A STUDY ON THE APPLICATION AND COVERAGE OF GEOGRAPHICAL INDICATIONS FOR INDUSTRIAL/MANUFACTURED GOODS UNDER INDIA'S FREE TRADE AGREEMENTS (FTAs)

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KEY ABBREVIATIONS

&	And
AGRI.	Agriculture / Agricultural
ANNEX.	Annexure
AOO/ AO	Appellation of Origin
APEDA	Agricultural and Processed Food Products Export Development Authority
ASEAN	Association of South East Asian Nations
AU	Authorized Users
BIMSTEC	Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation
BOP	Balance of Payments
CAPEXIL	Chemicals and Allied Products Export Promotion Council
CECA	Comprehensive Economic Cooperation Agreement
CECPA	Comprehensive Economic Cooperation and Partnership Agreement
CEPA	Comprehensive Economic Partnership Agreement
CETA	Comprehensive Economic and Trade Agreement
CHEMEXCIL	Basic Chemicals, Pharmaceuticals and Cosmetics Export Promotion Council
CJEU	Court of Justice of the European Union
CLE	Council for Leather Exports
CN	Combined Nomenclature
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
CTIL	Centre for Trade and Investment Law
CTM	Certification Trade Mark
DC	Development Commissioner
DEFRA	Department for Environment, Food and Rural Affairs
DEPT.	Department
DGCI&S	Directorate General of Commercial Intelligence and Statistics
DGFT	Directorate General of Foreign Trade
DPIIT	Department for Promotion of Industry and Internal Trade

DTC	Direct To Customer
EC	European Communities
ECTA	Economic Cooperation and Trade Agreement
EEPC	Engineering Export Promotion Council, India
EFTA	European Free Trade Association
EPA	Economic Partnership Agreement
EPC	Export Promotion Council
EPCH	Export Promotion Council for Handicrafts
ESG	Environmental, Social, and Governance
esp.	especially
EU	European Union
EUIPO	European Union Intellectual Property Office
EVS	Early Harvest Scheme
FFDC	Fragrance & Flavour Development Centre
FTA	Free Trade Agreements
GATT	General Agreement on Tariffs and Trade
GCC	Gulf Cooperation Council
GeM	Government e-Marketplace
GI / GIs	Geographical Indications
GIA	Geographical Indications Act
GIGA	Geographical Indication of Goods (Registration and Protection) Act
GIR	Geographical Indications Registry
GKDT	Ganjam Kewda Development Trust
HEPC	Handloom Export Promotion Councils
HIMCOSTE	Himachal Pradesh Council for Science, Technology and Environment
HMRC	His Majesty's Revenue and Customs
HMS	Handloom Mark Scheme
HS/HSN	Harmonised System Nomenclature
IIFT	Indian Institute for Foreign Trade
IMFL	Indian Made Foreign Liquor
INR	Indian Rupee
IOS	Indication of Source
IP	Intellectual Property

IPAB	Intellectual Property Appellate Board.
IPFC	Intellectual Property Facilitation Centre
IPR	Intellectual Property Rights
ITC	Indian Trade Classification
KIPO	Korean Intellectual Property Office
KSDL	Karnataka Soaps & Detergents Limited
MAFF	Ministry of Agriculture, Forestry and Fisheries
MFN	Most Favoured Nation
MOST	Ministry of Science and Technology
MSME	Micro, Small & Medium Enterprises.
NABARD	National Bank for Agriculture and Rural Development
NIC	National Informatics Centre
NTM	Non-Tariff Measures
ODOP	One District One Product
ONDC	Open Network for Digital Commerce
OTOP	One Tambon One Product
OVOP	One Village One Product
PDO	Protected Designations of Origin
PFN	Protected Food Names
PGI	Protected Geographical Indications
QR	Quick Response
RCEP	Regional Comprehensive Economic Partnership
ROI	Return on Investment
ROO	Rules of Origin.
SAFFPF	Specific Agricultural, Forestry, Fishery products and Foodstuffs
SAFTA	South Asian Free Trade Area
SAIP	Saudi Authority for Intellectual Property
SIDBI	Small Industries Development Bank of India
SPS	Sanitary and Phytosanitary
SWOT	Strengths, Weaknesses, Opportunities, Threats
TCA	Trade and Cooperation Agreement
TEPA	Trade and Economic Partnership Agreement
TKDL	Traditional Knowledge Digital Library

TM	Trade Mark
TRIFED	Tribal Co-operative Marketing Development Federation of India
TRIPS	Agreement on Trade-Related Aspects of Intellectual Property Rights
TSG	Traditional Speciality Guaranteed
UAE	United Arab Emirates
UK	United Kingdom
UKIPO	United Kingdom Intellectual Property Office
US / USA	United States of America
USC	United States Code
USD	United States Dollars
USPTO	United States Patent and Trademark Office
VCO	Virgin Coconut Oil
VND	Vietnamese Dong
VTPC	Visvesvaraya Trade Promotion Centre
WIPO	World Intellectual Property Organization
WTO	World Trade Organization
YADEM	Youth Association for Development and Empowerment

EXECUTIVE SUMMARY

Context

Geographical Indications (GIs) are internationally recognised as a vital intellectual property (IP) tool for product differentiation and strategic trade diplomacy. While the Geographical Indications of Goods (Registration and Protection) Act, 1999 (GIGA), has established a robust domestic regime, the commercial, diplomatic, and developmental potential of these products is hindered by persistent gaps. India's extensive GI portfolio, with 658 products enjoying GI status domestically (as of December 2024), remains severely fragmented and underdeveloped, particularly in the manufactured goods sector. Since its first GI registration in 2004, only 23 are classified under the Indian 'manufactured/industrial' category, underscoring the underutilisation of this sector's trade potential**.** Despite this extensive portfolio, the ecosystem remains severely fragmented and underdeveloped, particularly in manufactured goods.

The study focuses on five thematic areas: Production (scale, technology); Market Access (branding, certification); Trade Barriers (tariff and non-tariff challenges); Policy Awareness; and Institutional Support. The Quantitative Component analysed five years of export data (January 2019 – December 2024) and mapped products using the Harmonised System (HS) classification as a proxy, necessitated by the severe lack of granular, GI-specific trade statistics. Analysis confirmed robust export potential in high-value categories, including HS 64 (Leather Footwear), HS 42 (Leather Articles), and HS 85 (Electrical Machinery). Regression analysis of HS2-level export data confirmed strong coefficients for HS64 (Leather Footwear), HS42 (Leather Articles), and HS82 (Tools, Locks, Scissors), highlighted HS33 (Essential Oils and Perfumes) as promising, while HS34 (Soaps and Candles) showed mixed results with weak volume but encouraging value trends.

Key Findings

Persistent structural failures impede the practical commercialisation of Indian GI assets. A high-priority challenge is the absence of distinct HSN codes for most GI-manufactured goods, rendering them invisible in global trade statistics and compounded by the lack of a centralised trade-performance database.

- Authorised User (AUs) registration: The AU registration framework remains excessively complex, constraining participation in clusters such as Kannauj Perfume and Meerut Scissors.

- Regulatory environment: Persistent excise and licensing requirements, coupled with inconsistent institutional engagement, continue to impede compliance and sectoral growth.

• Operational constraints: The absence of structured export support mechanisms, combined with elevated tariff levels and sustained competition from low-cost imports (notably affecting Mysore Agarbathi), undermines competitiveness.

• Quality assurance: The lack of a comprehensive quality control framework, inadequate branding and packaging standards, and the absence of QR-coded authentication all dilute product integrity.

• Infrastructure deficits: Insufficient R&D funding and the non-availability of Common Facility Centres (CFCs) restrict innovation and scale.

• Social dimensions: Generational skill gaps, labour market vulnerabilities, and pressing occupational health risks for women workers highlight the need for targeted social safeguards.

International Cooperation and Diplomatic Shortfall

FTAs are increasingly serving as platforms for countries to secure higher standards of IP protection (TRIPS-Plus), including the mutual recognition of GIs. Yet, India's FTAs have largely underutilised this opportunity. While India's trade network spans a range of FTAs (signed partners include SAFTA, ASEAN, Japan, South Korea, Mauritius, UAE, Australia, and EFTA members), only a few existing agreements, such as those with Japan and the UAE, contain explicit GI provisions. Consequently, India has not acceded to the Geneva Act of the Lisbon Agreement (2015). Its limited international presence, with only two GIs (Darjeeling Tea and Kangra Tea) registered under the EU's Protected Geographical Indication scheme, underscores the urgent need for proactive international protection.

Policy Recommendations

Comprehensive reforms remain necessary to unlock the trade potential of Indian GIs. These interventions must align with the Policy Recommendations. Priority must be given to expanding the HS code for GI-tagged products. For quality, India must establish mandatory, product-specific GI standards and implement digital traceability through QR codes. India can draw lessons from the EU's PDO/PGI system and its new 2025 regulation, which extends GI protection to craft and industrial goods, thereby embedding quality control and branding into trade policy. Compulsory registration of genuine producers as AUs and mandatory annual compliance reporting are required to strengthen governance.

Diplomacy must accelerate

India should formally accede to the Geneva Act (2015) and systematically pursue TRIPS-Plus chapters in all trade negotiations (including Ongoing Negotiations: Israel, Canada, GCC states, Peru). The forthcoming EU–India FTA is expected to become the first comprehensive agreement dedicated to GIs, marking a critical step in embedding GI protection within India's trade diplomacy.

Way Forward

A key takeaway is that India's strategy must move beyond the sui generis route, adopting a dual registration approach and incorporating GI provisions into trade diplomacy to unlock its full economic and cultural potential. Comprehensive reforms must be synchronised with international best practices, ensuring that India's GI framework is competitive, transparent, and globally recognised. Embedding GI protection into trade diplomacy, strengthening institutional governance, and adopting digital traceability will position Indian manufactured GIs as credible assets in global markets. By integrating domestic reforms with proactive international engagement, India can transform its GI assets into engines of economic growth, cultural diplomacy, and sustainable development.

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1. INTRODUCTION

1.1 Overview of the research

This research titled "***A study on the application and coverage of Geographical Indication for Industrial/Manufactured Goods under India's Free Trade Agreements (FTA)***" deals with the examination of India's geographical indications (hereinafter referred to as "GI" or "GIs") especially those falling in the category of 'manufactured/ industrial' goods; and its scope of protection under India's Free Trade Agreements (hereinafter "FTA").

It is evident that GI, as a vital instrument of intellectual property ("IP"), has significantly contributed to enhancing the socio-economic conditions of local producers and industries. By enabling producers to leverage their region's unique characteristics, skilled craftsmanship, and cultural heritage, GIs foster regional economic growth and provide opportunities to position these distinct attributes in domestic and global markets.

However, an analysis of the 658 registered GIs (as of December 2024) in India reveals a notable disparity: approximately 90% of the registered goods fall under agricultural, handicrafts, or foodstuff categories, while only a modest 8.3%, as per data from the official GI Registry website (https://ipindia.gov.in/registered-gls.htm), are classified as "manufactured goods." Only around 55 goods are registered as 'GI' under the 'manufactured goods' category, of which approximately 23 are of Indian origin.

This research aims to evaluate the current status of these registered manufactured goods within India's IP framework and to explore potential candidates for GI registration in this category, considering several broader product categories based on their nature, uniqueness, quality and reputation. Furthermore, it examines the export potential of these manufactured goods by analysing their performance in international trade markets. However, here we would like to notify that the central objective of the research is to assess whether integrating GI-tagged manufactured or industrial goods into India's bilateral and multilateral trade agreements, particularly FTAs, could enhance their export performance and international reach. The study shall comprehensively analyse the relevant international rules governing GI protection and different models of GI protection adopted by countries worldwide – especially with a particular focus on jurisdictions with which India has, or seeks to establish, trading relationships through FTAs.

In essence, this research seeks to bridge the gap in GI representation for manufactured goods, leveraging their potential to bolster exports and contribute to India's economic growth in the global marketplace.

1.2 Background of the research

In the modern global economy, the growing emphasis on high-quality goods stems from several factors, such as heightened consumer awareness towards a product's geographical origin, its quality or its popularity & reputation. It also carries an appreciation for the cultural and traditional heritage associated with the product, particularly when the product is a handicraft, foodstuff, manufactured good, or textile. Over time, consumers have started to increasingly favour goods that are explicitly linked to their place of origin, particularly those produced using traditional techniques, which also showcase the ingenious skills, knowledge, and dexterity of craftsmen, artisans, and other producers of those goods. This trend highlights the significance of a 'geographical origin' as a key differentiating factor in the marketplace. It also presents an opportunity for producers of value-added goods linked to specific geographical regions to differentiate themselves from similar product categories and access more profitable niche markets, rather than competing in traditional commodity markets. Consequently, this 'geographical origin' serves as a key strategy for price differentiation in the market and offers a valuable competitive edge. Due to the recognition and reputation these 'geographically distinctive' goods hold, it has become crucial to implement protective measures globally to preserve their authenticity, maintain quality in trade and safeguard their position in the marketplace.[i] However, the effectiveness of this approach relies on the existence of measures (both legal and administrative in nature) that ensure the localised production, registration, and protection of value-added or high-quality goods associated with a specific locality/ region.

In this context, GIs, as part of the domain of laws relating to intellectual property rights ("IPR"), play a crucial role in protecting, promoting, and preserving goods associated with specific regions or locations. GI acts as an indicator certifying that a product comes from a designated country or region and possesses unique qualities, a reputation or distinct attributes associated with the place of origin, considering both its natural and human factors. GIs pertain not only to agricultural and food goods but also other categories, as the distinctive qualities and attributes of these goods arise from human factors inherent to their place of origin, which includes specialised manufacturing skills, knowledge and traditions. Hence, GIs have emerged as a crucial instrument for intellectual property ("IP") protection. It signifies more than just a product's source; it also embodies historical continuity and shared practices, deeply connected to the environmental and cultural factors of its

place of origin. GIs serve as symbols of skilled and high-quality craftsmanship, thus offering economic benefits to local producers while fostering consumer trust. At the same time, GIs exhibit several characteristics that can influence entire supply chains and even other regional goods, promoting business clustering and rural development. They encapsulate the unique qualities derived from the natural environment (terroir), along with traditional production and processing techniques that are often challenging to replicate elsewhere. While GIs are considered a 'public good', it is pertinent that legal and administrative measures regarding the protection of GIs are well-structured to ensure that the producers of the region accrue fair and equitable benefits, growth, and are not affected by acts of misuse and misrepresentation of their region's unique product.[ii]

The Agreement on Trade-Related Aspects of Intellectual Property Rights (hereinafter "TRIPS Agreement") of 1995, which applies to all member nations of the World Trade Organization ("WTO"), formally defined 'GIs' for the first time. It also established a framework for their protection. Under TRIPS, GIs must be safeguarded by legal means to prevent consumer deception regarding product origin and to discourage unfair competition. Additionally, WTO members have the flexibility to implement various legal mechanisms to enforce the protection of the GIs. Notably, the TRIPS Agreement states that the GI protection on goods shall apply to all types of goods without restriction, ensuring broad applicability. WTO member countries, in compliance with the mandate of TRIPS have adopted national-level legal rules and frameworks on GI protection either through – (i) a '*sui-generis*' framework for protection and registration of GIs, (ii) national laws dedicated to business practices such as – laws against unfair competition or laws on consumer protection, or (iii) a trademark law-based approach (wherein certification marks or collective marks are used).

During TRIPS negotiations, two models of GI protection emerged. The United States relied on trademark and unfair competition laws, arguing these were sufficient. The European Union pressed for a sui generis system with a dedicated register. TRIPS set only minimum standards, requiring members to prevent misleading use and unfair competition, while leaving flexibility in implementation. Some countries adopted the EU model, others followed the US approach. India chose the EU path, introducing the Geographical Indications of Goods (Registration and Protection) Act, 1999. Actually, the TRIPS Agreement (1995) does not mandate a singular method for GI protection. Instead, it requires member states to provide the 'legal means' to prevent: (i) *misleading use of GIs* or (ii) *unfair competition*.[iii] This is one of the TRIPS' minimum-level standards, which resonates as a baseline standard for GI protection.[iv]

In terms of economic impact, GIs have a significant effect on international trade and exports, considering that these goods often command a premium price in global markets due to their authenticity and high-quality perception. This makes them valuable assets for economies that seek to export their high-quality, reputable goods. Such actions can help farmers, producers, and artisans gain access to international markets while reducing unfair competition from counterfeit ones. Recognising this economic potential, nations worldwide have been actively securing GI recognition in foreign jurisdictions to strengthen their market presence.

Over time, FTAs have emerged as a key policy tool for promoting and protecting GIs in international trade negotiations. Traditionally, FTAs focused on reducing tariffs and trade barriers; however, in recent years, intellectual property provisions, including GI protection, have become central to these agreements. Through bilateral and multilateral trade negotiations, countries aim to secure the mutual recognition of their GI-certified goods, thereby enabling them to access new markets with legal protection against unfair competition. The inclusion of GIs in FTAs not only strengthens trade relations but also fosters economic diplomacy, as nations use these agreements to safeguard their economic interests.

FTAs were chosen because the WTO's TRIPS Agreement, the most comprehensive international agreement on intellectual property to date, establishes only minimum protection standards that member countries must uphold. It outlines key aspects of protection, including the subject matter covered, the rights granted, permissible exceptions, the minimum period of protection, principles of 'most-favoured nation' treatment and national treatment, and specific enforcement and countermeasures. Given this foundational level of protection for GIs, it allowed countries significant flexibility to shape their domestic laws according to their socio-economic priorities while meeting the minimum requirements.[v] Consequently, different jurisdictions have adopted varied approaches to protecting GIs. However, developed nations, such as the United States of America and regional political/ economic blocs like the European Union (EU), aimed to promote their preferred IP protection frameworks by incorporating TRIPs-Plus standards into their FTAs.[vi] The US aimed to standardise TRIPS-Plus provisions in most areas of IP, excluding GIs, as it treated GIs as a subset of trademark law. In contrast, the EU actively promoted stronger GI safeguards. These differing approaches are evident in the FTAs they have negotiated with other nations. Now, TRIPS-Plus standards are generally attached to bilateral agreements that require a Member state of the WTO to implement a more extensive standard, or eliminate an option for a Member under the TRIPS Agreement.[vii] For instance, under TRIPS, Article 22 provides general protection against misleading use of GIs, while Article 23 offers additional safeguards for wines and spirits. In the context of GI protection, a TRIPS-Plus standard could mandate enhanced

protection for all categories of GI goods, allowing countries to flexibly extend the higher level of GI protection for wines and spirits to other categories of goods as well. A bilateral agreement may mandate more rigorous enforcement measures or require a member state to establish a mandatory GI registration system within its domestic legal framework. Under TRIPS-Plus agreements, countries may be required to phase out the use of generic terms for non-GI goods. In essence, a TRIPS-Plus agreement, such as FTAs, governs the same subject matter as the TRIPS Agreement but introduces an extra layer of regulations, further reinforcing the existing provisions.

For instance, if we examine the situation of the EU, it has been witnessed that the European Union's legal framework for GI protection (to be discussed in a later stage of the report) is regarded as the most sophisticated system worldwide, reflecting Europe's longstanding tradition of safeguarding goods linked to 'terroir'. Consumer preferences, particularly for quality and reputation, have contributed to a thriving GI market in Europe. Even non-European GIs perform well in European markets, encouraging producers from other regions to seek registration under EU Regulations and schemes for GI protection. Simultaneously, the EU aims to extend GI protection beyond its borders. In this context, FTAs serve as an effective mechanism benefiting both the EU and other countries seeking broader recognition for their domestic GIs. An FTA that secures extensive GI protection for both parties shall create a mutually beneficial outcome.[viii]

As per the latest 2024 data, based on the annual survey of intellectual property (IP) activity around the world carried out by WIPO, a total of 5,376 GIs are in force throughout the EU regional system, in every member state, and around 1,800 of them are protected under regional trade agreements.[ix] The EU's commitment to GI protection in trade agreements remains strong. In its trade agreements or standalone GI agreements, the EU offers direct protection for GIs by mutually recognising and listing them, ensuring a high level of protection beyond the provisions of Articles 22 and 23 of the TRIPS Agreement. However, across different EU trade agreements, both the list of protected GIs and the degree of protection vary. The motivation for securing additional GI protection through FTAs in other countries is driven not only by economic interests but also by cultural considerations.

The EU's TRIPS-Plus approach to GI protection in trade agreements includes the following, generally[x] –

(a) Expanding the heightened level of protection currently granted to wines and spirits to cover additional protection for its agricultural goods.

(b) Establishing a register for GIs that would have legal implications for both participating and non-participating countries.

(c) Prohibiting the use of, invalidating, or rejecting trademarks that incorporate or imitate a GI.

(d) Reviewing exceptions and limitations on GI protection to balance the rights of existing producers while safeguarding well-known GIs.

(e) Enhancing the global visibility and promotion of domestic GI goods of partner countries.

With this motive, the EU actively pursued bilateral agreements with several countries (which shall be discussed in the report) to strengthen market access and visibility of their GIs, which include wines, spirits, and other alcoholic beverages, thus leveraging its competitive advantage in these sectors. Now, we see that clauses on protection of GIs have become a central component of most FTAs negotiated by the EU.

At the same time, other countries from the Asian and South American regions have become increasingly proactive in shaping their GI protection frameworks, driven by a growing recognition of the socio-economic benefits associated with GIs. Many countries have expanded their presence in the international agro-food market and industrial sector, now viewing GIs as a strategic tool for market growth and tapping into the growing global demand for region-specific goods. These countries are negotiating with the EU and the US, given the relatively recent adoption of GI laws and regulations in their domestic legal framework. They are working to align their national GI frameworks with international standards and commitments.

Taking this into account, it is crucial to analyse India's approach to GI protection and its role in FTAs. With a commendable portfolio of GI-tagged goods, effective implementation of sui-generis legislation, and increasing engagement in global trade, a thorough examination is needed to determine how India can effectively leverage its GI goods in international markets. This research, therefore, aims to explore how India is currently navigating the evolving GI landscape and how it will comply with best practices globally within the context of FTAs.

However, we do not yet have a concrete, standalone agreement on GIs. Out of the FTAs already signed by India and put into effect, only two of them include general clauses regarding the mutual recognition of GIs and the promotion of GI goods in trade. Interestingly, we are currently engaged in ongoing negotiations with the EU for the first-ever standalone GI Trade Agreement, which has progressed through six rounds since 2022. The discussions primarily centred on clarifying the domestic systems of the EU and examining the provisions of the agreement. Both parties are highly enthusiastic about promoting their GIs internationally and are deeply interested in collaborating and organising joint events to showcase their GIs. Issues such as India's appeal for

extending protection to non-agricultural GIs as well, the inclusion of control and enforcement provisions crucial for implementing the agreement were discussed. India's need to register AUs for each GI, and the EU's request for a heightened level of protection (Article 23+ TRIPS) that goes beyond wines and spirits, were the crux of the negotiations. Until the third round of talks in December 2022, the EU emphasised the protection (under the agreement) of 28 EU GIs that are already registered in India through domestic legislation.

In 2023, the negotiations covered topics and perspectives in which potential modalities for the inclusion of non-agricultural GIs in the scope of the agreement were discussed; however, they were contingent upon the applicability clause that the EU would come up with a regulation on the protection of crafts and industrial GIs. In 2023, the European Union extended GI protection to craft and industrial goods, covering products such as jewellery, textiles, glass and porcelain. The regulation will apply from 2025. Once applicable, craft and industrial goods, such as jewellery, textiles, lace, glass, or porcelain (among others), will be able to benefit from GI protection. In the March 2024 negotiations, an agreement was reached on the exchange of GI lists comprising 200 names, which will provide protection for both parties in their respective regions. In such a situation, India must emphasise the inclusion of the maximum number of industrial & manufactured GI goods ('non-agricultural goods') in the trade agreement and receive the necessary protection under law.

To accomplish this objective, this comprehensive research seeks to assess the potential of both existing and prospective non-agricultural GIs, especially those falling under the manufactured/ industrial goods category. The primary aim of this research is to undertake a thorough examination of India's domestic GI framework, analysing its strengths, gaps, and overall effectiveness. Additionally, the study aims to assess the export potential of India's industrial and manufactured goods, which currently enjoy GI protection in the region, and to identify other promising goods that may qualify for such recognition in the future.

The ultimate goal is to map consumer demand and market opportunities for India's GIs on a global scale, with a particular focus on industrial and manufactured categories such as wines and spirits, gems and jewellery, perfumes, essential oils, leather goods, metallic tools and equipment, hand-tools, soaps, candles, ceramic tiles, granite goods and other goods of similar nature. Through this approach, the research aspires to enhance the protection, promotion and international market visibility of our nation's promising GI goods. However, a key strategy in achieving this would be to leverage bilateral trade agreements that incorporate TRIPS-Plus provisions, thereby ensuring

stronger safeguards and market access for India's goods in multiple international markets, including its key trading and FTA partners.

1.3 Scope of Work/ Terms of Reference

(a) An in-depth study of the different models of GI protection in select jurisdictions (to be identified in due course), including the protection for industrial/ manufactured goods.

(b) A comprehensive examination of the domestic regimes in India, as well as India's key trading partners, for GI protection (including industrial/ manufactured goods protection).

(c) Identifying industrial/ manufactured goods that may be eligible for GI protection in India and their subsequent promotion through protection under India's FTAs.

(d) A detailed examination of:

- Export data of India's GI-protected goods to key jurisdictions;
- Export data and export potential of India's GI-protected industrial/manufactured goods to key jurisdictions; and
- Export potential of the industrial/manufactured goods that may be eligible for GI protection for their subsequent promotion through protection under India's FTAs.

(e) Comprehensive policy recommendations for:

- Improving the GI regulatory landscape in India;
- India's FTA practice in relation to GI protection;
- Increasing exports of GI-protected industrial/ manufactured goods, including through FTAs.

Considering the 'scope of work', our focus has been on gathering and analysing data related to GIs that are registered or have the potential to be identified and registered as 'manufactured GI goods' in India. Additionally, we have examined India's current 13 signed Free Trade Agreements (FTAs), including the India-European Free Trade Association (EFTA) Trade and Economic Partnership Agreement, which India has signed but not yet enforced.[xi] Subject to the scope of work, our analysis regarding these FTAs, along with some other trade agreements currently under negotiations or being planned, shall deal with intellectual property rights (IPR) and provisions for GI registration and protection only.

This report will assess India's approach to protecting GIs in international markets and explore strategies to utilise TRIPS-plus standards in its bilateral and multilateral trade agreements to enhance the protection of Indian GIs, particularly for manufactured goods. It will also examine how India can negotiate within existing and prospective free-trade agreements (FTAs) to secure stronger protection and enforcement of its GIs abroad and mitigate acts of unfair competition

abroad, considering their market presence there and export potential. Additionally, the report will examine the development of standards, policy measures, and other strategies within India's GI framework to facilitate the proper commercialisation of GIs in international markets, in accordance with global standards, and promote the export of these goods. There is ample significance to GIs in the promotion of Indian merchandise exports, as well as the role of FTAs in securing protection and recognition of GI goods across international markets. The report shall highlight how countries, including India, are already utilising or yet to utilise (depending on their economic interests) such 'significance' and other mechanisms strategically to enhance their financial and cultural standing in global trade.

1.4 Research Gaps & Limitations

The research has identified several limitations during the process that hinder a comprehensive evaluation. These gaps stem from issues related to the classification of goods according to international trade regulations (such as Harmonised System codification), the market presence of newly registered GI goods, policy enforcement, and data availability, which collectively impact the trade potential and legal protection of GI-tagged manufactured goods. Additionally, the research is limited to a specific timeframe, covering only the past five financial years from 2019 to 2024, and considers the number of GI registrations of India as of December 31st, 2024. All records and statistical data regarding the number of GIs and trade agreements are still for the financial year 2023-2024. Any developments beyond this period are not reflected in the findings, which may impact the comprehensiveness of long-term trends and policy implications.

(a) GI-tagged manufactured goods presently do not have distinct Harmonised System Nomenclature ("HSN") Codes, a standardised numerical system used in international trade to classify goods.[xii] This presents a significant barrier to tracking their trade patterns and assessing their global market potential. Currently, GI goods are often classified under broad, generalised categories that encompass all other goods within the industry. For instance, Agra Leather footwear will be accounted for under the 'Leather Footwear industry,' and its independent trade statistics will be missing. This generalised classification diminishes the unique cultural and geographical significance of GI goods, contradicting the fundamental purpose of commercialising the GI product in international markets.

(b) There are no dedicated government reports or datasets that specifically record the export trends and trade performance of GI-tagged manufactured goods. The absence of structured monitoring, data collection, and maintenance by government agencies, export

promotion councils, or producers' organisations makes it challenging to evaluate their actual export potential, economic contribution, and international market reception.

(c) The research identifies anomalies in the categorisation of GI-tagged goods between the 'handicrafts' and 'manufactured goods' categories in India's One-District-One-Product ("ODOP") list, which has been utilised to identify potential goods. Details will be shared in the subsequent chapters of the report. Such discrepancies highlight significant challenges in ensuring category-wise accuracy, which is crucial for maintaining consistency in government records and policy formulation, as well.

(d) A significant limitation in the commercial utilisation of GIs in India is the restricted number of registered AUs. According to Indian law, only AUs listed in the GI Registry (GIR) can legally produce, market, and sell GI goods. However, out of the 23 GI-manufactured goods analysed in this research, only a few have registered AUs. This presents several challenges. Many genuine producers remain unregistered, preventing them from leveraging GI protection for market expansion. To maximise the benefits of GI protection, more producers need to be encouraged and assisted in registering as AUs, ensuring wider and more effective market access for GI-manufactured goods.

(e) Despite multiple outreach efforts, the research faced significant challenges and limitations in acquiring concrete and accurate statistical data regarding production volumes and export figures for GI-tagged manufactured goods, the economic impact of their trade performance, and other related market trends. The reluctance or inability of stakeholders to provide structured data restricts the empirical validation of trade performance. This underscores the need for more transparent and structured data-sharing mechanisms between industry stakeholders and the public.

(f) A crucial limitation is that most of the Free Trade Agreements signed and enforced between India and its partners do not explicitly list or recognise our GI goods. We have yet to develop a policy and strategy for leveraging our GI goods in foreign trade and negotiating dedicated provisions (TRIPS-Plus) for our goods in the currently negotiated FTAs and future negotiations. We are unable to base our research on any of the Indian FTAs for analysing the development of policies and provisions related to the protection and promotion of GIs.

(g) A notable limitation of the research is the absence of a unified dataset for the EU. Disaggregated, country-specific data for all 27 EU Member States was unavailable, and it seemed to be inconsistently monitored, making it impractical to construct a comprehensive EU country group index, unlike other blocs such as ASEAN and EFTA.

1.5 Methodology

To successfully carry out the research described in the scope of work, we have employed a mixed-methods research approach that combines elements of both qualitative and quantitative methodologies to ensure a comprehensive assessment. We have obtained secondary data from trade databases, news sources, government reports and articles, websites, academic studies, working papers, and journals, which will be utilised in our research. In addition to that, meetings were organised to collect preliminary findings & inputs from concerned stakeholders.

Our objective is to identify GI-tagged manufactured/industrial products with high export potential and evaluate their trade prospects in a quantifiable manner. For this purpose, we have employed the export data of such manufactured/industrial GI goods of India (registered and potential GI applications), based on their product category or class in key jurisdictions. We have limited our study to

(a) jurisdictions with which India has signed an FTA with,
(b) jurisdictions with ongoing FTA negotiations with India

To capture the impact of the selected GI-tagged items on India's total export generation to each country/ country association, we study both export volumes (in thousands of units) and export values (in USD millions) over the past five years, i.e., from 2019 to 2024. This would give us a holistic understanding of each product's true trade potential. Nevertheless, specific issues arise due to the limited availability of data. Moreover, in the globally standardised HS classification system, products are coded at the HS-6 level, which allows for a wider range of products while maintaining a uniform description across all countries, thereby enabling broader comparability. However, beyond HS-6 (i.e., at the HS-8 or HS-10 level), certain countries also employ these classifications, which may vary based on individual country-specific tariff lines.

According to our understanding, India's publicly available export data, particularly through the Ministry of Commerce's Trade Statistics (Export Import Data Bank), is accessible at the HS-2, HS-4, HS-6, and HS-8-digit levels. However, the GI products are yet to be mapped with the specific HSN codes. We obtained the product-wise export data, which also had a similar limitation regarding mapping to specific GI product tags. Lastly, for a more detailed monthly study, country-specific data were required, which were only available to us at the HS2 level. This is because monthly data is desirable to identify patterns of growth within the product markets across various jurisdictions, to find high-growth international markets.

The study addressed these limitations by employing an alternative data source, which was categorised at the HS2 level. This source contained monthly data for specific countries. Three recommended methods are: (A) utilising HS2 data as a proxy in conjunction with HS6 and external sources; (B) relying on five-yearly data supplemented by other sources; and (C) relying solely on external data sources. However, method (A) has proved to work well, given the limitations we faced in procuring accurate data.

The trade performance of the identified goods will be evaluated by comparing data from both periods, i.e., the months preceding and following GI certification. Furthermore, the influence of Free Trade Agreements (FTAs) in India will be analysed to comprehend the trade dynamics of the GI product categories encompassed in this research. This entails examining the impact of trade in each category (according to HS2 data) and commodity on specific regions after the establishment of FTAs between India and its partner countries.

The quantitative analysis will primarily involve studying the export trends of specific GI-manufactured goods (categorised by commodity and country, based on the jurisdictions mentioned earlier) over the mentioned time period. This will be further supplemented by qualitative analysis through direct engagement with stakeholders via group discussions, which will focus on trade challenges, opportunities, and current trade dynamics. This combined method will facilitate the assessment of growth rates in exports over recent years and also help identify indicators of export potential. Moreover, it will also approximate a market share in target regions. The evaluation of market share will be determined by the ratio of Indian exports to countries that import them, whereas export potential would be deduced using category-specific (HS2) data about particular GI goods (proxy with HS6).

Based on the final analysis, the selected GI products will be categorised as either top-performing or underperforming, depending on their export volumes and values. A prioritized list of HS Codes of product categories with significant export potential will be proposed, integrating findings from the detailed analysis incorporating both quantitative and qualitative approaches. The methodology includes fundamental statistical descriptions, trend analysis, growth rate calculations, and comparative market share evaluations. If significant evidence is present, advanced analytical techniques, including multivariate/ univariate time series analysis and panel regression, will be utilized. Separate indices will be created for FTA and ongoing FTA country groups. We will employ time series index regressions to conduct and assess the performance of specific categories within each group. Visual tools such as time-series plots, statistical tables and comparative growth charts will substantiate the conclusions.

The *'Bluebook: A Uniform System of Citation (19th Edition)*' shall be followed as citation style.

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2

2. GEOGRAPHICAL INDICATIONS & FREE TRADE AGREEMENTS – THEORETICAL FRAMEWORK

2.1 Global Context

GIs (GIs) are collective rights that link products to their place of origin, combining natural factors such as climate and soil with traditional know-how passed down through generations. Unlike trademarks, which identify the commercial origin of goods for individual businesses, GIs protect community heritage and reputation.[i] They strengthen producer bargaining power, support rural development, and prevent unfair competition.[ii] Empirical evidence shows that GIs enhance exports by signalling quality and authenticity, as illustrated by Champagne and Italian wines.[iii]

Internationally, GI protection has evolved through successive legal instruments: the Paris Convention (1883) recognised indications of source[iv]; the Madrid Agreement (1891) mandated action against false origin claims;[v] the Lisbon Agreement (1958) defined appellations of origin and created an international registration system;[vi] and the TRIPS Agreement (1994) set minimum standards, including enhanced protection for wines and spirits under Articles 22–24.[vii] The Geneva Act of 2015 modernised the Lisbon system, extending coverage to both appellations of origin and GIs, recognising transborder GIs, and providing indefinite protection.[viii]

Together, these developments highlight the global importance of GIs as instruments of trade[ix], cultural heritage, and economic development, while also revealing divergent approaches: the European Union's emphasis on sui generis systems and multilateral registers versus the United States' reliance on trademark law.

2.2 India's GI Framework

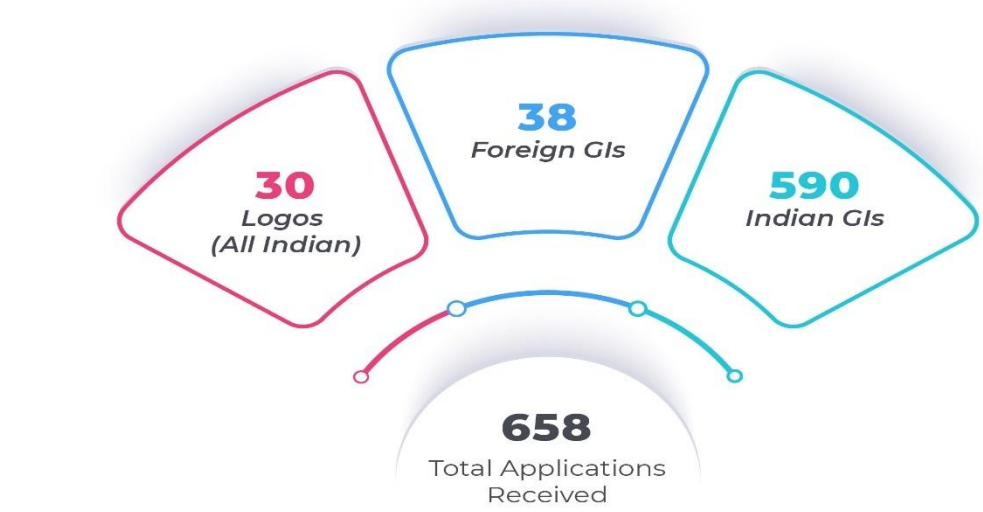
Before 1999, India relied on common law remedies such as passing off and consumer protection statutes to safeguard regional products.[x] The enactment of the Geographical Indications of Goods (Registration and Protection) Act, 1999 (hereinafter GIGA) marked a turning point, establishing a sui generis system with a dedicated GI Registry in Chennai.[xi] The Act aims to protect producers, prevent misuse, and promote exports. It grants exclusive rights to the authorised users, provides civil enforcement remedies, As of December 2024, 658 GIs including 628 products and 30 logos were registered covering agricultural goods, natural goods, handicrafts, manufactured items, and foodstuffs, thereby going beyond TRIPS minimum standards.[xii] The Act sets out a registration

process involving application, examination, publication, opposition, and registration for a renewable term of ten years each.[xiii]

Despite this robust framework, challenges remain. Producer awareness is limited, administrative processes are slow, enforcement is weak, and international recognition is scarce — only Darjeeling Tea and Kangra Tea have secured protection in the EU.[xiv] These gaps reduce the economic potential of GIs and limit their role in trade diplomacy.

Figures 3 and 4 illustrate the current GI landscape in India and the registration process. Together, they highlight both the achievements of India's system and the need for stronger institutional capacity to translate registrations into market value.

Figure 2.1 GI Landscape in India

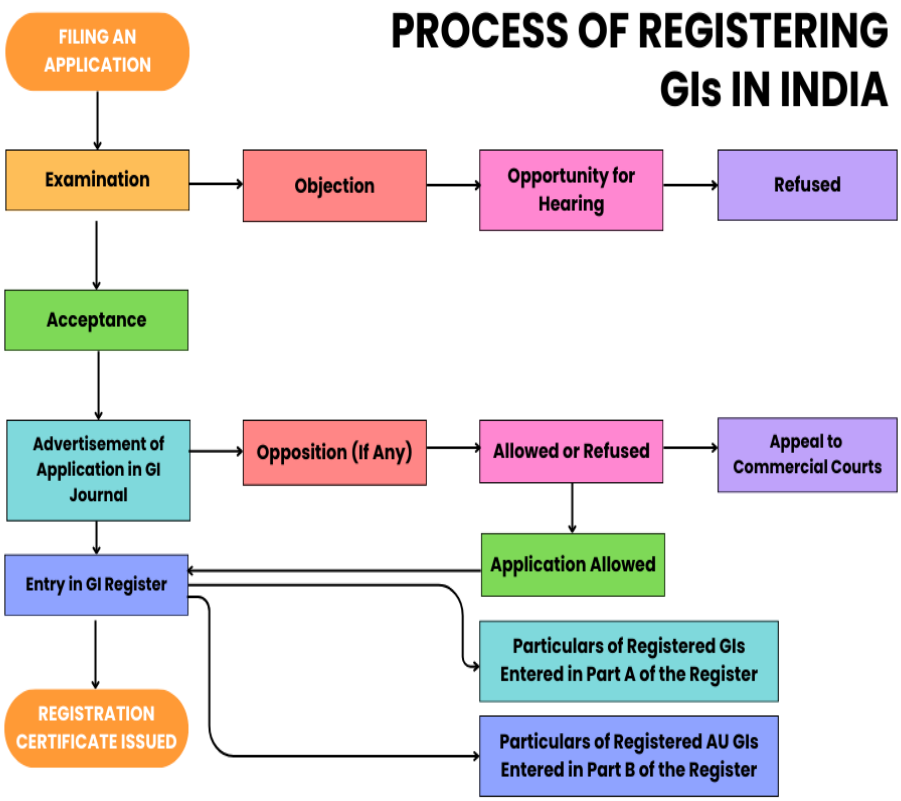


Geographical Indications in India

GI Applications in India (2004 - 2025)

Note: As of December 2024, India had registered 658 GIs, including 628 products and 30 logos.

Figure 2.2 : GI Registration Process in India



2.3 India's FTAs and GI Provisions

The growing importance of GIs is reflected in their inclusion in FTAs. The European Union (EU) has pursued a TRIPS-Plus approach, embedding extensive GI lists in agreements with Canada (CETA), South Korea (KOREU), Singapore (EUSFTA), Vietnam (EVFTA), Japan (JEFTA), China, and others, advancing cultural and commercial interests by embedding strong GI chapters within trade policy.[xv] In contrast, the United States advocates narrower GI protection under trademark law, as seen in the Korea-US (KORUS) agreement.[xvi] The European Free Trade Association (EFTA) countries (Switzerland, Norway, Iceland, and Liechtenstein) have also prioritised GI recognition in their recently concluded FTAs, including the 2024 agreement with India. EFTA typically extends protection automatically to all recognised GIs, rather than limiting

coverage to annexed lists, ensuring wider protection than the EU model.[xvii] Asian countries, through RCEP and bilateral agreements, have also begun to incorporate GI provisions, reflecting their increasing recognition of the economic and cultural value of GIs.[xviii]

These divergences highlight competing philosophies: the EU views GIs as instruments of cultural heritage and rural development, the US emphasises market competition and consumer choice, and the EFTA adopts a middle path by extending protection broadly[xix]. Together, these developments reflect intensifying global negotiations to expand GI protection as a core component of international trade governance.

India's FTAs mirror this global divergence. Early agreements such as those with Sri Lanka, SAFTA, Bhutan, and Nepal did not include intellectual property provisions. Later agreements with Singapore, ASEAN, South Korea, Japan, Mauritius, UAE, and EFTA incorporated GI protection, ranging from cooperation clauses to TRIPS-Plus safeguards. Table 2.1 summarises the coverage of IPRs in India's FTAs.

Table 2.1: Provision on IPRs in India's FTA

Sl. No.	Name of the FTA with year of implementation	Coverage or Discussion of IPRs (*esp. GI & TM*) [Yes/No]	Remarks
1.	India - Sri Lanka FTA (2000)	No	ISLFTA did not cover areas like IPRs.
2.	Agreement of SAFTA (2006)	No	It did not cover IPRs.
3.	India – Nepal Treaty of Trade (2023)	No	It did not cover IPRs.
4.	India – Bhutan Agreement on Trade Commerce and Transit (2017)	No	It did not cover IPRs.
5.	India – Thailand FTA (Early Harvest Scheme) (2004)	Yes	Article 3 & Article 6 (Facilitation and promotion of effective and adequate protection of trade-related aspects of IPRs based on existing WTO Agreements like TRIPS; India and Thailand agree to strengthen their cooperation in areas like IPR.)

6.	India – Singapore CECA (*Comprehensive Economic Cooperation Agreement*) (2005)	Yes	(Chapter 11) The Parties undertake to develop and promote mutually beneficial co-operation in this area of IPR which may include: (a) joint consideration of the organization of symposia, seminars, workshops and other training programs in Singapore and in India; and (b) joint consideration of collaboration in projects including the development of programmes, platforms, tools and other infrastructure to promote the effective use and application of intellectual property rights.
7.	India - ASEAN CECA (2010-11)	Yes	Included IPR in the area of cooperation. Cooperation among IPR agencies in India and ASEAN, including the enforcement of IPR rules and regulations, is encouraged.
8.	India – South Korea CEPA (*Comprehensive Economic Partnership Agreement*) (2010)	Yes	(Chapter 12) The Parties shall commit to promoting a strong and efficient regime of IPR in accordance with their laws and regulations. Both parties reaffirm their commitments under the TRIPS Agreement and agree to provide adequate and effective protection for IPR for each other's nationals within their respective territories. Either party may establish stronger IP protection in its laws than required under the TRIPS Agreement, as long as such measures are consistent with the provisions of the agreement.
9.	India – Japan CEPA (2011)	Yes	(Chapter 9, Article 107) Each Party shall ensure protection of GIs in accordance with its laws and regulations and in conformity with the TRIPS Agreement.
10.	India – Malaysia CECA (2011)	No	It does not cover the area of IPR.
11.	India – Mauritius CECPA (*Comprehensive Economic Cooperation and Partnership Agreement*) (2021)	Yes	(Article 2.18) The Parties agree to cooperate in ensuring adequate protection of IPRs.

12.	India – United Arab Emirates (UAE) CEPA (2022)	Yes	(Chapter 11; Section E- Article 11.24 on GIs) The Parties agree to provide adequate and effective protection for GIs in their domestic laws. This protection can be established through a trademark system, a sui generis system, or other legal frameworks, as long as they comply with the TRIPS Agreement. The agreement acknowledges that GIs can apply to various categories of goods, including agricultural goods, natural goods, manufactured goods, industrial goods, handicrafts, and foodstuffs. Furthermore, Article 11.12 mentions promotion and recognition of GIs.
13.	India – Australia ECTA (*Economic Cooperation and Trade Agreement*) (2022)	No	Does not contain general IPR or GI Chapter as of now.
14.	India – European Free Trade Association (EFTA) TEPA (*Trade and Economic Partnership Agreement*) (2025)	Yes	Article 1.1 (Clause 2-e) The objectives of this Agreement are to provide for adequate, effective and non-discriminatory protection and enforcement of IPRs. (Chapter 8) The chapter outlines the commitment of the parties to ensure adequate, effective, and non-discriminatory protection and enforcement of IPRs. This includes measures to combat infringement, counterfeiting, and piracy, aligned with the provisions of the agreement.

Note- The above table does not feature the India-UK CETA as it is yet to be implemented. It also does not refer to the India-EU trade talks as the trade deal has not been signed yet.

As of December 2024, India is engaged in a wide network of bilateral and regional FTA negotiations, several of which have been ongoing for over a decade. Among regional frameworks, the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC) remains limited to a framework agreement signed in 2004, with no progress on intellectual property or GI-related provisions[xx]. Similarly, bilateral negotiations with Australia (under the Comprehensive Economic Cooperation Agreement) and Israel have continued intermittently since

2011 and 2010, respectively, with the latest rounds in 2024 and 2018, but neither includes specific references to GIs.[xxi]

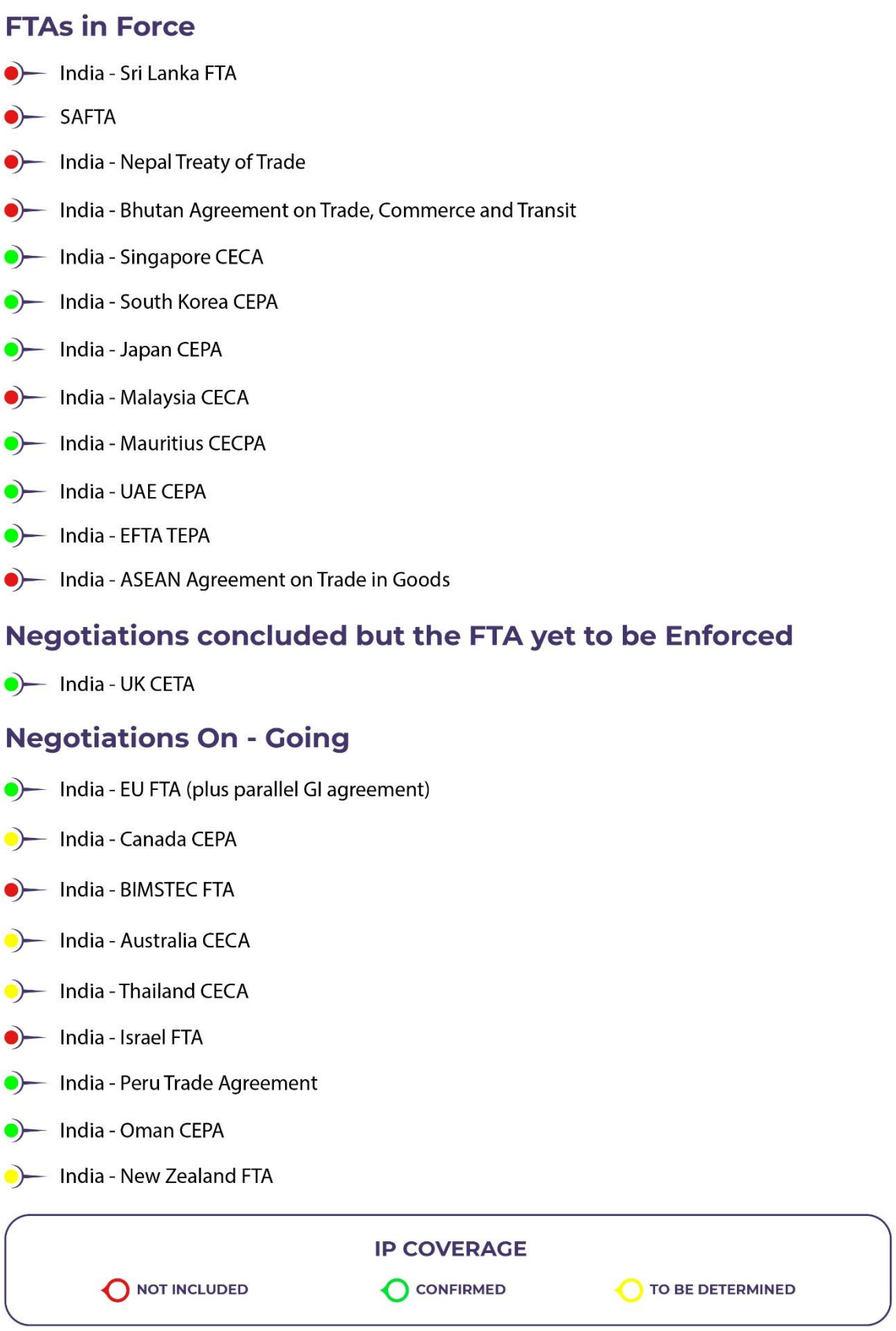
The India–European Union FTA remains India's most advanced and strategically significant trade negotiation in terms of intellectual property integration. Initially launched in 2007 but stalled in 2013, talks were revived in 2022 alongside parallel negotiations for a standalone GI Agreement.[xxii] In parallel, the India–United Kingdom FTA, launched in January 2022, concluded negotiations in May 2025 and was signed in July 2025. This agreement, modelled partly on the UK's post-Brexit trade commitments, includes explicit provisions for GI recognition and mutual protection.[xxiii]

Negotiations with Indonesia and Thailand under their respective Comprehensive Economic Cooperation Agreements have seen limited advancement, with the former paused due to the Regional Comprehensive Economic Partnership (RCEP) discussions and the latter's last meeting in 2016. Similarly, talks with Canada began in 2010 but have remained stalled since 2023 after ten negotiation rounds.[xxiv]

India's engagement with the Gulf Cooperation Council (GCC) dates back to a framework agreement signed in 2004, but formal negotiations have not progressed since 2008. More recently, bilateral talks have begun with Peru and Oman.[xxv]

Overall, while India maintains an expansive FTA agenda, only the agreements with the European Union and the United Kingdom explicitly include Geographical Indication provisions, marking a significant step toward integrating GI protection within India's trade policy. The absence of similar commitments in other ongoing or concluded negotiations highlights the continued need to mainstream GI recognition in India's bilateral and regional trade frameworks.[xxvi]

Figure 2.3 IPR in FTA negotiations of India



The most significant development is the India–UK Comprehensive Economic and Trade Agreement (2025). This agreement establishes India's strongest bilateral framework yet for GI protection, creating a public register, opposition and cancellation procedures, mutual protection lists, and enforcement mechanisms. Table 2.2 outlines these provisions.

Table 2.2: Provision on GIs in India-UK CETA

Article	Subject	Key Points
13.34	Scope	(a) Applies to GIs for wines, spirits, agricultural products, and foodstuffs through a sui generis system. (b) Other goods (e.g. handicrafts, natural goods) may be protected via sui generis, trademark, or other legal methods.
13.35	System for GI Protection	(a) Public register of GIs. (b) Examination process to verify the origin link. (c) Specific product specifications (amendable through proper process). (d) Opposition mechanism for third parties. (e) Legal right for legitimate users if the product meets the specification. (f) Cancellation procedure if conditions are no longer met.
13.36	Initial GIs	Parties may agree on an initial list of GIs for protection.
13.37	Additional GIs	New GIs may be added through consultations under the Working Group on Intellectual Property Rights.
13.38	GI Submission Procedures	(a) Submission of GI name and product specification. (b) Examination by the other Party. (c) Opposition process. (d) Updates and consultations on progress. (e) Reasons for any refusal must be shared. (f) Verification by recognised authority or certification body, if needed.
13.39	Modifying GI Lists	(a) GIs added after successful examination/opposition. (b) Balance maintained between Parties. (c) Removal is possible if GI loses protection in its origin country.
13.40	Mutual Protection	(a) The UK protects Indian GIs listed in Annexe 13B. (b) India protects UK GIs listed in Annexe 13B. (c) Indian handicrafts and other non-food GIs (Annexe 13C) can be applied under the UK trademark system.

13.41	Scope of Protection	(a) Prevent misleading use of GIs. (b) Prevent unfair competition. (c) Prevent misuse, even if geographically correct but misleading. (d) No protection for GIs that: conflict with plant/animal names, are generic, or conflict with prior trademarks. (e) Homonymous GIs must be differentiated.
13.42	Right of Use	Anyone may use a GI if the product meets legal specifications. Streamlined renewal process with prior notifications.
13.43	Relationship with Trademarks	Later trademarks are invalid if they conflict with a protected GI. Prior good-faith trademarks remain valid.
13.44	Enforcement	Authorities must enforce GI protection (on request or proactively)—contact points to be designated for enforcement queries.

These GI provisions mark a significant breakthrough for India, helping secure international recognition for a wide range of its agricultural, artisanal, and manufactured products. The India–UK FTA not only liberalises trade through substantial tariff reductions but also establishes India's strongest bilateral framework yet for mutual GI protection, offering TRIPS-Plus safeguards that extend beyond wines and spirits to additional categories of goods. While this enhanced protection benefits both countries, supporting market access for Indian GIs such as handicrafts and toys while safeguarding iconic UK products like Scotch whisky and Stilton cheese, its effectiveness will depend on robust domestic measures, including stronger producer capacity, improved certification and branding, and active enforcement against misuse. The final list of protected GIs is still under negotiation, and clarity on reciprocity, implementation procedures, and enforcement mechanisms remains essential. As the agreement comes into force, producers must ensure compliance with technical specifications and prepare to monitor and protect their GIs in the UK market to maximise these trade gains fully.

Together, these developments highlight India's shift from limited GI coverage in early FTAs to comprehensive protection in recent agreements. Embedding GI provisions systematically in future FTAs will be critical to unlocking export potential, safeguarding cultural heritage, and strengthening India's trade diplomacy.

2.4 Conclusion

India has built a strong domestic GI framework and begun embedding GI provisions in FTAs. . Yet enforcement gaps, limited producer awareness, and weak global recognition constrain their potential. This trajectory sets the foundation for examining how India can strengthen its GI regime and leverage it more effectively in international trade.

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3

3. JURISDICTIONAL ANALYSIS OF INDIA'S FTA PARTNERS

3.1 Jurisdictional analysis of India's FTA partners

India's expanding network of FTAs has brought intellectual property rights (IPRs), and particularly GIs (GIs), into sharper focus. As of December 2024, India had signed 13 FTAs and was negotiating with several major partners. Among these, Australia**,** and the **European Union (EU)** stand out as the most relevant jurisdictions for India's GI strategy. These partners not only represent significant export markets but also maintain some of the world's most sophisticated GI regimes.

Table 3.1 : India's FTA partners

Jurisdictions with signed / in-effect FTAs	**Jurisdictions with ongoing FTA or standalone GI Agreement negotiations**
Afghanistan, Bangladesh, Bhutan, Maldives, Nepal, Pakistan, Sri Lanka **(as SAFTA – South Asian Free Trade Area)**	European Union **(27 Member States in Europe) (Standalone GI Agreement being negotiated)**
Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam. **(as ASEAN - Association of Southeast Asian Nations)**	Israel
South Korea	Indonesia
Japan	Canada
Mauritius	Saudi Arabia, Oman, Kuwait, Bahrain, Qatar **(as GCC – Gulf Cooperation Council)**
United Arab Emirates	Peru
Australia	Oman
Iceland, Liechtenstein, Norway, Switzerland **(as EFTA - European Free Trade Association)**	

3.2 Detailed Insights about the jurisdictions: India's key FTA partners

GI Protection in Australia

In Australia, the protection of GIs is achieved through two primary mechanisms: registration as a Certification Trade Mark (CTM) under the Trade Marks Act or protection under the Wine Australia Act, specifically for wines.

Registration and Enforcement

For wines, GI applications are reviewed by the GI Committee, which defines geographic boundaries. These GIs are then formally registered with Wine Australia and recorded in the Register of Protected Geographical Indications, which serves as the official record for recognised wine-producing regions. In contrast, non-wine agricultural goods, such as food and beverages, do not have a separate GI registration system; instead, they are protected through the certification trademark mechanism. For CTMs, IP Australia forwards rules to the **Australian Competition and Consumer Commission (ACCC)** to ensure compliance with competition and consumer protection standards. The owner of a certification trademark is responsible for ensuring that only those producers who comply with the prescribed GI rules are authorised to use the indication.

In addition to statutory protections, common law remedies, particularly the tort of passing off, can also safeguard GI terms that are not registered either as certification trademarks or under wine-specific legislation. Australia currently has over 100 domestic wine GIs and more than 2,000 European GIs recognised under its system. This includes some of the world's most renowned names, such as Bordeaux, Mosel, Chianti, and Sherry.

Overall, Australia's GI protection framework combines statutory registration with common law remedies, ensuring that geographically significant products, especially wines, are protected against misuse and that consumers are accurately informed about the true origins of goods.

GI Protection in the European Union (EU)

The EU has developed the most comprehensive system of GI protection in the world. This sui generis framework is codified through a series of specialised regulations that, together, establish a harmonised and robust protection regime. The cornerstone of this system is Regulation (EU) No. 1151/2012, which governs quality schemes for agricultural products and foodstuffs. It is complemented by Regulation (EU) No. 1308/2013 for wines and Regulation (EU) 2019/787 for spirit drinks. In 2023, the EU further advanced this framework by adopting Regulation (EU) 2023/2411, which consolidates GI protection across various sectors and extends it to craft and

industrial goods, including jewellery, textiles, glass, and porcelain. This regulation will take effect in December 2025, marking a significant expansion of the GI regime beyond agricultural products. The India–European Union FTA is India's most advanced and strategically significant trade negotiation in terms of intellectual property integration, with talks revived in 2022 alongside parallel negotiations on a standalone GI Agreement.

The EU's system differentiates between three main categories of protection: Protected Designations of Origin (PDOs), Protected Geographical Indications (PGIs), and Traditional Specialities Guaranteed (TSGs). PDOs represent the highest level of protection, requiring that all stages of production, processing, and preparation occur within the designated region. PGIs offer slightly broader eligibility, requiring that at least one stage of production take place in the region, provided that the product's quality, reputation, or other characteristics are attributable to its origin. TSGs, on the other hand, do not depend on geographical origin but instead protect traditional methods of production or recipes that are part of Europe's cultural heritage.

Registration and Enforcement

The registration process for GIs in the EU involves both national and supranational levels of governance. Producers first submit their applications to the respective national authorities, which conduct preliminary checks before forwarding approved applications to the European Commission for further review. Once the Commission accepts an application, it is published in the Official Journal of the European Union, allowing a three-month period during which third parties may file objections. Enforcement of GIs is largely decentralised: each Member State designates competent authorities responsible for monitoring compliance, supported by customs, market surveillance bodies, and consumer protection agencies.

The EU's GI regime offers several notable strengths. It ensures harmonized protection across all 27 Member States and establishes TRIPS-plus standards, including safeguards against evocation and imitation. Enforcement mechanisms are strong, incorporating both administrative and criminal sanctions, and consumer trust in GI labels is remarkably high due to their association with quality, authenticity, and regional identity.

However, the system also faces particular challenges. The complex, multi-layered regulatory framework can be difficult for producers to navigate, and compliance often involves significant administrative and financial burdens. In some categories, the optional nature of GI labelling can also reduce the visibility and marketing potential of registered products.

GI Protection in the United Kingdom (UK)

Following Brexit, the UK established an independent GI protection system to safeguard product names marketed within Great Britain, comprising England, Scotland, and Wales. At the same time, the EU GI framework remains applicable to Northern Ireland and EU member states. Products that were registered under the EU GI schemes as of December 31, 2020, remain protected under both UK and EU regulations, ensuring continuity of rights during the transition period.

On 24 December 2020, the EU and the UK concluded a Trade and Cooperation Agreement (TCA) that defined their future relationship, effective from 1 January 2021. Under the TCA, from 1 January 2021 -

a) UK-origin GIs that were protected within the EU as of 31 December 2020 continue to enjoy protection across the EU27 countries;

b) EU-origin GIs that were registered in the EU as of that date were granted equivalent protection within the UK; and

c) New or pending EU GI applications no longer have automatic effect in Great Britain, requiring separate applications to the UK GI scheme for protection.

The UK GI system operates through distinct registers for various categories, including Protected Designation of Origin (PDO), Protected Geographical Indication (PGI), and Traditional Speciality Guaranteed (TSG), as well as separate registers for spirit drinks, wines, and aromatised wines. Each category is associated with distinct UK GI symbols, reflecting its classification and compliance with domestic standards.

Registration and Enforcement

To apply for GI protection, producers must complete a product specification, provide supporting evidence, and prepare a single summary document that outlines the product's characteristics. Once the Department for Environment, Food and Rural Affairs (DEFRA) receives a qualifying application, it is published online to allow for public scrutiny and objections. Third parties may object within three months of publication. Decisions on acceptance or rejection may be appealed to the First-tier Tribunal, ensuring procedural fairness and transparency.

After registration, producers are required to adhere strictly to product specifications and undergo conformity inspections. Regulatory authorities are empowered to enforce compliance, and violations may result in penalties of up to £40,000. Inspections for Protected Food Names (PFNs), spirits, and wines are conducted by local authorities, accredited inspection bodies, or HM Revenue

and Customs (HMRC). Non-compliance can lead to criminal proceedings under UK law. For foreign producers, inspections must be carried out by competent authorities in their own countries, with documentary proof of conformity submitted before products can be marketed in the UK.

Notably, GIs in the UK are not proprietary rights held by individuals or companies. Instead, any certified producer meeting the required product standards and specifications may use the registered GI name. This open, certification-based system ensures broad legal protection, encourages fair competition, and provides strict penalties for misuse or misrepresentation across all GI classifications, thereby preserving the authenticity, reputation, and economic value of regionally distinctive products in the post-Brexit UK market.

3.3 Analysis – Tabular representation

This analysis synthesises key legal, institutional, and operational insights from the three jurisdictions, assessing each on its protection model, unique features, and lessons for India.

Table 3.2 : Analysis of FTA jurisdictions

Country/ Region	Mode of Protection	Key Features	Lessons/Practices for India
European Union	Sui generis system under multiple EU Regulations	- Differentiated labels: PDO, PGI, TSG, - Separate criteria for each category (e.g., 100% origin for PDO; partial for PGI) - Specific logos for "Mountain Product" and "Outermost Regions" - Use of optional and mandatory GI labels depending on product category	- Introduce differentiated GI categories like PDO/PGI in India (based on quality and production terms) - Permit use of optional quality terms to incentivise premium production
Australia	Dual system: Certification Trade Mark (CTM) regime (for non-wine products) and the Wine Australia Act (for wines)	- Certification marks used as a substitute for the GI regime - Separate Wine GI Registry administered by Wine Australia - Ensures compliance with competition and consumer protection standards - Public objection mechanism for both wine and non-wine GI applications	- India could explore Wine Australia's clear geographic boundary system and international GI accommodation model for wines and spirits - Consider ACCC-style involvement for market competition & consumer interest review in GI regulation - Leverage the public objection and stakeholder consultation model in an efficient way to make GI registration more participatory.
United Kingdom	Independent Sui Generis GI System (Post-Brexit) for Great Britain; legacy EU	- Separate GI registers for PDO, PGI, TSG, wines, spirits, and aromatised wines	- Useful model for creating distinct visual GI identifiers (logos) across product classes - Consider adopting an independent tribunal

	protections retained for Northern Ireland	- Distinct UK GI logos/symbols introduced - Third-party objection and tribunal appeal system (First-tier Tribunal) - Penalties up to £40,000 and possible criminal liability for misuse	appeal system for faster dispute resolution - Reinforces importance of inspection & certification infrastructure for post-registration verification

3.4 Recommendations for India

Based on the institutional practices and novel features of the EU, UK, and Australian regimes, India can adopt several actionable measures to refine its existing *sui generis* framework and enhance trade leverage:

- **Implement Tiered GI Classifications:** India should introduce differentiated GI categories such as PDO, PGI, and TSG. The EU's model provides a mature template for this standalone, tiered GI registration system. This would enable India to reflect quality and production criteria across sectors better and stratify protection, providing separate criteria for each category (e.g., distinguishing between 100% origin compliance and partial compliance).

- **Strengthen Consumer Protection and Market Review:** India must incorporate a market-based oversight mechanism by considering ACCC-style involvement for market competition and consumer interest review in GI regulation. Australia's system, where the ACCC ensures **fair market practices** during GI approval, is a direct lesson for India, which currently lacks a similar competition watchdog role in GI vetting.

- **Enhance Enforcement and Certification Infrastructure:** The UK's robust post-Brexit system reinforces the importance of a detailed inspection and certification infrastructure for post-registration verification, supported by strong criminal penalties. India should ensure that its inspection capacity is strengthened and that non-compliance leads to explicit, punitive action, such as penalties comparable to those in the UK system.

- **Improve Dispute Resolution and Visual Identity:** India should consider adopting an independent tribunal appeal system for faster GI dispute resolution, similar to the UK's First-tier Tribunal. Additionally, the UK's successful introduction of distinct visual GI

identifiers (logos) across product classes is a valuable model for India to improve consumer recognition and GI visibility.

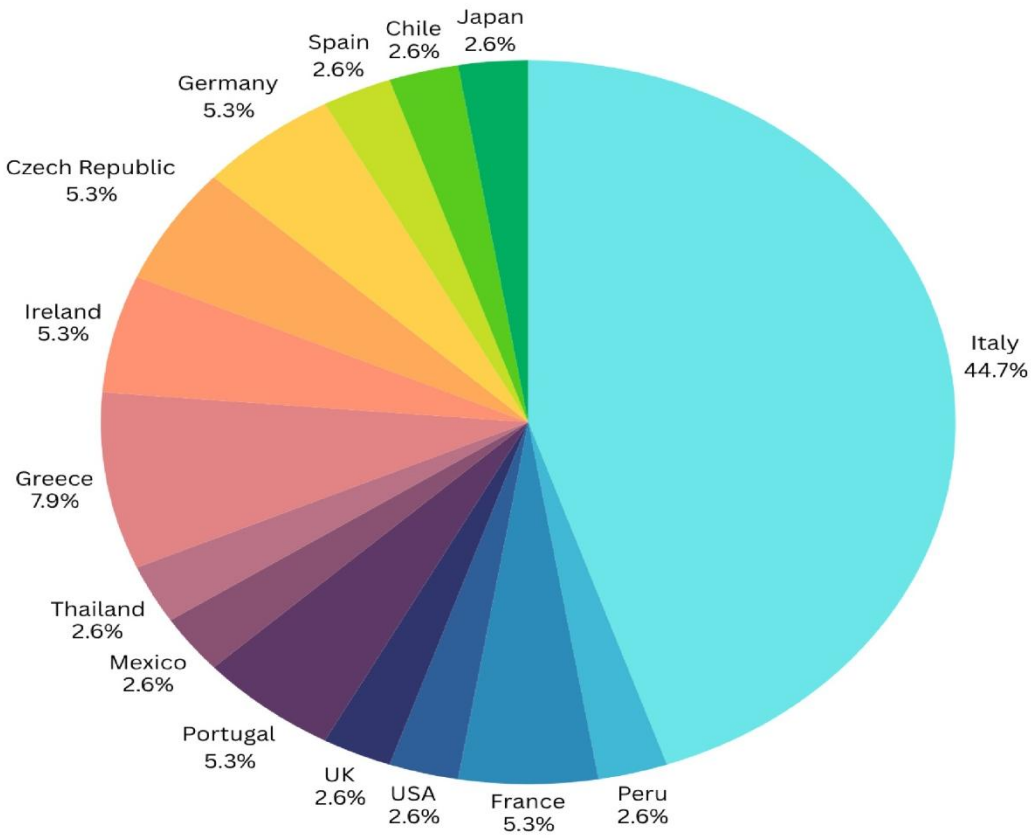
- **Expand Scope to Industrial/Craft Goods:** Following the EU's progressive regulatory changes, India should move towards recognition and protection of non-agricultural (industrial/manufactured) goods. The EU's new regulation**,** although not yet fully effective, grants recognition equivalent to that of agricultural GIs for craft goods like textiles and jewellery

4

4. INDUSTRIAL & MANUFACTURED PRODUCTS AS GEOGRAPHICAL INDICATIONS – AN ANALYSIS

4.1 Status of industrial/ manufactured goods registered as a GI in India (as of December 2024)

Figure 4.1: Foreign GIs registered in India (till December 2024)



There are 32 manufactured products of foreign origin registered as GIs in India under various sub-categories. Details of these 32 products are as follows: -

Table 4.1 Foreign goods registered as a manufactured GI in India (till December, 2024)

Sl. No.	Name of the Geographical Indication	Country of Origin	Product category
1.	Peruvian Pisco	Peru	Alcoholic Beverages/Wines/ Spirits
2.	Champagne	France	Alcoholic Beverages/ Wines/ Spirits
3.	Napa Valley	United States of America	Alcoholic Beverages/ Wines/ Spirits
4.	Scotch Whiskey	United Kingdom	Alcoholic Beverages/ Wines/ Spirits
5.	Cognac	France	Alcoholic Beverages/ Wines/ Spirits
6.	Porto	Portugal	Alcoholic Beverages/ Wines/ Spirits
7.	Douro	Portugal	Alcoholic Beverages/ Wines/ Spirits
8.	Tequila	Mexico	Alcoholic Beverages/ Wines/ Spirits
9.	Parmigiano Reggiano	Italy	Cheese
10.	Prosecco	Italy	Alcoholic Beverages/ Wines/ Spirits
11.	Grana Padano	Italy	Cheese
12.	Irish Whiskey	Ireland	Alcoholic Beverages/ Wines/ Spirits
13.	Chios Mastiha	Greece	Gum/ Resin
14.	Brunello Di Montalcino	Italy	Alcoholic Beverages/ Wines/ Spirits
15.	Lambrusco Di Sorbara	Italy	Alcoholic Beverages/ Wines/ Spirits
16.	Lambrusco Grasparossa Di Castelvetro	Italy	Alcoholic Beverages/ Wines/ Spirits
17.	Montepulciano D'abruzzo	Italy	Alcoholic Beverages/ Wines/ Spirits
18.	Žatecký chmel'	Czech Republic	Alcoholic Beverages/ Wines/ Spirits
19.	Münchener Bier	Germany	Alcoholic Beverages/ Wines/ Spirits
20.	Toscano	Italy	Alcoholic Beverages/ Wines/ Spirits
21.	Conegliano Valdobbiadene Prosecco	Italy	Alcoholic Beverages/ Wines/ Spirits
22.	Franciacorta	Italy	Alcoholic Beverages/ Wines/ Spirits
23.	Chianti	Italy	Alcoholic Beverages/ Wines/ Spirits

24.	Bayerisches Bier	Germany	Alcoholic Beverages/ Wines/ Spirits
25.	Irish Cream / Irish Cream Liqueur	Ireland	Alcoholic Beverages/ Wines/ Spirits
26.	Brandy De Jerez	Spain	Alcoholic Beverages/ Wines/ Spirits
27.	Provolone Valpadana	Italy	Cheese
28.	Českobudějovické Pivo	Czech Republic	Alcoholic Beverages/ Wines/ Spirits
29.	Vino Nobile Di Montepulciano	Italy	Alcoholic Beverages/ Wines/ Spirits
30.	Chilean Pisco	Chile	Alcoholic Beverages/ Wines/ Spirits
31.	Barolo	Italy	Alcoholic Beverages/ Wines/ Spirits
32.	Nihonshu / Japanese Sake	Japan	Alcoholic Beverages/ Wines/ Spirits

4.2 Details of 23 Indian goods (manufactured category) registered as a GI in India

Table 4.2 Manufactured GIs of India (till December, 2024)

Sl. No.	Name of the GIs	Place of Origin	Product category	Date of GI Certificate
1.	Mysore Agarbathi	Karnataka	Perfumery (Incense stick)	06-02-2005
2.	Coimbatore Wet Grinder	Tamil Nadu	Machines and machine tools	30-01-2006
3.	Mysore Sandalwood Oil	Karnataka	Essential Oil	30-01-2006
4.	Mysore Sandal Soap	Karnataka	Soaps	30-01-2006
5.	East India Leather	Tamil Nadu	Leather	28-03-2008
6.	Feni	Goa	Alcoholic Beverages/ Wines/ Spirits	03-05-2009
7.	Nashik Valley Wine	Maharashtra	Alcoholic Beverages/ Wines/ Spirits	08-04-2010
8.	Ganjam Kewda Rooh	Odisha	Perfumery (oil-based)	19-03-2012
9.	Kannauj Perfume	Uttar Pradesh	Perfumery	31-03-2014
10.	Meerut Scissors	Uttar Pradesh	Hand-tools	25-03-2015
11.	Himachali Chulli Oil	Himachal Pradesh	Horticultural/ Forestry Product (oil-extract)	03-04-2019
12.	Dindigul Locks	Tamil Nadu	Locks (metal-hardware)	30-08-2019

13.	Judima	Assam	Alcoholic Beverages/ Wines/ Spirits	14-09-2021
14.	Agra Leather Footwear	Uttar Pradesh	Leather Footwear	31-07-2023
15.	Nainital Mombatti (Candle)	Uttarakhand	Wax Product (natural soy wax)	11-08-2023
16.	Arunachal Pradesh Adi Apong	Arunachal Pradesh	Alcoholic Beverages/ Wines/ Spirits	22-01-2024
17.	Arunachal Pradesh Dao (Sword)	Arunachal Pradesh	Hand tools and implements	22-01-2024
18.	Arunachal Pradesh Marua Apo (Marua Millet Beverage)	Arunachal Pradesh	Alcoholic Beverages/ Wines/ Spirits	22-01-2024
19.	Meghalaya Chubitchi	Meghalaya	Alcoholic Beverages/ Wines/ Spirits	30-03-2024
20.	Bodo Jou Gwran	Assam	Alcoholic Beverages/ Wines/ Spirits	01-10-2024
21.	Bodo Jou Gishi	Assam	Alcoholic Beverages/ Wines/ Spirits	01-10-2024
22.	Bodo Maibra Jou Bidwi	Assam	Alcoholic Beverages/ Wines/ Spirits	01-10-2024
23.	Nicobari Tavi-i-Ngaich (Virgin Coconut Oil) of Andaman & Nicobar	Andaman & Nicobar Islands	Coconut Oil (Oil-Extract)	03-12-2024

4.3 Portfolio of registered manufactured GI goods (Indian origin)

Table 4.3 : Classification as per 4th Schedule, GI Rules 2002

Sl. No.	Name of the Geographical Indication	GI Classification (Class of Goods)	Product Category
1	Mysore Agarbathi	3	Perfumery (Incense stick)
2	Coimbatore Wet Grinder	7	Machines and machine tools
3	Mysore Sandalwood Oil	3	Essential Oil
4	Mysore Sandal Soap	3	Soaps

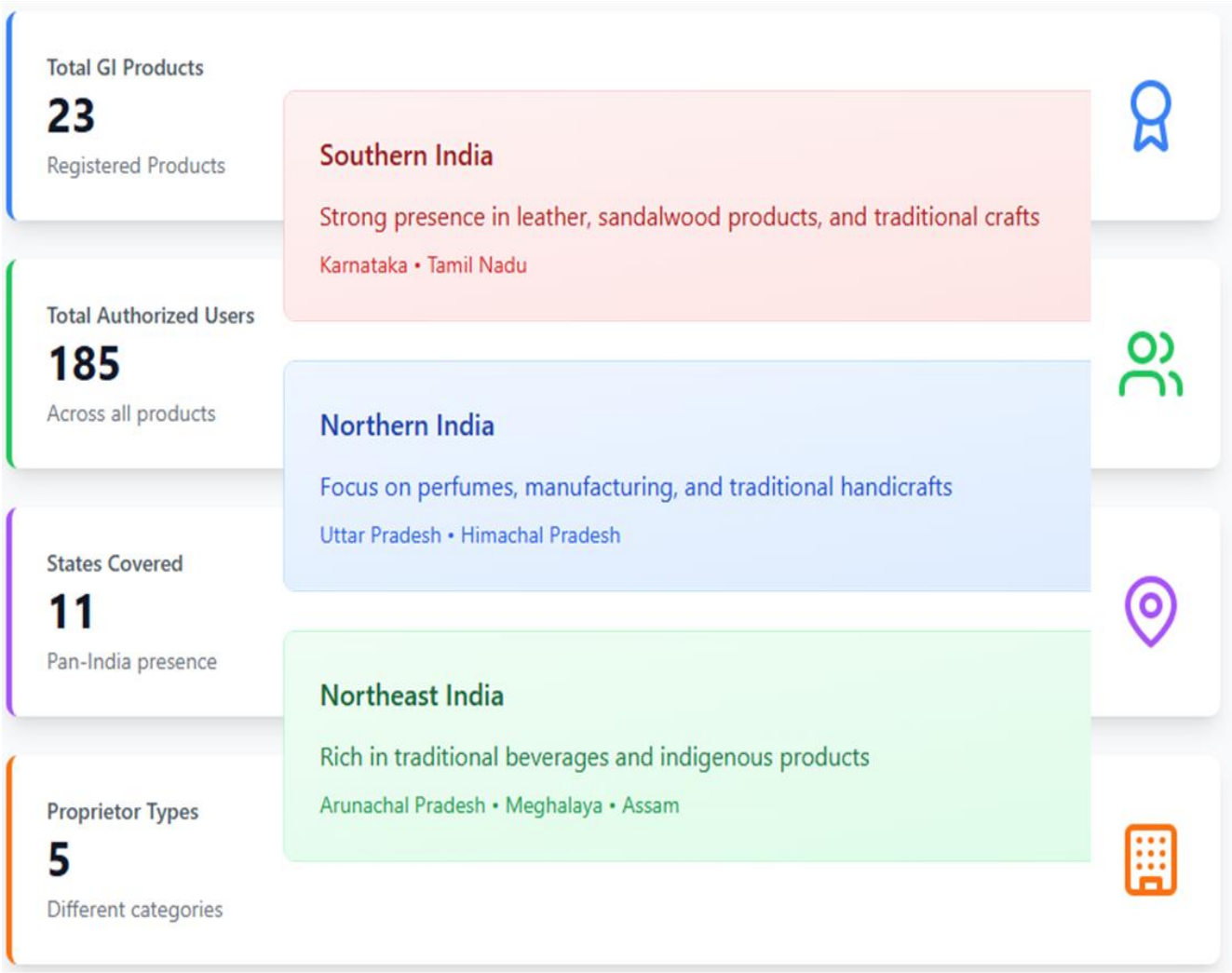
5	East India Leather	18	Leather
6	Feni	33	Alcoholic Beverages/ Wines/ Spirits (except beers)
7	Nashik Valley Wine	33	Alcoholic Beverages/ Wines/ Spirits (except beers)
8	Ganjam Kewda Rooh	3	Perfumery (oil-based)
9	Kannauj Perfume	3	Perfumery
10	Meerut Scissors	8	Hand-tools
11	Himachali Chulli Oil	31	Horticultural/ Forestry Product (oil-extract)
12	Dindigul Locks	6	Locks (metal-hardware)
13	Judima	33	Alcoholic Beverages/ Wines/ Spirits (except beers)
14	Agra Leather Footwear	18	Leather Footwear
15	Nainital Mombatti (Candle)	4	Wax Product (natural soy wax) / Candle
16	Arunachal Pradesh Adi Apong	32	Beers/ Alcoholic Beverages/ Wines/ Spirits
17	Arunachal Pradesh Dao (Sword)	8	Hand tools and implements
18	Arunachal Pradesh Marua Apo (Marua Millet Beverage)	32	Beers/ Alcoholic Beverages/ Wines/ Spirits
19	Meghalaya Chubitchi	32	Beers/ Alcoholic Beverages/ Wines/ Spirits
20	Bodo Jou Gwran	32	Beers/ Alcoholic Beverages/ Wines/ Spirits
21	Bodo Jou Gishi	32	Beers/ Alcoholic Beverages/ Wines/ Spirits
22	Bodo Maibra Jou Bidwi	32	Beers/ Alcoholic Beverages/ Wines/ Spirits
23	Nicobari Tavi-i-Ngaich (Virgin Coconut Oil)	30	Coconut Oil (Oil-Extract) (condiments)

Table 4.4 Details of registered proprietor and number of authorised users

Sl. No.	Name of the Geographical Indication	Registered Proprietor	Authorised User (Registered)
1	Mysore Agarbathi	All India Agarbathi Manufacturers Association	None
2	Coimbatore Wet Grinder	Coimbatore Wet Grinders & Accessories Manufacturers Association	None
3	Mysore Sandalwood Oil	Karnataka Soaps & Detergents Limited (A Government of Karnataka Enterprise)	None
4	Mysore Sandal Soap	Karnataka Soaps & Detergents Limited (A Government of Karnataka Enterprise)	None
5	East India Leather	(a) The Trichy Tanners Association, Trichy, Tamil Nadu (b) The Dindigul Tanners Association, Dindigul, Tamil Nadu.	159
6	Feni	Goa Cashew Feni Distillers & Bottlers Association	6
7	Nashik Valley Wine	(a) National Horticultural Board (b) Nashik Valley Wine Producers Association	1
8	Ganjam Kewda Rooh	Ganjam Kewda Development Trust (GKDT)	None
9	Kannauj Perfume	The Attar and Perfumers Association	8
10	Meerut Scissors	Meerut Scissor Manufacturers Special Purpose Vehicle	None
11	Himachali Chulli Oil	M/s. Kinnaur Chulli - Bhemi Oil Producers & Processor Society District	11
12	Dindigul Locks	The Dindigul Lock, Hardware and Steel Furniture Workers Industrial Co-Operative Society Limited	None
13	Judima	DIMAJIK HOSOM	None

14	Agra Leather Footwear	Agra Footwear Manufacturers & Exporters Chamber	None
15	Nainital Mombatti (Candle)	Nayana Devi Aipan Craft Evam Eco-friendly Bag Nirman Swayat Sahkarita Growth Centre	None
16	Arunachal Pradesh Adi Apong	Adi Bane Kebang	None
17	Arunachal Pradesh Dao (Sword)	Arunachal Vikas Ebum Shiksha Sangathan	None
18	Arunachal Pradesh Marua Apo (Marua Millet Beverage)	All Pei Welfare Association	None
19	Meghalaya Chubitchi	Bethany Society	None
20	Bodo Jou Gwran	Bodo Traditional Brewer's Association	None
21	Bodo Jou Gishi	Bodo Traditional Brewer's Association	None
22	Bodo Maibra Jou Bidwi	Bodo Traditional Brewer's Association	None
23	Nicobari Tavi-i-Ngaich (Virgin Coconut Oil)	Tribals Development Co-operative Society Limited	None

Figure 4.2 : Interactive analysis of manufactured Indian GIs and Authorised Users



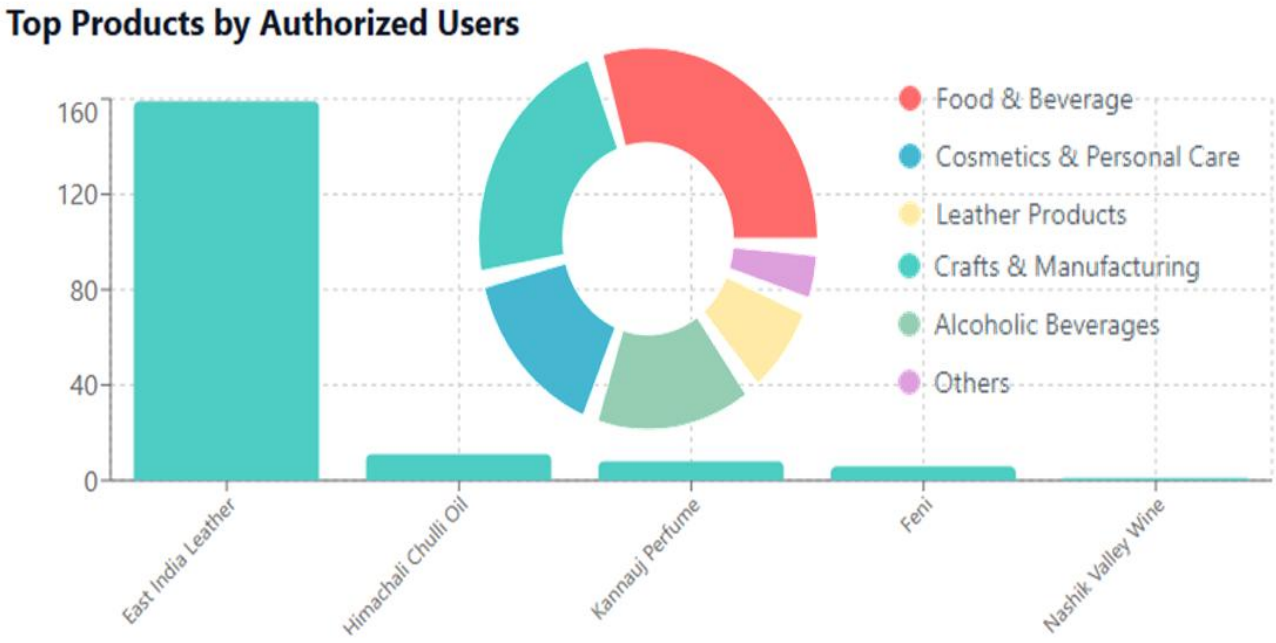


Figure 4.3: State-wise distribution of registered manufactured GIs in India (till December 2024)

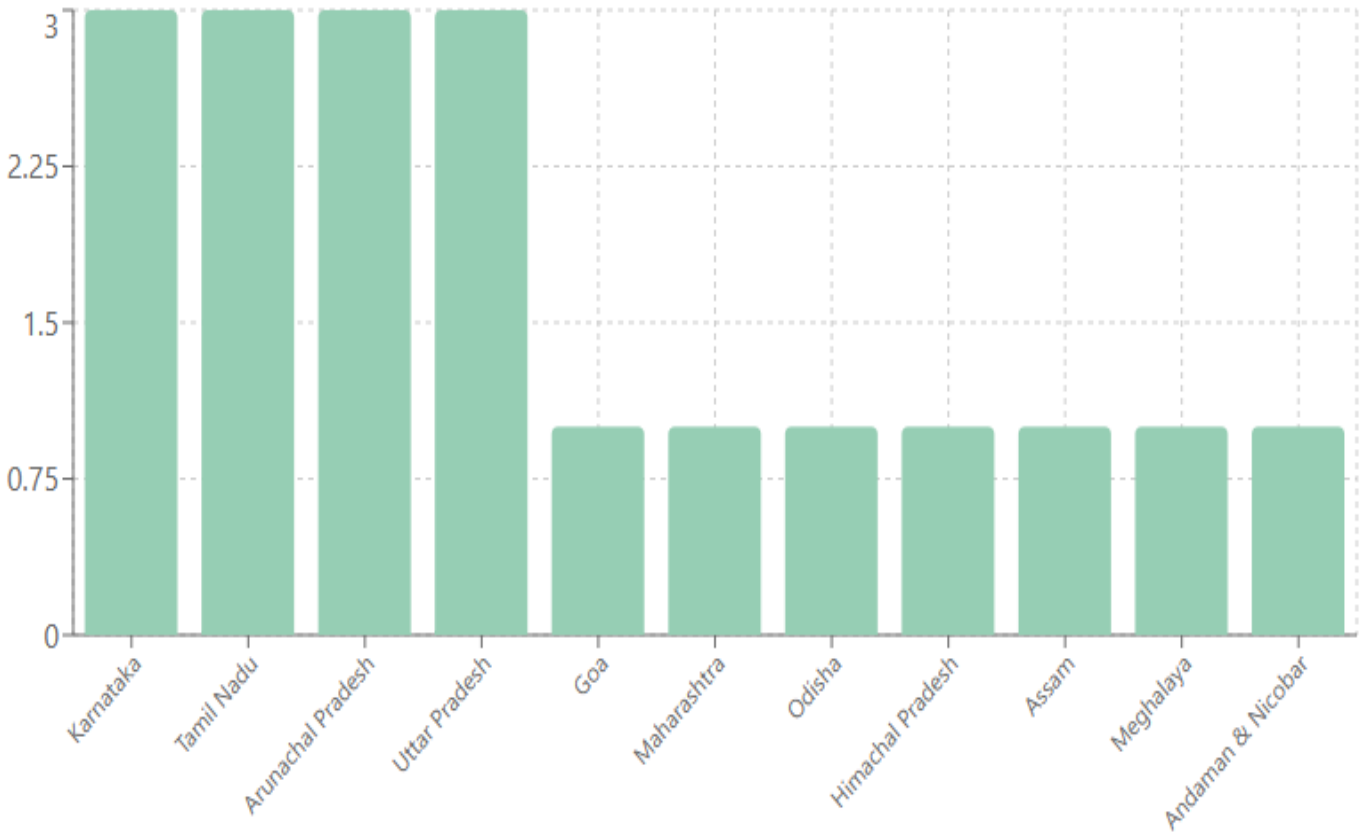


Table 4.5 : HSN Codes assumed for the registered products based on their general product category

Sl. No	Product Name	HSN Code	Description of the HSN Code
1	Mysore Agarbathi	33074100	Agarbatti and other odoriferous preparations, which operate by burning (EPCH)
2	Coimbatore Wet Grinder	85094010	Food grinders and mixers; fruit or vegetable juice extractors
3	Mysore Sandalwood Oil	33012937	Sandalwood Oil
4	Mysore Sandal Soap	34011190	Other soaps (including medicated products)
5	East India Leather	420300	Articles of apparel and clothing accessories, of leather or of composition leather
6	Feni	22060000	Other Fermented Beverages (E.G., Cider, Perry, Mead), Mixtures of Fermented Beverages and Non-Alcoholic Beverages, Not Elsewhere Specified or Included (APEDA)

7	Nashik Valley Wine	22042290	Other wine, containers holding more than 2 l but not more than 10 l (APEDA)
8	Ganjam Kewda Rooh	33019090	Other aqueous solutions of essential oils
9	Kannauj Perfume	33029019	Other mixture of aromatic chemicals and essential oils as a perfume base
10	Meerut Scissors	82130000	Scissors, tailor's shears, and similar shears
11	Dindigul Locks	830110	Padlocks
12	Himachali Chulli Oil	33019079	Other aqueous solutions of essential oils
13	Judima	22060000	Other Fermented Beverages (E.G., Cider, Perry, Mead), Mixtures of Fermented Beverages and Non-Alcoholic Beverages, Not Elsewhere Specified or Included (APEDA)
14	Agra Leather Footwear	64039110	Footwear with Outer Soles of Rubber, Plastics, Leather or Composition Leather and Uppers of Leather Sports Footwear
15	Nainital Mombatti (Candle)	34060010	Candles
16	Arunachal Pradesh Adi Apong (Beverage)	22060000	Other Fermented Beverages (E.G., Cider, Perry, Mead), Mixtures of Fermented Beverages and Non-Alcoholic Beverages, Not Elsewhere Specified or Included (APEDA)
17	Arunachal Pradesh Dao (Sword)	82014000	Axes Billhooks & Similar Hewing Tools
18	Arunachal Pradesh Marua Apo (Marua Millet Beverage)	22060000	Other Fermented Beverages (E.G., Cider, Perry, Mead), Mixtures of Fermented Beverages and Non-Alcoholic Beverages, Not Elsewhere Specified or Included (APEDA)
19	Meghalaya Chubitchi	22060000	Other Fermented Beverages (E.G., Cider, Perry, Mead), Mixtures of Fermented Beverages and Non-Alcoholic Beverages, Not Elsewhere Specified or Included (APEDA)
20	Bodo Jou Gishi	22030000	Beer Made from Malt
21	Bodo Jou Gwran	22030000	Beer Made from Malt
22	Bodo Maibra Jou Bidwi	22030000	Beer Made from Malt
23	Nicobari Tavi-i-Ngaich (Virgin Coconut Oil)	15131900	Coconut copra oil and its fractions: other than crude oil

4.4 Understanding the gap – HS Codes and GI goods

The Harmonised System (HS) assigns six-digit codes to traded goods, which are extended nationally to 8–10 digits. It underpins customs duties, trade statistics, and FTAs, serving as the global reference for product classification. While the first six digits are consistent globally, countries often extend the code to eight or ten digits for national-level tariff, statistical or regulatory purposes. The HS Code system is foundational to international trade operations. It enables customs authorities to assess duties, regulate imports and exports, apply trade policy instruments, and collect trade statistics. It also plays a central role in trade negotiations and the implementation of FTAs, serving as a common reference point for tariff commitments and market access provisions. Furthermore, governments and trade bodies use HS codes to monitor sectoral performance, identify trade trends, and implement product-specific export promotion schemes.

Despite the legal protection afforded to GIs under India's GI Act and relevant international treaties, GI-tagged products are not currently linked to the HS code framework in any structured or formal manner. This is especially problematic in the context of industrial and manufactured GI goods. The absence of an HS code linkage for GI products has created several barriers to effective trade policy, export promotion, and enforcement.

- First, GI products cannot be tracked through official trade data because they are classified under broad HS headings that do not distinguish between GI-certified and non-GI goods. This leads to a lack of visibility in trade statistics and undermines evidence-based policymaking.
- Second, India is unable to fully leverage GI protection in its FTAs, as it cannot identify or monitor GI-designated goods within tariff schedules or customs documentation.
- Third, many government schemes for trade facilitation and incentives are administered based on HS code classification. GI products that are not separately identified often fail to qualify or receive inadequate support.
- Finally, enforcement at the border becomes difficult for customs authorities when GI goods are indistinguishable from generic products, limiting the ability to prevent counterfeiting or misuse of GI names.

4.5 Situation in India – GI landscape vis-à-vis HS Codes

India has not yet adopted a formal system to map GIs to Harmonised System (HS) codes. This absence reflects a combination of institutional, legal, and technical gaps that prevent GI products from being fully integrated into trade classification systems. There is no structured coordination between the GI Registry, which manages legal recognition under the GIGA, and trade authorities

such as the Directorate General of Foreign Trade or Customs. As a result, GI registrations rely on narrative descriptions that do not align with the HS coding system, making product-level classification and tracking challenging. Additionally, databases that hold GI registration data and those that capture trade flows operate in isolation, lacking interoperability or integration.

The problem is further compounded by the limited availability of international models for linking HS codes to non-agricultural GIs. This has contributed to policy hesitation, particularly given the technical complexity involved in introducing new tariff lines or backend protocols within customs systems. Consequently, India's current trade and intellectual property frameworks remain fragmented, leading to administrative invisibility for GI products at the border.

This issue has particularly significant implications for India's growing portfolio of industrial, craft-based, and agricultural GIs. With over 650 registered products and increasing demand for GI-labelled exports, the lack of HS code linkage creates a critical policy vacuum. Without formal classification, GI goods are indistinguishable from generic commodities in export documentation. This undermines efforts to track trade performance, target export incentives, secure carve-outs in FTAs, and prevent misrepresentation in global markets.

Among the most illustrative examples of this gap is the treatment of non-Basmati GI-tagged rice varieties. India is home to over two dozen such varieties, including Gobindobhog (West Bengal), Jeeraphool (Chhattisgarh), Chak-Hao (Manipur), Kalanamak (Uttar Pradesh), and Katarni (Bihar). These products are catalogued by the Agricultural and Processed Food Products Export Development Authority (APEDA) and represent a significant opportunity for value-added rural exports. However, under India's tariff classification, all rice—including GI varieties—falls under Chapter 10 of the HS system. Within this chapter, rice is further classified by processing status, such as paddy (1006.10), husked (1006.20), milled or polished (1006.30), and broken rice (1006.40). Most GI rice exports fall under 1006.30.90 (semi- or wholly milled rice, other than Basmati or parboiled), but may also appear under other subheadings depending on their form.

These classifications are based purely on physical and processing attributes, offering no recognition of origin or GI status. As a result, premium varieties like Joha or Gobindobhog are exported under the same categories as generic, non-GI rice. This invisibility in trade statistics has real consequences: during export bans or restrictions, GI rice, despite its limited domestic consumption and niche foreign demand, receives no special exemption. Moreover, the inability to track GI-specific trade flows prevents these products from receiving targeted promotional support or recognition in trade negotiations.

Recognising these challenges, the Finance Bill 2025 introduced a significant step forward by inserting a supplementary note under Chapter 10 to define "Rice, GI recognised." New tariff lines were created under subheading 1006.30 to classify GI-registered parboiled and non-parboiled rice separately. The codes 1006.30.11 and 1006.30.91 now offer a mechanism for customs-level identification of GI rice. This marks a significant advancement in administrative visibility within India's domestic trade systems. However, these codes currently have no bearing on international classification systems and do not provide legal protection abroad.

Internationally, India's GI rice varieties continue to face challenges in recognition and enforcement. Only Darjeeling Tea and Kangra Tea have secured Protected Geographical Indication (PGI) status in the European Union. Basmati rice, although not technically a non-Basmati variety, applied for PGI registration in 2018 and was published in the EU's official journal in 2020, but its registration remains pending. Critically, none of India's GI-tagged non-Basmati rice varieties have been registered for PGI or equivalent protection in the EU, the US, or China. As a result, these products remain vulnerable to brand dilution, consumer deception, and loss of premium market positioning.

Comparative experiences from other jurisdictions reinforce the importance of formal GI recognition in trade. In France, GI-protected cheese producers consistently earn price premiums and benefit from stronger consumer perception—not due to production scale, but because of legal protection (Duvaleix et al., 2021). EU trade agreements that include GI protection clauses have led to agricultural product premiums ranging from €210 to €270 per ton (Emlinger & Latouche, 2024). China's mutual GI recognition agreement with the EU helped reposition its GI products in global markets by driving quality improvements and enhancing traceability (Qian et al., 2023).

Yet, in all these jurisdictions, customs systems do not automatically recognise foreign GIs unless they are domestically registered. The EU uses an eight-digit Combined Nomenclature (CN) system, the US uses a ten-digit Harmonised Tariff Schedule (HTSUS), and China applies its own HS extensions. Indian GI products, unless registered or protected through mutual recognition, are classified generically and lack market visibility.

Efforts at the national level are ongoing to support trade visibility for GI-tagged rice. APEDA and related bodies are working to assign unique HS codes for varieties like Black Rice, Red Rice, and Kalanamak. These efforts aim to create a more granular export classification, enhance traceability, and differentiate GI products from mass-market equivalents. However, HS code designation alone does not confer intellectual property rights. For proper protection, these reforms must be coupled with international GI registration and inclusion in bilateral or multilateral agreements.

Ultimately, the core issue is systemic. The lack of integration between India's IP regime and trade infrastructure results in a disjunction between legal recognition and operational facilitation. Without institutional alignment and technical coordination among the GI Registry, customs, and trade authorities, even well-known and commercially viable GI products remain under-recognised in export data and global markets.

In conclusion, India's move to introduce distinct HS codes for GI-tagged rice is a welcome and necessary step. It provides a foundation for improving export statistics, facilitating policy support, and enhancing brand recognition. However, to fully unlock the value of GI products, this initiative must evolve into a coordinated strategy that includes backend data integration, international GI registrations, and strategic use of trade agreements. Integrating GI products into the HS framework is not just a technical requirement - it is a policy imperative for safeguarding India's cultural heritage, improving rural livelihoods, and enhancing export competitiveness.

4.6 International practices on HS Codes – Comparative takeaways

(a) Japan

Japan has a well-defined legal framework for protecting GIs, but it is strictly limited to agricultural, forestry, fishery and food products. This system is governed by the Ministry of Agriculture, Forestry and Fisheries (MAFF) under the Geographical Indication Act, which came into effect in 2015. The manufactured goods, including traditional crafts such as washi paper, ceramics, textiles and brushes, are not covered under this GI law. On the other hand, such products are protected separately under Japan's traditional craft system managed by the Ministry of Economy, Trade and Industry (METI).

Japan follows the international Harmonised System (HS) for trade classification, but uses its own extended version, which is a 9-digit HS code structure. The first six digits align with the World Customs Organisation's global HS system. In comparison, the last three digits are added by Japanese customs authorities to provide more specific sub-categories for domestic use.

Japan does not assign any special or separate HS codes to products with a GI tag. There is no mechanism to identify a product as GI-protected through its HS code. A GI-certified product and a non-GI product of the same kind, such as green tea or sake, would be classified under the same code.

Thus, coming to manufactured goods, Japan currently has no GI-tagged manufactured products registered under its official GI system. This means that there are no GI-manufactured goods in

Japan that have a dedicated HS code reflecting their GI status, as such goods are not part of the GI registry in the first place.

In April 2024, India granted GI status to "Nihonshu" (Japanese sake) and classified it under the category of manufactured goods. This registration was part of India's GI recognition of foreign products and is listed in India's GI registry. Nihonshu is produced using fermented rice and may involve technical processing. Japan itself considers it a GI-protected agricultural product, rather than a manufactured good. In Japan, it is registered under the GI Act through MAFF and is treated similarly to food or beverage products. However, India has classified Nihonshu differently, and this classification is only valid within the Indian GI framework and does not change how Japan treats or codes the product.

(b) Australia

Australia uses the Harmonised Tariff Item Statistical Code (HTISC) system based on the global HS framework. This system has a total of 10 digits. The first six digits are harmonised at the international level; the next two digits reflect further national classification, and the last two digits are statistical codes added by the Australian Bureau of Statistics for data collection purposes.

Australian wine can be an example of a product that fits within the intersection of a GI-tagged good, a manufactured item and one that is classified under the HS code system. Wine undergoes an extensive production process involving fermentation, ageing, blending, and bottling, making it an example of a manufactured product.

Australia has a well-developed GI regime for wine under its Wine Australia Act, and over 100 Australian wine GIs are currently registered. These include names such as Barossa Valley, Margaret River and Hunter Valley. Moreover, as per their official website, more than 2,000 European GIs are protected in Australia through an agreement with the EU, including Bordeaux, Chianti, Mosel, and Sherry. The wines that are GI-protected are listed on the Register of Protected GIs maintained by Wine Australia. Australian wines also fall within the HS code classification. For example, HS code 2204 covers wine of fresh grapes, including fortified wines. Thus, depending on specific characteristics such as alcohol content, packaging size, and level of carbonation, more specific 8-digit and 10-digit codes are assigned. Thus, Australian wines tick all three boxes: they are GI-protected, manufactured goods, and they are assigned HS codes under Australia's 10-digit HTISC system.

(c) Afghanistan

Afghanistan began building its GI protection system in 2015 with support from the FAO and the EU. The country enacted a dedicated law, known as the Law on the Geographical Signs of

Production Points. It complemented it with a regulatory framework that outlines application procedures, registration, evaluation, and objection mechanisms. The law defines GIs as signs that indicate a product's origin, quality, reputation, or other characteristics linked to a specific geographic area. This definition aligns with Article 22 of the TRIPS Agreement.

The GI law of Afghanistan is quite broad in scope. Article 2(5) and Article 3(5) of the GI Law explicitly state that both agricultural products and manufactured goods, such as handicrafts and industrial tools, are eligible for GI registration.

However, only three products have been registered so far- Herat Bastan saffron, Khost Musakhil pine nuts and Kandahar Arghandab pomegranates. All three are agricultural products, and no manufactured goods have been registered under the GI system yet.

Afghanistan utilises the international Harmonised System (HS) for trade and customs classification, in line with WTO and WCO standards, particularly following its accession to the WTO in 2016. However, the three agricultural GIs currently registered are not assigned distinct HS codes that identify them as GI-tagged; instead, they fall under general commodity categories.

(d) Pakistan

Pakistan implemented its GI protection system through the Geographical Indications (Registration and Protection) Act, 2020. This Act establishes a legal framework to protect products originating from a specific geographical area that possess qualities, reputation, or characteristics associated with that origin. The law allows for both agricultural and non-agricultural goods, including handicrafts and manufactured products, to be registered as GIs.

Pakistan follows the World Customs Organisation's (WCO) internationally standardised Harmonised System (HS) of nomenclature for classifying goods in import and export transactions. Pakistan Customs use the HS system for tariff schedules, statistical data and regulatory purposes. Pakistan's version of the system is called the Pakistan Customs Tariff (PCT). It is based on the 6-digit HS code, a standard used across countries, which has been extended to 8 digits for further national classification. This PCT is maintained and published by the Federal Board of Revenue (FBR) and updated annually.

Pakistan has taken steps to register several well-known products under its GI regime. These include Basmati rice, Peshawari chappal, Multani blue pottery, Swat emeralds, Hunza apricots, and more. Upon examination, we can observe that some of these items are indeed manufactured goods, particularly Multani blue pottery and Peshawari chappals (although they may also be classified as handicrafts, as they involve human craftsmanship and local production techniques).

(e)Nepal

Nepal does not yet have a GI law. The country's current legal regime, under the Patent, Design and Trademark Act, 1965, does not include GI protection in the true sense. Because of this, products that could potentially qualify as GIs, such as Ilam Tea, Jumla Apple, Mustang Garlic, Dhaka fabric and Pashmina, have been protected only through certification marks or collective trademarks.

Nepal has been working on an Industrial Property Bill, which includes a dedicated chapter on GIs. The draft law borrows from the TRIPS Agreement and international practices. It defines a GI as a sign that identifies goods as originating from a region or locality where a particular quality, reputation, or characteristic of the product is essentially linked to its origin. However, the bill remains in the drafting or approval stage and has not yet become enforceable law.

However, Nepal has also made some progress at the international level. For example, Ilam Tea has received GI registration in the EU. This marks a rare case where a Nepalese product has been protected internationally before being formally recognised under Nepal's own law. However, within Nepal, there is no official GI register, no procedural framework for registration, and no GI tag has been issued under domestic legislation.

Nepal uses the Harmonised System (HS) for trade and customs classification. The Department of Customs follows the international 6-digit HS code structure and extends it for national purposes.

(f) Bangladesh

Bangladesh enacted its Geographical Indications (Registration and Protection) Act in 2013, which came into effect in 2015. This law allows producers to register goods that derive their quality, reputation, or distinctiveness from their geographical origin. The Department of Patents, Designs and Trademarks (DPDT) administers the GI system under the Ministry of Industries.

The law applies to both agricultural and manufactured goods. Article 2 of the Act defines GIs broadly enough to include natural goods and products that are partly or wholly manufactured or processed in a particular geographical area. So, Bangladesh's GI framework legally supports registration of manufactured goods.

Bangladesh has registered several GIs, such as Jamdani (handloom textile), Hilsa fish, Khirsapat mango, Shataranji of Rangpur, and Muslin of Dhaka. Out of these, Jamdani, Shataranji, and Muslin are all examples of manufactured or craft-based goods, involving traditional skills, handwork, and region-specific methods.

In terms of trade classification, Bangladesh utilises the Harmonised System (HS) for customs and exports, which is managed by the National Board of Revenue (NBR). It uses an 8-digit HS code format; the first six digits follow the WCO standard, while the seventh and eighth digits serve national classification purposes.

(g) Maldives

The Maldives currently does not have a dedicated GI law in force. The country has been a member of the WTO and a signatory to the TRIPS Agreement since 1995; however, it lacks GI legislation in place, although a draft law is currently under discussion.

The WIPO report lists a few products that are being considered for future GI protection. These include both agricultural items, such as Maldivian dried fish and Rihaakuru (a thick fish paste), as well as traditional handicrafts, including lacquer work, mat weaving, coir making, embroidery, and Foamulah Ala (traditional wooden goods).

Currently, no product, whether agricultural or manufactured, has been officially registered as a GI under Maldivian law, as the necessary legal framework is still pending.

The Maldives follows the international Harmonised System (HS) for customs classification, administered by its customs authority.

(h) Sri Lanka

Sri Lanka has an operational GI system, governed by its Intellectual Property Act, which was further strengthened through the Intellectual Property (Amendment) Act, 2022. This legal framework aligns with the TRIPS Agreement and allows for the registration and protection of GIs for a wide range of products, including those that are processed or manufactured.

One of the most prominent GI-tagged products from Sri Lanka is Ceylon Cinnamon. It originates from an agricultural product; however, the way it is harvested, peeled, dried and graded makes it a processed and thus manufactured GI product. Ceylon Cinnamon has received GI protection within Sri Lanka and has also been granted PGI status by the EU.

Sri Lanka follows the international HS system and classifies products using an extended format, generally 8 to 10 digits, beyond the standard 6-digit global format. For instance, Ceylon Cinnamon is traded under HS code 0906.20 for crushed or powdered cinnamon.

(i) European Union

The EU has long had a comprehensive system to protect GIs, particularly for agricultural products, wines, and spirits. These protections are legally recognised across all EU member states and extend to international trade agreements. Historically, the EU did not offer harmonised protection for

non-agricultural or manufactured products at the union-wide level, although several such products were protected nationally within individual member states.

The manufactured goods now eligible for EU-wide GI protection include well-known products such as Murano glass from Italy, Limoges porcelain from France, and Solingen cutlery from Germany. These goods involve region-specific traditional know-how and skilled production methods, qualifying them as manufactured goods under the EU definition. They were already protected nationally for years and were even included in bilateral trade agreements, most notably with South Korea. For example, Limoges and Solingen were explicitly recognised as GIs in the EU–Korea FTA, confirming that the EU has extended GI protection to manufactured goods through international agreements even before the new regulation came into effect.

The EU uses the Combined Nomenclature (CN) system to classify traded goods. This is based on the international 6-digit HS code system, with two additional digits added at the EU level, resulting in an 8-digit code. It has been further extended to 10 digits for customs and statistical purposes under the TARIC system. All goods, including those protected by GI, are traded using these codes. The products, such as Limoges porcelain and Solingen knives, are classified under their relevant commodity headings (for example, ceramics, cutlery, glass), and their GI status is recorded through separate certification and labelling, not embedded within the tariff code.

As for Australia, the EU has proposed the inclusion of over 2,000 wine and food GIs in the ongoing FTA negotiations, but there is no evidence that any manufactured GI products from Australia have been protected under the EU's trade framework so far. However, the new regulation now enables the legal framework for such protection to occur in future trade arrangements.

Thus, the EU now has formal GI protection for manufactured goods, recognises those goods as processed or craft-based under law, and classifies them using its standard HS-based CN and TARIC system.

HS Codes of famous EU GIs

Product Description	Protected Status	Commodity Code
Sparkling wine of fresh grapes	–	2204.10
Champagne	PDO	2204.10.11
Cava	PDO	2204.10.13
Prosecco	PDO	2204.10.15
Asti Spumante	PDO	2204.10.91
Sparkling wine with PDO (excl. Asti Spumante, Champagne, Cava, Prosecco)	PDO	2204.10.93

Sparkling wine with PGI	PGI	2204.10.94

(j) United Kingdom

The UK has its own GI system (independent of the EU) under the Post-Brexit GI scheme, which covers food, agriculture, wine, and spirits. The UK legally recognises product names tied to specific regions through its own registers, and producers must display the relevant GI logo on products sold in Great Britain, particularly those registered before 2021.

The UK's GI system does not extend to manufactured or craft goods, as its protection currently focuses exclusively on food and agricultural products such as Scotch whisky, Cornish pasties, or Melton Mowbray pork pies. There is no official inclusion of non-agricultural GIs. When it comes to trade agreements, the UK does include GI provisions in its FTAs. In the UK–Japan Comprehensive Economic Partnership Agreement (CEPA), both sides agreed to protect each other's GIs, including Scotch whisky and Kobe beef. The agreement also allows additions to the list through mutual requests. Under the UK-Australia FTA, the UK did not secure protection for its GIs. However, it secured a commitment to revisit GI issues if Australia were to adopt its own national GI framework in the future. This means that UK GIs may be recognised in Australia in the future, depending on legislative developments. Similar provisions exist or are in negotiation in deals with New Zealand and other countries, reflecting the UK's intent to extend GI protection through trade diplomacy.

The UK classifies traded goods using the UK Global Tariff (UKGT), which extends the international 6-digit HS code by adding two additional digits, making an 8-digit HS code system. This classification is used for customs, statistical tracking, and tariff purposes.

(k) South Korea

South Korea has a formal GI system established under its Agricultural Products Quality Control Act. The system currently focuses primarily on agricultural, food, and processed food products. However, there are indications that some GI-registered products fall into the category of manufactured or semi-manufactured goods, especially where significant human processing is involved. For example, Andong soju, traditional sauces, and dried persimmons are protected under GI and require specific processing methods, which may place them within the broader definition of manufactured goods used in other jurisdictions, such as the EU.

South Korea also recognises foreign GIs through FTAs, particularly in its agreement with the EU. This agreement includes non-agricultural GIs from Europe, such as Solingen cutlery and Limoges porcelain, both of which are clearly manufactured goods. This means that while Korea's domestic

GI system primarily focuses on food and drink, it also accepts and protects foreign-manufactured GIs under trade agreements.

South Korea classifies products for customs and trade using the Korean Harmonised System (KHS), which is based on the international HS code system. The structure follows the 6-digit global HS codes, extended to 10 digits for national classification. This system is used for all imports and exports, including goods with GI tags.

(l) GCC Countries (Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Oman and Kuwait)

GCC does not yet have a unified or well-developed regional system for the protection of GIs, particularly for manufactured goods. GI protection in the region remains relatively underdeveloped compared to jurisdictions such as the EU or even some Asian nations. However, individual countries within the GCC, especially Saudi Arabia, the UAE, and Oman, have made some progress in terms of trademark systems, including limited provisions that may accommodate GIs under broader IP frameworks.

Currently, there is no known GI registration in the GCC region specifically for manufactured goods. Most registered or informally recognised GIs relate to agricultural or food-related products, and even those are few in number. That said, GCC countries do use the international Harmonised System (HS) for customs purposes, generally applying the standard 6-digit HS codes, which may be extended with national-level digits.

Regarding international trade agreements, GCC countries have not yet entered into FTAs that actively promote or protect GI-manufactured goods. However, discussions on IP rights have occurred within certain bilateral agreements (for example, between the GCC and the EU).

4.8 Stakeholder perspectives on the registered manufactured GI goods of India

During the compilation of this report, stakeholder engagement played a crucial role in ensuring that ground-level insights and accurate trade-related data informed the analysis. Recognising the critical need for credible information on exports, sales, and trade of GI goods, as well as to understand the feasibility of promoting certain GI goods for exports, the research team adopted a multi-tiered approach to stakeholder interaction and data collection. To begin with, GI products were grouped according to their suitability under various Export Promotion Councils, considering each council's mandate and sectoral relevance. It was done in the following manner.

For analytical clarity, the GI goods were mapped under their respective sectoral Export Promotion Councils (EPCs). Handicraft-related products such as Mysore Agarbathi and Nainital Candle were

aligned with the Export Promotion Council for Handicrafts (EPCH); engineering-based products such as Coimbatore Wet Grinder, Meerut Scissors, Dindigul Locks, and Arunachal Dao with the Engineering Export Promotion Council (EEPC); essential oils and cosmetic items such as Mysore Sandalwood Oil, Mysore Soap, Ganjam Kewda Rooh, Kannauj Perfume, and Himachali Chulli Oil with the Basic Chemicals, Pharmaceuticals and Cosmetics Export Promotion Council (CHEMEXCIL); leather goods with the Council for Leather Exports (CLE); food and beverage products such as Feni, Nashik Valley Wine, Judima, and traditional fermented drinks of Arunachal Pradesh and Assam with the Agricultural and Processed Food Products Export Development Authority (APEDA); and Nicobari Virgin Coconut Oil with the Coconut Development Board.

This classification guided structured outreach and data collection. While multiple rounds of communication were undertaken, detailed responses were received from three export promotion councils and multiple producer associations. In total, consultations covered 20 of the 23 registered manufactured GI goods, ensuring broad geographical and sectoral representation.

Insights were sought to gain a deeper understanding of production capacities, market access challenges, and existing trade linkages. Several stakeholders made meaningful contributions, enriching the qualitative dimension of the study. However, in some cases, engagement was constrained by factors such as limited availability, logistical challenges, or resource constraints.

4.9 Preliminary insights (Stage – I)

The preliminary stage of engagement yielded an indicative understanding of production, trade conditions, and export potential across various products. Key findings are summarised below.

Product	Stakeholder Insights and Observations
Feni (Goa)	Exclusive licensing by the Excise Department; Strong demand in the United States, but limited access in the EU and the UK due to regulatory constraints.
Nashik Valley Wine (Maharashtra)	Represents 3-4% of India's total wine exports; Major destinations include the EU, the Gulf, and Australia. High tariffs and limited brand visibility restrict further expansion.
Coimbatore Wet Grinder (Tamil Nadu)	Low awareness of GI benefits; Not covered under ODOP; No registered authorised users.

Kannauj Perfume (Uttar Pradesh)	Recognised under ODOP; Exports primarily to the UAE, the US, and Germany. Despite an industry size of ₹10,000 crore, global reach remains limited due to licensing and tax barriers.
Ganjam Kewda Rooh (Odisha)	Niche essential oil with strong export potential to Middle Eastern markets; Limited by a lack of branding and funding.
Arunachal Beverages (Adi Apong, Marua Apo)	Traditional fermented beverages of socio-cultural significance; Confined to local markets; No labelling or branding initiatives.
Arunachal Dao (Arunachal Pradesh)	Culturally significant handmade sword; Limited production (approx. 1,000–1,200 units); Potential in heritage crafts.
Bodo Rice Beers (Assam)	Three beverages—Jou Gishi, Jou Gwran, and Maibra Jou Bidwi—are central to Bodo cultural life; there is strong local demand, but an absence of a formal market and cooperative structure.
Meerut Scissors (Uttar Pradesh)	Faces competition from low-cost Chinese imports; Lacks product-specific HS code; Supported by MSME Common Facility Centre.
Mysore Sandal Oil and Soap (Karnataka)	Sandal Soap is exported mainly to the Middle East; Sandal Oil remains domestic. There is no distinct HS code for GI tracking.
Mysore Agarbathi (Karnataka)	Primary employment sector, largely women-led; High export potential but challenged by health hazards, input shortages, and import competition.
Leather Products (Agra Footwear; East India Leather)	CLE reported USD 10.69 million in exports (2023–24); Export duty reduced to zero; No separate HS code for GI-based trade.
Nicobari Virgin Coconut Oil (A&N Islands)	Women-driven artisanal production; Praised nationally; Strong domestic demand, but logistical barriers to mainland exports.
Himachali Chulli Oil (Himachal Pradesh)	Potential wellness product; Limited branding and export data; Requires coordinated institutional support.

Engagements were conducted with select export houses and promotional councils, depending on their availability. The following section highlights the key points of these interactions.

Export Promotion Council / Board	GI Products Covered	Export-Related Information	HS Codes	Remarks

Council for Leather Exports (CLE)	1. Agra Leather Footwear 2. East India (EI) Leather	55 tanneries registered for EI leather GI. Export duty reduced from 15% to 0% for EI tanned leather. Export in 2023-24: USD 10.69 million.	41044100, 41044900, 41053000, 41062200, 41063200, 41069200, 41064000	CLE marketing events open to all GI exporters. There is no separate ITC HS code for Agra Footwear.
CHEMEXCIL (Basic Chemicals, Pharmaceuticals and Cosmetics Export Promotion Council)	1. Kannauj Perfume 2. Mysore Sandalwood Oil and Soap	No specific export data is available for these GI products. Suggested referring to DGCI&S and Ministry websites.	Not specified	No FTA data available with the council. Suggested consulting with member exporters and official portals.
Engineering Export Promotion Council (EEPC)	Products classified under the engineering goods category	Taxes and charges vary by HS Code, affecting FTA benefits. 6-digit codes are universal, 8-digit codes are India-specific and complex.	Varies by product	Encouraged checking official trade portals for tariffs and FTA status.
Coconut Development Board	Nicobari Tavi-i-Ngaich Virgin Coconut Oil (VCO)	No separate HS code; exported under general coconut oil codes. The board has proposed an 8-digit code, 15131990 (similar to the Philippines). Port-wise export data is available, but VCO-specific monthly data is not segregable.	15131100, 15131900 (proposed: 15131990)	Data based on exporter returns. Segregation from general coconut oil exports is currently not feasible.

		According to records, the GI-tagged VCO has not been exported yet.		

4.10 Stage – II data (qualitative data) acquired from Stakeholder meetings - summary

Building on the preliminary phase, detailed virtual consultations were conducted with stakeholders representing nine registered manufactured GIs of India. These engagements provided richer qualitative perspectives and helped connect trade performance with the lived realities of production, marketing, and institutional support. They revealed both the potential and the persistent challenges within India's diverse GI landscape, particularly the need for financial assistance, cooperative structures, and branding mechanisms that can translate traditional value into market advantage.

The nine manufactured GIs were as follows:

GI Good	Stakeholders interacted
Bodo Jou Gishi Bodo Jou Gwran Bodo Maibra Jou Bidwi	(a) Bodo Traditional Brewer's Association (b) Agricultural University, Assam (c) Local brewers
Himachali Chulli Oil	HIMCOSTE (Dr Suresh Attri)
Judima	Prof. Uttam Bathari; YADEM (Managing Trustee)
Kannauj Perfume	(a) Fragrance & Flavour Development Centre (FFDC) (b) GI producers
Meerut Scissors	(a) Sajid Saifi (artisan) (b) MSME, Meerut (c) SIDBI
Nainital Mombatti (Candle)	Mr Rajeev Mehrotra (GI Producer)
Nicobari Tavi-i-Ngaich (Virgin Coconut Oil)	(a) Prince Rashid (prominent figure of A&N Islands) (b) Tribal Development Cooperative Society (c) Coconut Board (d) NABARD

(a) <u>Bodo Jou Gishi, Bodo Jou Gwran and Bodo Maibra Jou Bidwi</u>

The meeting with representatives from the Bodo Traditional Brewers' Association, the Assam Agricultural University, and local brewers shed light on the traditional rice-based beverages of the Bodo tribe in Assam: Jou Gishi, Jou Gwran, and Maibra Jou Bidwi. These drinks, integral to Bodo cultural identity, are brewed mainly by women in household settings using time-honoured fermentation practices. Stakeholders emphasised the lack of research funding, infrastructure, and

AU registration, which limits the ability to scale and market. Misperceptions by enforcement authorities often lead to production restrictions, making it difficult for producers to access institutional credit. Nevertheless, the beverages hold strong niche potential: Jou Gwran could be positioned similarly to craft spirits such as tequila. At the same time, Maibra Jou Bidwi has export promise due to its unique ingredients. Participants agreed that forming a cooperative society, building a data collection system, and establishing a research centre to document indigenous fermentation would be the next vital steps.

(b) Nainital Mombatti (Candle)

The consultation on Nainital Mombatti (Candle) with local producer Rajeev Mehrotra highlighted the artisanal nature of this small cottage industry. All production is confined to Nainital, where artisans hand-craft candles using wax from Delhi, fragrances from Kannauj, and glass components from Firozabad. The work is largely manual and seasonal, peaking between March and November when tourism and festive sales rise sharply. Despite its artistic value, the product struggles against inexpensive Chinese imports, limited packaging quality, and the absence of registered AUs. Stakeholders underlined the need for cooperative organisation, digital marketing, and inclusion in ODOP and e-commerce platforms to sustain this regional craft.

(c) Meerut Scissors

Artisans and officials from the MSME Department and SIDBI described a heritage industry comprising over 500 small units that produce hand-forged scissors. The process involves intricate metalwork and hand finishing, giving each pair a distinctive mark of craftsmanship. Yet, the influx of cheaper imported scissors, high raw material prices, and a lack of product-specific HS codes undermine profitability. The newly established Common Facility Centre at Lohia Nagar, created through a public–private partnership, now provides shared forging and testing facilities, but broader market access remains limited. Stakeholders sought policy attention to support branding, participation in government procurement, and online marketing, aiming to reinforce Meerut's artisanal identity.

(d) Kannauj Perfume

Interactions with the Fragrance and Flavour Development Centre and local producers reaffirmed the city's status as India's "Perfumery Town." The industry, valued at approximately ₹3,000 crore, continues to rely on natural distillation techniques that are free from synthetic additives. However, exports remain modest because small artisans face heavy compliance costs, complex cosmetic regulations, and limited access to export licenses. Stakeholders recommended simplified export procedures, a Common Facility Centre for shared distillation and bottling, and fiscal incentives to revive traditional sandalwood-based operations that declined after the 1990s.

(e) Judima

In the case of Judima, a fermented rice wine of the Dimasa community, discussions with Professor Uttam Bathari and the women's collective Dimajik Hosom demonstrated how a community-led initiative successfully secured a GI tag in 2021. The beverage's uniqueness lies in its use of Bairing rice and Thembra bark, imparting a distinct flavour. Production remains small-scale, with approximately 200 women involved, and formal licensing processes are still underway. Judima has gained visibility through festivals such as the Hornbill Festival and the North East Festival, creating opportunities for GI tourism and niche marketing. Stakeholders envisioned positioning it as a premium artisanal drink linked to sustainable livelihoods and women's empowerment.

(f) Nicobari Tavi-i-Ngaich (Virgin Coconut Oil)

Engagement with representatives of the Tribal Development Cooperative Society, NABARD, and the Coconut Board regarding Nicobari Virgin Coconut Oil illustrated how GIs can anchor indigenous entrepreneurship. Produced through traditional cold-press methods in about 70 villages, the oil is handmade by women and admired for its purity and longevity. Despite national recognition following its registration in 2021 and mention by the Prime Minister in Mann Ki Baat, challenges persist in transportation, packaging, and cost-effective logistics to the mainland. Current output averages 200–400 litres per batch, with plans to expand to 1,000 litres. Stakeholders are developing GI-branded packaging, verifying genuine producers, and exploring collaborations with TRIFED and APEDA to establish export channels.

(g) Himachal Chulli Oil

A meeting with the Himachal Pradesh Council for Science, Technology and Environment (HIMCOSTE) on Himachali Chulli Oil focused on branding, pricing, and coordination between producers and government departments. Chulli Oil, extracted from apricot kernels, is valued both for therapeutic and culinary uses. HIMCOSTE, which has facilitated nine GI registrations in the state, agreed to collaborate with the DPIIT IPR Chair at GNLU to identify relevant HS codes and strengthen inspection mechanisms. The discussion highlighted the importance of structured data, authorised user registration, and interdepartmental coordination in developing the product's export potential.

Throughout these engagements, several recurring themes emerged. Institutional and financial constraints limit scaling across all sectors; producers repeatedly highlighted the absence of R&D funding, start-up linkages, and coordinated government support. Weak branding and inconsistent use of GI logos diminish visibility in both domestic and export markets, while the lack of standardised packaging undermines consumer confidence. Cultural continuity and women's

participation, however, emerged as notable strengths; exemplified by the Bodo beverages, Judima, and Nicobari Oil, which illustrate the social value of GIs as vehicles for inclusive growth. Finally, inadequate trade facilitation- particularly the absence of GI-specific HS codes, fragmented export data, and limited awareness of schemes such as GeM and FTA benefits - continues to hinder broader market integration. Overall, the Stage II consultations confirmed that India's manufactured GIs embody exceptional craftsmanship and heritage yet remain under-leveraged as economic assets. Strengthening institutional convergence among export promotion councils, GI facilitation centres, and state agencies; improving branding infrastructure and packaging; and developing digital export registries and cooperative models were widely identified as crucial measures to unlock their full potential in domestic and international markets.

4.11 Mapping potential manufactured goods eligible for GI protection

This research aims to find potential goods within the "manufactured goods" category that may qualify as Geographical Indication (GI) goods. We are specifically focusing on goods that demonstrate significant export potential and may serve as viable commodities for trade under FTAs, thereby enhancing India's export growth.

(1) **Pending GI Applications**: As per the records of December 2024, our research reveals that 15 goods are presently awaiting approval as GI applications with the GI Registry. These items have been classified as "manufactured goods."

(2) **One-District-One-Product (ODOP) initiative and ODOP List of Goods**: We analysed and identified the potential of the ODOP initiative for its visionary approach towards fostering balanced regional development by identifying, branding, and promoting one product from each district of the country, which has been really pivotal in boosting domestic markets, generating employment and enhancing international exports of Indian goods.

We utilised the ODOP product list from the "Invest India" website as our principal source for acquiring detailed information regarding the various goods. The ODOP initiative, launched by the Government of India, serves as a strategic framework to promote regional economic development by identifying and nurturing district-specific products with inherent strength, market potential and cultural significance. This initiative draws inspiration from globally successful frameworks in rural development, such as Japan's One Village One Product (OVOP) movement and Thailand's One Tambon One Product (OTOP) initiative, which are community-driven development strategies employed to identify and enhance regional products.

We are relying on the ODOP list to identify potential manufactured GIs of India for these reasons:

(a) Credible source of information, curated by the Government of India, and it is a government-validated database of products that have local relevance, production clusters and potential for value addition and exports.
(b) The list focuses upon unique products that are highlights of the region and are culturally rooted, have a strong connection to the geographical origin, are traditionally produced and are well-reputed. These attributes naturally position them as potential candidates for GI registration.
(c) Using the ODOP framework aligns with multiple national-level initiatives, including Atmanirbhar Bharat, Make in India, etc., creating opportunities for integrated policy support and access to government incentives once GI registration is completed.
(d) Many ODOP products are already being promoted for branding, standardisation, and packaging under state and central schemes. They are receiving promotional attention through government campaigns, buyer-seller meets, and export facilitation.

During our research, we identified certain anomalies in the categorisation of GI-based goods between "Handicrafts" and "Manufacturing" categories in the ODOP. Among them, two goods have pending GI applications but are listed as handicrafts in the ODOP list, creating confusion regarding their classification. Additionally, six registered GIs are categorised as manufactured goods in the ODOP list, although some are listed under other categories within the same list. Furthermore, two goods with pending GI applications are categorised differently on the GI website but are included as manufacturing items in the ODOP list. Similarly, five registered GIs are designated as handicrafts or natural goods under their GI classification, but are listed as manufacturing goods in the ODOP list. Finally, the remaining 193 goods are consistently listed as manufacturing items. These inconsistencies highlight significant challenges in maintaining category-wise accuracy, which is crucial for ensuring proper identification and labelling of goods correctly.

The differentiation between "manufactured goods" and "handicrafts" is contingent upon context, shaped by the goods' nature, attributes, production techniques, use of metal and functionality. Preliminary findings suggest that “manufactured goods” pertain to goods created using standardised processes, typically including mechanised production or serial manufacturing.
Some key takeaways are:

Table 4.6 Differentiation between “manufactured goods” and “handicrafts”

Criteria	Handicrafts	Manufactured

Production process	Predominantly made by hand, though some tools may be used.	Mass production utilising mechanised processes with minimal manual involvement.
Artistic element	Must have ornamentation, inlay work, or aesthetic appeal as a substantial part of the product	Functional utility is prioritised over aesthetics.
Extent of mechanisation	Some tools/ machinery may aid production, but do not replace hand skills.	Fully mechanised processes; Minimal artisanal input.
Value addition	Artistic elements contribute significantly	Value is derived from efficiency and scalability.

For clarifications and concrete data, we are actively participating in discussions with representatives and stakeholders from both ODOP and Invest India to enhance our expertise and help us find potential candidates for GI registration. These consultations aim to utilise their opinions, insights, and expertise.

They could only provide us with three particular recommendations, outlined as follows. Others, we assume based on their quality, characteristics, and reputation.

Table 4.7 : ODOP goods recommended by officials

State	District	ODOP product	ODOP sector	Product category	GI category
Andhra Pradesh	Tirupati	**Ratnam Pens**	Handloom	Tertiary	Potential Manufactured
Madhya Pradesh	Sehore	**Wooden Toys and Handicraft**	Handicraft	Primary	Potential Manufactured
Madhya Pradesh	Umaria	**Mahua**	Food Processing	Primary	Potential Manufactured

4.12 Details of goods mapped as potential GI goods under the 'manufactured' category

Table 4.8 : Indian goods that are under examination/ new applications for being registered as a geographical indication in India (i.e., pending applications under the GI Registry)

Sl. No.	Name of the Good	Place of Origin	Product category
1.	Kinnauri Jewellery	Himachal Pradesh	Jewellery

2.	Lao-pani (Beverage)	Assam	Alcoholic Beverages/ Wines/ Spirits
3.	Po:ro Apong (Beverage)	Assam	Alcoholic Beverages/ Wines/ Spirits
4.	Goa Urrack/ Uraq/ Urracca	Goa	Alcoholic Beverages/ Wines/ Spirits
5.	Kantilo Brass and Bell Metal Craft	Odisha	Common metals and their alloys (goods made of common metals)
6.	Kanpur Leather Goods	Uttar Pradesh	Leather
7.	Ayodhya Tika (Tilak) Product	Uttar Pradesh	Colourant (natural dye)
8.	Aligarh Dastagi-Hastagi Product (Hardware)	Uttar Pradesh	Metal hardware (locks, cabinet lever latches)
9.	Tribal Jewellery of Jharkhand	Jharkhand	Jewellery
10.	Athangudi Tiles	Tamil Nadu	Non-metallic Building Materials
11.	Chhang	Ladakh	Alcoholic Beverages/ Wines/ Spirits
12.	Ladakh Apricot Oil	Ladakh	Horticultural/ Forestry product (oil-extract)
13.	Soor	Uttarakhand	Alcoholic Beverages/ Wines/ Spirits
14.	Mahua	Maharashtra	Alcoholic Beverages/ Wines/ Spirits
15.	Surat Cut	Gujarat	Gems & Jewellery

Table 4.9 : Status of pending applications in the GI Registry (potential manufactured GIs) – as of December 2024.

Pending Application Name	Class	Product category	Region	Stage of Registration (as on December 31, 2024)	Applicant's name
Kinnauri Jewellery	14	Jewellery	Himachal Pradesh	Pre-Examination	Kinnaur Kalash Samiti
Lao-pani (Beverage)	33	Alcoholic beverage	Assam	Pre-Examination	Nomami Farmer Producer Company Limited
Po:ro Apong (Beverage)	33	Alcoholic beverage	Assam	Pre-Examination	Polo SHG Group
Goa Urrack/ Uraq/ Urracca	33	Alcoholic beverage	Goa	Pre-Examination	Department of Science, Technology & Waste Management, Government of Goa

Kantilo Brass and Bell Metal Craft	6; 15; 21	Common metals and their alloys (goods made of common metal); Musical instruments; Household utensils and containers(not of precious metal or coated therewith)	Odisha	Pre-Examination	The Managing Director, Odisha State Co-Operative Handicraft Corporation Ltd., Utkalika, represented by the Managing Director and Joint Secretary to the Govt. HT and H Dept, Govt of Odisha
Kanpur Leather Goods	18	Leather products	Uttar Pradesh	Pre-Examination	Secretary Kanpur Handicraft Leather Craft Development Welfare Association, Facilitated by Small Industries Development Bank of India -SIDBI RO
Ayodhya Tika (Tilak) Product	2	Colourants; mordents; raw natural resins (Natural dye)	Uttar Pradesh	Pre-Examination	Ayodhya Handicraft Producer Company Limited .
Aligarh Dastagi-Hastagi Product (Hardware)	6	Hardware product	Uttar Pradesh	Pre-Examination	Aligarh Hardware Evam Locks Traders Association
Athangudi Tiles	19	Building materials (non-metallic)	Tamil Nadu	Examination	Federation of Chettinad Athangudi Heritage Flooring Tiles Manufacturer Association & MSME - Technology Development Centre & Process and Product Development Centre (PPDC), IP Facilitation Centre
Chhang	33	Alcoholic beverage	Ladakh	Pre-Examination	Great Mission Group Society
Ladakh Apricot Oil	31	Agro, horticultural and forestry products	Ladakh	Pre-Examination	Sham Vegetable and Fruit Growers Cooperative Marketing Society
Soor	33	Alcoholic beverage	Uttarakhand	Pre-Examination	Dhatri Sendul Swayat Sahakarita Samiti
Mahua	33	Alcoholic beverage	Maharashtra	Examination	Great Mission Group Society

Tribal Jewellery of Jharkhand	14	Jewellery	Jharkhand	Pre-Examination	Jharkhand Silk Textile and Handicraft Development Corporation Limited (Jharcraft)
Surat Cut	14	Jewellery	Gujarat	New Application	Surat Diamond Association (SDA)

Table 4.10 : ODOP listed products and other goods in India that could be potentially registered as a geographical indication as a 'manufactured good' owing to its quality, reputation and other characteristics linked to the place of origin.

Sl. No.	Name of the Good	State/ Region	Product category
1.	Ratnam Pens	Andhra Pradesh	Engineering good
2.	Golaghat Agar Products	Assam	Perfumery
3.	Himmatnagar Ceramic Tiles	Gujarat	Non-metallic building materials
4.	Kaithal metal-based products	Haryana	Common metals and their alloys (goods made of common metals)
5.	Kinnaur (Fruit wine)	Himachal Pradesh	Alcoholic Beverages/ Wines/ Spirits
6.	Doda Lavender Oil	Jammu & Kashmir	Essential Oil
7.	Doda Lavender oil	Jammu & Kashmir	Natural Oil
8.	Coorg home-made wines	Karnataka	Alcoholic Beverages/ Wines/ Spirits
9.	Wooden Toys	Madhya Pradesh	Wooden items
10.	Jiribam (coconut oil)	Manipur	Coconut Oil (Oil-Extract)
11.	Jalandhar Sports Goods	Punjab	Gymnastic and sporting articles
12.	Ajmer Granite/Marble - Slabs, Tiles, and Articles	Rajasthan	Building materials (non-metallic)
13.	Chuwarak	Tripura	Alcoholic Beverages/ Wines/ Spirits
14.	Agar oil	Tripura	Perfumery oil
15.	Meerut Sports Goods	Uttar Pradesh	Gymnastic and sporting articles
16.	Mirzapur Brass metal products	Uttar Pradesh	Common metals and their alloys (goods made of common metals)
17.	Cufflinks (Gulabi Meenakari) of Varanasi	Uttar Pradesh	Gems & Jewellery
18.	Cufflinks (Shajar Stone) of Banda	Uttar Pradesh	Gems & Jewellery

4.13 Potential goods identified for GI Registration in India and their assumed HSN Codes

Of the 32 goods identified in this section as having the potential to be registered under India's GI framework:

(a) Sl. Nos. 1 to 15 have already been filed for GI registration, and their applications are currently pending with the GI Registry.

(b) Sl. Numbers 16 to 32 represent new or potential goods for which fresh applications have yet to be initiated.

This distinction is critical, as it enables us to approach the registration process through a two-pronged strategy: expediting ongoing applications and supporting new applications through capacity building, documentation, and institutional support.

Table 4.11 : HS Codes assumed for the potential GIs

Sl. No.	Name of the Good	HSN Code (*assumed*)	Product Category Description
1	Kinnauri Jewellery	7113	Articles of jewellery & parts thereof of precious metal or metal clad with precious metal
2	Lao-pani (Beverage)	2203	Beer
3	Po:ro Apong (Beverage)	2203	Beer
4	Goa Urrack / Uraq / Urracca	220600	Other fermented beverages (e.g., cider, perry, mead), mixtures with non-alcoholic beverages
5	Kantilo Brass and Bell Metal Craft	74199930	Articles of brass
6	Kanpur Leather Goods	4203	Leather apparel and clothing accessories
7	Ayodhya Tika (Tilak) Product	—	—
8	Aligarh Dastagi-Hastagi Product (Hardware)	8301 / 8302	Locks and base metal fittings for furniture, doors, etc.
9	Tribal Jewellery of Jharkhand	7113	Articles of jewellery & parts thereof of precious metal or metal clad with precious metal
10	Athangudi Tiles	6908	Wall tiles
11	Chhang	220600	Other fermented beverages (e.g., cider, perry, mead), mixtures with non-alcoholic beverages

12	Ladakh Apricot Oil	33019079	Other aqueous solutions of essential oils
13	Soor	220600	Other fermented beverages (e.g., cider, perry, mead), mixtures with non-alcoholic beverages
14	Mahua	220600	Other fermented beverages (e.g., cider, perry, mead), mixtures with non-alcoholic beverages
15	Surat Cut	71023910	Cut or worked diamonds (non-industrial), not mounted or set
16	Chuwarak	220600	Other fermented beverages (e.g., cider, perry, mead), mixtures with non-alcoholic beverages
17	Ajmer Granite/Marble (Slabs, Tiles, Articles)	6908	Wall tiles
18	Agar Oil	33013010	Agar oil
19	Jalandhar Sports Goods	9506	Sports articles and equipment
20	Meerut Sports Goods	9506	Sports articles and equipment
21	Kinnaur (Fruit Wine)	220600	Other fermented beverages (e.g., cider, perry, mead), mixtures with non-alcoholic beverages
22	Jiribam (Coconut Oil)	1513	Coconut oil and its fractions
23	Himmatnagar Ceramic Tiles	6908	Wall tiles
24	Mirzapur Brass Metal Products	74199930	Articles of brass
25	Kaithal Metal-Based Products	83079000	Base metal fittings and products
26	Doda Lavender Oil	—	—
27	Cufflinks (Gulabi Meenakari) of Varanasi	—	—
28	Cufflinks (Shajar Stone) of Banda	680423	Natural stone products
29	Coorg Home-made Wines	220600	Other fermented beverages (e.g., cider, perry, mead), mixtures with non-alcoholic beverages
30	Golaghat Agar Products	33013010	Agar oil
31	Ratnam Pens	960830	Fountain pens
32	Wooden Toys (Sehore)	95030010	Wooden toys

To ensure the effective registration of manufactured goods under India's GIs framework, a structured yet adaptable approach is essential. The process must begin with the systematic compilation of product-specific documentation, including historical records, ethnographic evidence, and detailed production narratives that establish the product's origin, quality, and unique attributes. For manufactured products, where human skill and cultural tradition are central, demonstrating the territorial linkage between place and craftsmanship is particularly critical.

Equally important is the organisation of genuine producers into formal associations, cooperatives, or trusts that can serve as legally recognised applicant bodies. Such entities should represent the community inclusively and act as custodians of the GI, ensuring its authenticity and long-term stewardship. Since many producer groups may lack legal or technical expertise, facilitation through law schools, legal aid clinics, or designated nodal agencies, supported by state departments, can play a crucial enabling role.

Each application must also ensure accurate classification under the "manufactured" category, with clear descriptions of the production process, the role of artisans, and the specialised inputs involved—especially for goods like fermented beverages, metal crafts, or handmade tiles, where craftsmanship defines the product's identity.

Finally, applicants should adopt a forward-looking registration strategy, integrating post-registration considerations such as inspection mechanisms, authorised user registration processes, and quality assurance or branding frameworks. A comprehensive application rooted in community participation, institutional coordination, and quality control will not only strengthen the case for GI registration but also secure sustainable value creation and recognition for India's manufactured goods in the long term.

5

5. ANALYSIS OF TRADE AND EXPORTS OF MANUFACTURED GI GOODS – INDIA

5.1 Analysing the registered manufactured GIs of India

Regarding the secondary data

While the HS6 code offers a more precise classification for GI products, data availability at this level remains limited. Consequently, this study assumes that GI-designated goods align with the broader sectoral categories identified by HS2 codes. However, the general nature of HS2, encompassing a range of related products, may lead to challenges in accurately isolating the export contribution of the specific GI product. As the study seeks to assess the export potential of selected GI goods, using HS2 as a proxy may result in some degree of estimation error. Although existing literature acknowledges the challenge of accurately mapping GI products within HS classifications, several studies have effectively utilised broader categories.

For instance, Chakravarthy, Bharathi, et al. (2023)[i] applied HS2-level data to analyse the comparative advantage of various Indian export sectors, highlighting their relevance for the MSME segment.

Similarly, Neogi et al. (2019)[ii] investigated trade patterns between India and ASEAN, employing both HS2 and HS6 codes, where HS2 provided a macro-level view and HS6 enabled pinpointing high-performing items within those categories.

The following GI products have been identified for our analysis and have been mapped at the HS2 level:

Name of the Product	HS2 Code	Broad Category
Bodo Jou Gishi	22	Alcoholic Beverages
Bodo Jou Gwran		
Bodo Maibra Jou Bidwi		
Nashik Valley Wine		
Feni		
Judima		
Arunachal Pradesh Adi Apong (Beverage)		
Arunachal Pradesh Marua Apo		

(Marua Millet Beverage)		
Meghalaya Chubitchi		
Mysore Sandalwood Oil	33	Essential Oils and Perfumery
Himachali Chulli Oil		
Ganjam Kewda Rooh		
Kannauj Perfume		
Mysore Agarbathi		
Mysore Sandal Soap	34	Soaps, Lubricants, Waxes
Nainital Mombatti (Candle)		
East India Leather	42	Leather Articles
Agra Leather Footwear	64	Footwear
Dindigul Locks	82	Hand Tools, Cutlery, Base Metal Articles
Arunachal Pradesh Dao (Sword)		
Meerut Scissors		
Coimbatore Wet Grinder	85	Electrical Machinery

The export data corresponding to the identified broad categories are accurately aligned with their respective HS2 codes. The dataset spans from January 2019 to November 2024 and is organised every month. Export figures are reported in both value (in millions of USD) and volume (in thousands of units). For country-level analysis, we utilised country-specific export data—also presented in terms of value and volume—which was sourced from the same database.

5.2 Jurisdictions Considered in the Analysis (Based on India's FTA Engagements)

A. Countries/Trading Blocs with FTAs Signed and In Effect:

(a) **SAFTA Members:** Afghanistan, Bangladesh, Bhutan, Maldives, Nepal, Pakistan, Sri Lanka

(b) **ASEAN Members**: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam

(c) Others:

- South Korea
- Japan
- Mauritius

- United Arab Emirates (UAE) – GCC member state
- Australia

(d) **EFTA Members:** Iceland, Liechtenstein, Norway, Switzerland

B. Countries with Ongoing FTA Negotiations:

(a) United Kingdom (recently concluded)

(b) Israel

(c) Canada

(d) GCC member states - Saudi Arabia, Oman, Kuwait, Bahrain, Qatar

(e) Peru

For this study, data from specific countries have been aggregated under regional trade blocs, including SAFTA, ASEAN, EFTA, and the GCC. The remaining countries are considered individually to facilitate analysis. The EU trade statistics are compiled using the Combined Nomenclature (CN), which is revised annually. These revisions often split, merge, or reclassify product categories, creating breaks in continuity that make long time series difficult to align with India's HS-based dataset. While concordance tables exist, aligning CN with HS2 codes requires significant methodological effort and risks introducing artefacts. To preserve consistency, the econometric analysis excludes the EU as a single bloc and focuses instead on regions where HS-based data can be directly compared. Although the EU is an ongoing FTA negotiation partner, it is not analysed as a single aggregated bloc in the econometric sections of Chapter 5. This is because constructing a EU-wide dataset comparable to other regions would demand substantial reconciliation of COMEXT statistics with India's general trade system. To maintain consistency, the EU is therefore referenced only in narrative terms and excluded from the bloc-level indices and regressions.

5.3 Regarding Qualitative Information

To understand the nature of production, business, and their challenges, we planned to have a comprehensive discussion with the producers and traders of the GI products in our study. After a brief conversation, we managed to obtain a few responses from all the producers. We connected with stakeholders of 20 out of 23 manufactured registered GIs and managed to conduct both preliminary and detailed group discussions with them. A qualitative understanding gained from those discussions becomes an integral part of the analysis.

Products covered in qualitative discussions & meetings with key stakeholders			
Bodo Jou Gishi	Kannauj Perfume	Meerut Scissors	Bodo Jou Gwran
Judima	Himachali Chulli Oil	Feni	Nashik Valley Wine
Ganjam Kewda Rooh	Bodo Maibra Jou Bidwi	Nainital Mombatti (Candle)	Nicobari Tavi-i-Ngaich (Virgin Coconut Oil)
Mysore Sandal Soap	Mysore Agarbathi	Arunachal Pradesh Dao	Arunachal Pradesh Adi Apong
Agra Leather Footwear	Coimbatore Wet Grinder	Mysore Sandalwood Oil	East India Leather

5.4 Methodology used

For a detailed empirical analysis of India's exports of each commodity, we have employed the Panel Regression method, which is a statistical method that simultaneously analyses data across both time periods and specific countries. Through this method, we examine the relationship between export value and total commodity exports across multiple countries and commodity categories over time. Also, we construct trade indices for FTA and Ongoing FTA partners in India to analyse commodity-specific trade patterns.

The data also showed evidence of very high variability, which may potentially distort the empirical findings of the study. To avoid adverse effects from exceptionally high or extremely low values, which may potentially skew the data, Berman et al. (2012)[iii] applied the log(1+x) transformation, where 'x' represents the export volume or value, in their study of exporters' responses to currency changes. Similar to this approach, to stabilise the variance of the variable and handle zero values, a logarithmic transformation of log (1+x) has been applied to total export volume, total export value, and commodity-specific value and volume data. To account for unobserved, time-invariant variables across country-commodity pairs, such as geographical location, regulatory frameworks, or long-standing trade agreements (historical), fixed effects were included. Applying a fixed effects model absorbs all characteristics unique to a given country-commodity pair that remain constant over time. This minimises the potential for omitted variable bias. The use of fixed effects is inspired by Baier and Bergstrand (2007)[iv], who have also employed similar models to estimate the trade effects of FTAs. In a similar context, Egger and Larch (2008) examined how trade agreements influence exports while taking into account persistent bilateral factors.

Considering the unique attributes of the dataset, the aim was to identify the most suitable model for analysis. To achieve this, a Hausman test was performed to compare models. The test results

favoured the fixed effects model by rejecting the null hypothesis, which assumed that the random effects estimator is consistent. This indicates that unobserved, country–commodity-specific factors have a significant impact on the dependent variable and should be controlled for using fixed effects. This approach aligns with the methodology adopted in previous research, such as Baier and Bergstrand (2007), which also highlighted the need for consistent estimators in the analysis of trade-related data.

In another study by Head and Mayer (2014), they[v] have emphasised the importance of capturing heterogeneous effects in trade regressions through interaction terms. Interaction terms specifically account for the combined effects of multiple predictors in a model. In addition to our basic fixed effects estimation model, we also estimate interaction and intersection models to look into the differential effects across country groups and commodity categories. Given below are the interaction predictors for the models.

$$\boldsymbol{log(Export\ Value) \times Country\ Group},\ \ \boldsymbol{log(Export\ Value) \times Commodity}$$

$$\boldsymbol{log(Export\ Volume) \times Country\ Group},\ \ \boldsymbol{log(Export\ Volume) \times Commodity}$$

These interactions test whether the relationship between export value and total exports varies by country group or product type.

5.5 Index and Scaling

To analyse how trade varies with country partners with whom India has signed an FTA and those with whom negotiations are ongoing, based on our monthly data of each commodity exported to those countries, we have created two indices: 'FTA' and 'ongoing FTA'.

$$\text{FTA Index}_t = \sum_{i \in \text{FTA Group}} \text{Trade}_{i,t}, \quad \text{Ongoing FTA Index}_t = \sum_{j \in \text{Ongoing Group}} \text{Trade}_{j,t}$$

Trade volumes frequently exhibit significant fluctuations over time. To manage this variability, data scaling is employed to bring values onto a common scale without compromising the integrity or relevance of the original information. Bown and Crowley (2013)[vi] utilised scaled trade volume data to examine governmental policy actions during periods of financial turmoil. In this study, we apply a similar approach by scaling both the aggregate export volume and the export volume for individual commodities. These scaled metrics are then used as dependent variables to evaluate the effectiveness of FTAs and ongoing FTA engagements. Additionally, the indices for 'FTA' and

'ongoing FTA' are constructed using scaled export volume or value data corresponding to each partner country.

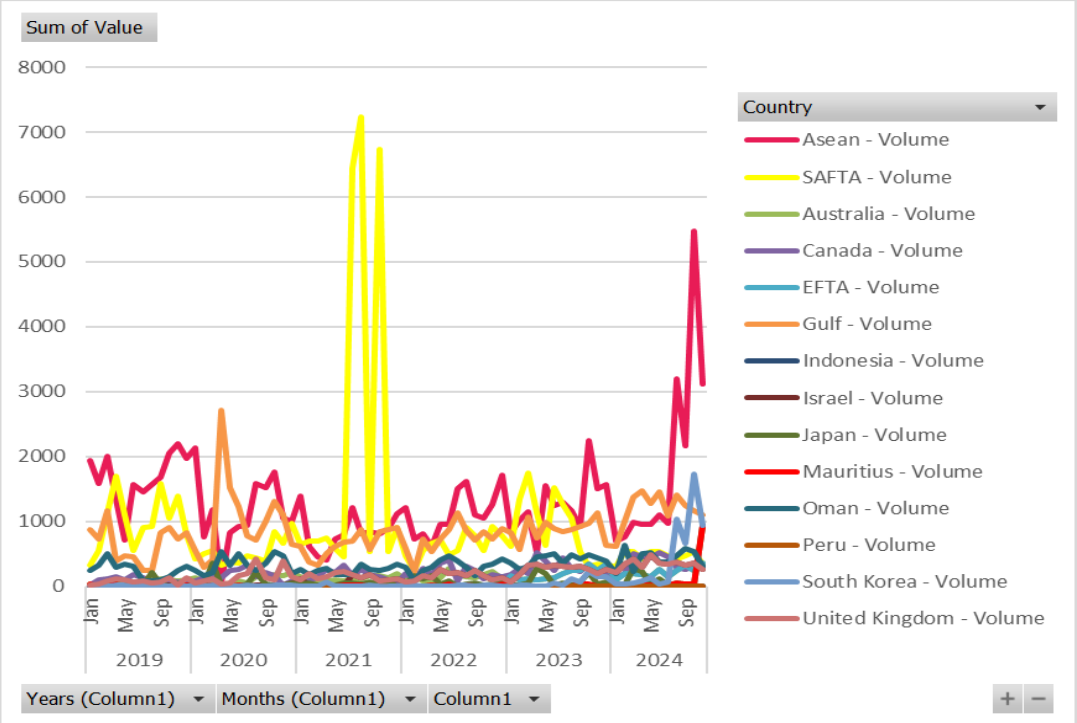
Given below is the operation that has been used for scaling and transforming the data:

$$\text{Scaled Trade}_t = \left(\frac{\text{Trade}_t - \min(\text{Trade})}{\max(\text{Trade}) - \min(\text{Trade})} \right) \times 100$$

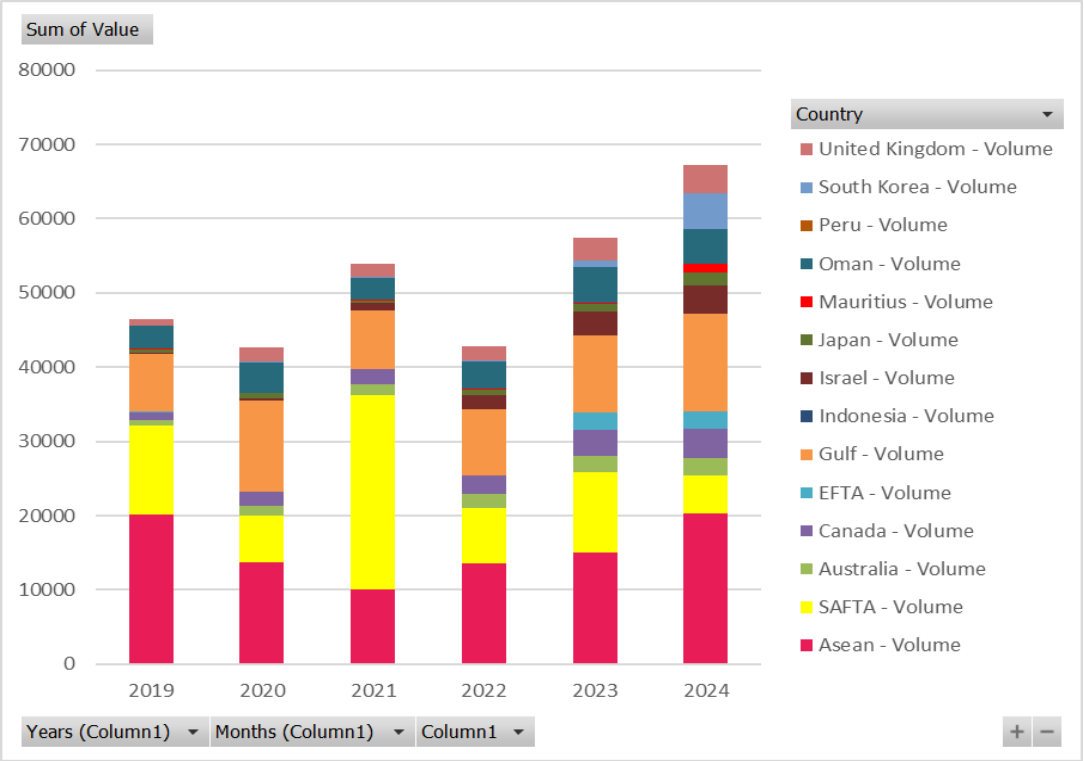
5.6 Trends in Export - Analysis

In this section, we analyse the trend in export volume for different categories.

(a) HS Code 22 – Alcoholic Beverages



From 2019 to 2024, India's alcoholic beverage exports moved unevenly, with some months showing higher shipments and others much lower. SAFTA peaked in 2021, ASEAN experienced sharp growth in 2024, and the Gulf recorded its highest activity in 2020 before settling into steadier levels. Overall, the trend suggests demand is seasonal or driven by occasional large orders rather than steady trade.



From 2019 to 2024, SAFTA and ASEAN countries together make up the largest share of India's alcoholic beverage exports each year. The United Kingdom has become a significant buyer in 2023 and 2024, while other regions remain minor contributors. Overall, exports are concentrated in a few key markets, with limited growth in different areas.

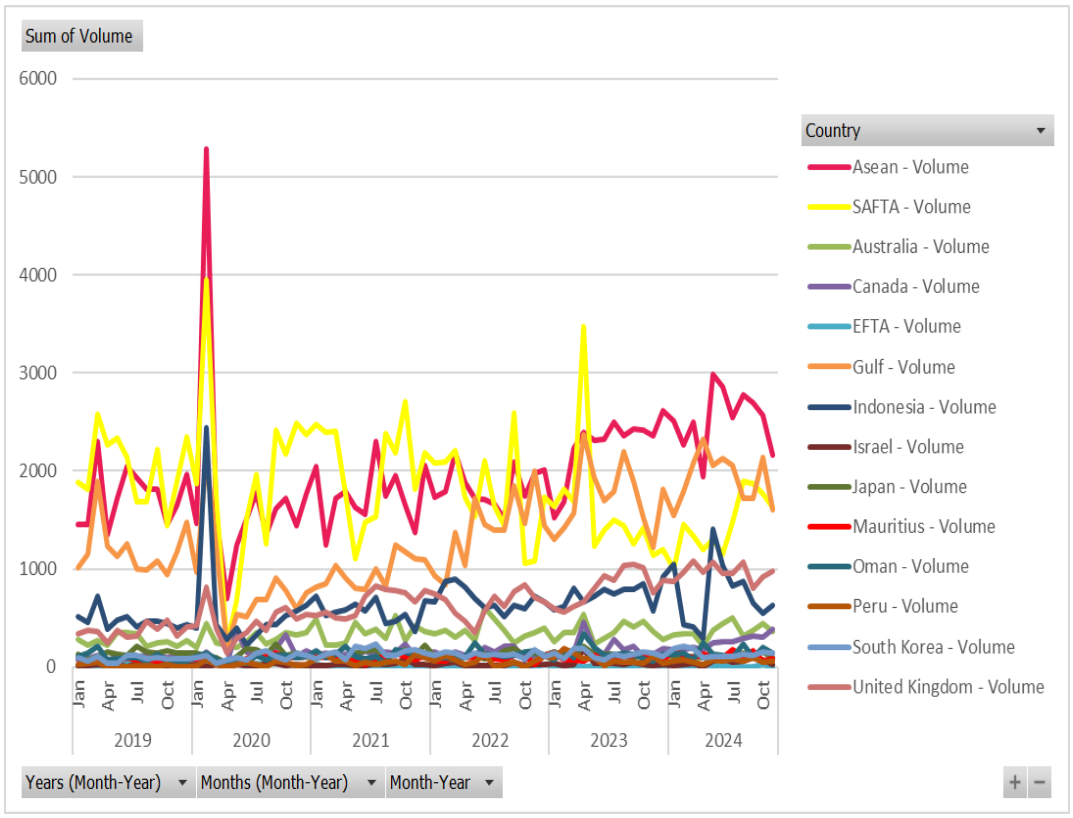
HS 22 Ranking Based on Volume of Trade

FTA			Ongoing FTA		
Country Group	**Average Annual Volume**	**Rank**	**Country Group**	**Average Annual Volume**	**Rank**
ASEAN	92741.49	1	Gulf	60459.79	1
SAFTA	67946.34	2	Oman	23355.59	2
Australia	10046.33	3	Canada	14945.18	3

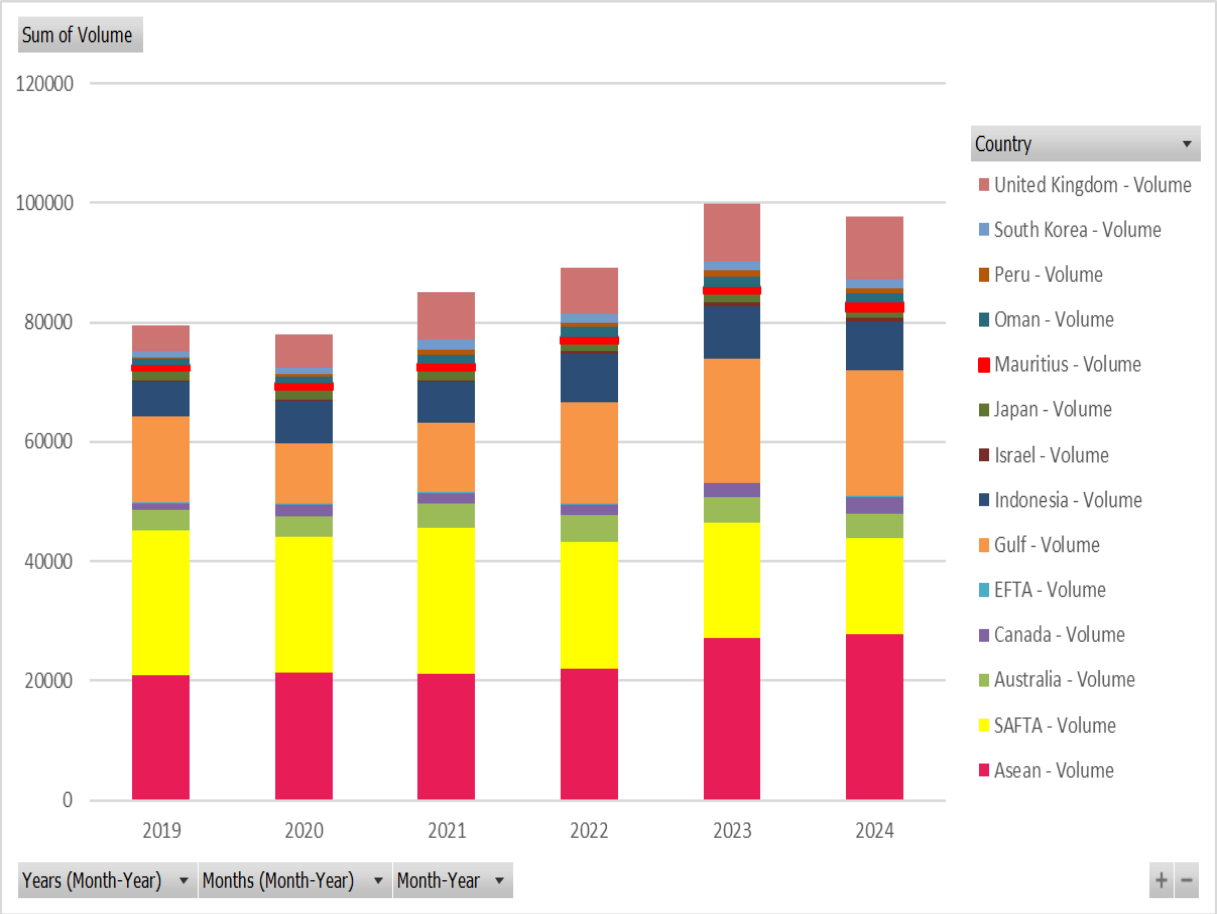
South Korea	6043.24	4	United Kingdom	13331.69	4
Japan	5173.21	5	Israel	10129.36	5
EFTA	4726.44	6	Indonesia	0	6
Mauritius	1667.09	7	Peru	0	6

ASEAN is the top buyer under current FTAs, followed by SAFTA. Australia, South Korea, Japan, EFTA, and Mauritius import much smaller amounts. For ongoing FTAs, the Gulf leads, with Oman, Canada, and the UK also showing demand. Israel records moderate activity, while Indonesia and Peru show none. Trade is concentrated in ASEAN, SAFTA, and the Gulf, with the UK emerging as another strong market.

(b) HS Code 33 – Essential Oils and Perfumes



The chart shows a stable and consistent export trend for HS Code 33 from January 2019 to October 2024, with ASEAN, SAFTA, and the Gulf showing regular activity.



Between 2019 and 2024, India's exports of essential oils and perfumes increased steadily. SAFTA and ASEAN are the main buyers every year, while the Gulf, UK, and Australia also purchase regularly. Exports rose until 2023, dipped slightly in 2024, but overall demand remains strong across regions.

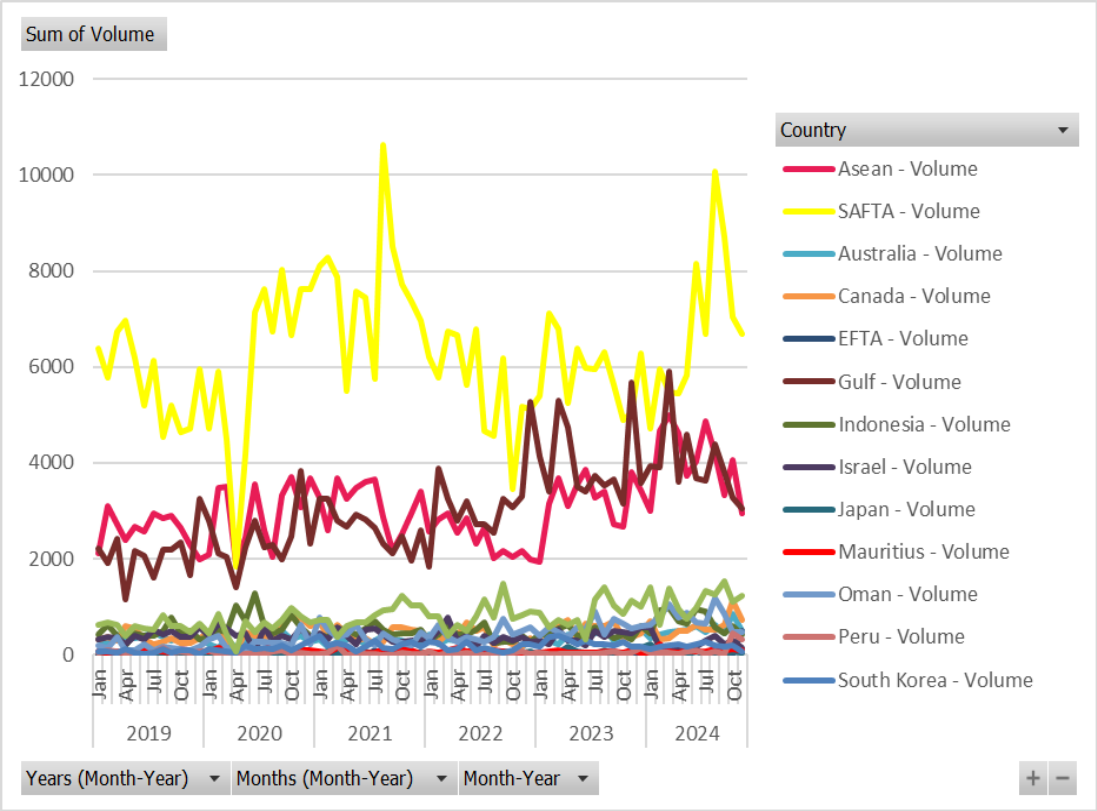
HS 33 Ranking based on volume of trade

FTA				**Ongoing FTA**		
Country Group	**Average Annual Volume**	**Rank**		**Country Group**	**Average Annual Volume**	**Rank**
ASEAN	140490.8	1		Gulf	94847.28	1

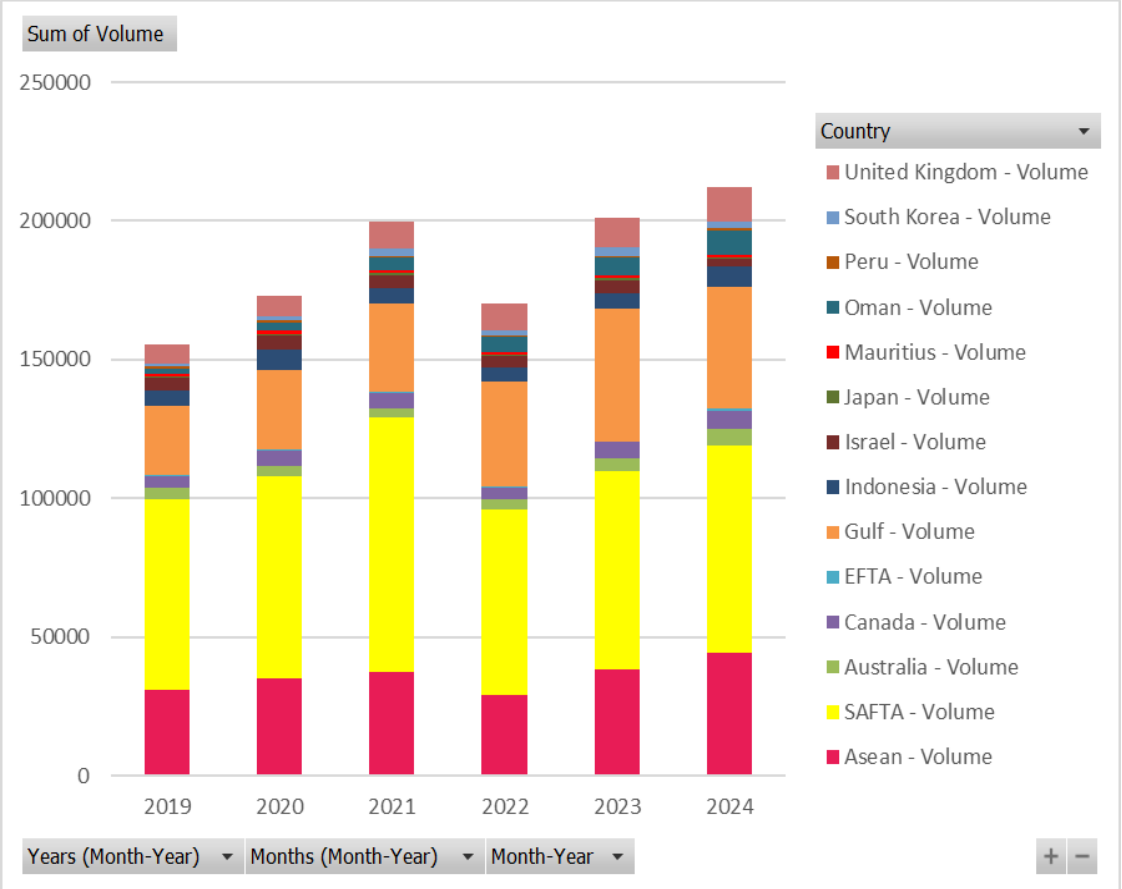
SAFTA	127938.07	2	United Kingdom	45933.81	2
Australia	23824.18	3	Indonesia	44909.25	3
Japan	9125.61	4	Canada	11485.1	4
South Korea	8690.52	5	Oman	8646.94	5
Mauritius	6667.86	6	Peru	3697.93	6
EFTA	1119.43	7	Israel	2111.4	7

ASEAN is the top buyer under current FTAs, followed by SAFTA and Australia. Under ongoing agreements, the Gulf and UK lead. India's strongest markets are in South and Southeast Asia, with growing demand from the Gulf and the UK.

(c) HS Code 34 – Soaps, Agarbathi, Candles



From 2019 to 2024, exports stayed steady, with SAFTA as the largest and most consistent buyer, followed by the Gulf and ASEAN. While there are small changes from month to month, overall demand remains regular, indicating that India has reliable buyers across several regions.



From 2019 to 2024, exports grew steadily. SAFTA and ASEAN are the primary buyers each year, while the Gulf, the UK, and Australia also make regular purchases. The total export volume rose in 2021 and again in 2024, indicating strong and growing demand across regions.

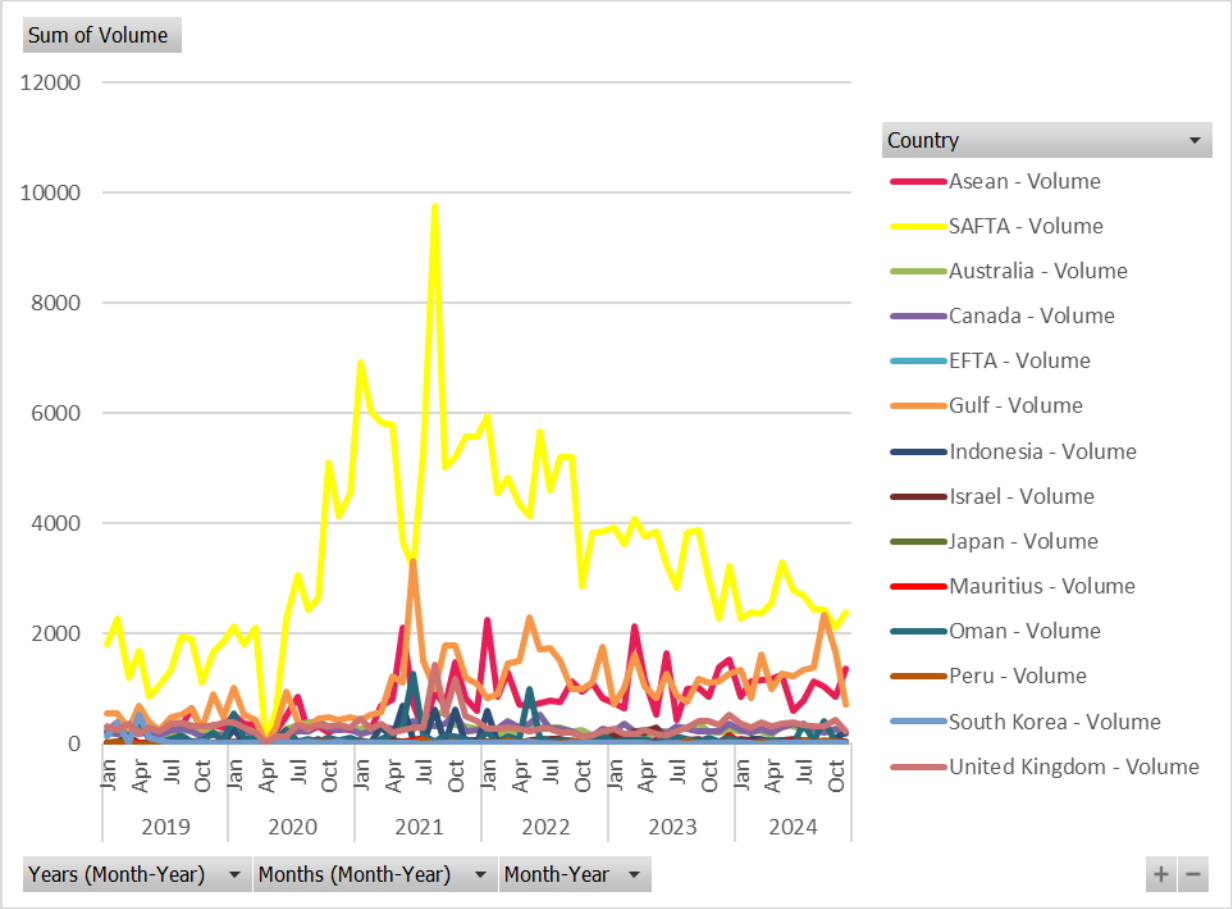
HS 34 Ranking Based on Volume of Trade

FTA			Ongoing FTA		
Country Group	**Average Annual Volume**	**Rank**	**Country Group**	**Average Annual Volume**	**Rank**
SAFTA	445553.16	1	Gulf	215051.45	1
ASEAN	216175.94	2	United Kingdom	57074.38	2

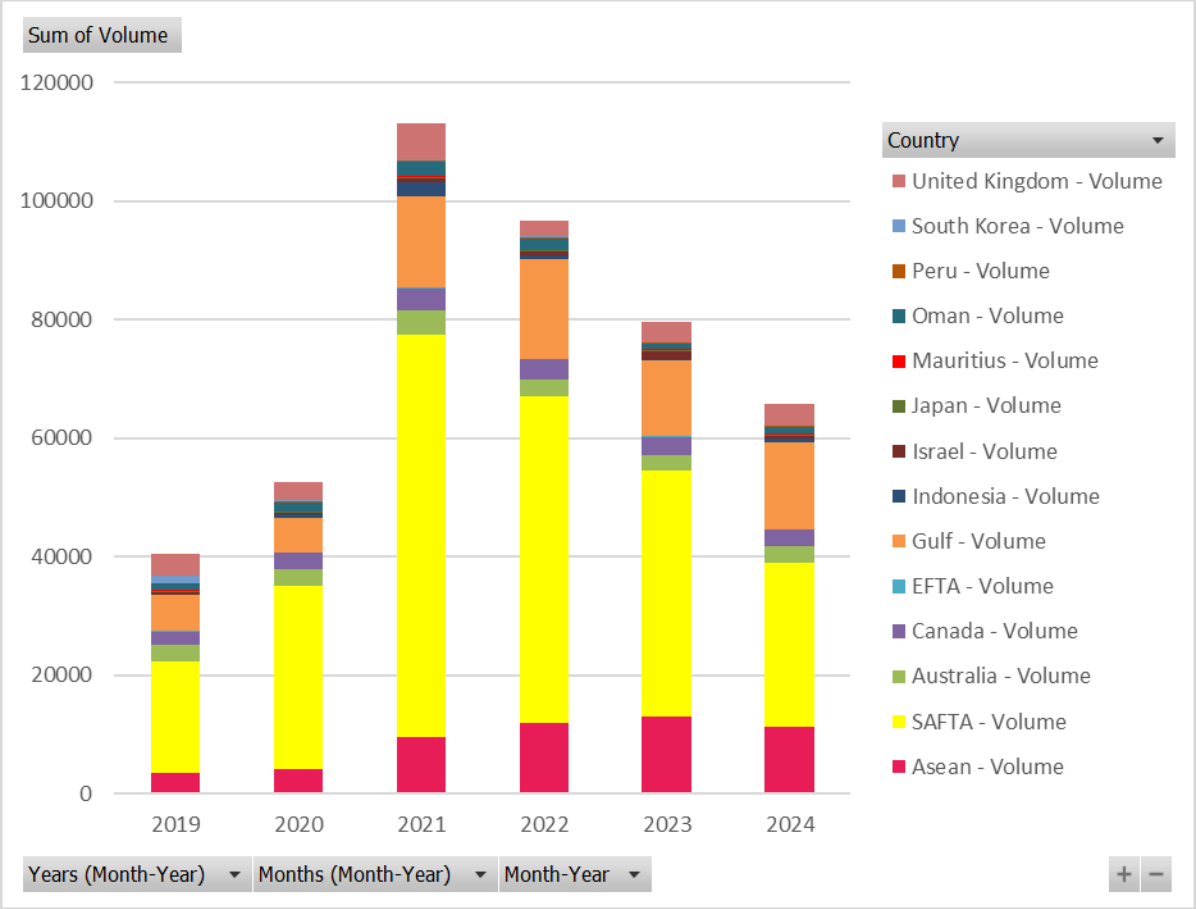
Australia	25628.4	3	Indonesia	37219.13	3
South Korea	11966.32	4	Canada	32491.94	4
Mauritius	5752.1	5	Oman	30482.6	5
Japan	3208.81	6	Israel	26111.85	6
EFTA	1419.3	7	Peru	3841.45	7

SAFTA is the leading buyer under current FTAs, followed by ASEAN and Australia, showing strong ties with eastern markets. Under ongoing agreements, the Gulf leads, with the UK and Indonesia also important.

(d) HS Code 44 – Wooden products



From 2019 to 2024, India's wood exports show a steady upward trend. SAFTA leads with the highest and most consistent volumes, followed by ASEAN and the Gulf. Other regions show smaller, fluctuating activity. Overall, demand is growing and spread across multiple countries.



SAFTA is the top buyer across all years, followed by ASEAN and the Gulf. The UK and Australia also show regular demand. Export volumes peaked in 2021 and remained strong through 2024, indicating stable and growing interest from multiple regions.

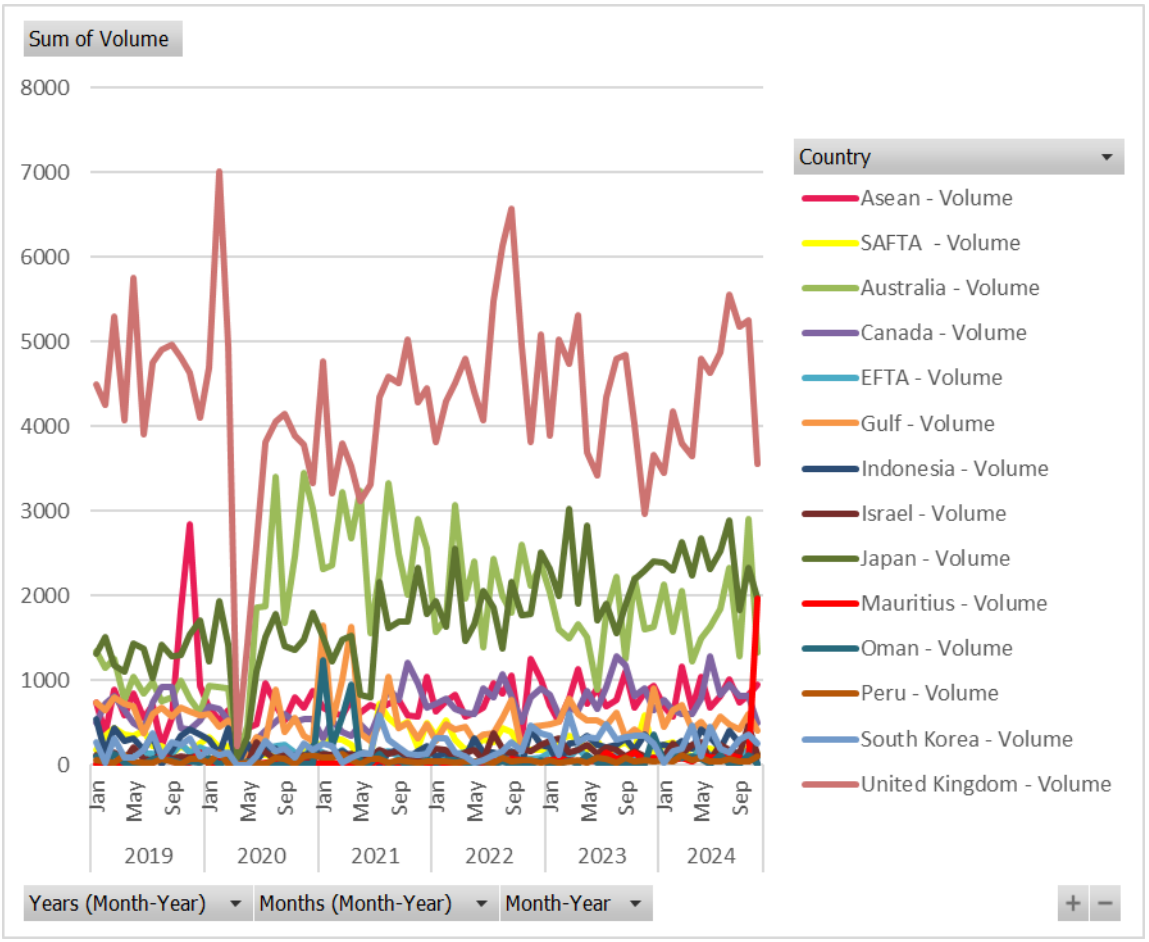
HS 44 Ranking Based on Volume of Trade

FTA			Ongoing FTA		
Country Group	**Average Annual Volume**	**Rank**	**Country Group**	**Average Annual Volume**	**Rank**
SAFTA	241647.6	1	Gulf	71517.26	1
ASEAN	53643.59	2	United Kingdom	22788.59	2

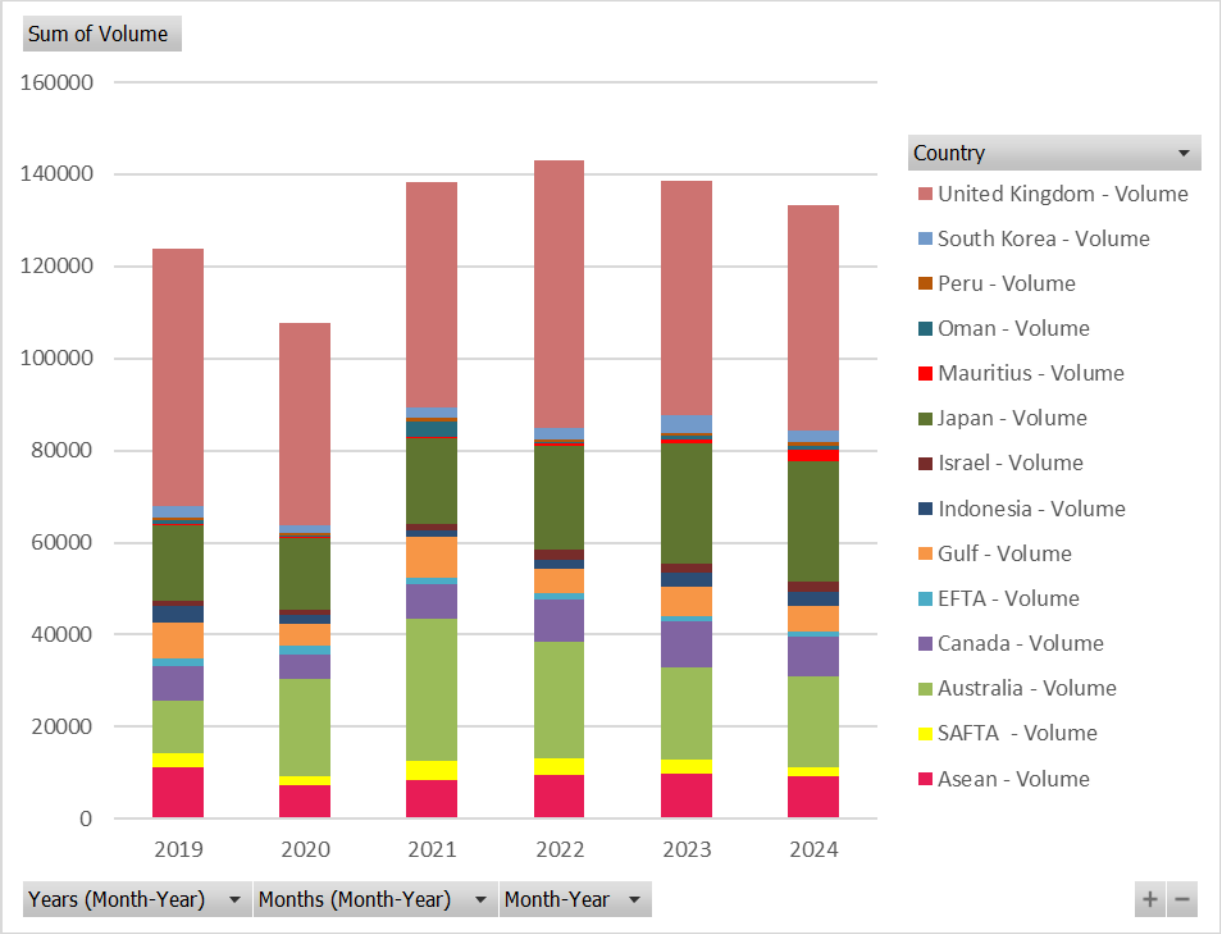
Australia	17994.71	3		Canada	18094.91	3
South Korea	1796.34	4		Oman	8919.53	4
Japan	1111.2	5		Indonesia	4726.17	5
Mauritius	998.53	6		Israel	3635.09	6
EFTA	627.17	7		Peru	1070.8	7

SAFTA is the largest buyer, followed by ASEAN and Australia — together, they account for the majority of trade under existing agreements. Among ongoing deals, the Gulf leads, with strong demand from the UK and Canada. These countries already import in large volumes, even before formal agreements are established. India's wood products have established a strong global presence, and as trade partnerships deepen, their export potential is expected to grow further.

(e) HS Code 42 - Leather Articles and Accessories



From 2019 to 2024, exports of handbags, belts, and other leather accessories remained stable. No sharp spikes or drops suggest regular shipments and reliable trade relationships, likely supported by long-term agreements.



From 2019 to 2024, exports of handbags, belts, and suitcases remained strong. The UK is the top buyer each year, followed by Japan and Australia. Volumes increased from 2020 to a peak in 2022, then dipped slightly, indicating steady demand with minor fluctuations in recent years.

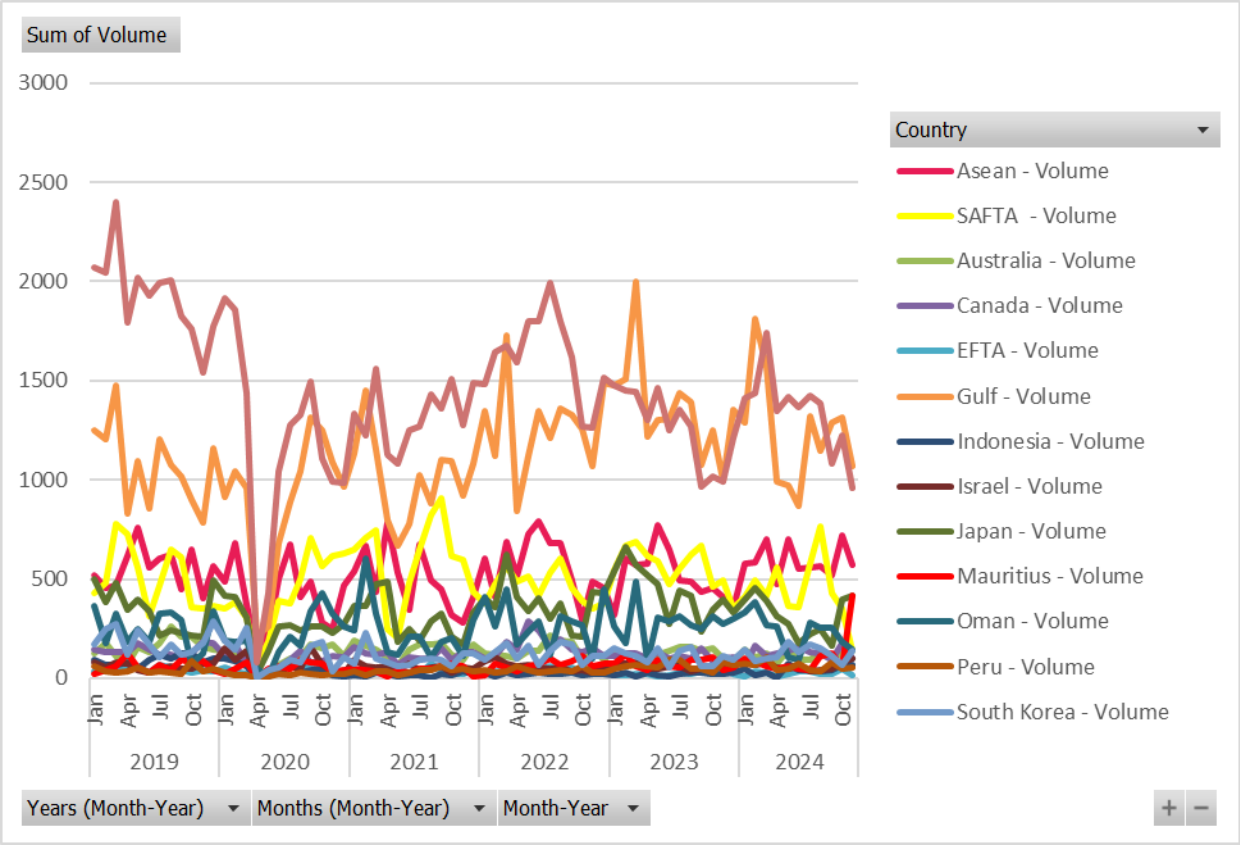
HS 42 Ranking Based on Volume of Trade

FTA			Ongoing FTA		
Country Group	**Average Annual Volume**	**Rank**	**Country Group**	**Average Annual Volume**	**Rank**
Australia	128458.59	1	United Kingdom	306321.79	1
Japan	125210.34	2	Canada	48379.81	2

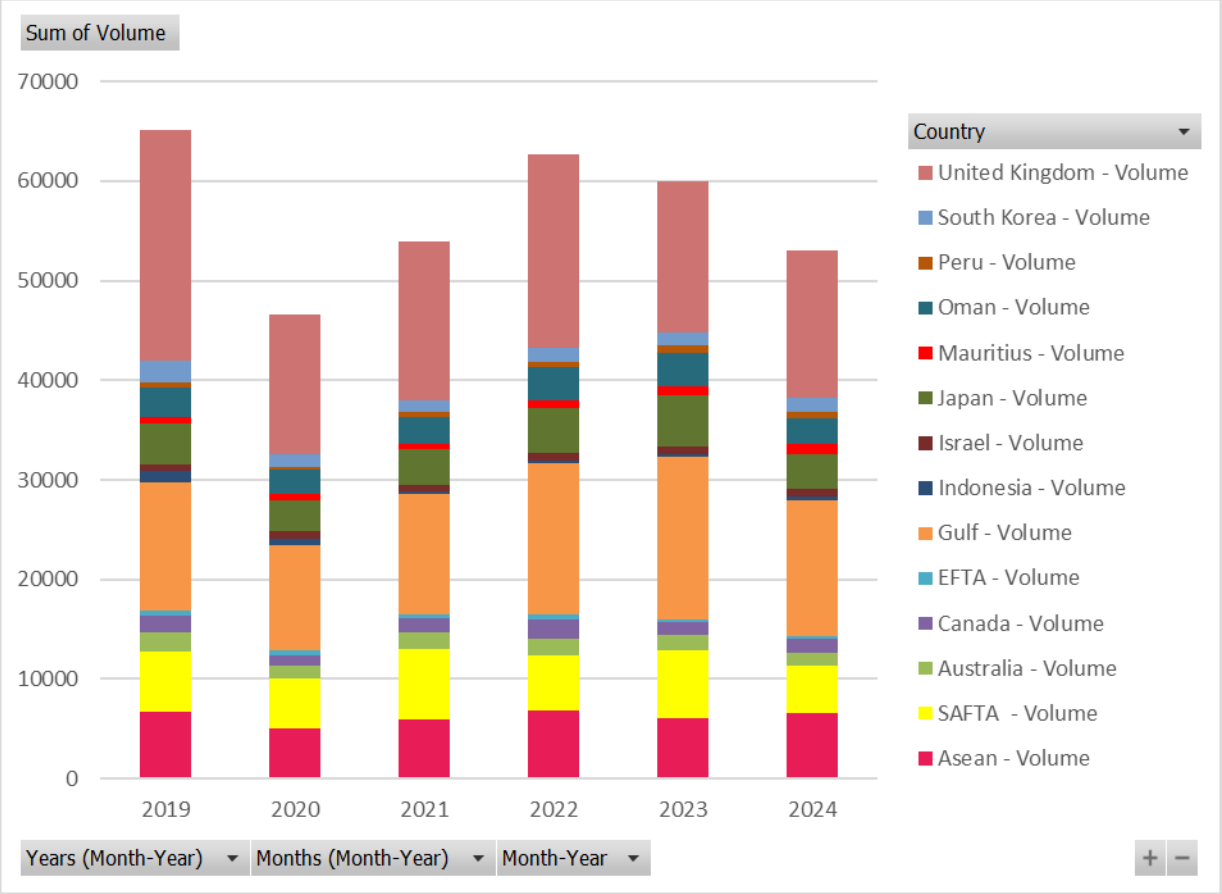
ASEAN	55301.01	3	Gulf	38480.53	3
SAFTA	18091.26	4	Indonesia	14750.99	4
South Korea	15646.87	5	Israel	10344.11	5
EFTA	8590.99	6	Oman	6053.85	6
Mauritius	5039.02	7	Peru	3896.67	7

Australia and Japan are the biggest buyers under current trade deals, with ASEAN also playing a key role. Among ongoing agreements, the UK leads, followed by Canada and the Gulf. India's leather products already enjoy strong global demand, and as new trade deals are finalised, exporters can expect even greater growth opportunities.

(f) HS Code 64 – Footwear



From 2019 to 2024, India's footwear exports—shoes, sandals, and boots—grew steadily. The lines rise smoothly with regular peaks and no sharp drops, showing consistent shipments and strong demand. Reliable buyer relationships and repeat orders maintain a stable and well-organised trade.



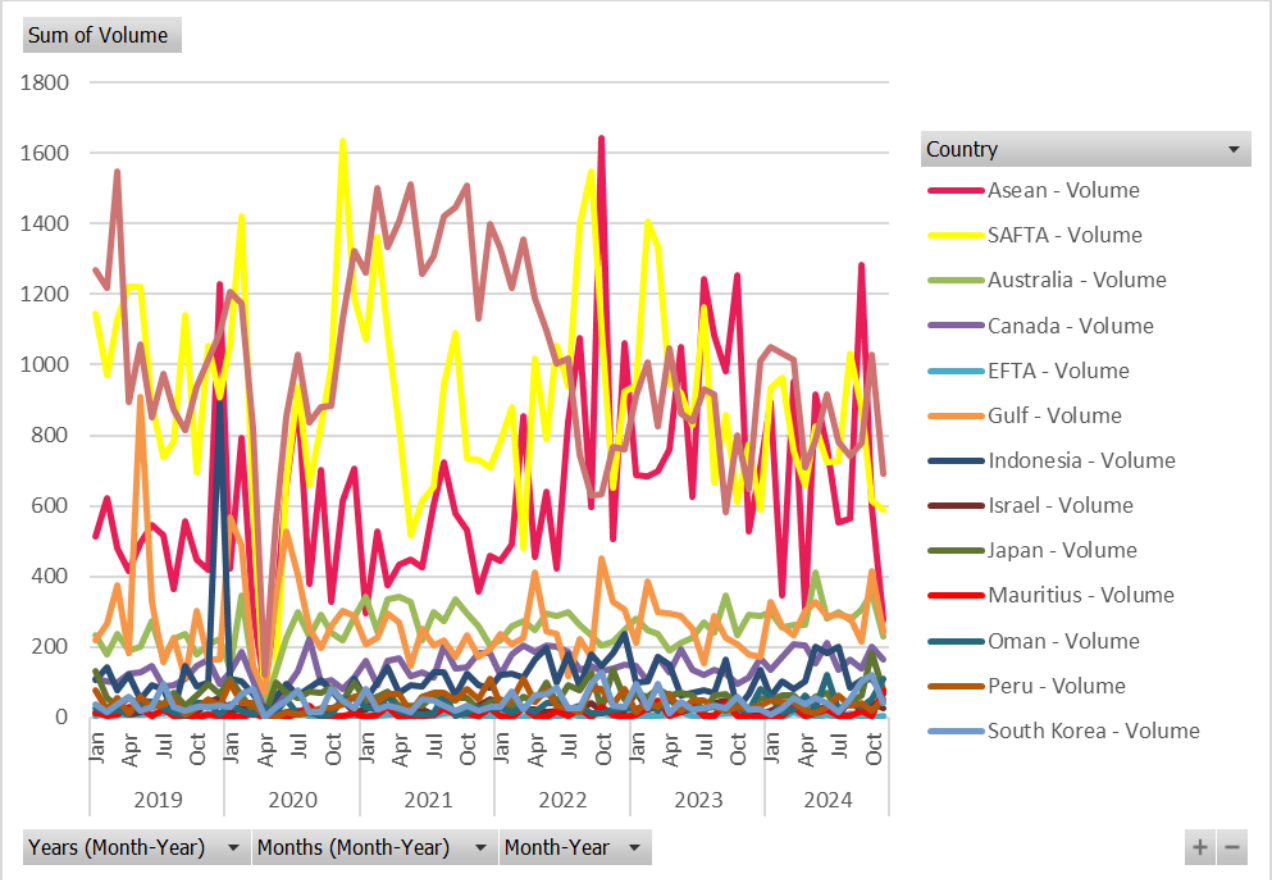
From 2019 to 2024, India's footwear exports—shoes, sandals, and boots—remained strong and consistent. The UK is the biggest buyer each year, followed by the Gulf region. Volumes shift slightly from year to year, but overall, they show steady demand, with buyers placing regular orders and trusting Indian products.

HS 64 Ranking Based on Volume of Trade						
FTA				Ongoing FTA		
Country Group	Average Annual Volume	Rank		Country Group	Average Annual Volume	Rank

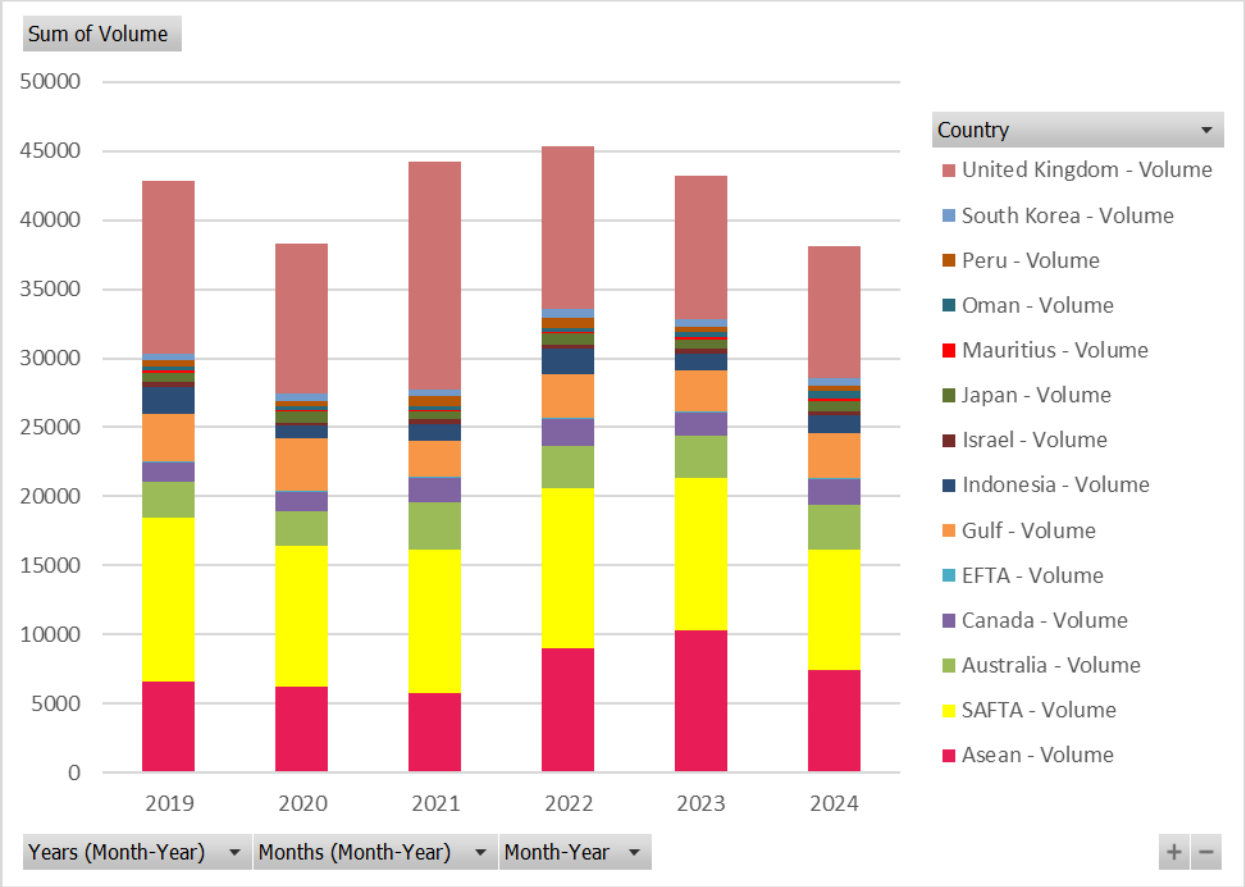
ASEAN	37050.38	1	United Kingdom	102467.42	1
SAFTA	35353.89	2	Gulf	80722.74	2
Japan	23903.06	3	Oman	17393.4	3
Australia	9368.46	4	Canada	8856.34	4
South Korea	8970.56	5	Israel	4330.1	5
Mauritius	4708.12	6	Peru	2996.67	6
EFTA	2427.95	7	Indonesia	2805.08	7

From 2019 to 2024, ASEAN, SAFTA, and Japan are the biggest buyers under the current trade deals. Among ongoing agreements, the UK leads by far, followed by the Gulf and Oman. The UK alone imports more than all its current partners combined, indicating strong demand even before formal deals are signed. India's footwear exports are already robust, and with new agreements, the sector can expand further into both established and emerging markets.

(g) HS Code 82 – Tools, Locks, Scissors



Between 2019 and 2024, India's exports of tools, locks, and scissors increased steadily. The line rises smoothly with regular peaks and no sharp drops, showing frequent shipments and strong demand. Buyers place consistent orders, making the market active and reliable.



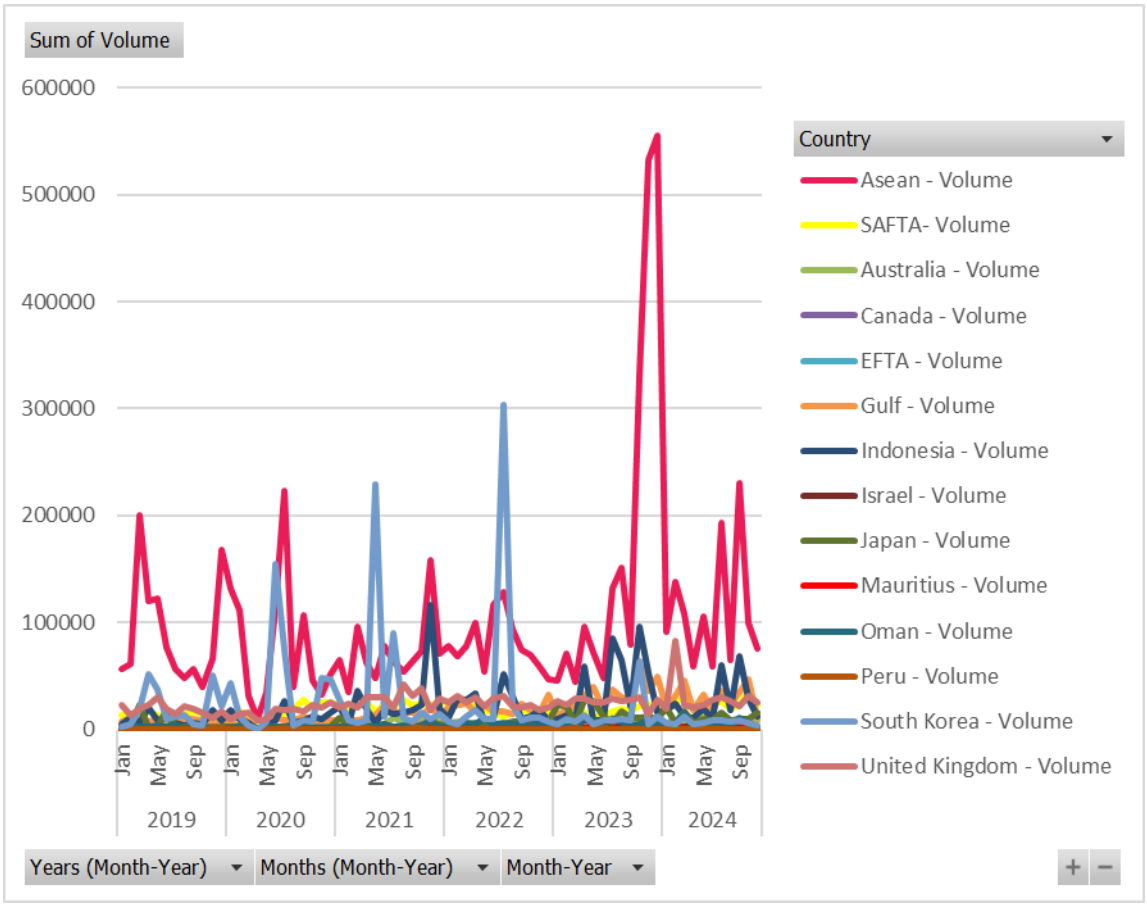
From 2019 to 2024, India's exports of tools, locks, and scissors remained strong and consistent. The UK is the biggest buyer each year, followed by SAFTA and ASEAN. Volumes shift slightly year to year, but the steady presence of top buyers highlights reliable demand and stable trade relationships.

HS 82 Ranking Based on Volume of Trade						
FTA				Ongoing FTA		
Country Group	Average Annual Volume	Rank		Country Group	Average Annual Volume	Rank

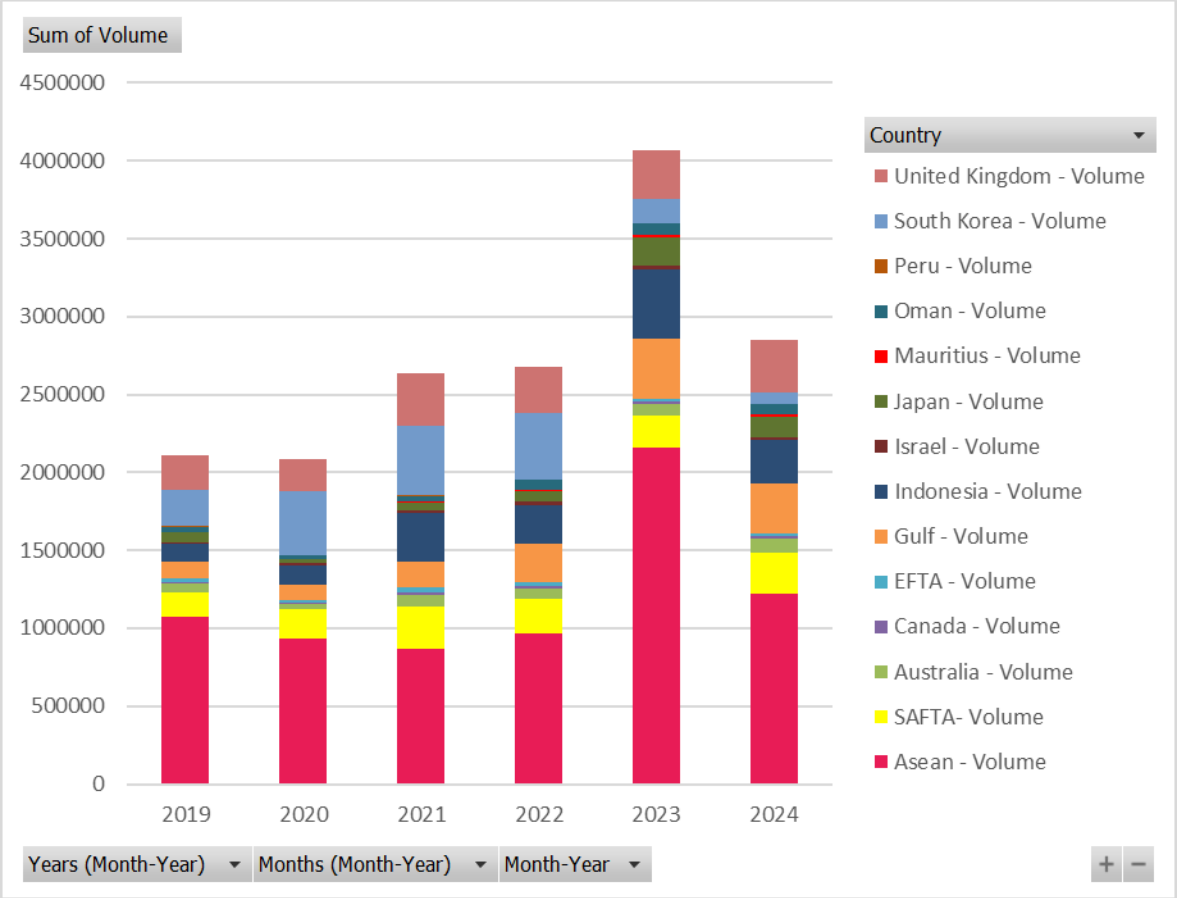
SAFTA	63752.62	1	United Kingdom	71519.63	1
ASEAN	45366.2	2	Gulf	19150.59	2
Australia	17954.25	3	Canada	10013	3
Japan	4289.55	4	Indonesia	8337.1	4
South Korea	3085.78	5	Peru	3057.25	5
Mauritius	861.86	6	Oman	2167.1	6
EFTA	494.51	7	Israel	1903.48	7

From 2019 to 2024, SAFTA and ASEAN were the leading FTA partners for India's exports of tools, locks, and scissors, demonstrating an intense regional concentration. Australia also records notable volumes. Among ongoing agreements, the UK leads by far, followed by the Gulf and Canada. The UK's strong demand even before a formal deal highlights significant growth potential. HS 82 products already enjoy a broad market reach, and streamlined trade rules will further boost exports across both established and new FTA markets.

(h) HS Code 85 – Electrical Machinery (Wet Grinder, etc.)



From January 2019 to September 2024, India's exports of electrical machinery—such as wet grinders—rose sharply. ASEAN shows a dramatic spike around mid-2023, while South Korea records several noticeable peaks. The overall trend is steep and upward, with no sudden drops, highlighting strong global demand and stable trade ties across regions.



From 2019 to 2024, India's exports of electrical machinery—such as wet grinders—grew every year, with the highest volumes in 2023. The UK, SAFTA, ASEAN, and South Korea are the biggest buyers, with the UK showing strong demand across all years. Overall, the chart highlights steady growth, stable trade, and high global demand for these products.

HS 85 Ranking Based on Volume of Trade

FTA			Ongoing FTA		
Country Group	**Average Annual Volume**	**Rank**	**Country Group**	**Average Annual Volume**	**Rank**
ASEAN	7221074.57	1	United Kingdom	1703928.33	1

South Korea	1739126.42	2	Indonesia	1517952.81	2
SAFTA	1316356.09	3	Gulf	1323662.62	3
Japan	508751.21	4	Oman	291076.99	4
Australia	390914.09	5	Israel	112584.08	5
EFTA	121225.57	6	Canada	89937.19	6
Mauritius	61449.29	7	Peru	27048.81	7

From 2019 to 2024, ASEAN has been India's top trade partner for electrical machinery, with volumes far exceeding those of others. South Korea, SAFTA, and Japan also show strong demand, making them key FTA partners. Among ongoing agreements, Indonesia, and the Gulf region already record high volumes, highlighting strong demand even before deals are finalised. Consistent export levels and extensive country coverage confirm HS 85 as a significant component of India's global trade. With new FTAs, exporters can expect easier market access and more growth opportunities.

Observation on discussions with stakeholders – SWOT Analysis

The talks with producers and traders of 20 manufactured GI-tagged products yield qualitative data, revealing deep-rooted strengths, weaknesses, opportunities, and threats (SWOT) in India's traditional goods sector. This analysis is structured by industry to highlight systemic issues and policy implications.

Alcoholic Beverages and Traditional Ferments

The assessment begins with the **Alcoholic Beverages and Traditional Ferments sector**, and within that, with Feni, where strengths include exclusive production permissions and a strong local identity, alongside a high-quality product with a robust domestic reputation. Weaknesses include monopolised branding and limited access to the GI logo, as well as restricted market entry in the EU and UK due to regulatory barriers. Opportunities lie in niche positioning within premium spirit

markets and tapping into US demand. Threats involve risks of brand dilution due to limited participation and inadequate international protection.

Nashik Valley Wine benefits from GI protection that enhances authenticity and consumer trust. Its favourable terrain and climate, combined with a strong wine tourism ecosystem that attracts over 350,000 visitors annually, underpin a robust production base of 29 wineries, which account for 90% of India's wine output. Consistent exports, particularly to Europe, further reinforce its market presence. Weaknesses include systemic market access barriers (such as tariffs and certification), limited global recognition, a weak domestic wine culture, and underdeveloped infrastructure. Opportunities lie in e-commerce, FTAs with the EU and UK, diaspora demand, sustainability branding, and strategic storytelling. Threats reflect international competition, climate change impacts on viticulture, regulatory unpredictability, fragmented domestic wine policy, and slow domestic growth. Similar to other premium alcohol products, Nashik Valley Wine demonstrates how GI recognition can enhance authenticity, but it requires supportive trade policies to overcome systemic barriers.

Arunachal Pradesh Adi Apong Strengths highlight socioreligious significance, traditional fermentation, and community knowledge. Weaknesses include confinement to local markets, a lack of branding, small-scale production, and the absence of certification. Opportunities lie in artisanal niches and wellness tourism. Threats involve risks of commodification and compliance challenges.

Arunachal Pradesh Marua Apo Strengths highlight distinct millet-based flavours and perceived health benefits. Weaknesses include unlabeled packaging, the absence of branding, and a lack of marketing outside the region, with zero visibility of the GI logo. Opportunities exist in the positioning of millet-based health drinks and the functional beverage market. Threats involve negative perceptions due to food safety concerns and risks of authenticity loss. Both Adi Apong and Marua Apo demonstrate the potential of tribal ferments in niche wellness markets, but highlight the urgent need for food safety compliance and branding support.

Bodo Jou Gishi has its strengths in social and ceremonial relevance as a symbolic gift in marriages, as well as a pleasant flavour with health-linked consumption. Weaknesses reflect the absence of standards, the lack of GI-labelled exports, and limited awareness among stakeholders. Opportunities lie in herbal beverage markets and cultural storytelling. Threats involve neglect in mainstream alcohol policies and risks of exploitation without fair benefit to producers.

Bodo Jou Gwran presents strengths as high alcohol content with cultural and ritual significance and an income source for local communities. Its weaknesses include the absence of branding, packaging, or certification, as well as no authorised user registration or scaling initiative. Opportunities lie in the niche alcohol and artisanal beverage market, particularly in branding around tribal heritage. Threats, however, involve informal production that violates safety norms and risks cultural appropriation.

Bodo Maibra Jou Bidwi records the strengths of ritual and cultural significance, as evident from its use during festivals. Its strength also lies in being a premium rice beer with a unique aroma and medicinal value, with a strong identity within the Bodo community. Its weaknesses include a lack of standardisation and branding, no GI-marked packaging, the absence of formal markets, and limited scalability of production systems. The opportunities are framed as ethnic beverage branding and export, with a focus on craft drinks, rural livelihoods, and tourism linkages. Threats highlight that informal production raises regulatory risks and the risk of imitation without protection.

Judima is characterised by strengths such as unique fermentation using Thembra bark, a strong cultural identity with women-led GI ownership, and artisan pricing (₹100–₹1,000), which highlights its premium quality and reputation. Weaknesses include the absence of industrial-scale production, pending Excise licenses and formal clearances and a lack of structured supply chain & bottling standards. Opportunities include cultural festivals, GI tourism, niche alcohol markets, and artisanal product branding with APEDA's interest in brand promotion. Threats include the risk of losing authenticity if carelessly scaled and competition from other North Eastern rice wines if the first-mover advantage isn't leveraged. The Northeastern rice ferments collectively highlight opportunities in cultural tourism and artisanal branding, but also underline systemic weaknesses in licensing, safety, and scalability.

Essential Oils and Perfumery

Kannauj Perfume strengths highlight cultural legacy, heritage production, established export networks, and GI recognition. Weaknesses include fragmented production, limited exports due to complex licensing requirements, reliance on traditional methods, outdated distillation units, and weak branding. Opportunities lie in the rising demand for natural fragrances, CAPEXIL support, trade fair visibility, and niche oriental perfume markets. Threats include the dominance of synthetic

perfumes, lack of export clearances, underreporting in the informal economy, global competition, and low visibility of the GI logo.

Ganjam Kewda Rooh showcases the strengths of naturally aromatic essential oil, featuring therapeutic and cosmetic uses, as well as a cultural and regional identity tied to Odisha, with high potential in the aromatherapy and wellness markets. Weaknesses include limited production capacity (~200 kg/year) on a small scale, the absence of modern technology and standardisation, and a lack of branding, packaging, and marketing infrastructure. Opportunities include growing demand for natural essential oils globally with scope for export to the Middle East and wellness markets, and the possibility of wellness branding and GI-based storytelling. Threats include being overshadowed by more established oils (e.g., Tea Tree, Lavender), risk of adulteration and value erosion without quality control, and no access to funding schemes or tech incubation support.

Himachal Chulli Oil notes its strengths as a recognised GI with high potential in the wellness sector, supported by an active state agency (HIMCOSTE), IPR Chair collaboration, and a focus on technical and quality inspections that are emerging. Weaknesses include the absence of export/yield/market data, as well as the lack of HS Code identification, which hampers the branding strategy due to undefined consumer segmentation. Opportunities include the potential for HS Code finalisation to ease exports and eco-lifestyle product positioning, while threats include market invisibility due to weak packaging and branding, as well as the absence of a commercial roadmap for expansion.

Mysore Agarbathi records the strengths of traditional processes and GI protection with diverse natural variants and raw materials. Weaknesses identified include health risks to workers with low wages and input shortages with regulatory constraints. Opportunities lie in its export potential as a premium, eco-friendly incense, with branding in the tourism and spiritual markets. Threats include plastic bags and global competition (China) with high packaging/transport costs.

Mysore Sandalwood Oil details its strengths as a prized fragrance with deep-rooted cultural and traditional relevance in India, derived from authentic, GI-protected sandalwood, ensuring integrity and recognition as a domestic luxury product with strong local demand. Weaknesses include an extremely high price (₹6,000 for 5 ml; ₹10,000 for 10 ml), which limits broader usage, and a lack of a dedicated HS Code, complicating international trade and tracking. Lack of clarity on authorised user registration is weakening protection/enforcement. Opportunities exist in high-end wellness, perfume, and Ayurveda segments globally, with premium branding tied to heritage and

authenticity, as well as niche cultural gifting and fragrance tourism. Threats stem from synthetic substitutes, which may dilute premium positioning due to raw material scarcity, biodiversity pressures, and the risk of misuse without proper oversight.

Nicobari Coconut Oil Strengths highlight organic, handmade, tribally rooted, and women-led production. Weaknesses include fragile packaging, lengthy transport times, and a lack of diversification. Opportunities exist in GI-branded tourist packaging and cosmetic markets. Threats involve high packaging costs, spillage, and cultural erosion.

Essential oils and perfumery products collectively highlight a strong cultural heritage but face systemic barriers in technology, branding, and export facilitation. Policy support in HS Code classification and modernisation is critical.

Soaps, Waxes, and Polishes

Mysore Sandal Soap Strengths highlight established exports, brand legacy, and cultural connection. Weaknesses reflect reliance on general HS Codes, limited AU data, and unclear export volumes. Opportunities lie in fragrance-based care demand, spiritual marketing, and the bundling of wellness tourism. Threats include global competition, fluctuations in raw materials, and risks of GI erosion**.**

Nainital Mombatti (Candle) Strengths highlight high craft value, customised designs, and artisan individuality. Weaknesses reflect the absence of AU registrations, weak packaging, and supply chain limitations. Opportunities lie in eco-conscious decorative markets and e-commerce gifting. Threats involve cheap imports and a lack of institutional support.

Soaps and decorative crafts highlight export potential in wellness and lifestyle markets, but require stronger branding and institutional support to compete globally.

Leather Articles and Footwear

For **the Leather article, East India Leather notes the** strengths of government support (0% export duty), recognised GI with real export traction, and global demand for natural leather. Weaknesses include a limited number of registered users (55 tanneries), no differentiation of HS codes for GI-branded leather, and low visibility of GI identity in export channels. Opportunities lie in inclusion in FTA frameworks and leveraging CLE's global events for branding. Threats come

from competition from mass-manufactured, cheaper leather and the risk of price undercutting in the worldwide market.

In **Footwear**, **Agra Leather Footwear** showcases its strengths as a historic craft tradition and an established reputation in India, recognised under GI, known for its quality craftsmanship, and included in CLE marketing events and a support ecosystem, with a strong local cluster of skilled artisans and MSMEs. Weaknesses are evident in the absence of a dedicated HS Code for export classification, a lack of formal export data or traceability under GI, and the absence of Authorised User registration, which limits market access. Low packaging, branding, and global design standard alignment reflect further weaknesses. Opportunities lie in leveraging India's FTAs and CLE export platforms with GI branding, capitalising on the high international demand for handcrafted leather products and the potential for integration with tourism and heritage retail circuits, with scope for upskilling artisans and modernising design lines. Threats are posed by competition from mass-produced or machine-made footwear (China, Vietnam), with price undercutting due to cheaper substitutes and market invisibility resulting from a lack of GI-labelled exports. The failure to differentiate from generic leather footwear may dilute GI value.

Leather products highlight India's artisanal strengths but underline systemic weaknesses in HS Code differentiation and AU participation. Policy harmonisation is needed to protect competitiveness.

Hand Tools and Machinery

Arunachal Pradesh Dao (Sword) articulates its strengths as rust-resistant, unique craftsmanship with premium pricing, artisanal high-value production, and deep socio-religious and cultural significance, making it a high-value collectable (up to ₹30 lakh). Weaknesses emerge from the absence of an export strategy or branding, with no organised value chain or scaling mechanism, and extremely low production volume (1,000–1,200 units annually), resulting in limited market visibility beyond the region. Opportunities lie in the global niche market for collectables and heritage crafts, leveraging cultural diplomacy, heritage tourism, and museum partnerships, as well as the potential to be a luxury heritage artefact for collectors. Threats arise from its high cost, which may deter local market adoption, as skills and artisanal knowledge are at risk due to limited retention and generational shifts, as well as the risk of cultural commodification.

Meerut Scissors boasts strengths in strong craftsmanship, a distinctive product identity, and a historical reputation and heritage, featuring a brass and iron build with a unique finish.

Additionally, it is included in ODOP, with over 500 active units, and operates a Common Facility Centre offering 80% subsidised services. Weaknesses arise due to the absence of a dedicated HS Code, a low scale of production, and poor profit margins, as well as weak export visibility and a lack of export data. This is compounded by the absence of GeM access and an authorised user registry, which has been in place since 2013, as well as the difficulty in price comparison with Chinese imports. Opportunities lie in the potential for GI-aligned product clusters (e.g., cricket bats) with ODOP recognition and digital marketing for artisan products, as well as expansion into surgical/industrial scissors, leveraging branding via laser printing, logos, and polishing. Threats are posed by cheaper imports from China, which dominate the market, resulting in a loss of artisanal identity due to unclear classification and government procurement that ignores GI/ODOP priorities, as well as ₹300 crore in imports from cheaper competitors.

The Coimbatore Wet Grinder indicates strengths as a GI-tagged product with an active association. Weaknesses include a lack of pertinent export data and limited awareness of the benefits of the GI tag and the utility of the logo. It is also not included under the One District One Product (ODOP) initiative, and no knowledge of registration of authorised users under the GI Act. Opportunities lie in the scope to build awareness about GI advantages and branding, with the potential to seek ODOP inclusion for policy support. Establishing an authorised user registry can also improve compliance and enforcement. Threats emerge from the risk of GI misuse due to the absence of an authorised user registry. Further, the loss of visibility and competitiveness versus ODOP-supported products and persistent institutional neglect may reduce stakeholder motivation.

Hand tools and machinery highlight India's artisanal engineering strengths but underline systemic weaknesses in HS Code classification, authorised user registration, and institutional support. Addressing these gaps is critical for competitiveness.

The consolidated SWOT analysis of registered manufactured GIs of India reflects strengths such as deep-rooted cultural, ceremonial, and heritage links that enhance the authenticity and identity of the products and artisan-led production processes that preserve traditional knowledge and ensure unique product quality. GI registration provides legal recognition and the potential for exclusivity in domestic and international markets and strong craftsmanship and manual precision result in high-value, distinctive offerings. Such sectors benefit from local clusters, community involvement, and partial state or institutional support mechanisms.

Weaknesses highlight systemic barriers, including absence of standardized branding, labelling, and packaging under GI norms, lack of dedicated HS codes, and very limited AU registration. Production systems often lack scalability, structured value chains, and modern infrastructure, with restricted formal market access and prevalence of informal or unregulated production.

Opportunities point to rising global demand for natural, artisanal, culturally rooted, and wellness-linked products. E-commerce, Direct-to-Consumer (DTC), and diaspora markets offer scalable branding avenues. Increasing government focus on local production schemes presents opportunities for cluster support and GI promotion. Cultural tourism, storytelling-based branding, and heritage positioning amplify market reach.

Threats highlight risks of market flooding by cheaper alternatives, commodification of cultural identity, weak international protection, and regulatory ambiguities in excise, labelling, and export policies. Lack of monitoring of AU registration further undermines enforcement.

Taken together, these findings suggest the need for harmonised export policies, branding support, and stronger institutional mechanisms to protect GI integrity.

Conclusion

The analysis highlights that India's GI-tagged manufactured products have significant potential for inclusive growth, rural livelihoods, and cultural diplomacy. Their authenticity and heritage value are unmatched, but systemic weaknesses constrain competitiveness. Addressing gaps in branding, export facilitation, and regulatory harmonisation could unlock opportunities in wellness, tourism, diaspora markets, and premium global segments. Careful management is essential to safeguard against imitation, commodification, and regulatory uncertainty. With coordinated institutional support and sensitive commercialisation, India's GI products can evolve into globally recognised assets that reinforce both cultural identity and economic resilience.

5.6. Fixed Effect Model – Analyses

5.6.1 Based on volumes of export

In this section, we conduct an analysis based on the Volume of exports (in thousands of units).

Fixed effect model - Volume			
Variable	**Coefficient**	**t-Statistic**	**Significance**
Volume	0.077	-4.52	***
Volume × HS2: 33	0.125	-2.16	*

Volume × HS2: 34	0.017	-0.53	**---**
Volume × HS2: 42	0.167	-2.97	****
Volume × HS2: 44	0.094	-1.31	**---**
Volume × HS2: 64	0.317	-5.13	***
Volume × HS2: 82	0.153	-2.91	****
Volume × HS2: 85	0.13	-3.38	***
*p < 0.1, **p < 0.05, ***p < 0.01			
HS2 codes refer to the Harmonised System 2-digit product classification.			

The baseline effect indicates that trade volume has a positive and significant overall impact, with a coefficient of 0.077 at the 1% level. This means that across all HS2 categories studied, an increase in export volume of GI-tagged products is associated with a corresponding rise in total trade volume.

HS Code 33, which includes essential oils and perfumes, as well as GI products such as Mysore Sandalwood Oil, Kannauj Perfume, Himachali Chulli Oil, and Ganjam Kewda Rooh, falls under this group. The numbers clearly show that this category benefits from increased exports. During discussions with Kannauj perfume makers, there was a strong emphasis on traditional extraction methods and unique scent profiles. These features could be used to promote these products in global markets that value authenticity and natural origin.

HS Code 34, which includes items such as soaps and candles, contains GI products, including Mysore Sandal Soap and Nainital Mombatti. This category is not observed to have a significant effect in the base model. The Nainital Mombatti producers mentioned during the interaction that while the candles have unique designs and are made using traditional methods, the current production scale is limited. This makes it challenging for the product to have a measurable impact on export data. This could be a common issue in this category. The intersection model discussed later offers more clarity.

Under HS Code 42, the relevant GI product is East India Leather. The results show that exports in this category tend to do well with increased volume. The numbers suggest that this product can perform better with support for quality improvement, better design, and consistent branding.

HS Code 64, which covers footwear, includes the GI-tagged Agra Leather Footwear. This category recorded the strongest performance in the model. Agra's footwear has long been known for craftsmanship and durability. If exports increase, this product has a high likelihood of performing well. There's a clear case here for more visibility, trade facilitation, and institutional backing to take Agra's GI-tagged footwear into larger markets.

For HS Code 82, the GI products are Meerut Scissors, Dindigul Locks, and Arunachal Pradesh Dao (Sword). The data shows solid results for this category. Field visits and interviews with Meerut Scissors producers revealed ongoing issues with competition from cheap imports and a lack of coordinated marketing. Additionally, products with a handmade nature, a long history, and unique construction are considered strong points. The recent establishment of a Common Facility Centre and its recognition under government programs have created optimism. With proper export channels, these products could gain international attention.

HS Code 85 includes electrical appliances, with the Coimbatore Wet Grinder listed as the GI-tagged item. Though it's not a modern electronic product in the usual sense, it fits within this category. Export potential is visible here. Many households abroad still use or look for traditional Indian kitchen appliances. If appropriately marketed to this segment, the wet grinder could do very well, especially given its reputation for quality and durability.

Each of these product groups has a different story. In some cases, such as Agra footwear and essential oils, the numbers are substantial and align with what was shared during meetings with producers. In products like candles or soaps, the numbers are less clear, and producers are still working on scaling up and establishing export channels. The results show that GI products, especially those rooted in strong tradition and quality, have room to grow if supported with the right kind of promotion and infrastructure.

Interaction model

Interaction Table: Volume

HS2_Code	ASEAN	SAFTA	Australia	Canada	EFTA	Gulf	Indonesia	Israel	Japan	Mauritius	Oman	Peru	South Korea	UK
22	0.108 . (1.7)	0.195 *** (3.61)	0.295 *** (4.95)	0.149 ** (3.17)	0.057 *** (3.63)	0.255 ** (3.28)	NA (NA)	0.109 *** (4.94)	0.014 (0.44)	0.01 (0.37)	0.295 *** (3.81)	NA (NA)	0.032 (1.53)	0.249 *** (4.97)
33	0.788 *** (6.01)	0.259 ** (2.81)	0.486 *** (3.67)	0.343 *** (4.45)	-0.12* (-2.12)	0.482 *** (5.79)	0.414 *** (4.27)	0.159 ** (2.95)	0.19 (1.52)	0.296 *** (4.13)	0.329 *** (4.33)	0.104 *** (3.61)	0.285 ** (2.89)	0.498 *** (5.84)
34	0.484 ** (3.23)	0.471 *** (3.34)	0.262 * (2.52)	0.266 ** (3.23)	0.039 (1.36)	0.362 ** (3.27)	0.06 (0.57)	-0.069 (-0.9)	0.064 (1.4)	0.103 . (1.65)	0.183 *** (3.35)	0.019 (0.54)	0.142 ** (2.59)	0.26* ** (3.36)
42	0.509 *** (6.21)	0.339 *** (6.96)	0.436 *** (7.69)	0.634 *** (8.69)	0.255 ** (3.08)	0.348 *** (7.59)	0.094 ** (3.23)	0.396 *** (8.19)	0.689 *** (9.38)	0.209 *** (5.56)	0.053 * (1.97)	0.179 ** (3.16)	0.256 *** (7.22)	0.787 *** (9.07)
44	0.553 *** (12.39)	0.693 *** (13.34)	0.637 *** (10.74)	0.972 *** (11.74)	0.008 (0.19)	0.658 *** (13.9)	0.009 (0.52)	0.426 *** (10.56)	0.241 ** (3.19)	0.176 *** (5.09)	0.088 ** (2.9)	0.102 *** (3.8)	-0.125 *** (-4.12)	0.523 *** (8.75)
64	0.609 *** (5.36)	0.529 *** (6.08)	0.579 *** (7.81)	0.642 *** (7.4)	0.34* ** (4.58)	0.835 *** (7.89)	0.124 ** (2.84)	0.468 *** (5.79)	0.566 *** (7.3)	0.238 *** (4.58)	0.363 *** (5.96)	0.326 *** (5.84)	0.445 *** (7.27)	0.725 *** (8.59)
82	0.386	0.507	0.824	0.603	0.138	0.292	0.206	0.278	0.234	0.039	0.013	0.254	0.23*	0.7**

	*** (5.04)	*** (6.75)	*** (7.44)	*** (6.48)	** (2.6)	** (3.21)	** (3.23)	*** (5.17)	*** (3.58)	(1.05)	(0.23)	*** (5.02)	** (4.55)	* (6.9)
85	0.36*** (6.47)	0.511*** (6.69)	0.491*** (5.89)	0.285*** (4.83)	0.307*** (4.9)	0.361*** (6.89)	0.242*** (6.99)	0.161** (2.84)	0.163*** (3.96)	0.112*** (4.74)	0.321*** (6.21)	-0.004 (-0.07)	0.134*** (3.92)	0.56*** (5.51)
*p < 0.1, **p < 0.05, ***p < 0.01														

The interaction analysis between commodity categories and country groups reveals critical trade linkages and specialisation patterns.

(a) For **HS Code 22**, which includes traditional beverages like Judima and Bodo rice wines, significant positive associations are observed with SAFTA, Australia, Canada, EFTA, Gulf, Israel, Oman, and the United Kingdom. The strongest link appears with Australia (coefficient = 0.295, $p < 0.01$) and Oman (0.295, $p < 0.01$), followed by Israel (0.109, $p < 0.01$) and the UK (0.249, $p < 0.01$), suggesting concentrated export flows to these regions. During our interaction with Judima and Bodo rice wine producers, it was observed that, despite their rich cultural identity and local popularity, these products face substantial barriers to scaling up exports, primarily due to a lack of bottling infrastructure, branding, and international certifications. However, their inclusion under GI registration reflects export potential, especially toward diaspora-dense or culturally curious markets.

(b) For **HS Code 33**, which includes Kannauj Perfume, strong positive coefficients are seen across most country groups, especially ASEAN (0.788, $p < 0.01$), Gulf (0.482, $p < 0.01$), and UK (0.498, $p < 0.01$). These patterns likely reflect historical trade ties and strong consumer preference in Middle Eastern markets for natural, oil-based perfumery. During the discussion with Kannauj Perfume's stakeholders, it was highlighted that GI registration has bolstered the authenticity appeal; however, competition from synthetic perfumes and limited branding hinder mass-scale exports. Countries like the UK and Gulf countries (Members of the GCC) offer promising destinations if branding and shelf-readiness can be improved.

(c) **HS Code 34**, which covers products like Nainital Mombatti (candles), shows moderate to significant associations with country groups such as SAFTA, the Gulf, South Korea, and the

UK. While coefficients are slightly lower compared to other sectors, South Korea (0.142, $p < 0.05$) and the UK (0.26, $p < 0.01$) stand out. From our discussions, it became clear that Nainital Candle Makers operates on a small scale, primarily targeting the domestic and tourist markets. The artisanal appeal of these GI-tagged candles could gain traction abroad if supported by innovative packaging and e-commerce integration.

(d) Turning to **HS Code 82**, which includes **Meerut Scissors**, the interaction coefficients show statistically significant and substantial trade volumes with Australia (0.824, $p < 0.01$), Canada (0.603, $p < 0.01$), and the United Kingdom (0.7, $p < 0.01$). These figures suggest the potential of Meerut Scissors in quality-conscious markets that value craftsmanship. From our meeting with the manufacturer association in Meerut, it was highlighted that while exports are currently underdeveloped, interest is growing due to handmade features, brass handles, and durable blades. Challenges such as competition from cheaper Chinese imports and limited access to the GeM portal were noted. However, the recent establishment of a Common Facility Centre and efforts to register authorised exporters signal positive momentum.

(e) And other HS codes, like the **42 (leather goods), 44 (wood products), 64 (footwear), and 85 (electronic equipment),** also display robust positive interactions with various country groups, particularly ASEAN, SAFTA, and Australia. The statistical results indicate dynamic trade patterns, possibly driven by scale, existing trade agreements, and established supply chains.

5.6.2 Based on value of trade

In this section, we analyse the data based on the value of trade, which is captured in USD million.

Fixed effect model – Value			
Variable	**Coefficient**	**t-Statistic**	**Significance**
Value	0.415	3.66	***
Value × HS2: 33	-0.227	-1.83	.
Value × HS2: 34	0.334	2.79	**
Value × HS2: 42	0.547	3.59	***

Value × HS2: 44	0.674	4.92	***
Value × HS2: 64	0.532	4.14	***
Value × HS2: 82	0.332	1.97	*
Value × HS2: 85	0.185	1.54	
*p < 0.1, **p < 0.05, ***p < 0.01			
HS2 codes refer to the Harmonised System 2-digit product classification.			

The baseline coefficient for the total trade value is 0.415 and is statistically significant at the 1% level. This indicates a strong positive association between the total value of exports and the GI product trade under study, suggesting that as the overall export value increases, trade in GI-tagged products tends to rise as well.

For HS2 code 33, which includes products such as Kannauj Perfume, the coefficient is -0.227 and is statistically significant at a weak level. This suggests a slight negative deviation from the average effect, meaning the value of exports in this category is growing at a slower rate compared to others.

In contrast to the above, HS2 code 34, including Nainital Mombatti (Candle), has a positive coefficient of 0.334 and is significant at the 5% level. This indicates a favourable trend, where export value in this category is rising faster than the average.

HS2 code 42, associated with leather products, shows a strong positive coefficient of 0.547 and is statistically significant. This suggests that leather-based GI products are gaining value in international trade, with increasing demand contributing to higher export values.

HS2 code 44 stands out with the highest coefficient of 0.674, which is significant at the 1% level of significance. This indicates that exports in this category have seen a substantial increase in value, reflecting strong performance. Similarly, HS2 code 64, including 'Agra Leather Footwear', has a positive coefficient of 0.532, also significant at the 1% level. This suggests that footwear exports are performing well and have strong growth potential in terms of value.

For HS2 code 82, including Meerut Scissors, the coefficient is 0.332 and marginally significant. This suggests that the export value of these tool-related GI products is increasing, albeit at a

moderate pace. HS2 code 85, which includes the Coimbatore Wet Grinder, has a coefficient of 0.185; however, this is not statistically significant. This suggests that the export value growth in this category is weaker compared to others and may require more focused promotion or market development efforts to achieve stronger results.

Interaction model

Interaction Table: Value														
HS2_Code	ASEAN	SAFTA	Australia	Canada	EFTA	Gulf	Indonesia	Israel	Japan	Mauritius	Oman	Peru	South Korea	UK
22	0.356** (2.59)	0.11 (0.78)	1.063** (2.98)	1.37** (4.11)	-5.273 (-1.13)	0.147 (0.8)	NA (NA)	-1.524* (-2.12)	0.794 (1.61)	-5.189. (-1.76)	0.706* (2.56)	NA (NA)	-0.667 (-0.72)	0.684*** (4.81)
33	0.499*** (3.57)	0.451*** (3.3)	0.014 (0.07)	0.377* (2.43)	0.059 (0.39)	0.251*** (3.81)	0.081 (0.4)	0.237 (0.8)	0.07 (0.42)	0.441. (1.92)	0.1* (2.47)	0.125 (0.39)	0.244* (1.99)	0.607** (3.06)
34	0.824*** (4.87)	0.809*** (5.09)	0.962*** (4.2)	0.927*** (4.38)	0.501 (0.95)	0.723*** (4.99)	0.737** (3.22)	0.365. (1.65)	0.909** (3.12)	0.979 (1.58)	0.886*** (4.67)	0.557 (1.03)	0.623*** (3.39)	0.646*** (4.3)
42	0.579*** (5.4)	1.904*** (5.65)	1.3*** (10.76)	1.188*** (9.86)	0.464*** (3.68)	0.79*** (5.77)	0.485. (1.88)	1.78*** (6.68)	1.272*** (9.81)	1.954** (3.18)	1.076* (2.12)	0.32 (1.6)	1.114*** (6.17)	1.065*** (11.69)
44	1.02***	0.871***	1.181***	1.09**	1.322*	1.075***	1.318.	1.574***	3.198***	1.286*	0.648**	2.1 (1.38)	0.509 (1.1)	1.504***

	(5.38)	(6.86)	(6.68)	(7.06)	(2.08)	(7.2)	(1.82)	(4.97)	(4.11)	(2.01)	(2.67)			(8.48)
64	1.401*** (8.78)	0.647*** (4.91)	1.144*** (7.71)	0.975*** (7)	0.852*** (5.06)	1.038*** (8.08)	0.354* (2.31)	1.295*** (5.84)	1.072*** (8.5)	1.07** (2.68)	1.204*** (5.04)	1.026*** (4.64)	0.92*** (7.12)	0.891*** (10.36)
82	1.051*** (7.34)	0.887*** (5.87)	1.332*** (7.31)	0.668*** (4.64)	2.766*** (3.91)	0.719*** (4.37)	1.003*** (4.4)	0.172 (1.22)	1.047*** (4.37)	0.371 (0.67)	0.089 (0.63)	0.76*** (3.93)	0.896** (2.93)	1.108*** (6.99)
85	1.072*** (9.19)	0.716*** (6.93)	0.665*** (10.48)	0.6*** (11.42)	0.283 (1.64)	0.873*** (12.73)	0.89*** (9.68)	0.192* (2.29)	0.489*** (10.26)	0.515*** (6.43)	0.708*** (6.42)	0.555*** (8.2)	0.536*** (6.19)	0.572*** (13.03)
*p < 0.1, **p < 0.05, ***p < 0.01														

The trade data across different HS2 categories shows varied levels of performance by destination country groups.

(a) Categories like alcoholic beverages (HS 22), essential oils and perfumes (HS 33), and incense, soap, and candles (HS 34) demonstrate promising export trends in countries such as Canada, Australia, ASEAN, and the Gulf. For example, alcoholic beverages perform exceptionally well in Canada and Australia, while essential oils show strength in ASEAN and Asia. These trends suggest that broader category performance in these regions is already strong, creating a foundation for GI products under these HS codes to grow potentially. In our discussions, producers of Judima and Bodo traditional beverages mentioned their ongoing efforts to formalise production and improve branding after obtaining GI registration. Similarly, producers of Kannauj Perfume highlighted challenges related to raw material availability and cost, despite the high global demand for these products.

(b) For categories like HS 34, which includes incense and soap, and HS 82, which provides for tools and cutlery, the data shows a solid market presence. Countries such as Japan, Australia, and those in the ASEAN region have demonstrated strong coefficients, indicating healthy trade in these sectors. During our meetings, producers of Nainital Mombatti discussed

packaging improvements and product quality for better market outreach. For Meerut Scissors under HS 82, producers highlighted rising competition from Chinese imports, but also noted positive developments, such as the establishment of a Common Facility Centre to support local craftsmanship. These discussions underline that although there are challenges, the overall strength of their respective categories suggests clear opportunities for GI products to perform better with targeted support.

(c) Other high-performing categories such as leather goods (HS 42), footwear (HS 64), and electrical machinery (HS 85) also show strong potential across many regions. The data reveals consistent and positive coefficients, particularly in the Australian, SAFTA, and ASEAN markets. If developed and supported, GI-tagged products in these categories could benefit from this momentum in the future.

5.6.3 Based on the performance of product categories in FTAs

In this section, we discuss the performance of the category in FTA vs. ongoing FTA country groups.

Performance in FTA vs Ongoing FTA				
HS2 Code	**FTA (Volume)**	**Ongoing FTA (Volume)**	**FTA (Value)**	**Ongoing FTA (Value)**
22	0.276 (4.48) ***	0.083 (1.50)	0.379 (3.62) **	0.542 (5.69) ***
33	0.323 (3.84) ***	0.754 (14.82) ***	0.539 (5.19) ***	0.360 (4.23) ***
34	0.493 (9.20) ***	0.438 (9.74) ***	0.560 (9.17) ***	0.550 (10.31) ***
42	0.499 (7.36) ***	0.513 (6.56) ***	0.270 (3.38) **	0.704 (11.45) ***
44	0.575 (5.26) ***	0.617 (5.30) ***	0.344 (4.04) ***	0.396 (5.34) ***
64	0.158 (1.94) *	0.705 (8.40) ***	0.311 (4.01) ***	0.589 (8.13) ***
82	0.349 (5.17) ***	0.406 (6.22) ***	0.727 (11.01) ***	0.307 (4.85) ***
85	0.499 (5.90) ***	0.297 (3.77) ***	0.059 (0.81)	1.004 (18.51) ***

*p < 0.1, **p < 0.05, ***p < 0.01

The regression results show how trade in different HS2 product categories is impacted by FTAs and Ongoing FTAs. In the case of HS Code 22 (alcoholic beverages), the coefficient for FTA is moderate and significant for both volume (0.276) and value (0.379), indicating that trade under existing FTAs has contributed to the growth of this category. However, the coefficient for ongoing FTAs is significant only for value (0.542), suggesting that future agreements may have a more substantial impact on trade value than volume. This means that with better policy support, traditional GI-tagged alcoholic products, such as Judima, Bodo Jou Gwran, and others in this category, could gain improved market access and price realisation in upcoming FTA partner countries.

For HS Codes 33 (essential oils, perfumes, cosmetics) and 34 (soaps, detergents, candles), the regression table shows substantial coefficients for both FTA and ongoing FTA. Volume and value effects are particularly high for ongoing FTAs in HS Code 33 (0.754 and 0.360, respectively), while HS Code 34 maintains balanced and strong effects across both. This implies that categories like Mysore Sandalwood Oil, Kannauj Perfume, Mysore Agarbathi, and Nainital Mombatti are already benefiting from current FTAs and are likely to perform even better under future agreements. These products could see an increase in both quantity exported and earnings, especially in partner countries where demand for natural and traditional goods is growing.

Other categories, such as HS Code 42 (leather), 44 (wood), and 64 (footwear), also exhibit positive and statistically significant coefficients, particularly under ongoing FTAs. For example, the HS Code 64 has a modest coefficient for FTA volume (0.158) but a high and significant one for ongoing FTAs (0.705 in volume and 0.589 in value), suggesting a stronger future impact. Meanwhile, HS Code 85 (electronics) has a very high value coefficient (1.004) under ongoing FTAs, though it shows weak results under current FTAs. This suggests a shift where electronics may not have gained as much yet, but upcoming FTAs could open significant opportunities in value-based exports. For HS Code 82 (tools, such as Meerut Scissors), the positive and significant coefficients across both existing and ongoing FTAs confirm a strong potential in both existing and future trade relationships.

5.7 Analysis of Data: Conclusive Statement

Volume of Export (2019–2024)

We looked at the quantity of items shipped abroad. Leather footwear (HS 64), machinery items (HS 85), and leather products (HS 42) are doing well. These products are currently being exported in significant volumes. They show a promising outlook for sustained performance. Especially with peaks in 2023 across ASEAN and South Korea

Value of Trade (2019–2024)

We examined the amount of money earned from exports. Leather footwear (HS 64), wooden products (HS 44), and leather products (HS 42) are performing well. These are high-value products. They need to be the current focus of export promotion strategies, particularly in markets like the Gulf, where FTAs are under negotiation.

Combined Priority Assessment (2019–2024)

When considering both value and volume, HS Code 64 (Leather footwear) is the best performer. It is strong in both trade value and volume. It is closely followed by HS Code 42 (Leather products). HS 42 performs almost as well as HS 64. However, HS 42 has slightly lower significance in terms of volume. These two categories represent the top segments. Wooden products (HS 44) look promising for the near future. They are a high-value category. They offer ample growth opportunities. This growth can occur through targeted trade promotions and effective marketing strategies. Machinery items (HS 85) need more research. This category exhibits a high volume of trade. However, it operates within a relatively lower value range. Given its steep growth trend and strong demand from ASEAN and SAFTA, HS 85 should be prioritised for value enhancement through competitor analysis and quality upgrades.

5.8 Performance in FTAs

HS Code 22 (Alcoholic Beverages)

Existing FTAs have moderately boosted both export volume and value. Upcoming FTAs are expected to enhance value further. However, they may not increase volume as much. Traditional GI-tagged drinks could benefit more in the future with better policy support.

HS Codes 33 (Essential oils, perfumes, cosmetics) and HS Code 34 (Soaps, candles, etc.)

These categories already benefit strongly from current FTAs. They are likely to perform even better under future agreements. For example, Mysore Sandalwood Oil, Kannauj Perfume, Mysore Agarbathi, and Nainital Mombatti could see higher exports and earnings. This is because global demand for traditional products is growing.

HS Codes 42 (Leather), 44 (Wood), and 64 (Footwear)

These products show positive effects. This is especially true under upcoming FTAs. Footwear (HS 64) shows a small benefit from current FTAs. However, it shows a significant potential gain in both volume and value from future agreements. The Gulf markets stand out as key opportunities once FTAs are finalised.

HS Code 85 (Electrical Machinery)

Current FTAs have not helped this category much. Future agreements could bring significant value gains. The sharp rise in volumes between 2019 and 2024, especially ASEAN's spike in 2023, confirms strong demand that can be unlocked with better trade terms.

HS Code 82 (Hand-Tools)

This category shows positive and significant results. This is true for both current and future FTAs. This confirms strong trade potential now and in the future.

Conclusion

Leather footwear (HS 64) and leather products (HS 42) are the most competitive segments. They combine high export volumes and substantial trade value. Wooden products (HS 44) are a high-value niche. They need expansion through marketing. Machinery items (HS 85) are exported in significant numbers. They require strategic upgrading to improve their value. Given their rising volumes and strong demand from ASEAN, SAFTA, and South Korea, HS 85 should be treated as a priority growth sector. FTAs already benefit several sectors. They are expected to further enhance competitiveness. This is particularly true for footwear, hand tools (HS 82), and traditional cultural products. Future FTAs with the Gulf, and ASEAN are likely to deliver the most significant gains. Targeted policy support should focus on these regions and categories to maximise India's export potential.

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6

6. Conclusion and Strategic Policy Recommendations for Enhancing the Trade Potential of Manufactured Geographical Indications in India

Drawing on HS trade data (2019–2024) and extensive stakeholder consultations, this chapter assesses the trade potential and policy landscape for India's GI-manufactured goods. The core objective of the study was to evaluate the current trade potential and policy landscape for Geographical Indication (GI)-tagged manufactured and industrial goods in India. This analysis revealed systemic, institutional, and data gaps that hinder the economic and legal potential of these products. There are critical systemic, institutional, and data-related gaps that fundamentally impede the effective realisation of the financial and legal potential of these products. While India's GI ecosystem is rich in traditional knowledge and product diversity, its growth is fundamentally hampered by systemic policy, market, and institutional failures. These findings underscore the urgent need for structural reforms, data modernisation, and strategic trade diplomacy to enhance global visibility, competitiveness, and the long-term resilience of India's GI-manufactured goods ecosystem.

6.1 Findings and Analytical Context

The analysis highlights the inherent trade invisibility of Indian GI-manufactured goods. Despite legal recognition, from its first GI registration in 2004 to December 2024, out of 658 registered GIs, only 23 of these goods are registered in the 'manufactured/ industrial' categories. Their commercialisation, international recognition, and global market presence remain limited, fragmented, and underdeveloped. Industrial and manufactured products account for only a small fraction of this total GI portfolio. The majority of GIs, particularly those manufactured, struggle with critical issues concerning their weak global presence, branding, standardisation, and traceability.

Regulatory and Administrative Deficits

The single most pressing concern is the dedicated Harmonized System (HSN/ITC-HS) codes lack of product-specific Harmonised System Nomenclature (HSN) codes (or ITC-HS codes) for GI goods. This deficiency cuts across all GI categories and severely undermines their distinct classification in customs and trade records, hindering accurate tracking, tariff application, and the

promotion of GI-specific exports. The use of generic HS codes dilutes the commercial identity of these products.

Furthermore, the AU registration process was widely described as bureaucratic and opaque. This opacity particularly affects producers of certain goods, including three Bodo beverages (Jou Gishi, Jou Gwran, Maibra Jou Bidwi), Kannauj Perfume, Meerut Scissors, and Nicobari Tavi-i-Ngaich (Virgin Coconut Oil or VCO). The resulting low number of AUs excludes many genuine artisans and manufacturers from fully leveraging GI protection, thereby reducing the effectiveness of GIs as tools for promoting equitable development and livelihoods.

Additionally, persistent excise and licensing hurdles persist for alcoholic and aromatic GI-tagged goods. Products such as Judima rice wine, Nashik Valley Wine, Feni, and perfumes face regulatory obstacles that obstruct both their domestic sale and export readiness, severely narrowing their commercial scope.

Market Access and Trade Constraints

Stakeholders reported a glaring absence of export-specific support systems, including subsidies, FTAs mapping guidance, and targeted trade promotion incentives. GI goods, such as Kannauj Perfume, Mysore Sandal Soap, Nashik Valley Wine, and Nicobari Tavi-i-Ngaich (VCO), are notably affected. The lack of structured, product-level export data \ further complicates policy planning, with goods like Coimbatore Wet Grinders and Mysore Sandal Oil remaining invisible in trade statistics.

Producers face intense competition from low-cost imports, particularly from China, which has adversely impacted artisanal sectors such as Meerut Scissors, Nainital Candles (Mombatti), and Mysore Agarbathi. High tariff barriers and weak export facilitation for products like Feni, Nashik Valley Wine, and Kannauj Perfume further restrict their global reach. Stakeholders emphasised that global demand exists, but GI products lack the strategic state backing needed to leverage their heritage value internationally.

Branding, Packaging, and Quality Deficiencies

A recurring deficiency is the lack of strategic state support for strong branding, as well as the absence of distinctive packaging across many goods with a GI tag. Products such as Marua Apo, Jou Gwran, Adi Apong, and Nicobari VCO are often sold in generic or plain packaging, diminishing their shelf appeal and market recognition. The absence of GI-specific labels and QR-based authentication in sectors like Nicobari VCO and Nainital Candle hampers consumer trust and value realisation.

Notably, India currently lacks a robust GI quality assurance framework comparable to international models, such as the European Union's PDO/PGI/TSG labels. Failure to monitor adherence to the production standards specified in the Examination Report results in a dilution of product integrity. The DPIIT-endorsed "common GI logo" and "tagline" remain voluntary and inconsistently applied.

Capacity, Infrastructure, and Social Concerns

Several GIs face critical infrastructural gaps. The absence of Common Facility Centres (CFCs) and shared infrastructure strains clusters like Kannauj Perfume and Meerut Scissors, which struggle with outdated tools and fragmented operations. Clusters face obsolete tools and fragmented operations, along with logistical challenges such as high transportation costs and weak connectivity. Producers of Himachal Chulli Oil and Nicobari VCO have reported these issues. Local-level institutional engagement also remains inconsistent.

There is dedicated research and development (R&D) funding support for GI goods, especially those relying on traditional fermentation or fragrance techniques, such as Bodo beverages and Judima. Many artisanal sectors are experiencing a generational erosion of skills, characterised by limited youth participation and a decline in skills continuity, most notably in the Bodo alcoholic beverage clusters. Secondary challenges must be addressed to ensure long-term sectoral resilience.

Labour and Social Concerns

Labour vulnerabilities are particularly pronounced in sectors that rely on informal and home-based workers. GI goods such as Mysore Agarbathi and Nainital Candles operate in largely unregulated settings, resulting in low wages and employment insecurity. Occupational health concerns are critical, specifically the health risks faced by women workers due to exposure to harmful chemicals and poor working conditions in Mysore Agarbathi production. These findings highlight the need for labour formalisation, the enforcement of occupational health standards, and the integration of social protections.

6.2 Export Performance and Policy Gaps

The quantitative analysis relied on Harmonised System (HS) two-digit level data spanning January 2019 to December 2024. This methodological choice was necessitated by the absence of granular HS4 or HS6-level data, as well as a lack of granular trade data at the HS4 or HS6 level from the

Ministry of Commerce, which reflects a core institutional data gap. The analysis operated on the assumption that GI-tagged products were captured within these broader HS2 categories. \

A fixed effects panel regression model revealed strong export potential in categories corresponding to manufactured GIs. The analysis reinforced the need for targeted policy interventions to address institutional gaps and strengthen the competitiveness of GI-manufactured goods.

Key Findings from Fixed Effects Panel Regression Model (Jan 2019–Dec 2024)

The regression analysis highlights the strong export potential of several GI-linked manufactured categories. Leather footwear (HS 64) emerges as the most consistent performer, ranking high both in export volume and trade value, confirming its role as a flagship segment. Leather articles and accessories (HS 42) and tools, locks, and scissors (HS 82) also exhibit solid and stable growth, indicating resilience and demand across various markets. Electrical machinery (HS 85) shows a significant increase in volume, although it is concentrated in lower-value ranges, suggesting opportunities for value-added strategies. On the value side, wooden products, such as toys (HS 44), stand out with the highest coefficients, indicating strong near-term growth prospects. Soaps and candles (HS 34) are gaining value at a faster rate than average, while essential oils and perfumes (HS 33) exhibit slower growth, underscoring the need for targeted branding and quality assurance. Overall, the findings confirm that GI-manufactured goods have significant untapped potential, but require policy and institutional support to leverage their competitiveness in global trade fully.

The analysis of FTAs shows a consistently positive impact on trade volumes and values across most HS2 categories.

Importantly, products under negotiation, particularly in high-potential categories like HS64, HS42, and HS85, demonstrated even stronger correlations than those already governed by signed agreements. This underscores the substantial potential of upcoming trade deals with partners, including the EU, UK, US, China, ASEAN, SAFTA, Australia, and Japan, to expand market access and strengthen the global competitiveness of GI-manufactured goods.

Key Policy Gaps Identified from Data and Institutional Analysis

1. **Absence of GI-Specific HSN Codes:** The use of generic classification obscures the products' identity, resulting in their trade invisibility in global statistics and hindering targeted market strategies. While India's recent initiative to create dedicated tariff lines for GI-recognised rice marks a significant policy shift, its scope remains narrowly applied. It does not extend to manufactured goods with GI recognition.

2. **Lack of Centralised GI Trade Database:** There is no dedicated government platform or reporting mechanism to record the trade performance or economic value of GI-manufactured goods. This institutional data gap significantly hinders the design of evidence-based policies.

3. **Limited AU Registrations:** Despite legal provisions, the majority of GI-manufactured goods suffer from a low number of registered AUs, excluding genuine producers from protection benefits and weakening the inclusivity of the GI framework.

4. **Inadequate FTA Integration of GI Protection:** India's existing FTAs have not sufficiently integrated GI protection as a strategic trade tool; most do not recognise Indian GIs, and there is an absence of dedicated GI provisions or negotiations for TRIPS-Plus protection. This omission limits global enforceability and outreach.

5. **Weak Global Presence and Standardisation: Apart from exceptions like Darjeeling Tea, Kangra Tea,** and Basmati, most Indian GIs remain unprotected internationally. This is compounded by the absence of a comprehensive quality assurance framework comparable to the EU's PDO/PGI system.

6.3 Strategic Policy Recommendations for Resilience and Global Competitiveness

Addressing these structural barriers requires a comprehensive National GI Policy that integrates legal, technological, and trade-diplomacy instruments. The following strategic recommendations represent the core priorities for structural reform, data modernisation, and proactive trade diplomacy to strengthen resilience and enhance the global competitiveness of India's GI-manufactured goods.

6.3.1 Policy Imperatives for Enhanced Trade Visibility and Data Management

To overcome the current trade invisibility caused by the absence of GI-specific HSN codes, immediate and structured policy interventions are required.

The government should mandate a declaration in shipping documentation that identifies GI-tagged consignments. This would take the form of a "GI Origin Statement" on shipping bills, ensuring authenticity and facilitating customs oversight. The lack of GI tagging in export documentation currently weakens enforcement against counterfeits.

India must prioritise the systematic expansion of GI-specific ITC-HS sub-classifications beyond rice, extending to high-value manufactured goods, industrial products, and handicrafts. A feasible

solution is to assign unique 2- or 4-digit differentiating codes within the internationally recognised HS-6 framework. This integrated GI tag with the ITC-HS system could evolve into a reliable instrument for targeted national and international trade policy. ODOP (One District One Product) items that are either GI-tagged or have GI potential should be prioritised for ITC-HS mapping.

To address the absence of a centralised GI trade database, a National GI Policy should mandate the creation of a national platform integrating production, trade, and compliance data. This database is essential to consolidate currently fragmented information on sales turnover, exports, and employment generated by GI products. Export Promotion Councils (EPCs) should collaborate to build digital platforms that integrate GI identifiers with ITC-HS codes, providing exporters with real-time analytics and market intelligence.

6.3.2 Strengthening Standardization and Quality Assurance

To address India's weak global presence, fragmented branding, and lack of standardisation, a shift toward mandatory quality and consistency requirements is essential.

India must establish product-specific standards, drawing inspiration from the rigorous frameworks of the European Union's PDO/PGI system. These standards should cover not only core product attributes (as outlined in the original GI Examination Report) but also sustainability benchmarks increasingly demanded by global buyers.

To reinforce authenticity and prevent brand dilution, the government should mandate uniform use of the official GI logo and tagline across all GIs. Periodic compliance audits and random quality inspections must be institutionalised, supported by digital traceability tools such as QR codes or blockchain systems. These mechanisms will enable consumers to instantly verify the origin of products, thereby enhancing trust and reducing the risk of counterfeit products.

Finally, a national branding initiative — such as the proposed "Bharat GI" mark — should be launched as a unified symbol of quality and authenticity, helping GI products gain stronger recognition in both domestic and international markets.

6.3.3 Administrative and Governance Reforms

Administrative reforms are crucial for overcoming bureaucratic hurdles in authorised-user registration and ensuring robust post-registration compliance.

The opacity of the registration process must be addressed by mandating the compulsory enrolment of genuine producers as AUs. Registered GI associations should be required to file annual compliance reports detailing turnover, quality audits, and authorized-user activity.

Legal amendments must strengthen enforcement by granting equal legal standing to registered proprietors and AUs in infringement cases. New offences should be incorporated into the GI Act, including the misuse of GIs as ingredients or on digital platforms. The introduction of a dedicated "control body" for quality verification and a system of annual reporting on GI usage ("Mandatory Working of GIs") will enhance transparency and accountability.

Institutional capacity building requires the creation of a specialised cadre of GI professionals through a 'GI Agents' Certification Programme,' modelled on patent and trademark agents. State GI facilitation centres must evolve beyond basic registration support to function as integrated service hubs, providing legal guidance, trade advisory services, and export readiness assistance.

6.3.4 Strategic International Engagement

To address the inadequate integration of GI protection within FTA frameworks and the weak global presence, strategic trade diplomacy is paramount. India should formally accede to the WIPO Geneva Act of the Lisbon Agreement. This accession would enable multi-country GI registration through a single, cost-effective application, ensuring indefinite protection against misuse.

India must also actively pursue bilateral and multilateral GI agreements, embedding GI protection as a dedicated, binding chapter in all trade negotiations with key markets, such as the EU, UK, US, China, ASEAN, and GCC. This strategy should adopt a dual-track approach: securing sui generis GI protection while simultaneously registering manufactured products as Certification Marks or Collective Marks in jurisdictions that rely on trademark-based systems, such as the United States and Australia

6.3.5 Policy Focus on Priority Product Categories

Based on the quantitative analysis of export performance, policymakers should prioritise development and promotion strategies for high-potential manufactured GI product categories.

Priority List of Manufactured GI-Tagged Product Categories (Based on Export Performance)

The analysis highlights leather goods (HS 64 and HS 42) as the most competitive categories, as they combine high value and strong demand across diverse markets. Electrical machinery (HS 85) and wooden products (HS 44) represent high-potential sectors, with strategies focused on value addition and cultural branding. Tools, locks, and scissors (HS 82) and essential oils and perfumes (HS 33) demonstrate moderate potential, necessitating heritage-based branding and authenticity positioning. Alcoholic beverages (HS 22), while culturally significant, face regulatory and licensing

barriers that limit commercial scalability. The analysis also provides a roadmap for future GI applications that align with these high-performing categories.

Priority List for Potential Manufactured Goods for GI Registration

The priority list highlights Kanpur Leather Goods (HS 42) and Wooden Toys from Sehore (HS 44) as top candidates for GI registration, aligning with India's strongest export categories and offering immediate global competitiveness. Aligarh hardware (HS 82) and Kinnauri jewellery (HS 71) represent mid-tier opportunities, combining heritage value with active export potential in niche markets. Ladakh Apricot Oil (HS 33) aligns with the growing wellness and skincare segment, while LaoPani (HS 22) highlights the cultural significance of ethnic beverages, although its commercial readiness remains limited.

Together, these products provide a strategic roadmap for expanding GI recognition to high-potential manufactured goods, ensuring that India's GI policy captures both heritage and emerging market opportunities.

6.4 Concluding Summary

India's GI framework, though legally established under the GI Act, 1999, has not yet matured into a strategic economic and trade instrument, particularly for the underutilised manufactured goods sector. The volume of GI registrations continues to lag behind peer countries with comparable export footprints.

The comparison with established agricultural GIs such as Darjeeling Tea and Kangra Tea underscores the vast gap in structured support and international recognition for manufactured goods. The most significant structural barrier is the absence of distinct ITC HS code identifiers, which renders manufactured goods invisible in global trade statistics, severely undermining export targeting and market intelligence. The lack of a centralised GI trade database further compounds this invisibility.

Commercialisation remains limited and requires reinforcement through a cohesive branding architecture (e.g., the proposed "Bharat GI" label) and stronger institutional support. Widespread issues of weak global presence, fragmented branding, inadequate standardisation, and poor traceability must be addressed through the establishment of mandatory quality assurance and digital traceability systems (QR codes, blockchain).

These deficiencies necessitate an urgent re-examination of GI policy within a TRIPS-aligned trade strategy. The path forward requires a comprehensive National GI Policy that prioritises

manufactured goods, integrates technology-enabled solutions, and ensures alignment with broader export goals. By strengthening legal protection through accession to the Geneva Act (2015), mandating transparency in trade documentation via a "GI Origin Statement," and building institutional capacity through certified professionals and facilitation centres, GIs can be transformed from heritage symbols into powerful economic assets.

This comprehensive transformation is crucial for securing sustained value creation, enhancing the competitiveness of MSMEs, and promoting export diversification in the global marketplace.

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