



Brief Report on Exports of Toys, Games and Sports Requisites

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1. A country's economic strength is dependent on a vast set of domestic and global factors and development of industrial/manufacturing sector plays a key role in fostering a country on the path of sustained economic growth and employment generation.

2. India's industrial sector has significantly evolved over time and the development of Micro, small and medium enterprises (MSME) sector has contributed to the nation's economic development in manifold ways. This sector continues to play a pivotal role by fostering entrepreneurship and generating employment at relatively lower capital costs vis-a-vis heavy industries. Among plethora of industrial segments under the ambit of MSMEs, toys, games, sports requisites is one of the most unconventional sectors which has emerged as a dynamic and high-growth sector, playing an important role in India's economic landscape and now a crucial global supplier. According to UN Comtrade data, India ranked **30th** as a global exporter in calendar year 2023. In the following year, our country climbed up four places to occupy the **26th** slot and the global exports of toys, games and sports requisites stood at USD 138.89 billion in 2024.

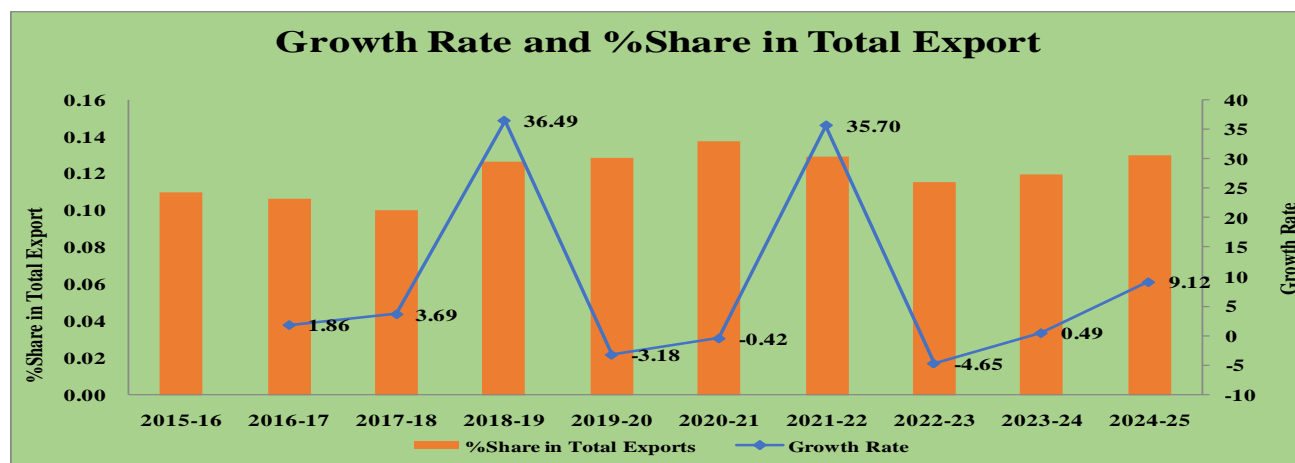
The current study aims to provide insights on the export performance of toys, games, sports requisites over a decade from FY 2015-16 to FY 2024-25. For the purpose of this analysis trade data on 2-digit HSN-95 (comprising Toys, games and sports requisites; parts and accessories thereof) of Indian Trade Classification (Harmonised System) has been extensively used.

Table 1: Export Values of HSN-95 during FY 2015-16 to FY 2024-25

Financial Years	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Export (USD Million)	289.56	294.96	305.83	417.43	404.15	402.44	546.09	520.69	523.24	570.95
Growth Rate		1.86	3.69	36.49	-3.18	-0.42	35.70	-4.65	0.49	9.12
%Share in Total Exports	0.11	0.11	0.10	0.13	0.13	0.14	0.13	0.12	0.12	0.13

Source: DGCI&S

Figure 1: Year-wise growth of Export of HSN-95

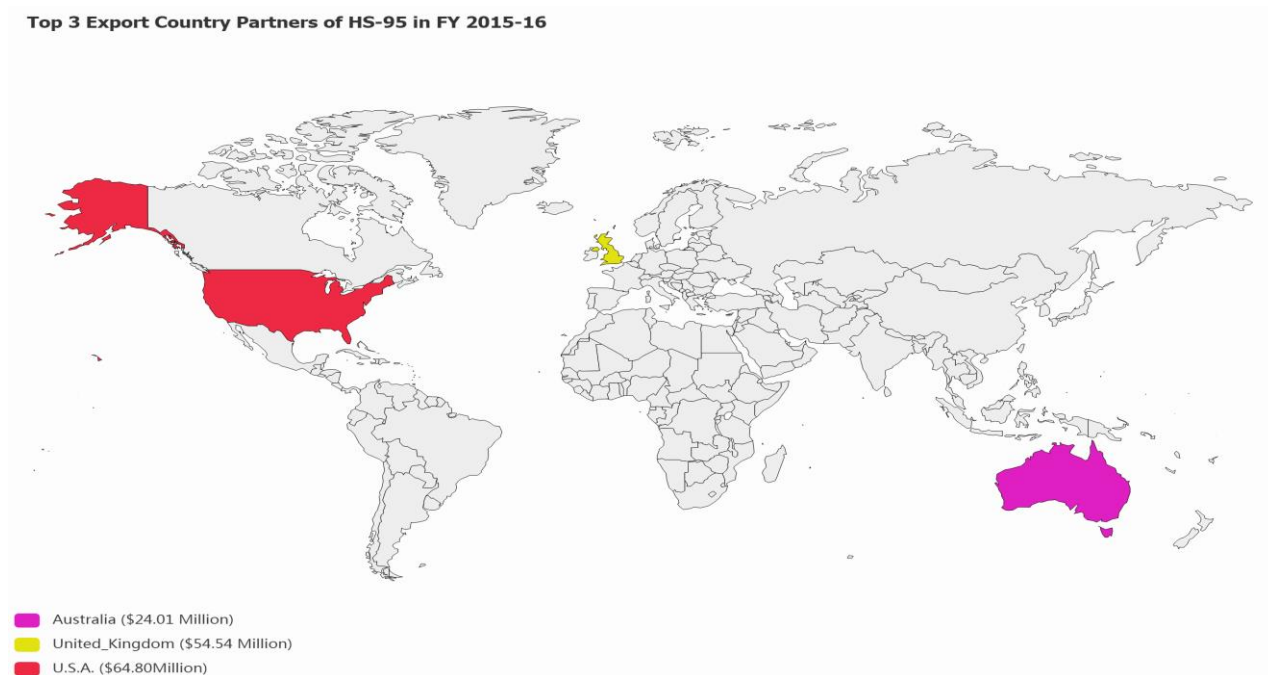


Source: DGCI&S

- India's exports under HSN-95 was at level around USD 290 million mark during the first two financial years i.e FY 2015-16 and FY 2016-17 and increased to slightly more than USD 300 million mark in FY 2017-18. In FY 2018-19, Sports Goods Export Promotion Council (SGEPC) participated in various fairs and buyer-seller meets at the global level which in turn gave a boost to total exports under HSN-95. Total exports in FY 2018-19 grew by 36.49% from that of FY 2017-18. Subsequently, between FY 2018-19 to FY 2020-21, exports remained at level close to USD 400 million mark.
- However, despite limitations faced during the Covid-19 pandemic period, the sector witnessed massive turnaround in FY 2021-22 when exports scaled up by 35.7% to USD 546.09 million. In the same year, through Market Access Initiative (MAI) scheme announced by Government of India, toys, sports goods sector was recognised as priority sector which helped in attracting bulk investments. There was moderation in exports during FY 2022-23 and FY 2023-24 from the peak registered in FY 2021-22, however, exports settled at USD 570.95 million in FY 2024-25 reflecting an all-time high.

3. To understand the trend in direction of export, only four financial years have been considered, initial year i.e FY 2015-16; FY 2018-19, FY 2021-22 were taken into account to capture whether there was any deviation in export pattern due to surge in exports and terminal year i.e FY 2024-25.

Figure 2: Top 3 export country partners of India under HSN-95 in FY 2015-16



Source: DGCI&S

Figure 3: Top 3 export country partners of India under HSN-95 in FY 2018-19

Top 3 Export Country Partners of HS-95 in FY 2018-19



Source: DGCI&S

Figure 4: Top 3 export country partners of India under HSN-95 in FY 2021-22

Top 3 Export Country Partners of HS-95 in FY 2021-22



Source: DGCI&S

Figure 5: Top 3 export country partners of India under HSN-95 in FY 2024-25

Top 3 Export Country Partners of HS-95 in FY 2024-25



Source: DGCI&S

- The above charts show the top three export country partners in four specified financial years FY 2015-16, FY 2018-19, FY 2021-22 and FY 2024-25 with USA being the lead destination for products under HS-95. In FY 2015-16, USA dominated with 22.38% share in USD 289.56 million worth of India's total exports of products under HSN-95. It is worth mentioning herein that percentage share of USA in total export of HSN-95 increased to almost 38% in FY 2024-25. Available reports suggest that high tariffs imposed on China during FY 2024-25, induced consumers in USA to search for alternative suppliers and India successfully catered to the growing demand of educational and electronic games in USA.
 - The top three export country partners remained more or less consistent i.e. USA, UK and Australia in the period under review and contributed close to 56% in total exports in FY 2024-25. Though in absolute value terms, exports to Australia increased over time, percentage share of Australia in total exports of HSN-95 as a destination has shown a diminishing trend.
 - Further, Germany has consistently secured 4th position as a significant export partner and indicative of the fact that Indian participation in International trade fairs organised in Germany in FY 2018-19 had massively given due impetus to Indian sports goods and toys industry to expand its business.
4. All commodities under HSN-95 classified into six major sub-headings which consist of 4-digit HSN codes as per Indian Trade Classification system.
- 9503:** Tricycles, scooters, pedal cars and similar wheeled toys; Dolls' carriages; Dolls; Other toys; Reduced-size ("scale") models and similar recreational models, working or not; Puzzles of all kinds
- 9504:** Video game consoles and machines, table or parlour games, including pintables, billiards, special tables for casino games and automatic bowling equipment, amusement machines operated by coins, bank notes, bank cards, tokens or by any other means of payment.
- 9505:** Festive, carnival or other entertainment articles, including conjuring tricks and novelty jokes
- 9506:** Articles and equipment for general physical exercise, gymnastics, athletics, other sports (including table-tennis) or out-door games, not specified or included elsewhere in this HS; swimming pools and paddling pools
- 9507:** Fishing rods, fish-hooks and other line fishing tackle; fish landing nets, butterfly nets and similar nets; decoy "birds" (other than those of heading 9208 and 9705) and similar hunting or shooting requisites
- 9508:** Travelling circuses and travelling menageries; amusement park rides and water park amusements; fairground amusements, including shooting galleries; travelling theatres
- *9501 and 9502 have been omitted as per latest Indian Trade Classification – Harmonised System (2022)*
5. The following table represents export values at 4-digit level for the initial financial year, FY 2021-22 and the terminal financial year i.e. enabling one to have broad overview of section specific export scenario.

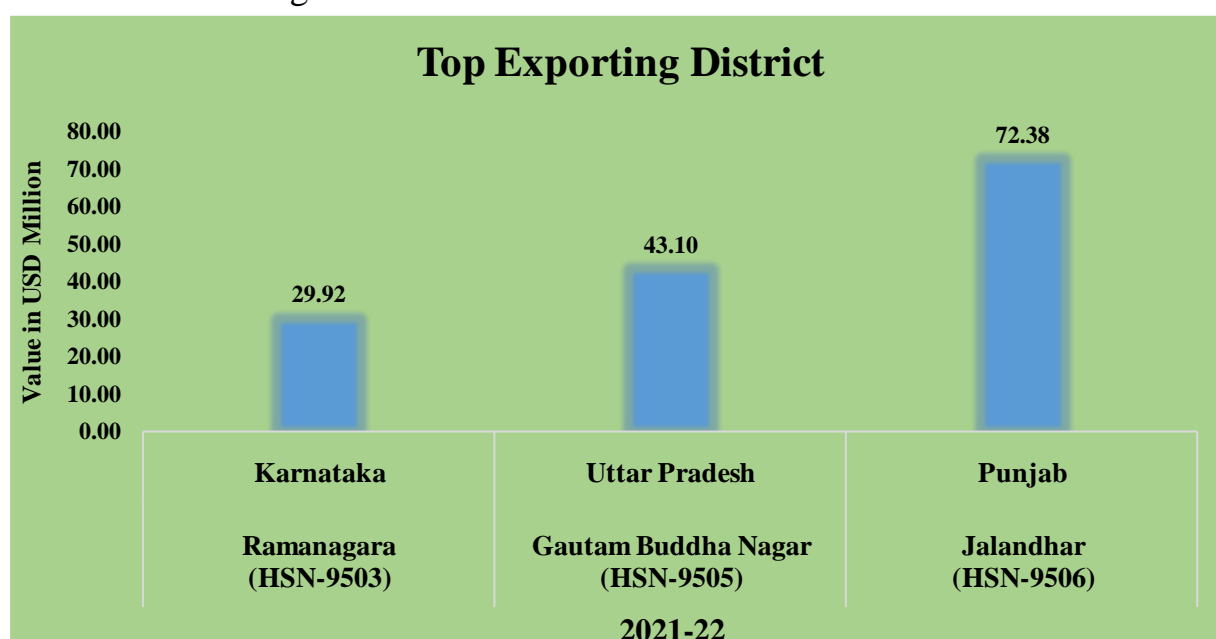
Table 2: Export Values of major sub-headings under HSN-95 in four financial years

Export Values (USD Million) of Major 4-digit HSN under HS-95 in FY 2015-16, FY 2018-19, FY 2021-22 and FY 2024-25						
4-digit HSN Financial Year	9503	9504	9505	9506	9507	9508
2015-16	65.37	13.36	47.44	145.39	9.37	8.64
2018-19	109.28	19.82	74.36	201.45	8.18	4.34
2021-22	177.04	32.27	117.32	197.59	13.66	8.20
2024-25	169.46	37.52	140.49	196.75	10.34	16.39

Source: DGCI&S

- The table reflects how India has progressed in this sector leading to enhanced exports. It is also observed that 4-digit HSN 9505 registered highest CAGR of 0.11 and the least CAGR of 0.01% has been recorded in case of 4-digit HSN 9507. Of all the six major sub-headings discussed above, detailed analysis has been executed for three sub-headings namely 9503, 9505 and 9506. However, HSN-9506 indeed had quite substantial value of exports in FY 2015-16.
- According to Annual Report published by Department of Commerce, in FY 2021-22, Karnataka, Rajasthan and Uttar Pradesh had been chosen to provide land for toy manufacturing units. Around 100 industrialists acquired land at Noida's Toy Park and 27 members of SGEPC (Sports Goods and Export Promotion Council) started to expand their manufacturing capacities in Khushkhera, Bhiwadi. Additionally, in order to promote exports and support local artisans, Government of India introduced Districts as Export Hubs scheme. In accordance with this scheme, Directorate General of Foreign Trade (DGFT) along with states and Union Territories organised export promotion events in more than 550 districts. The aim of these events was to make each district as potential exports hub. The following few charts aims to portray the district wise export scenario on the basis of 4-digit HSN sub-groups for two financial years i.e FY 2021-22 and FY 2024-25. *Prior to FY 2021-22, district-wise export data is not available.*

Figure 6: Leading exporting districts (states) of Toys, Games and Sports requisites based on HSN-4 digit Classification in FY 2021-22



Source: DGCI&S

- For sub-group – 9503 which consists of other toys; reduced-size (scale) models and similar recreational models, Ramanagara in Karnataka was the top exporting district in FY 2021-22 with export earnings of USD 29.92 million. The 2nd slot was held by Belagavi, from Karnataka. Further, it needs to be mentioned that Ramanagara was one of the 550 districts which was envisioned as “District as Export Hub” for Channapattana toys. This variety of toys has a rich history of more than 200 years old and these are made of ivory wood and vegetable dyes. As per available reports, Channapattana toys are mainly in demand for its sustainable and nature and are being exported to USA and various European and Asian countries.
- Gautam Buddha Nagar (Uttar Pradesh) was the most significant district in export of 4-digit HSN – 9505 comprising articles used in festivals, carnivals and entertainment with USD 43.10 million worth of exports.
- As regards, sub-groups – 9506 covering gymnastics equipments, articles of other sports (including table tennis)/outdoor games, Jalandhar from Punjab dominated among 186 exporting districts. Jalandhar was followed by Meerut from Uttar Pradesh with exports worth of USD 66.01 million. Both these districts were identified as “Districts as Export Hubs” for sports goods.

Table 3: Major export destinations of three districts and their respective percentage share in FY 2021-22

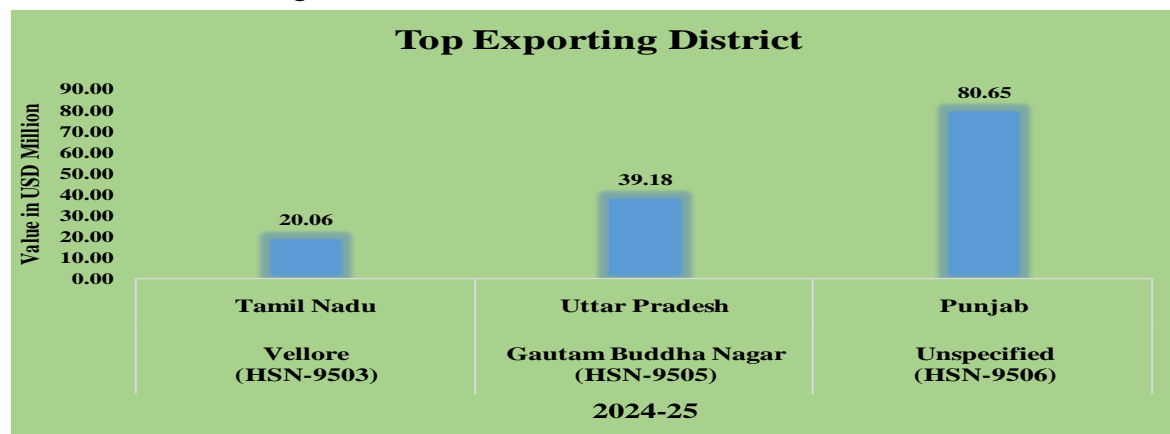
Financial Year	Districts with Export Value (USD Million)	Major Country Partners with percentage share		
2021-22	Ramanagara (29.92)	USA (42.28%)	UK (20.58%)	Germany (7.02%)
	Gautam Buddha Nagar (43.10)	USA (71.32%)	Germany (9.33%)	Sweden (5.33%)
	Jalandhar (72.38)	UK (31.20%)	Australia (24.18%)	USA (9.25%)

Source: DGCI&S

- Bulk of HSN-9503 shipments from Ramanagara amounting to USD 12.65 million were routed to USA, followed by UK and Germany with exports worth of USD 6.16 million and USD 2.10 million respectively. The leading export country partners of this district is quite similar to the major export partners of India under 2-digit HSN-95. Additionally, USA, UK and Germany consist of nearly 70% of the total exports of HSN-9503 from Ramanagara.
- USA was the major export destination of HSN-9505 which originated in Gautam Buddha Nagar, with exports worth of USD 30.73 million, constituting almost 71% share in total exports of HSN-9505 from Gautam Buddha Nagar.
- In FY 2021-22, USD 72.38 million worth of cumulative exports of HSN-9506 were routed from Jalandhar. UK was the most significant export country partner with USD 22.58 million worth of shipments routed therein. UK was followed next by Australia. Together the top three export country partners of Jalandhar contributed nearly 64% in total exports of HSN-9506 from this district. It is worth mentioning that, as per regional profile published by Government of Punjab, Jalandhar is the

largest sports goods production hub in India and inflatable balls account for 50% share in total production.

Figure 7: Leading exporting districts (states) of Toys, Games and Sports requisites based on HSN-4 digit Classification in FY 2024-25



Source: DGCI&S

- In FY 2024-25, Vellore in Tamil Nadu dominated as the major exporting district for sub-group 9503 with export earnings of USD 20.06 million. Vellore was followed by Gautam Buddha Nagar in Uttar Pradesh in exports of HSN-9503. The 3rd and 4th slots were occupied by Bengaluru Rural and Ramanagara respectively. In Foreign Trade Policy, 2023 (FTP), Koppal in Karnataka had been identified as ‘District as Export Hub’ for plastic and electronic toys. Despite establishing a toy cluster spreading over 400 acres, Koppal has not experienced significant rise in exports so far, urging for further policy reformulation.
- Gautam Buddha Nagar was the most significant district in exports of HSN – 9505. The export value of 9505 from this district fell by USD 3.92 million from that of FY 2021-22. Gautam Buddha Nagar was followed by Jaipur in Rajasthan. Like Koppal, Jaipur was also identified as export hub for toys.
- As regards, HSN – 9506, *specific data is not available for highest exporting district*. However, Punjab as a state accounted for USD 81.01 million worth of sports goods exports in FY 2024-25.

Table 4: Major export destinations of two districts and their respective percentage share in FY 2024-25

Financial Year	Districts with Export Value (USD Million)	Major Country Partners with percentage share		
2024-25	Vellore (20.06)	USA (41.09%)	UK (11.35%)	Netherlands (9.99%)
	Gautam Buddha Nagar (39.18)	USA (67.81%)	France (6.64%)	Netherlands (4.73%)

Source: DGCI&S

- Table 4 depicts the top three export country partners of Vellore with USA being the top spot holder with USD 8.24 million worth of shipments routed therein. USA was followed by UK and

Netherlands with export values of USD 2.28 million and USD 2 million respectively. Together these three countries constituted more than 62% of total exports under HSN-9503 from Vellore.

- As regards, Gautam Buddha Nagar, 67.80% of total exports of HSN-9505 were routed to USA. France and Netherlands were other two leading export country partners.
- Netherlands which is among the top five global exporters of toys, games and sports requisites constituted nearly 10% of India's exports from Vellore and also emerged as a leading export destination of exports from Gautam Buddha Nagar with 4.73% share in USD 39.18 million worth of exports. This corroborates the fact that Indian sports goods and toys sector has over time gained popularity in western market for its distinctive and innovative design and cultural significance of traditional wooden and handcrafted toys. However, there remains ample scope for further strides in this sector through focused and enabling policies.
- For each of the districts, USA dominated as the bulk consumer.

6. Further, granular review at the level of 8-digit HSN has helped to identify the actual products which have made a mark in the export sector. The following table showcases the top 5 commodities exported in sports goods and toys sector in FY 2024-25.

Table 5: Top 5 commodities (export) in sports goods and toys sector in FY 2024-25

8-digit HS Codes	Commodities	Export Value (USD Million)	%Share in Export of HS-95	%Share in Total Export
95051000	Articles for christmas festivities	119.92	21.00	0.03
95030020	Non-electronic toys etc.	97.80	17.13	0.02
95069990	Other sports equipments	65.24	11.43	0.01
95030099	Others-of-tricycles, scooters, pedal cars and similar wheeled toys; dolls carriages; dolls; other toys; reduced-size	53.55	9.38	0.01
95069190	Other gymnastic/athletic requisites	24.88	4.36	0.01

Source: DGCI&S

- The above table lists the top five commodities under the broad category of sports goods and toys. HSN-95051000 (Articles for Christmas festivities) topped the list with USD 119.92 million worth of exports. USA, Germany and UK were the major destination countries of HSN-9505100 wherein Christmas is a key and significant celebration. The 2nd slot was occupied by HSN-95030020 (Non-electronic toys etc) with exports of USD 97.80 million. The top five commodities contributed nearly 63% of total exports of 2-digit HSN-95 although cumulatively these five commodities constituted very minimal share in India's total export basket.
7. Indian sports goods and toys industry has witnessed remarkable growth over the span of ten years. In absolute value terms, India's exports of sports goods and toys increased significantly and also its rank improved substantially as a global exporter, surpassing small players. However, robust policy formulations and structural overhaul are needed to occupy single digit rank as a global exporter. For several years, our domestic market was overflowed with Chinese sports and toys products. To curb the huge import, India increased the tariff from 20% to 70% in 2023. Domestic market of sports goods and toys experienced 27% decline in imports in FY 2022-23 vis-à-vis that of FY 2015-16 and from FY 2021-22, India turned up as a net exporter in this segment.

8. With the introduction of Quality Control in December, 2020, Indian sports goods and toys industry was able to manufacture high-end products for international buyers. However, in this process, some small-scale units which could not meet the standards had to shut their businesses (as per available reports on the internet). Under the ‘Districts as Export Hubs’ scheme, manufacturers as well as exporters were involved in handholding sessions. The scheme was quite successful however it is very recent and at the nascent stage. More states, if enrolled in this scheme may augment the export potential and increase sustainable employment opportunities. Additionally, innovative designs, improved packaging and extensive promotion of local toys are of utmost importance for the sector to expand its global footprint and over time further reduce import dependence.
