

राजस्थान-सरकार
कार्यालय जिला उद्योग केन्द्र, जोधपुर

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संयुक्त निदेशक,
उद्योग विभाग,
आयुक्तालय, उद्योग भवन,
तिलक मार्ग, जयपुर-5

विषय:-जिला स्तरीय निर्यात कार्ययोजना तैयार करने एवं "एक जिला एक उत्पाद" योजना के क्रियान्वयन के संबंध में ।

प्रसंग:-आपकापत्रांकएफ.31)आ.उ./निर्यात/बीओटी/कार्य-योजना/2019 दिनांक 13.01.2020 के संदर्भ में ।

महोदय,

उपरोक्त विषयान्तर्गत प्रासंगिक पत्र के संन्दर्भ में निवेदन है कि जिला स्तरीय निर्यात कार्ययोजना तैयार करने एवं "एक जिला एक उत्पाद" योजना के क्रियान्वयन के संबंध में इस कार्यालय द्वारा तैयार की योजना की प्रति इस पत्र के साथ संलग्न कर आवश्यक कार्यवाही हेतु भिजवाई जा रही है।

संलग्न- उपरोक्तानुसार

भवदीय


महाप्रबन्धक
जिला उद्योग केन्द्र, जोधपुर

Export Potential Survey

District Industries Center

Jodhpur

1. Introduction:

The liberalization of Indian Economy and India's thrust to leap forward mapping global canvas world around and the fast changing market paradigm has lead to spurt in export and inport activitites.

Jodhpur is land of diverse art and crafts and thereby is major exporting hub of the country. The contribution of jodhpur in boosting the exports from rajasthan is indeed laudible. It has played significant role in providing employment opportunities at the grass root level, while at the same time it helps in preserving the traditional art and uniqueness of the Indian crafts.

The appoximate exports from the city is around 4000 crore annually which is growing at rapid pace. The major items exported are wooden handicrafts, iron&metal handicrafts, guar gum, sandstone, textiles, etc. Out of which wooden handicraft exports is dominant exporting cluster. Lately, it has emerged as a big centre of ethnic, traditional and artistic handicrafts. The dynamism in designs with blend of traditionality has led Jodhpur to become the first desitination for handicrafts, gift items, life styles, home decore and artistic furniture to the buyers world over.

2. Export Scenario:

Jodhpur has become major exporting destination in Rajasthan, with more than 60,000 TEUs (containers) being sent in previous year.

The main exporting item as seen in table 1 is Handicraft/furniture items. Around 99% exports from jodhpur is from this category. Handicraft manufacturing and export industry of jodhpur has proved as one of the fastest growing industrial sector with low capital investment and high ROI and export

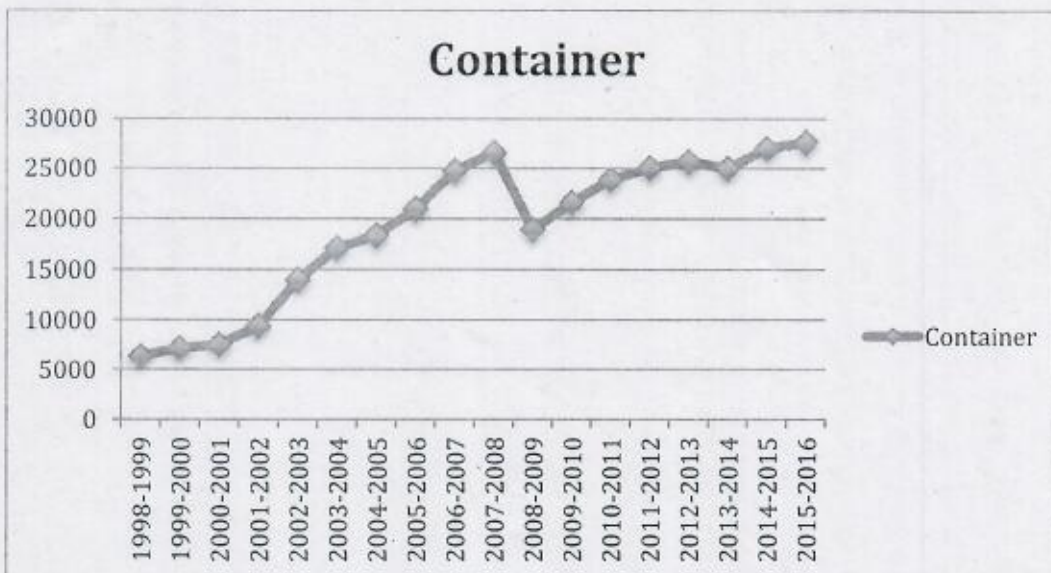
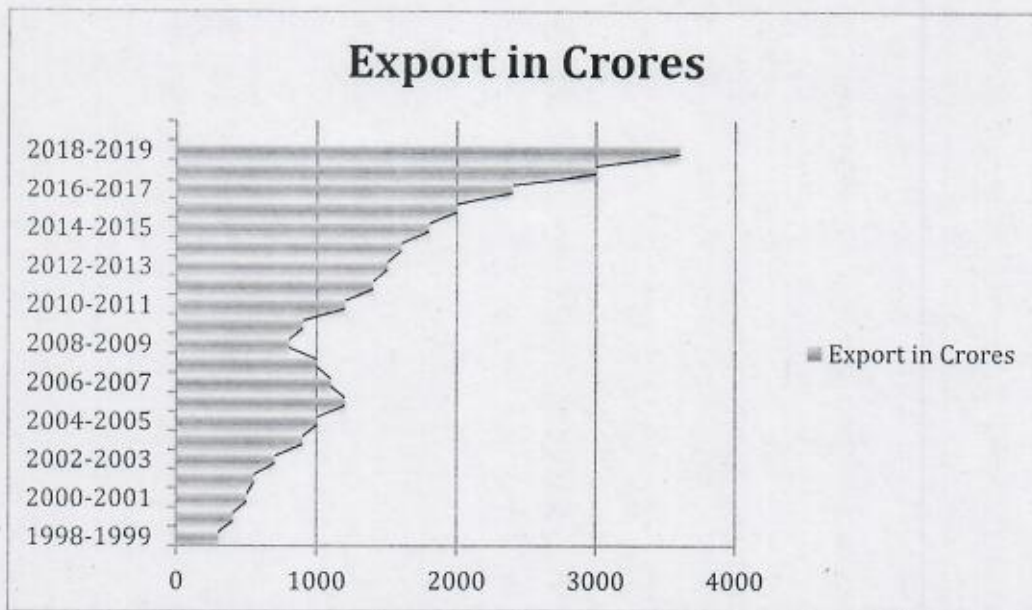
potential. Furthermore, it is also highly labour intensive industry providing employment to thousand of skilled artisans and unskilled labour.

Table 1: Export statistics from ICD RSIC (One of the three ICDs in the district)

S. NO	Commodity Name	2014-15		2015-16		2016-17		2017-18		2018-19	
		Export		Export		Export		Export		Export	
		TEU	Value (In Lac)	TEU	Value (In Lac)	TEU	Value (In Lac)	TEU	Value (In Lac)	TEU	Value (In Lac)
1	Handicraft / Furniture	490	3171.15	3024	20989.62	3482	24360.42	4167	22870.64	4803	32911.62
2	Guar Gum	-	-	2	27.70	8	111.09	248	1746.31	55	519.72
3	Machinery	6	225.62	25	604.36						
4	Cotton Yarn	-		1	12.80						
5	Conveyor Belt			1	24.65						
6	Stainless Steel			1	10.65						
7	Component Syringe			2	40.14						
8	Pump			1	41.27	3	109.63				
9	Textile Cloth	6	101.57	6	52.05	8	32.21				
10	Drip Irrigation System Parts					8	127.5				

SOURCE: ICD RSIC

If we see year wise growth chart, there is year on year averaged growth rate of 21%. Few years have seen negative rate due to global factors like recession, global economic slowdown and differential trade policies. Similar trends are seen in container growth with stagnation in later period. The major target geographies for exports from Jodhpur are the USA and the Europe. Main countries include the U.S.A., Germany, France, the U.K., etc.



If we look at second most exported item from Jodhpur i.e. Guar gum or clusterbean. It is extremely drought hardy, deep rooted summer annual legume and has great economic and adaptive significance. Though originally grown for grain, vegetable, fodder, cattle feed, guar has attracted attention during the last few years due to shooting demands of guar gum - a product, in the shale oil and gas sector, also a major cosmetic industry breakthrough raw material. Of the total global production of more than 15-20 lakh tones annually, India is the most important guar producer in the world contributing almost 75%-82% global guar

grain production, followed by Pakistan (15%). Annually almost 75%-80% of guar gum including its few derivatives like refined splits, gum powder and guar meals are exported from India. However, in recent years, Indian exports have shown high volatility in both volume and value. Exports from almost 4.04 lakh ton worth Rs. 2811.93 crore during 2010-11, rose dramatically to almost 7.07 lakh ton in 2011-12, worth Rs. 16523.87 crore. In 2012-13, it dipped to 4.06 lakh ton worth Rs. 21287 crores, eventually picking up again in the year 2013-14, to almost 6.02 lakh ton worth Rs. 11734.5 crores.

3. Issue faced by Exporters

Presently Handicrafts is facing two problems; First, due to 100% examination of export consignment resulting in delay in delivery. Increased cost and threat of loss of order, This 100% examination is started due to wrongly availing IGST refunds by filling fraudulent documents by some exporters in the country. Secondly due to imposing ban on export of items manufactured by using *shisham* wood by CITES considering It as endangered species and excessive illegal cutting in some African countries. However situation is differing in India because of Cultivation of *Shisham* tree was initiated long ago here and *shisham* woods are available in sufficient quantity as not be considered as endangered . As per certain reports handicrafts exporters are cultivating *shisham* wood as commercial crop. Export promotion council for Handicrafts has also supported to uplift this ban for Jodhpur exporters. In array of these the cluster is suffering resulting in impeded growth

Guar Gum industry faces fluctuating demand, monopolistic domination and unpredictably supply as main problem. Additionally, there is no value added industry or ancillary industry in this domain. Immense potential exist in the domain for establishing cosmetic, pharma and other industries.

4. Export Infrastructure

With zero export just two and half decades back to more than INR 1500 crore forex generation, Jodhpur has seen tremendous rise in exports. The growth chart of despatches of containers has seen exponential curve. In order to handle such tremendous accerealtion, jodhpur have three inland container depots, out of which two govt. opereated depots are , namely, ICD managed by The Rajasthan Small Industries Corporation Limited (the state govt. agency), ICD by CONCOR (managed by Indian Railways), and private owned ICD by Thar dry port. Though the city has connectivity with all major ports of the country, however, around 70-75% of exports is via Mudra port and around 20-25% of exports is via Pipava port. When considering import scenario, about 90% of import is via Mundra port and remaining via Pipava port. It is also reported that from last 7-10 years imports (along with exports) from Nava sheva port is negligible. The main reason that Mudra port and Pipava port remains favorable operating port for exports as well as imports from jodhpur is the transit time and connectivity (for mudra and pipava it is two days and for navasheva it is five days). Another notable fact is that while exports majorly consist of handicrafts, guar gum, agro, etc, the imports mainly include heavy commodities like solar panels, chemicals (mainly white cement adhesives), machineries. Therefore, for imports, cent percent trains as used as modality of transport as heavy commodities are not permissible and feasible via road transit mode. When we look at exports, the modality share is mainly road based. Further, mostly containerised export is done instead of bulk vessels. The handling cost is lower for containerised cargo as opposed to break bulk leading to containerisation of items that are exported. For containerisation of more commodities, we needs to focus on developing port infrastructure as well as multi modal logistics infrastructure (Road/Rail). On import side, we need to focus on effective systems in place for efficient cargo evacuation and transportation.



5. Potential Export Areas:

If we look at Jodhpur's industry portfolio, we will find that steel utensils, stone industry, mineral industry, pharmaceutical and medical industry, textile printing, agricultural commodities, agro processing, food processing, traditional carpets, terracotta art, local cuisine, hospitality and hotels are flourishing sectors in various domains. But exports are heavily concentrated on handicrafts. Therefore, if we match productions at district level with nationwide exports, we will find that above mentioned areas have significant export potential if provided with right medium and infrastructure.

Moreover, Jodhpur has more than 1000 units working in sandstone industry at Stone Park providing direct indirect employment to more than 1800 people.

Leather cluster development Program was conducted in 2009-11 by Industries Department and NGO called *Meera Sansthan* under State cluster development Program. This was highly successful cluster as before this cluster

there was not even single organised exporter in this field, no standardisation was practised and no continuous source of livelihood was there. Now more and more exporters are coming up and standard and innovative products are being developed. However, still full export potential is yet to be unlocked

The products that have been identified as having high export potential should be the immediate focus of export promotion activities in the district.