimates soybean production at 12.6 million tonnes during the recent kharif season.
 - Leading States: Madhya Pradesh, Maharashtra, and Rajasthan are the major soybean-producing states in India.
- ❖ India's sunflower oil production is relatively low, requiring significant imports to meet domestic demand. While India produces some sunflower oil, it relies heavily on imports, particularly from Ukraine and Russia, due to lower production costs and market competition ([according to The Economic Times](#) and [eximpedia](#)). Karnataka is the largest sunflower producing state in India, followed by Telangana and Maharashtra.
 - Low Domestic Production:-India's sunflower oil production is not sufficient to meet the country's demand, leading to substantial imports.
 - Key Producing States:- Karnataka is the leading producer, followed by Telangana and Maharashtra.

SECTION B- SUGAR (CHAPTER 17)

Sugarcane production in our country was introduced in 1920s and it got ‘industry’ status in the next decade. Gradually it became one of the main agro-based industries in India. At present, India is the second-largest producer of sugarcane in the world just behind Brazil. In 2019, India surpassed the production level of Brazil. Our country is also a major consumer of sugar. This item is widely used in food and hospitality sector and in recent times, a significant amount of production is diverted to process ethanol to meet our country’s increasing energy demand and also to reduce import dependence on petroleum products.

As a dominant producer as well as a consumer, India plays a crucial role in global market. In the next few sub-sections, production level data and trade data will be presented.

HS 17 refers to Chapter 17 of the Harmonized System and covers sugars and sugar confectionery. It includes raw and refined cane or beet sugar, sugar syrups, chemically pure sugars, and various sugar-based products like candies and toffees. This commodity chapter plays a pivotal role for examining the international trade of sugar and confectionery items. Principal commodities C4 and C5 denote sugar and molasses. For the purpose of this study, the focus will be limited to only **Sugar** and **Molasses** comprising 4-digit HSN 1701, 1702 and 1703. Sub-group/4-digit HSN-1704, which represents **sugar confectionery** has been omitted.

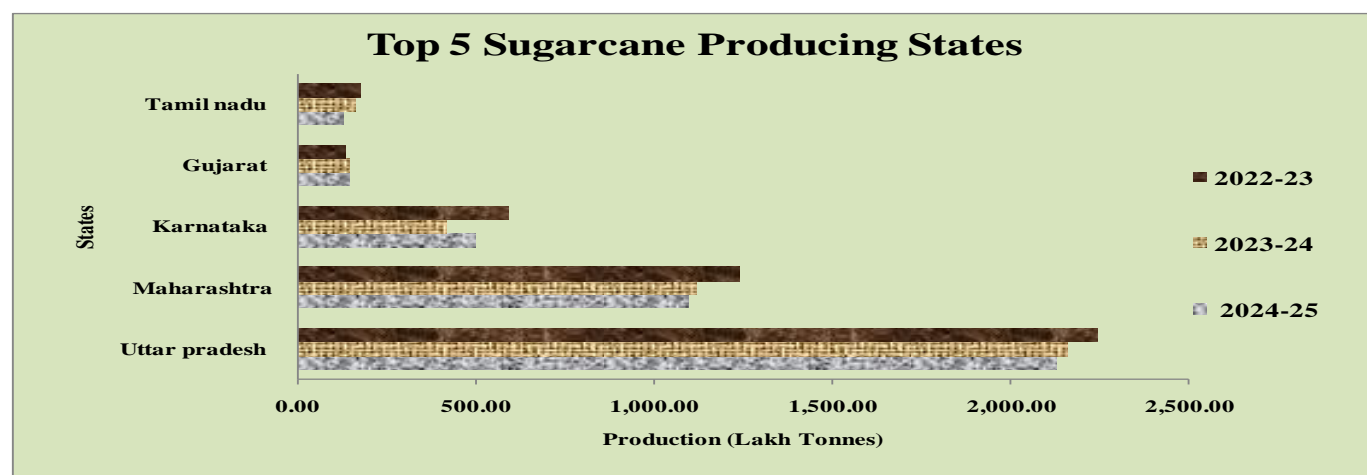
B.I: India’s Sugarcane Production, Export & Import of Sugar and Molasses Scenario

Financial Years	Production Quantity (in Lakh Tonnes)	Export Quantity (in Lakh Tonnes)	Import Quantity (in Lakh Tonnes)
2022-23	4905.33	133.79	5.77
2023-24	4531.58	51.35	33.10
2024-25	4399.30	38.43	27.08

Source: UPAg and DGCI&S

- India recorded significant production of sugar during FY 2022-23 and production as well as export in quantity terms have gradually decreased over the years. India imposed quantitative export restriction on sugar in FY 2022-23 which was later revised. However, import quantity substantially increased from 5.77 lakh tonnes in FY 2022-23 to 33.10 lakh tonnes in FY 2023-24 and moderated to 27.08 lakh tones in FY 2024-25.

B.II: Top 5 Sugar Producing States of India



Source: UPAg

- Among the top five producing states, Uttar Pradesh dominates in all the three financial years. It is worth to mention herein that, production across states shows a declining trend over the years but for the state of Gujarat. Sugar production in India is largely dependent on monsoon patterns and fluctuates due to variations in rainfall, cane acreage, and policy interventions.

B.III:

a) Year wise share of HS-17 Export in Total Export basket

Financial Year	Export Value of HS-17 (MUSD)	Total Annual Export Value (MUSD)	% Share
2022-23	6323.14	451070.00	1.40
2023-24	3291.66	437072.03	0.75
2024-25	2501.25	437511.75	0.57

Source: DGCI&S

- The above table presents the export share of HS-17 in total exports for the three financial years. Percentage share in total exports declined to a low of 0.57% in FY 2024-25 due to a combination of factors including lower production, diversion for ethanol processing and export quota of 3.174% of three years average production of sugar was imposed on all the sugar mills for controlling inflation.

b) Year wise share of HS-17 Import in Total Import basket

Financial Year	Import Value of HS-17 (MUSD)	Total Annual Import Value (MUSD)	% Share
2022-23	432.47	715968.90	0.06
2023-24	2149.58	678214.77	0.32
2024-25	1547.05	721320.47	0.21

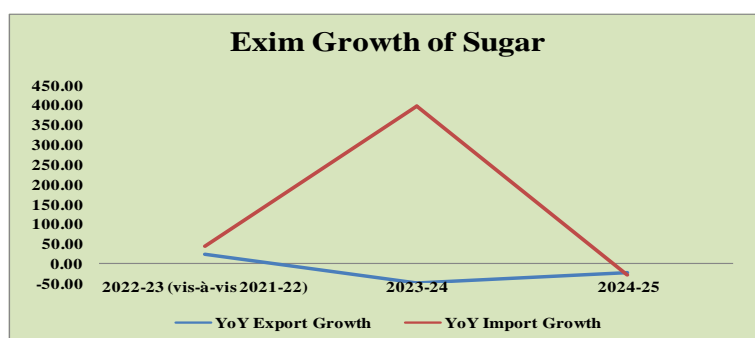
Source: DGCI&S

- Import of sugar spiked to USD 2149.58 million in FY 2023-24 from USD 432.47 million in FY 2022-23 on account of rising domestic demand amid lower production. Sugar imports slightly declined in the following year, FY 2024-25 and settled at USD 1547.05 million.

c) Growth of Export and Import on YoY basis

Financial Year	YoY Export Growth	YoY Import Growth
2022-23 (vis-à-vis 2021-22)	↑ 24.24	↑ 43.80
2023-24	↓ -47.94	↑ 397.04
2024-25	↓ -24.01	↓ -28.03

Source: DGCI&S



- In FY 2022-23, exports and imports had positive growth rates. In the following financial year, sugarcane production witnessed a sharp decline driven by dry monsoon, on account of El Nino. Additionally, India imposed quantity restrictions to control exports of sugar and allowed sugar mills to export only 6.1 million metric tonnes of sugar to ensure sufficient supply for domestic consumption. In August 2023, Directorate

General of Foreign Trade (DGFT) issued a ceiling of 5841MT of sugar to be exported to European Union (EU) under Tariff Rate Quota (TRQ) for the time period *October'23-September'24*. In FY 2023-24, imports exhibited a staggering growth of nearly 400% and in FY 2024-25, both exports and imports registered negative growth rates vis-à-vis previous financial year.

Export Scenario

B.IV: Export performance of Sugar and Molasses at HS-4 Digit level

Principal Commodity	HSN-4 Level	Description	Export Value (MUSD) (FY 2023-24)	Export Value (MUSD) (FY 2024-25)	% Share in Total Export of HS-17 (FY 2024-25)	YoY Growth
C4 (Sugar)	1701	Solid cane or beet sugar and chemically pure sucrose	2774.43	2116.02	84.60	↓ -23.73
	1702	Sugars nes, lactose, fructose, glucose, maple syrup	158.64	132.50	5.30	↓ -16.48
C5 (Molasses)	1703	Molasses from the extraction or refining of sugar	133.23	29.24	1.17	↓ -78.05

Source: DGCI&S

- In both years, **HSN 1701** (Solid cane or beet sugar) dominated sugar exports. **HSN 1701** constituted 84.60% of the total exports in FY 2024-25. However, its export value declined by nearly 24% on YoY basis. **HSN 1703** (molasses) experienced a sharp decline in export value earned from USD 133.23 million in FY 2023-24 to USD 29.24 million in FY 2024-25. Exports of **HSN 1702**, had also declined on YoY basis; however the change was not that massive. Overall exports diminished across categories.

Review of Exports of HSN-8 Commodities from FY2022-23 to FY2024-25

B.V:

a)Top 3 Eight Digit Level Commodities of Sugar Exported during FY 2024-25

Top 3 8-Digit Commodities of Sugar Exported during 2024-25							
8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
17019990	Other refined sugar includng centrifugal sugar	69.82	3536.46	31.21	2071.65	27.57	1613.66
17011490	Other forms of cane sugar	44.06	2036.49	8.73	524.45	6.10	341.05
17011420	Khandsari sugar	0.002906	0.15	0.91	51.21	1.26	70.27

Source: DGCI&S

- HSN-8 digit level data is useful in understanding the specific commodities which were exported during the period under review. The above table lists the top three commodities exported under the broad group of C4 (Sugar) during FY 2024-25. Exports of **HS Code 17019990** (Other refined sugar) and **HS Code 17011490** (Other forms of cane sugar) have declined both on value and volume terms.
- Export of raw sugar, white sugar, refined sugar (bearing 8-digit codes 17011490 and 17019990) after 1st June,2022 was subjected to quantity restriction till 31st October,2023. This ban/restriction was further extended beyond October, 2023. However, in January, 2025, Ministry of Consumer Affairs, Food & Public Distribution modified the export quota and mandated sugar mill to export all grades of sugar with a ceiling of 10 LMT for *sugar season 2024-25*.
- As regards, Khandsari sugar, export earnings shot up to USD 70.27 million in FY 2024-25 from less than USD 1 million in FY 2022-23. Exports in volume terms increased from 0.91 lakh tonnes in FY 2023-24 to 1.26 lakh tonnes in FY 2024-25. Khandsari is type of unrefined raw white sugar derived from jaggery and

it is preferred as a healthier alternative to the traditional while sugar. This particular category was so far exempted from export control measures.

b)Top 3 Eight Digit Level Commodities of Molasses Exported during FY 2024-25

Top 3 8-Digit Commodities of Molasses Exported during 2024-25							
8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
17039010	Molasses (excluding cane) edible	0.14	3.47	1.44	29.52	1.32	26.20
17031000	Cane molasses resulted from extraction/refining of sugar	16.09	253.25	6.29	103.47	0.22	3.01
17039090	Other molasses other than edible	0.000658	0.11	0.01	0.23	0.000072	0.03

Source: DGCI&S

- The three commodities listed in Table b above belong to the broad group of C5 (Molasses). **HS Code 17031000** (Cane molasses resulted from extraction/refining of sugar) witnessed sharp drops in both export quantity and export value terms. **HS Code 17039010** denoting Molasses (excluding cane) edible registered huge surge in export value earned in FY 2023-24 compared to immediate previous financial year and moderated to USD 26.20 million in FY 2024-25.

B.VI:

a) Direction of Trade (Export)

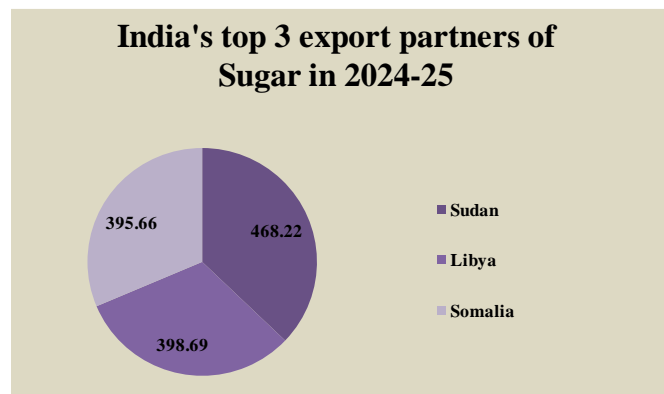
C4 (Sugar)				
Financial Year	Total Export Value (MUSD)	Top 3 Export Country Partners		
		1st	2nd	3rd
2022-23	5770.83	Sudan (13.56%)	Bangladesh (8.07%)	Indonesia (7.55%)
2023-24	2824.74	Sudan (18.36%)	Sri Lanka (8.81%)	Libya (8.23%)
2024-25	2159.40	Sudan (12.32%)	Libya (11.22%)	Somalia (10.66%)

Source:DGCI&S

C5 (Molasses)				
Financial Year	Total Export Value (MUSD)	Top 3 Export Country Partners		
		1st	2nd	3rd
2022-23	256.84	Netherlands (29.43%)	Philippines (20.37%)	Vietnam (6.67%)
2023-24	133.23	Bangladesh (28.42%)	Netherlands (26%)	Philippines (13.77%)
2024-25	29.24	Bangladesh (99.51%)	Bhutan (0.24%)	Baharain (0.08%)

Source: DGCI&S

b) Top 3 export partners in 2024-25 with their corresponding quantity (in Thousand Tonnes)



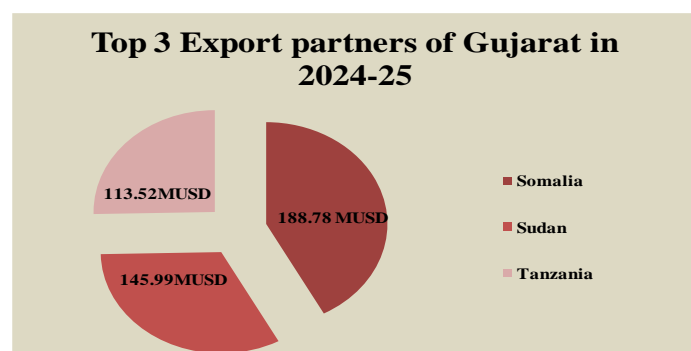
Source: DGCI&S

- Sudan is identified as the lead destination country for exports of products under Sugar for all the three financial years. Libya is also a leading export partner for Sugar. As regards, Khandsari sugar, bulk of India's shipments in FY 2022-23 were routed to Somalia. From 2023-24 onwards, Djibouti, Pakistan and Thailand became the major export country partners.
- For Molasses, Bangladesh and Netherlands are our primary export partners. In FY 2024-25, 154.25 thousand tonnes of Molasses were exported to Bangladesh and in the same year Netherlands did not figure as a major export partner.

B.VII: State-wise export scenario

Principal Commodity	Description	Top Exporting State
C4	Sugar	Gujarat
C5	Molasses	West Bengal

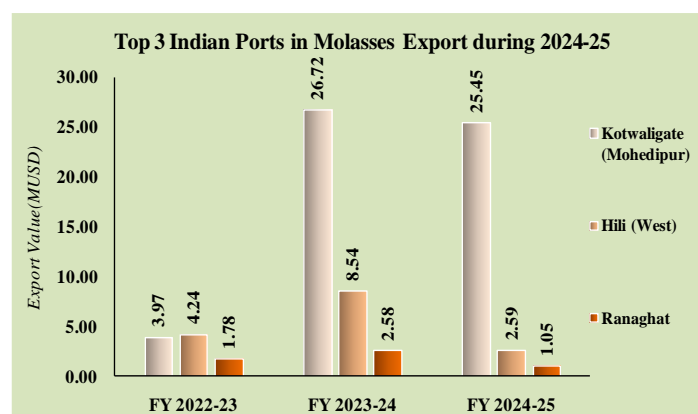
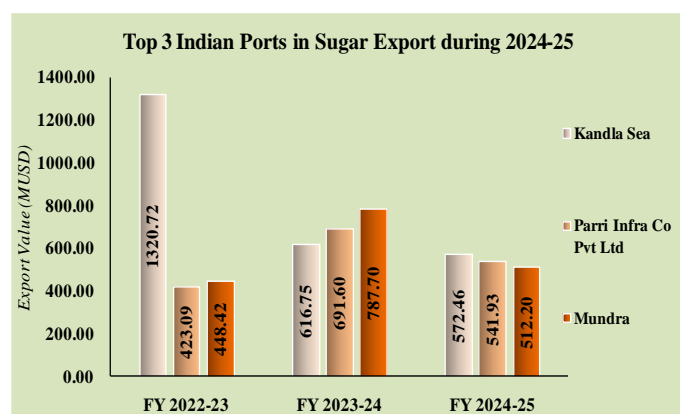
Source: DGCI&S



Source: DGCI&S

- The top producing states are not the top exporting ones. Gujarat and West Bengal are the top two states exporting Sugar and Molasses due to greater export-oriented infrastructure, more number of processing units and location of ports capable to operate high value consignments. In 2024-25, nearly 41% of shipments from Gujarat were routed to Somalia, Sudan and Tanzania. West Bengal exported bulk of its shipments of molasses to our neighbouring country, Bangladesh.

B.IX: Major Ports in Export Segment



Source: DGCI&S

- The above two charts displays the year-wise export value earned by the top three ports during FY 2024-25. Kandla seaport was the major port through which products of Sugar were exported in FY 2022-23, followed by Mundra and Parri Infra Co Pvt Ltd. Export value of Kandla seaport got slashed to USD 616.75 million in FY 2023-24 and further diminished to USD 572.46 million in FY 2024-25. On the other hand, exports picked up in FY 2023-24 in case of Parri Infra and Mundra and cumulative export earnings plunged by more than USD 400 million in the following year.
- In case of Molasses exports, all the top three land ports are from West Bengal. Exports through Kotwaligate in Malda (a key trade route of Indo-Bangladesh) experienced a substantial increase in export value earned from USD 3.97 million in FY 2022-23 to USD 26.72 million in FY 2023-24 and moderated to USD 25.45 million in FY 2024-25.

Import Scenario

B.VIII: Import performance of Sugar and Molasses at HS-4 Digit level

Principal Commodity	HSN-4 Level	Description	Import Value (MUSD) (FY 2023-24)	Import Value (MUSD) (FY 2024-25)	% Share in Total Import of HS-17 (FY 2024-25)	YoY Growth
C4(Sugar)	1701	Solid cane or beet sugar and chemically pure sucrose	1975.94	1381.46	89.30	↓ -30.09
	1702	Sugars nes, lactose, fructose, glucose, maple syrup	142.05	134.72	8.71	↓ -5.16
C5(Molasses)	1703	Molasses from the extraction or refining of sugar	1.97	1.04	0.07	↓ -47.36

Source: DGCI&S

- The bulk of sugar imports constitutes **HSN 1701** (Solid cane or beet sugar) amounting to 89.30% of total HS-17 imports in FY 2024-25, reflecting heavy reliance on basic sugar for consumption and processing. **HS 1702**, covering lactose and other sugars, accounted for 8.71% share in total imports of HS-17 reflecting demand for its usage in food and pharmaceutical industries. Share of **HSN 1703** (molasses from the extraction or refining of sugar) is miniscule at 0.07%, indicating limited import needs and this sub-group registered a negative import growth of almost 47% as compared to FY 2023-24.

Review of Imports of HSN-8 Commodities from FY2022-23 to FY2024-25

B.IX:

a) Top 3 Eight Digit Level Commodities of Sugar Imported during FY 2024-25

Top 3 8-Digit Commodities of Sugar Imported during 2024-25							
8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
17011490	Other forms of cane sugar	5.69	281.19	32.03	1915.60	25.10	1275.76
17019990	Other refined sugar including centrifugal sugar	0.02	5.74	0.63	46.32	1.74	98.17
17021190	Lacts and lacts syrup containing 99% or more lacts other than solid form	0.16	41.87	0.21	55.16	0.21	54.75

Source: DGCI&S

- The above table enlists the top three commodities imported under the broad group C4 (Sugar) during FY 2024-25. As a key ingredient in food processing industry, **HS Code 17011490** (Other forms of cane sugar) registered observable surge of 581% from USD 281.19 million worth of imports in FY 2022-23 to USD 1951.69 million in FY 2023-24 and imports recorded a slight dip in FY 2024-25, clocking a value of USD 1275.76 million.
- Import payments towards **HS Code 17019990** (Other refined sugar including centrifugal sugar) ballooned 25 times in FY 2024-25 from imports worth of USD 5.74 million in FY 2022-23 due to limited domestic supply, increased demand coupled with global price fluctuations.

b) 3 Eight Digit Level Commodities of Molasses Imported during FY 2024-25

Top 2 8-Digit Commodities of Molasses Imported during 2024-25							
8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
17031000	Cane molasses resulted from extraction/refining of sugar	0.05	0.57	0.17	1.97	0.08	1.03

Source: DGCI&S

- **HS Code 17031000** (cane molasses resulted from extraction of sugar) is the major commodity under Molasses segment imported during the period under review. In 2023, India became the 23rd largest importer of molasses in the world. Molasses is primarily used for production of ethanol.

B.IX:

a) Direction of Trade (Import)

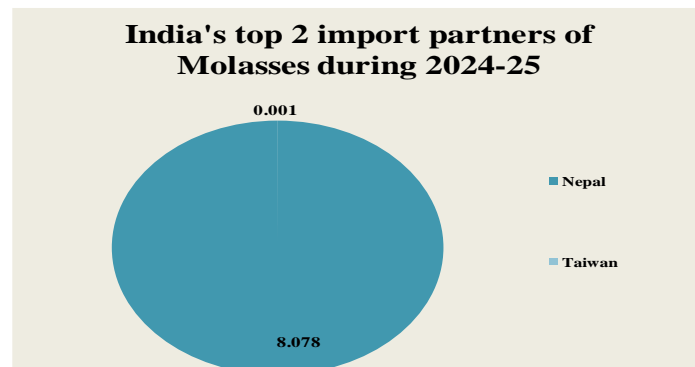
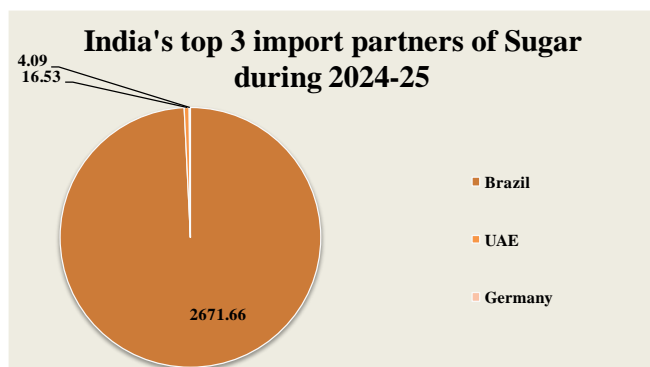
C4 (Sugar)				
Financial Year	Total Import Value (MUSD)	Top 3 Import Country Partners		
		1st	2nd	3rd
2022-23	292.97	Brazil (95.89%)	USA (0.95%)	China (0.95%)
2023-24	1984.88	Brazil (98.38%)	Sudan (0.75%)	Germany (0.16%)
2024-25	1388.10	Brazil (98.07%)	UAE (0.64%)	Germany (0.38%)

Source: DGCI&S

C5 (Molasses)				
Financial Year	Total Import Value (MUSD)	Top 3 Import Country Partners		
		1st	2nd	3rd
2022-23	0.58	Nepal (97.52%)	Bangladesh (2.15%)	Singapore (0.21%)
2023-24	1.97	Nepal (99.97%)	Tanzania (0.03%)	USA (0.01%)
2024-25	1.04	Nepal (99.53%)	Taiwan (0.41%)	France (0.06%)

Source: DGCI&S

b) Top 3 import partners in 2024-25 with their corresponding quantity (in Thousand Tonnes)

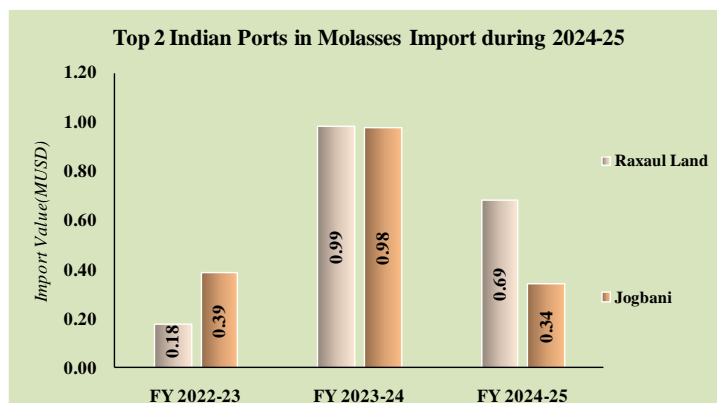
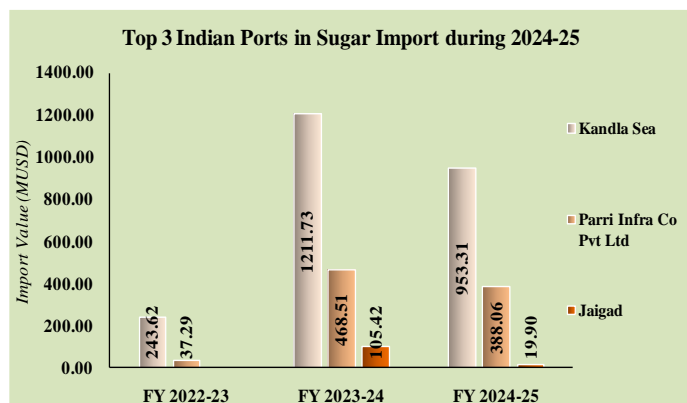


Source: DGCI&S

- India's Sugar imports are primarily sourced from Brazil and share of this country in India's import basket is characterized by a consistent upward trend. In FY 2024-25, 2671.66 thousand tonnes of sugar was imported from Brazil followed by UAE with 16.53 thousand tonnes of shipments. Brazil is the largest sugarcane producer in the world but also holds more than 50% share in global sugar exports. In FY 2024-25, sugarcane production in Brazil was affected by draught and wildfire. As per USDA report, Brazil produced 6770 lakh tonnes of sugarcane during marketing year 2024-25. India imposed export restrictions which escalated demand for Brazilian sugar both in India and rest of the world. India imported bulk of sugar from Brazil on account of decline in domestic production coupled with rise in consumption.

- Bulk of Molasses were sourced from Nepal possibly due to extant trade agreement. During FY 2022-23, Bangladesh secured the second slot as an import country partner with 2.15% share in imports of molasses. In FY 2024-25, 8.078 thousand tonnes of molasses were sourced from Nepal.

B.X: Major Ports in Import Segment



Source: DGCI&S

- The two charts give a clear picture about the major ports through which India imported Sugar and Molasses in FY 2024-25. Kandla seaport is the most significant port through which bulk of Sugar products were routed to our country. Jaigad port started importing Sugar since FY 2023-24. Molasses were sourced from Nepal and the shipments were routed through two crucial land ports, Raxaul and Jogbani.

SECTION C-COTTON (CHAPTER 52)

HS Chapter 52 pertains to cotton and encompasses a broad range of products derived from this essential natural fibre. It includes raw cotton, cotton waste, cotton yarn, and woven cotton fabrics, spanning both processed and unprocessed forms. As a key agricultural commodity, cotton holds significant economic importance for India, and India is among the world's leading producers and exporters. This commodity chapter plays a pivotal role in India's merchandise trade, both in terms of volume and value, and is integral to the functioning of the domestic textile industry. The present report aims to analyze trends in the export, import and production of **raw cotton** and **cotton yarn** under Chapter 52, for the period **2022-23 to 2023-24**, examining patterns over recent years, key markets, and the broader implications for India's foreign trade.

C.I: Year wise share of Cotton Export in Total Export basket of India.

Financial Year	Export Value of HS-52 (MUSD)	Total Annual Export Value (MUSD)	Share Percentage in Total Export Value
FY 2022-23	5663.55	451070.00	1.26
FY 2023-24	6780.81	437072.03	1.55
FY 2024-25	6333.82	437511.75	1.45

Source: DGCI&S

- The above table presents the year-wise share of HS-52 (Cotton) in India's total exports from FY 2022-23 to FY 2024-25. The export value of cotton increased from USD 5663.55 million in FY 2022-23 to USD 6780.81 million in FY 2023-24, marking a significant rise in its share from 1.26% to 1.55%
- However, in FY 2024-25, the export value slightly declined to USD 6333.82 million, with its share in total export basket dropping marginally to 1.45%. Despite fluctuations, cotton continues to hold a steady contribution of over 1% in India's overall export basket.

C.II: Year wise share of Cotton Import in Total Import basket of India.

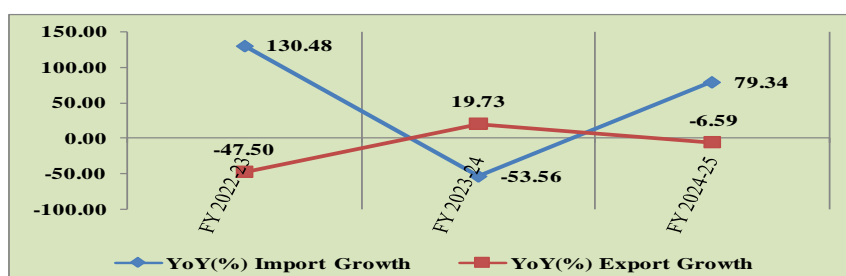
Financial Year	Import Value of HS-52 (MUSD)	Total Annual Import Value (MUSD)	Share Percentage in Total Import Value
FY 2022-23	1703.38	715968.90	0.24
FY 2023-24	791.01	678214.77	0.12
FY 2024-25	1418.58	721320.47	0.20

Source: DGCI&S

- The import value of HS-52 has shown fluctuations over the years, reflecting varying demand and market dynamics. In FY 2022-23, HS-52 accounted for 0.24% of total imports, which significantly declined to 0.12% in FY 2023-24. In FY 2024-25, the share has risen to 0.20%, suggesting a potential upward trend, possibly driven by renewed industry requirements or favourable global market conditions.
- India's cotton imports are largely driven by the requirements of the domestic textile industry. Despite being one of the world's top cotton producers, the country imports long and extra-long staple (ELS) length cotton to meet the specific needs of its textile and spinning industry, particularly for spinning fine count yarns and producing high-quality fabrics, which are not always met by domestic supply.

C.III: Growth of Export and Import on YoY basis.

Financial Year	YoY(%) Import Growth	YoY(%) Export Growth
FY 2022-23 (vis-à-vis FY 2021-22)	↑ 130.48	↓ -47.50
FY 2023-24	↓ -53.56	↑ 19.73
FY 2024-25	↑ 79.34	↓ -6.59



Source: DGCI&S

HS Chapter 52 encompasses all products related to cotton, including raw cotton, cotton waste, cotton yarn, and woven cotton fabrics. It covers both processed and unprocessed forms, such as carded or combed cotton, yarn for retail and non-retail use, and various types of woven cotton fabrics. For the purpose of this report, the focus will be limited to two broad groups: **A) Raw Cotton, including waste** and **B) Cotton Yarn**. These Broad groups are categorised under the following HS headings:

- **HS 5201 to 5203** (Listed under Principal Commodity Code **S4**): **Raw Cotton, including waste**.
- **HS 5205 to 5207** (Listed under Principal Commodity Code **P7**): **Cotton Yarn**.

Export scenario

C.IV: Export performance of Raw Cotton, including Cotton waste and Cotton Yarn at HS-4 Digit level

Principal Commodity Code	4-Digit HS Code	Commodity Group	Total Export Value (MUSD) in FY 2023-24	Total Export Value (MUSD) in FY 2024-25	Percentage Share in Total Export value of Cotton in FY 2024-25	YoY(%) Growth
S4 (Raw Cotton, including waste)	5201	Cotton, not carded or combed	678.75	660.43	10.43	↓ -2.70
	5202	Cotton waste (including yarn waste and garnetted stock)	57.70	79.84	1.26	↑ 38.37
	5203	Cotton, carded or combed	44.98	69.44	1.10	↑ 54.39
P7 (Cotton Yarn)	5205	Cotton yarn (other than sewing thread), containing 85% or more by weight of cotton	2559.93	3354.70	52.96	↑ 31.05
	5206	Cotton yarn (other than sewing thread), containing less than 85% by weight of cotton	190.69	190.80	3.01	↑ 0.06
	5207	Cotton yarn (other than sewing thread), put up for retail sale	1.78	7.69	0.12	↑ 331.91
Source: DGCI&S						

- The above table outlines the 4-digit HS codes/sub-groups representing various types of Raw Cotton, including waste and Cotton Yarn. In case of Raw Cotton, including waste, **HS 5201**(*Cotton, not carded or combed*), a fundamental input for the entire textile and garment industry, dominates the export chart, constituting a significant 10.43% share in total export value basket of Cotton (HS-52) for FY 2024-25. HS codes **5202** (*Cotton Waste*) and **5203** (*Cotton, Carded or Combed*) constituted slightly more than 1%.
- While HS 5201 saw a slight decline of 2.70% on YoY basis, both HS 5202 and HS 5203 registered strong growth of 38.37% and 54.39% respectively over FY 2023-24 as regards their respective export values.
- The Cotton Yarn segment showed robust export performance. **HS 5205** (*Cotton Yarn, containing 85% or more by weight of Cotton*) led the exports segment constituting over 52% of the total cotton exports and recorded a significant 31.05% YoY increase. **HS 5206** (*Cotton Yarn, containing less than 85% by weight of Cotton*) and **HS 5207** (*Cotton Yarn, put up for retail sale*) constituted 3.01% and 0.12% of the total export value basket of Cotton of FY 2024-25 respectively.

C.V: Top 3 Eight Digit Level Commodities of Raw Cotton, including waste Exported during FY 2024-25

8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
52010015	Indian cotton of staple length between 28.5 mm and 34.5 mm	2.21	613.62	3.96	830.41	3.11	610.51
52029900	Other cotton waste	0.35	54.16	0.52	79.07	0.58	74.25
52030000	Cotton, carded or combed	0.32	44.98	0.43	59.19	0.53	69.44

Source: DGCI&S

- The above table lists the top three commodities exported under the broad group of Raw Cotton, including waste during FY 2024-25. **HSN 52010015** (*Indian cotton of staple length between 28.5 mm and 34.5mm*) remained the leading export item in this segment, both in terms of quantity and value during the period under review. Exports were as high as USD 830.41 million in FY 2023-24 and stood at USD 610.51 million in FY 2024-25, reflecting observable plunge in both quantity and value. FY 2023-24 marked substantial exports of this HSN when compared vis-a-vis FY 2022-23 and FY 2023-24.

C.VI: Top 3 Eight Digit Level Commodities of Cotton Yarn Exported during FY 2024-25

8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
52052310	Grey Cotton Yarn (Measuring less than 232.56 decitex but not less than 192.31 decitex)	1.85	739.73	3.25	1000.00	3.49	1054.57
52052410	Grey Cotton Yarn (Measuring less than 192.31 decitex but not less than 125 decitex)	1.04	460.01	2.22	732.56	1.82	600.62
52052210	Grey Cotton Yarn (Measuring less than 714.29 decitex but not less than 232.56 decitex)	0.81	302.71	1.62	470.65	1.61	465.10

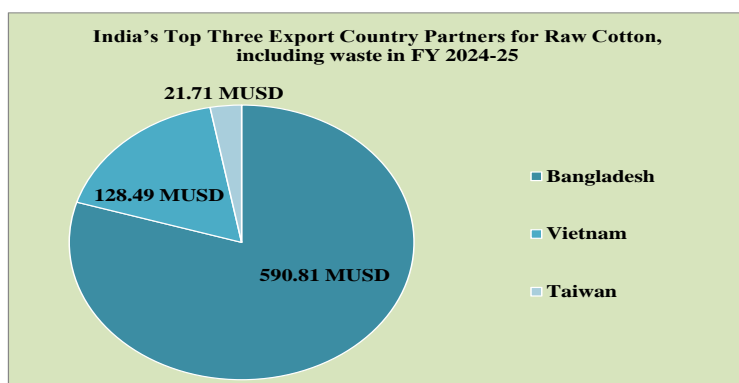
Source: DGCI&S

- In the case of Cotton Yarn, Grey Cotton Yarn with varying decitex measurements dominates the export chart from FY 2022-23 to FY 2024-25. **HSN 52052310** (*Grey Cotton Yarn, measuring less than 232.56 decitex but not less than 192.31 decitex*) consistently led export chart, with export values gradually rising from USD 739.73 million in FY 2022-23 to USD 1054.57 million in FY 2024-25.

C.VII& VIII: Direction of Trade (Export)

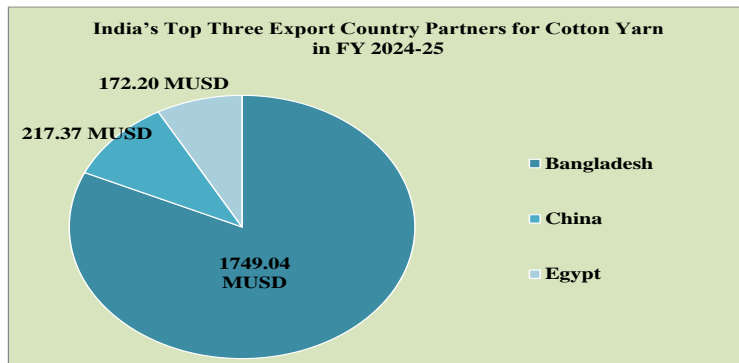
Raw Cotton, including waste				
Financial Year	Total Export Value (MUSD)	Top 3 Export Country Partner		
		1st	2nd	3rd
2022-23	781.43	Bangladesh (67.40%)	Vietnam (10.36%)	Indonesia (3.34%)
2023-24	1116.52	Bangladesh (56.75%)	China (19.95%)	Vietnam (12.29%)
2024-25	809.72	Bangladesh (72.97%)	Vietnam (15.87%)	Taiwan (2.69%)

Source: DGCI&S



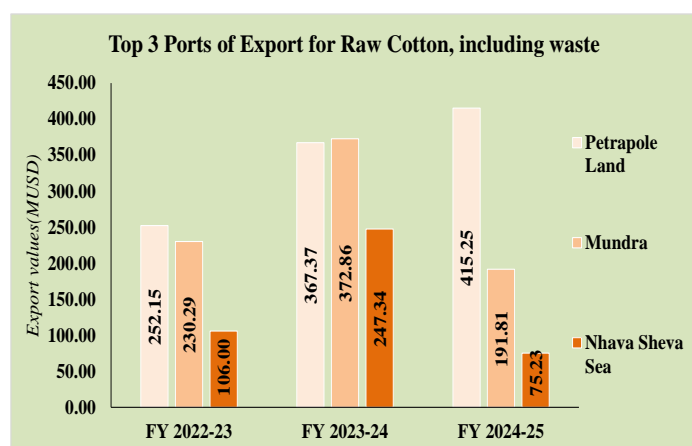
Cotton Yarn				
Financial Year	Total Export Value (MUSD)	Top 3 Export Country Partner		
		1st	2nd	3rd
2022-23	2752.41	Bangladesh (36.95%)	China (7.59%)	Egypt (6.25%)
2023-24	3780.23	Bangladesh (35.88%)	China (18.43%)	Egypt (5.39%)
2024-25	3553.19	Bangladesh (49.23%)	China (6.12%)	Egypt (4.85%)

Source: DGCI&S

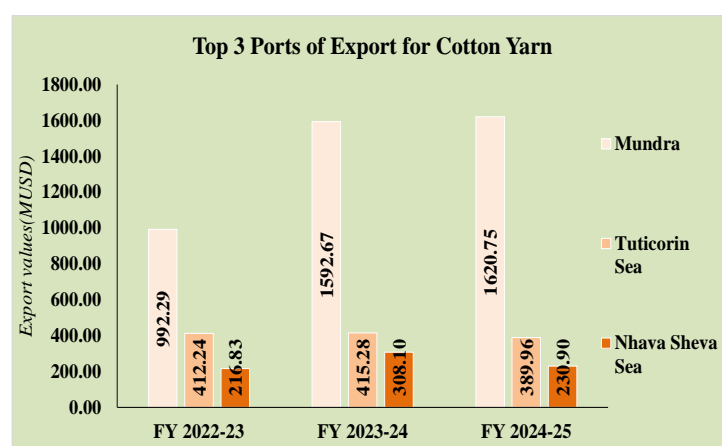


- The table and charts above depict the leading export country partners for Raw Cotton, including waste and Cotton Yarn during FY 2022-23 to FY 2024-25. The data highlights that Bangladesh has consistently been India's leading export partner for both raw cotton and cotton yarn. Exports to Bangladesh have shown a consistent upward trend and, in FY 2024-25, the combined value of raw cotton and cotton yarn, exported to Bangladesh has reached approximately USD 2339.85 million.
- In the case of raw cotton, apart from Bangladesh, Vietnam has remained a consistent export country partner, securing a position in the top three across all three years.
- For cotton yarn, the top three export destinations, Bangladesh, China, and Egypt have remained unchanged throughout the period under review, indicating stable and sustained demand from these key markets. India's exports are mainly routed to South Asian Country partners and Egypt (Africa).

C.IX & X: Top Ports of Export



Source :DGCI&S

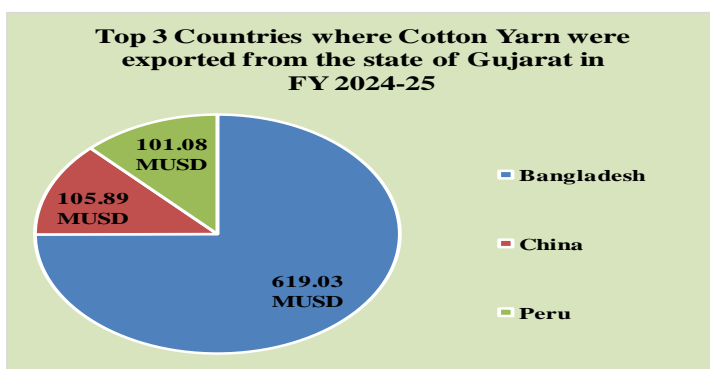
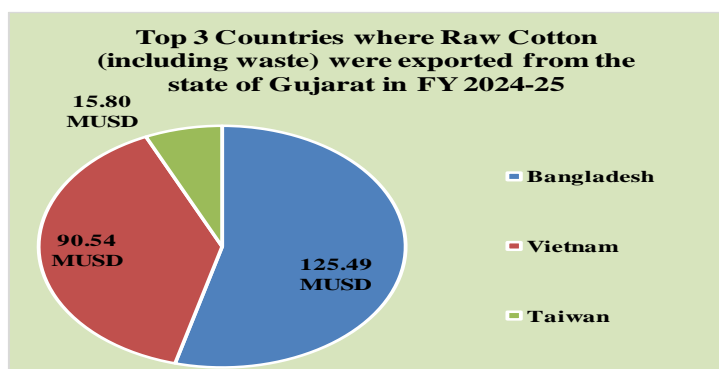


- The above charts present the leading three ports of export for Raw Cotton (including waste) and Cotton Yarn from India during FY 2022-23 to FY 2024-25. For Raw Cotton, Petrapole Land Port in West Bengal consistently emerged as the leading export gateway, with export values rising steadily from USD 252.15 million in FY 2022-23 to USD 415.25 million in FY 2024-25.
- In FY 2023-24, Mundra Port in Gujarat overtook Petrapole, recording a export value of USD 372.86 million, before dropping to USD 191.81 million in FY 2024-25, allowing Petrapole to regain the top position. Nhava Sheva Sea Port in Maharashtra consistently ranked third, with exports peaking at USD 247.34 million in FY 2023-24, before declining to USD 75.23 million in FY 2024-25.
- For cotton yarn, Mundra Port dominated exports throughout the period, with values rising from USD 992.29 million in FY 2022-23 to USD 1,620.75 million in FY 2024-25. Tuticorin Sea Port in Tamil Nadu consistently held the second position, contributing around USD 400 million worth of exports in each FY. Nhava Sheva Sea Port held the third position throughout the period, witnessing a moderate increase in FY 2023-24 before declining to USD 230.90 million in FY 2024-25.

C. XI & XII: State wise Export Scenario

Principal Commodity Code	Description	Top Exporting State
S4	Raw Cotton, including waste	Gujarat
P7	Cotton Yarn	Gujarat

Source: DGCI&S



- The above table and charts illustrate the top three destination countries for the export of Raw Cotton, including waste and Cotton Yarn from the state of Gujarat during FY 2024-25. Bangladesh was the leading importer of raw cotton from Gujarat, with export values reaching USD 125.49 million. Vietnam ranked second with USD 90.54 million, followed by Taiwan at USD 15.80 million.
- In the case of cotton yarn, Exports were significantly higher in value, with Bangladesh again emerging as the top destination, accounting for USD 619.03 million. China and Peru followed with imports valued at USD 105.89 million and USD 101.08 million, respectively. This export trend highlights Bangladesh's strategic importance in both raw cotton and cotton yarn trade, while also reflecting Gujarat's strong presence in the global cotton textile supply chain.

Import Scenario

C. XIII: Import performance of Raw Cotton, including waste and Cotton Yarn at HS-4 Digit level

Principal Commodity Code	4-Digit HS Code	Commodity Group	Total Import Value (MUSD) in FY 2023-24	Total Import Value (MUSD) in FY 2024-25	Percentage Share in Total Import value of Cotton in FY 2024-25	YoY(%) Growth
S4 (Raw Cotton, including waste)	5201	Cotton, not carded or combed	579.21	1200.97	84.66	↑ 107.35
	5202	Cotton waste (including yarn waste and garnetted stock)	18.25	17.29	1.22	↓ -5.24
	5203	Cotton, carded or combed	1.20	1.06	0.07	↓ -12.30
P7 (Cotton Yarn)	5205	Cotton yarn (other than sewing thread), containing 85% or more by weight of cotton	23.49	22.44	1.58	↓ -4.46
	5206	Cotton yarn (other than sewing thread), containing less than 85% by weight of cotton	2.84	2.55	0.18	↓ -10.26
	5207	Cotton yarn (other than sewing thread), put up for retail sale	0.13	0.20	0.01	↑ 56.06

Source: DGCI&S

- In case of Raw Cotton, including waste, **HS 5201** (*Cotton, not carded or combed*), a key raw material for the domestic textile and spinning industry, dominates the import chart, accounting for a substantial 84.66% share in the total cotton import basket for FY 2024-25. Imports under **HS 5202** (*Cotton Waste*) and **HS 5203** (*Cotton, Carded or Combed*) contributed marginally, with shares of 1.22% and 0.07%, respectively.
- The Cotton Yarn segment forms a minor part of India's total cotton imports. **HS 5205** (*Cotton Yarn, containing 85% or more by weight of Cotton*) was the leading category, constituting 1.58% of total cotton imports, followed by **HS 5206** (*Cotton Yarn, containing less than 85% by weight of Cotton*) with a share of 0.18% and **HS 5207** (*Cotton Yarn, put up for retail sale*) at a negligible 0.01% share in FY 2024-25. This reflects India's limited reliance on imported yarn, likely due to strong domestic production capacity.

C.XIV: Top 3 Eight Digit Level Commodities of Raw Cotton, including waste Imported during FY 2024-25

8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
52010024	Cotton, other than Indian, of staple length exceeding 27.0 m	0.00	0.00	1.27	288.78	4.78	917.11
52010025	Cotton, other than Indian, of staple length exceeding 32.0 m	0.00	0.00	0.66	245.36	0.75	272.46
52029900	Other Cotton Waste	0.42	17.85	0.23	9.04	0.22	8.10

Source: DGCI&S

C.XV: Top 3 Eight Digit Level Commodities of Cotton Yarn Imported during FY 2024-25

8-Digit HS Code	Commodity Description	FY 2022-23		FY 2023-24		FY 2024-25	
		Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD	Quantity in Lakh Tonnes	Value in MUSD
52052890	Other Cotton Yarn Measuring Less Than 83.33 Decitex	0.00	0.29	0.00	3.55	0.01	6.96
52051110	Grey Cotton Yarn Measuring 714.29 decitex or more	0.01	1.12	0.01	1.50	0.01	2.46
52051410	Grey Cotton Yarn Measuring less than 192.31 decitex but not less than 125 decitex	0.04	12.76	0.01	2.38	0.01	2.25

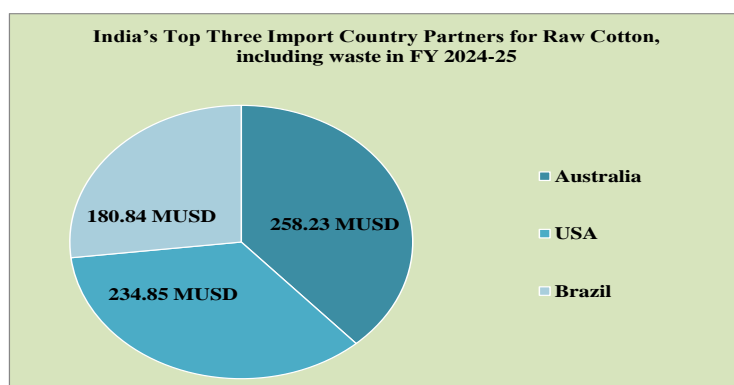
Source: DGCI&S

- The above two tables present the top three imported commodities at the 8-digit HS level for both Raw Cotton, including waste and Cotton Yarn segments. **HSN 52010024** (*Cotton, other than Indian, of staple length exceeding 27.0 mm*) emerged as the leading imported item in the Raw Cotton & Cotton Waste category, witnessing a substantial increase from USD 288.78 million in FY 2023-24 to USD 917.11 million in FY 2024-25. **HSN 52010025** (*Cotton, other than Indian, of staple length exceeding 32.0 mm*) also recorded consistent growth, with import values reaching USD 272.46 million in the FY 2024-25.
- The significant rise in imports of **HSN 52010024** and **HSN 52010025** in FY 2023-24 and FY 2024-25 can be partly attributed to the India-Australia ECTA (Economic Cooperation Trade Agreement) 2022, under which import of extra-long staple (ELS) length cotton was made duty-free within a Tariff Rate Quota (TRQ) limit of 51,000 MTS, as per DGFT's order dated 28th of December, 2022.
- HSN 52051410** (*Grey cotton yarn, measuring less than 192.31 decitex but not less than 125 decitex*) led cotton yarn imports in FY 2022-23 in value terms, but **HSN 52052890** (*Other cotton yarn measuring less than 83.33 decitex*) exhibited a sharp rise in import payments and emerged as the top imported item in FY 2024-25.

C.XVI&XVII: Direction of Trade (Import)

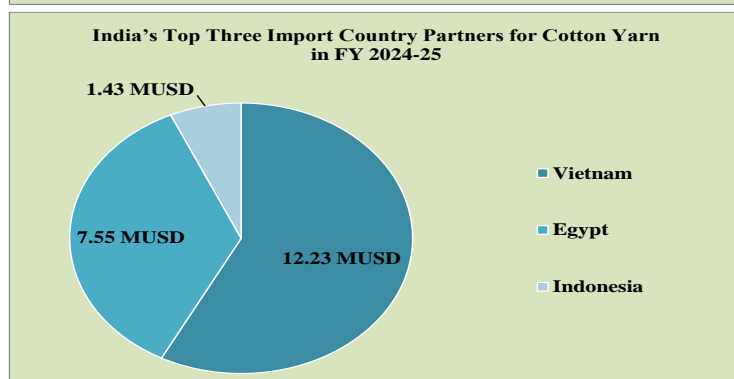
Raw Cotton, including waste				
Financial Year	Total Import Value (MUSD)	Top 3 Import Country Partner		
		1st	2nd	3rd
2022-23	1438.69	USA (37.11%)	Australia (19.88%)	Singapore (8.48%)
2023-24	598.66	USA (37.03%)	Australia (23.45%)	Egypt (16.91%)
2024-25	1219.32	Australia (21.18%)	USA (19.27%)	Brazil (14.84%)

Source: DGCI&S



Cotton Yarn				
Financial Year	Total Import Value (MUSD)	Top 3 Import Country Partner		
		1st	2nd	3rd
2022-23	74.26	Vietnam (72.83%)	China (11.03%)	Oman (4.09%)
2023-24	26.47	Vietnam (51.69%)	Egypt (14.19%)	Italy (8.56%)
2024-25	25.20	Vietnam (48.56%)	Egypt (29.95%)	Indonesia (5.67%)

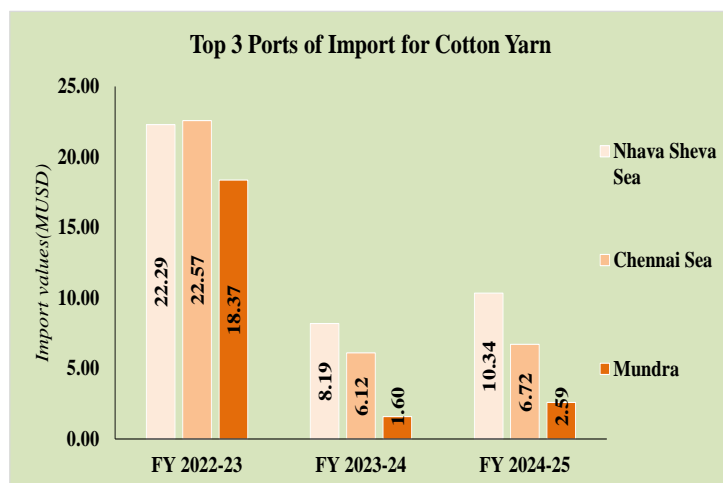
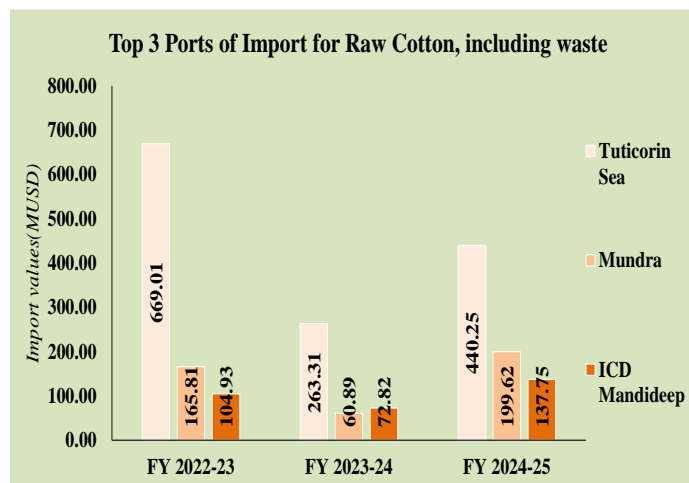
Source: DGCI&S



- For the period FY 2022-23 to FY 2024-25, India's imports of Raw Cotton, including waste have been primarily sourced from the USA and Australia, which have consistently featured as the top two suppliers. While the USA remained the leading import partner in the first two years, Australia emerged as the top supplier in FY 2024-25, contributing 21.18% of the total imports. One of the plausible reasons behind Australia's emergence as the top supplier in FY 2024-25 is the India-Australia ECTA (Economic Cooperation Trade Agreement) 2022, under which import of extra-long staple (ELS) length cotton from Australia was made duty-free.

- In FY 2024-25, Brazil's substantial raw cotton production, estimated at 3.79 million tonnes for the season contributed to its entry into India's top three suppliers alongside other notable partners such as Singapore and Egypt.
- In the case of Cotton Yarn, Vietnam has consistently been the dominant import partner, accounting for nearly half or more of India's cotton yarn imports over the last three years. Its share stood at 48.56% in FY 2024-25. Egypt maintained the second position in both FY 2023-24 and FY 2024-25, replacing China, which was the second major source in FY 2022-23.

C.XVIII & XIX: Top Ports of Import



Source: DGCI&S

- For raw cotton imports, Tuticorin Sea Port consistently handled the highest import volumes during the review period. Imports values through this port has declined sharply from USD 669.01 million in FY 2022-23 to USD 263.31 million in FY 2023-24, before peaking up again to USD 440.25 million in FY 2024-25.
- Mundra Port ranked second in FY 2022-23 and FY 2024-25, despite a dip to USD 60.89 million in FY 2023-24. ICD Mandideep, an inland container depot located in Madhya Pradesh, remained a key entry point for raw cotton, consistently holding the third position across all three years.
- For cotton yarn imports, Nhava Sheva Sea Port emerged as the leading entry point in FY 2023-24 and FY 2024-25, despite an overall decline in import values. Chennai Sea Port in Tamil Nadu held the top position in FY 2022-23, while Mundra Port consistently ranked third throughout the period under review.
- Imports of raw cotton and cotton yarn through the ports of Gujarat and Tamil Nadu are relatively higher compared to other ports. A key reason for this is the presence of well-established and large-scale textile industries in both states. Tamil Nadu, with its dense network of spinning mills, making ports like Tuticorin Sea and Chennai Sea major entry points. Similarly, Gujarat's robust textile sector supports consistent import activity through Mundra Port.

Production Insights

India ranks among the world's leading producers of cotton, with cultivation spread across multiple states. As per Statista database, in crop year 2022/2023 India holds the 2nd position globally in cotton production, following China. The country's cotton production is shaped by a range of factors, including monsoon patterns, pest management practices, seed quality, and government interventions such as minimum support prices and subsidies.

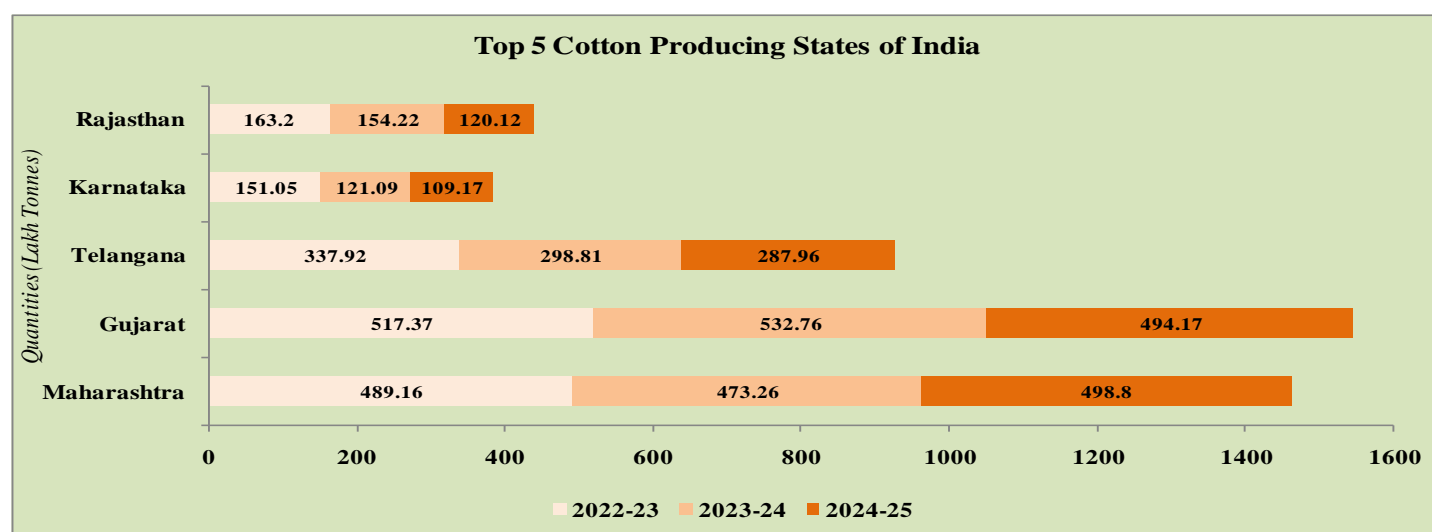
C.XX: India's Cotton Production, Export & Import Scenario

Finanacial Year	Produced Quantity (in Lakh Tonnes)	Exported Quantity (in Lakh Tonnes)	Imported Quantity (in Lakh Tonnes)
2022-23	1980.01	9.82	4.73
2023-24	1913.06	17.88	2.60
2024-25	1760.33	16.08	6.08

Source: DGCI&S and UPAg

- India's cotton production has shown a declining trend over the past three years, gradually decreasing from 1980.01 lakh tonnes in FY 2022-23 to 1760.33 lakh tonnes in FY 2024-25. Although production has declined steadily over the three years, the export share has remained relatively stable for FY 2023-24 and FY 2024-25. However exports in FY 2023-24 in quantity terms recorded bulk rise vis-a-vis FY 2022-23. In FY 2024-25, India produced 1760.33 lakh tonnes of cotton, out of which 16.08 lakh tonnes were exported, which is about 0.91% of the total cotton production. In FY 2023-24, 17.88 lakh tonnes were exported from a total production of 1913.06 lakh tonnes, which is about 0.93%.

C.XXI: Top 5 Cotton Producing States of India.



Source: UPAg

- Among the top five producing states, Gujarat and Maharashtra continue to dominate, with nearly equal outputs of around 500 lakh tonnes in FY 2024-25. Gujarat's leadership is driven by robust irrigation infrastructure, adoption of high-yield BT cotton, and strong agri-supply chains. Maharashtra, despite facing climatic challenges, has shown resilience through improved crop practices and supportive government initiatives like State sponsored special action plan for productivity improvement of cotton since FY 2022-23, making it a close competitor in recent years.
- Telangana, Karnataka and Rajasthan exhibited regular and gradual decline in cotton production over the years, indicating potential multi-pronged challenges in those regions.

CONCLUSION

India's trade in commercial crops— **Edible oils, sugar, and cotton** —continues to play a vital role in the country's agri-economy and global trade dynamics. **Cotton** exports have surged, with key destinations like Bangladesh, Vietnam and China driven by demand. **Sugar** trade remains stable with India both exporting and importing based on seasonal and policy-driven needs. Meanwhile, **edible oils imports**—particularly palm and soybean—remain crucial due to limited domestic production, with major sourcing from countries like Indonesia, Malaysia, Brazil, and the USA.

Despite global market fluctuations, India's strategic diversification of trade partners and growing port infrastructure reflect resilience and adaptability. Continued policy support, technological upgrades in farming, and targeted trade agreements will be essential for sustaining production and expanding India's commercial crop trade.