

ENHANCING FTA LEVERAGE

NEW DELHI 22nd September 2026



Earlier FTAs

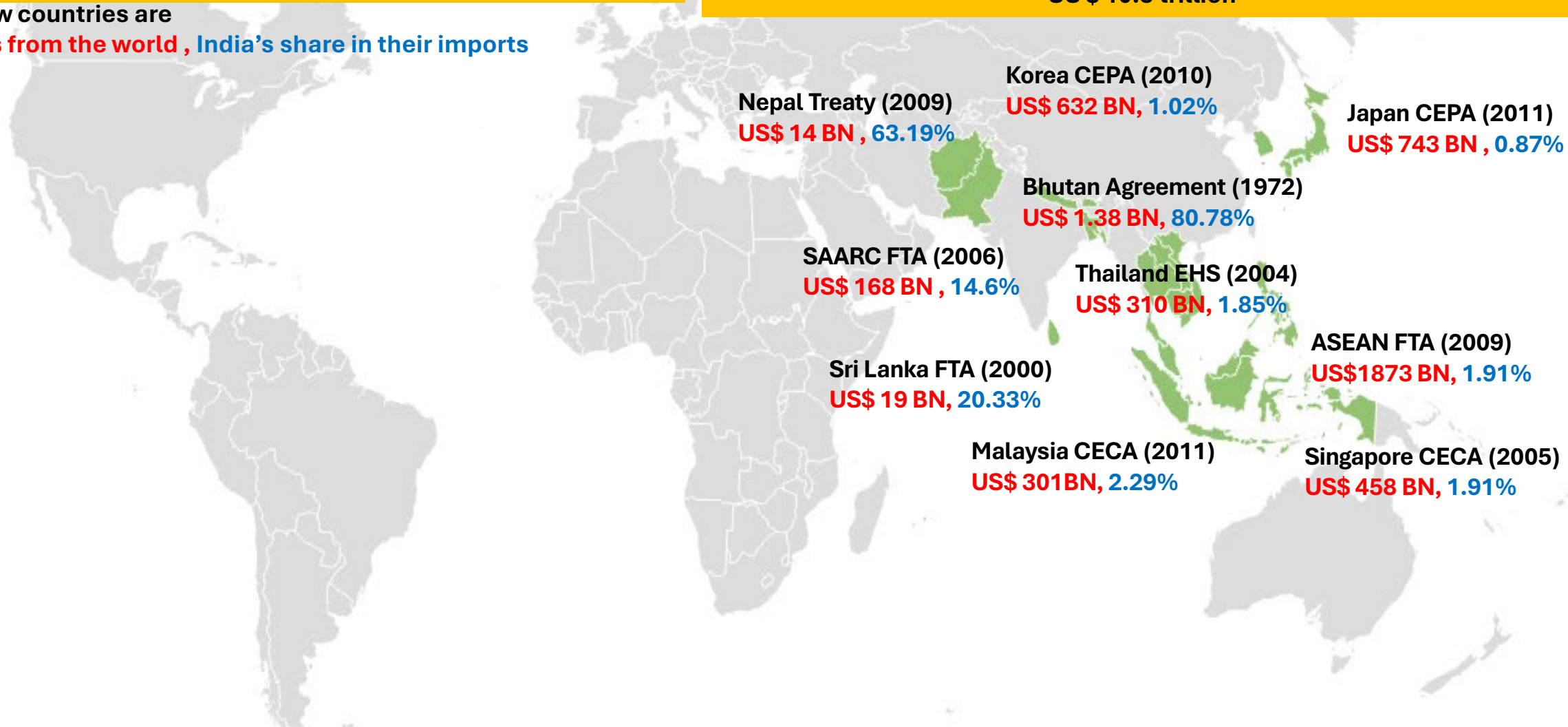
(signed prior to 2021)

Primary focus on Countries within Asian and South Asian region

Total import value of goods in past FTAs
US \$ 5.2 trillion

Total GDP value of past FTA countries
US \$ 10.8 trillion

Figures below countries are
their imports from the world , India's share in their imports



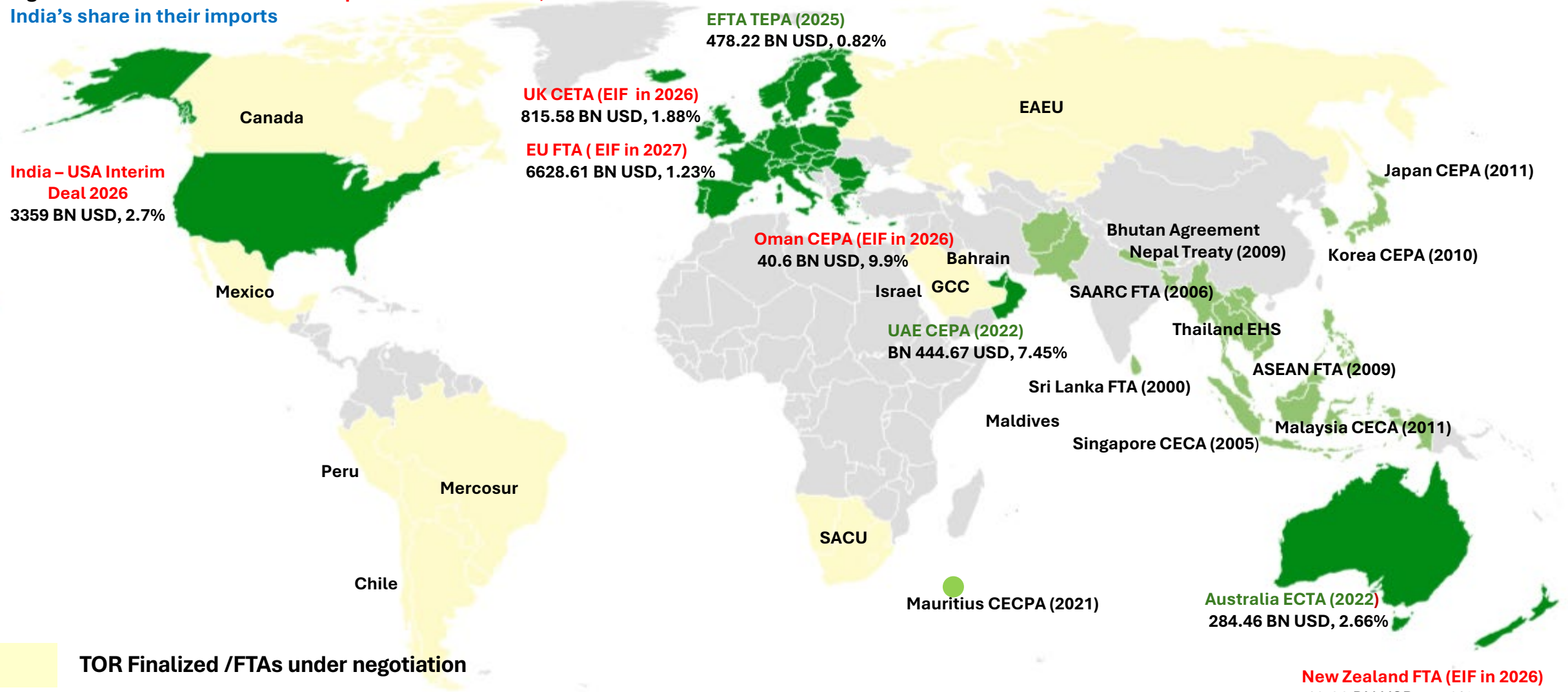
FTA: Free Trade Agreement EHS: Early Harvest Scheme ECTA: Economic Cooperation and Trade Agreement CEPA: Comprehensive Economic Partnership Agreement
CECA: Comprehensive Economic Cooperation Agreement CECPA: Comprehensive Economic Cooperation and Partnership Agreement

Recent FTAs gives market access to Developed markets of Oceania, UK & EU

Total import value of Goods in new FTAs is US \$ 12 trillion

Total GDP value of new FTAs is US \$ 56 trillion

Figures below countries are **their imports from the world**,
India's share in their imports



TOR Finalized / FTAs under negotiation

New FTAs since 2022

EIF: expected in Force

Old FTAs before 2021

EFTA includes Switzerland, Norway, Iceland, Liechtenstein
TEPA: Trade and Economic Partnership Agreement
CETA: Comprehensive Economic and Trade Agreement
ECTA: Economic Cooperation and Trade Agreement

**Mauritius CECPA
(2021)**

**UAE
CEPA (2022)**

**Australia
ECTA (2022)**

**EFTA TEPA
(2025)**

UK CETA (2025)

**Oman
CEPA (2025)**

**New Zealand
FTA (2025)**

EU FTA (2026)

Strong Re-export and Investment linkages into East Africa

Gateway to Middle East with zero-duty access on 99% of India's exports, boosting bilateral trade beyond \$80 billion

Unlocking High-Value Exports in a Resource-Rich Economy

Group of 4 countries with biggest FDI commitment of \$100 bn

99% market access with a reciprocal Double Contributions Convention (DCC)

Duty-free access for around 98% of India's exports, expanding trade in textiles, engineering and agriculture

Along with Australia, covers ~70% of Oceania's consumer market and ~98% of its GDP

Access across 27 High-Income Economies.

**India's
New FTA
momentum**

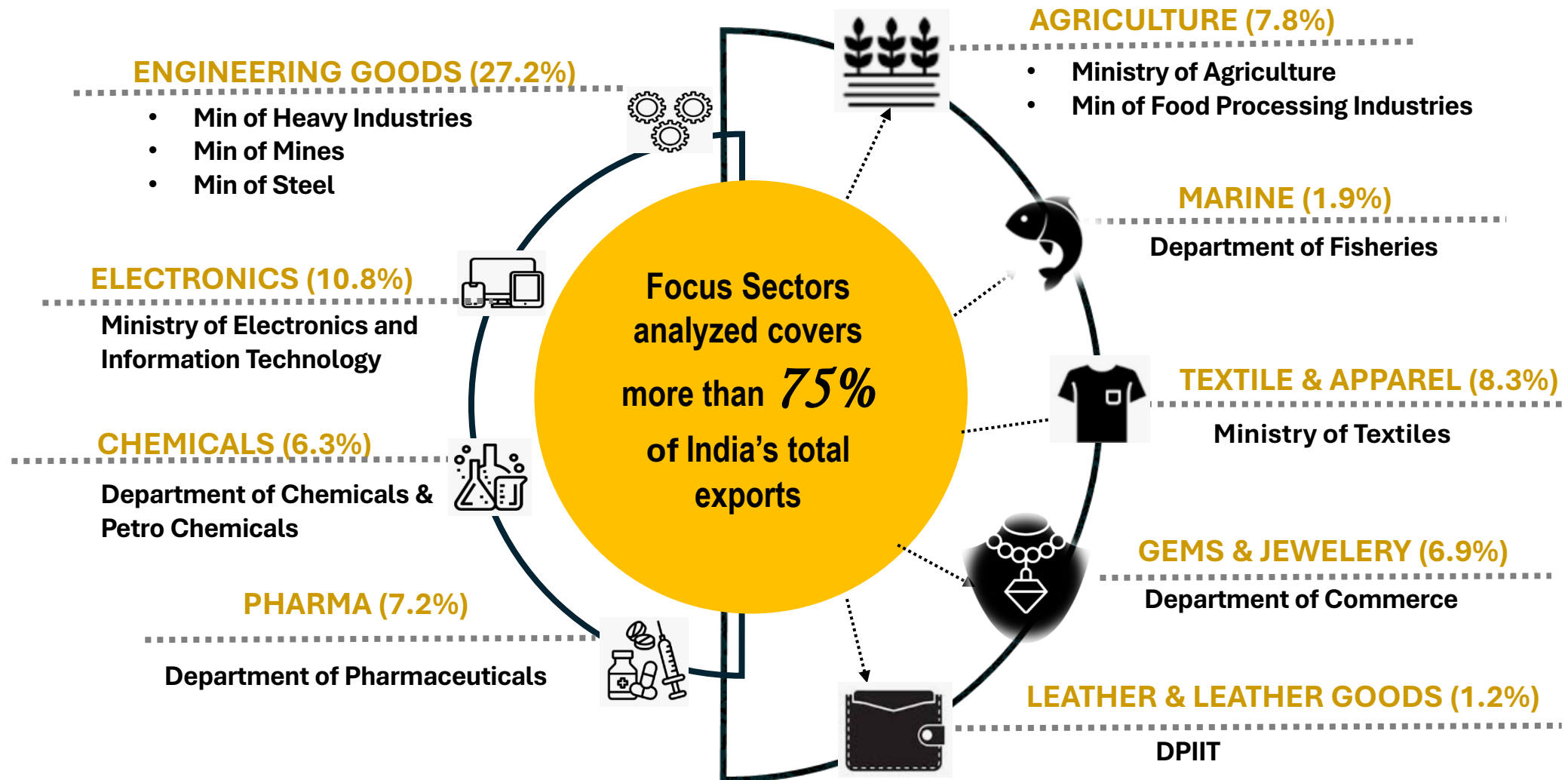
**9 FTAs with
38 countries
in 5 years**

Impact assessment for focus sectors across Line Ministries

MANUFACTURING SECTORS (51.5%)

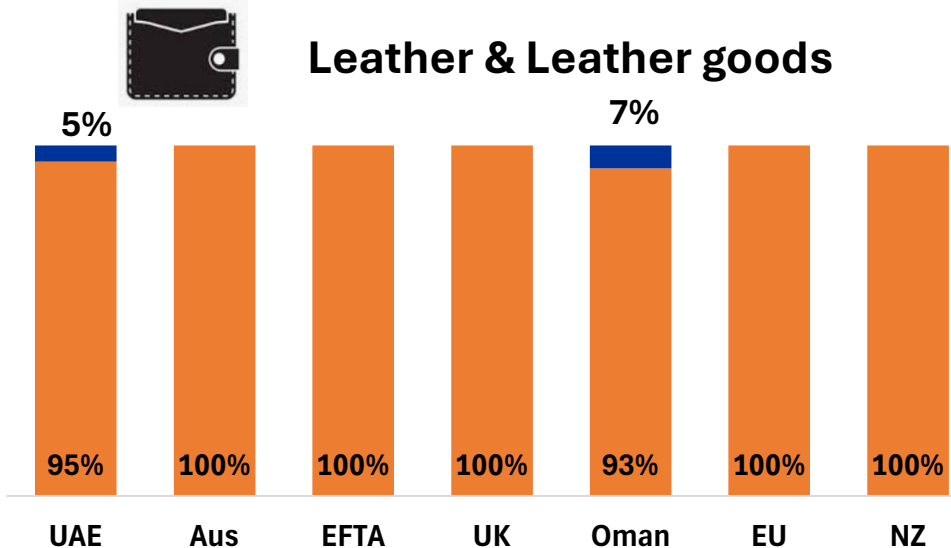
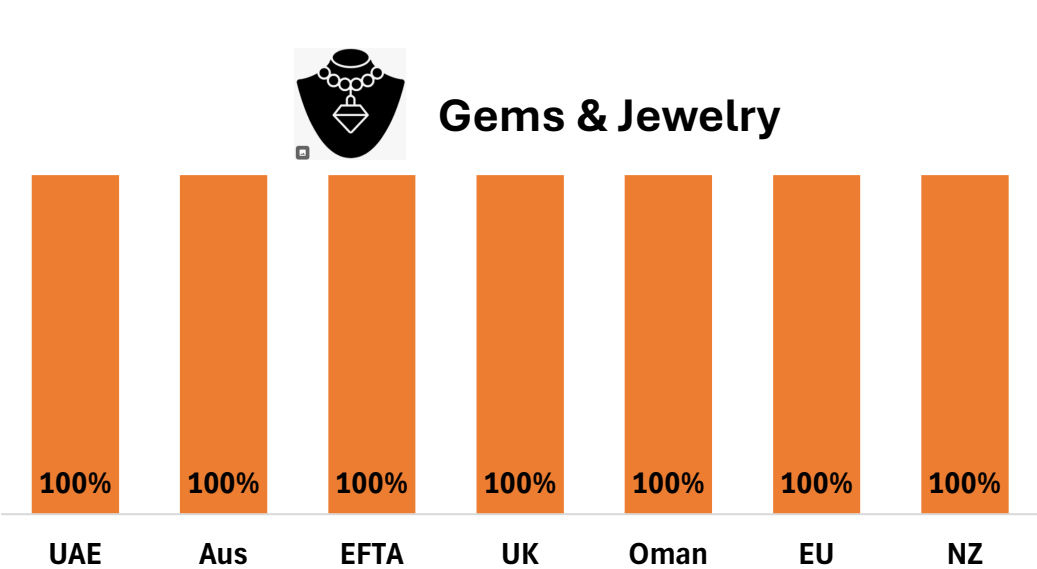
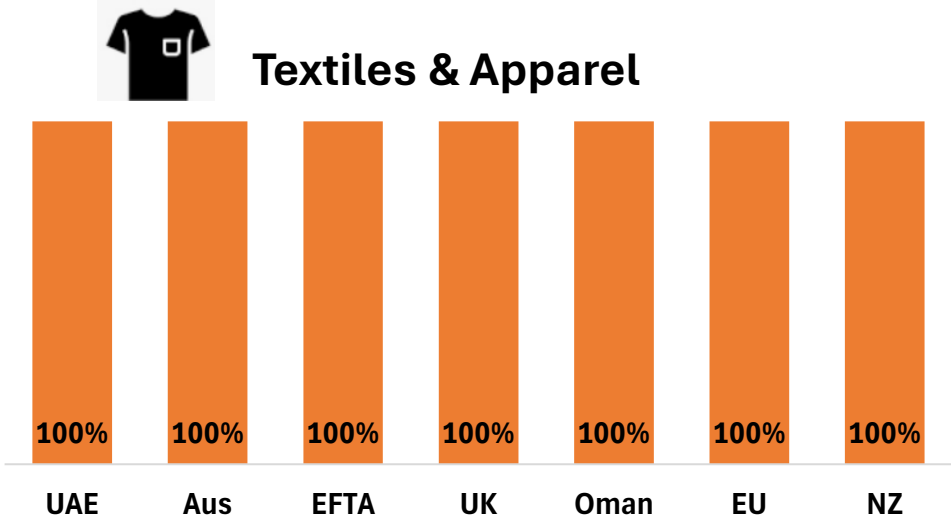
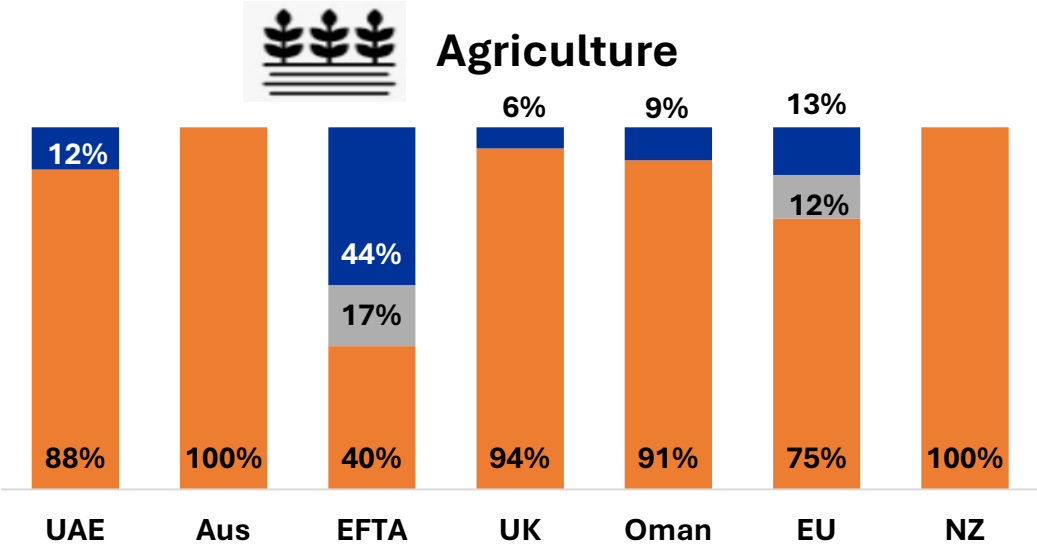
LABOR INTENSIVE SECTORS (26.1%)

Figure in bracket is the share of the sector in India's total exports in 2025



Market Access landscape across FTAs: breakup of Labour-intensive Sectors

New FTAs provides 100% duty free access across tariff lines for most of these sectors



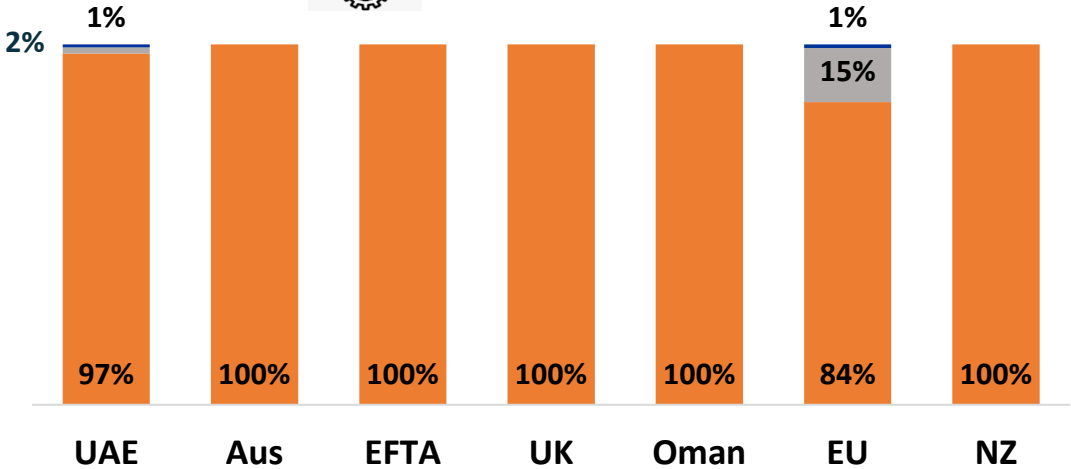
 **Duty Free Access**  **TRQ**  **Excluded**

Market Access landscape across FTAs: breakup of Manufacturing Sectors

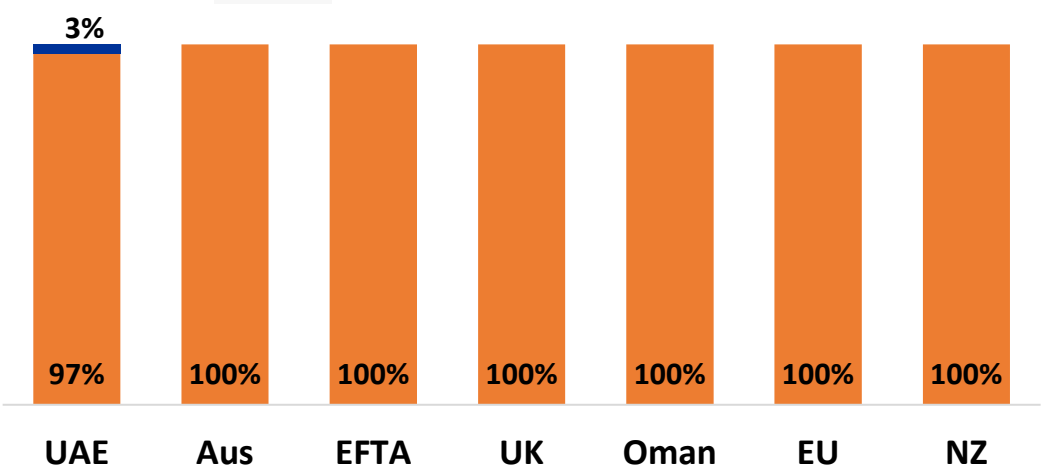
New FTAs provides 100% duty free on tariff lines access to most of these sectors



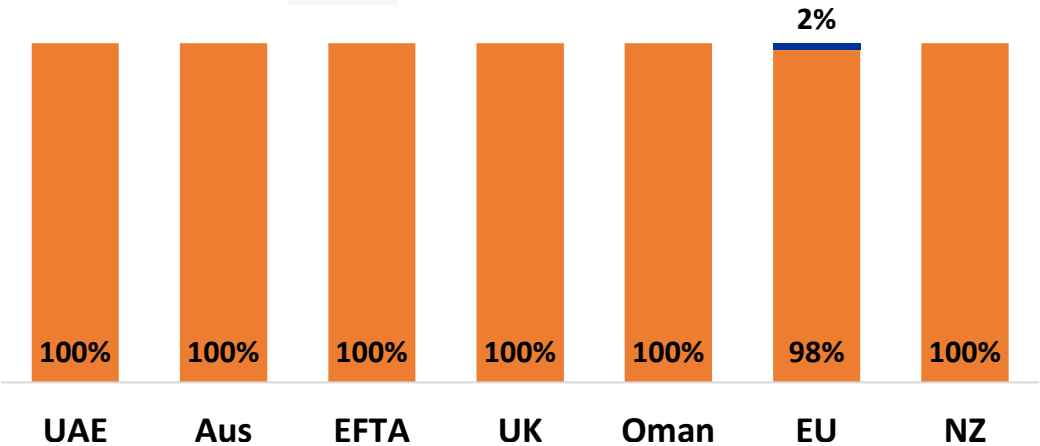
Engineering



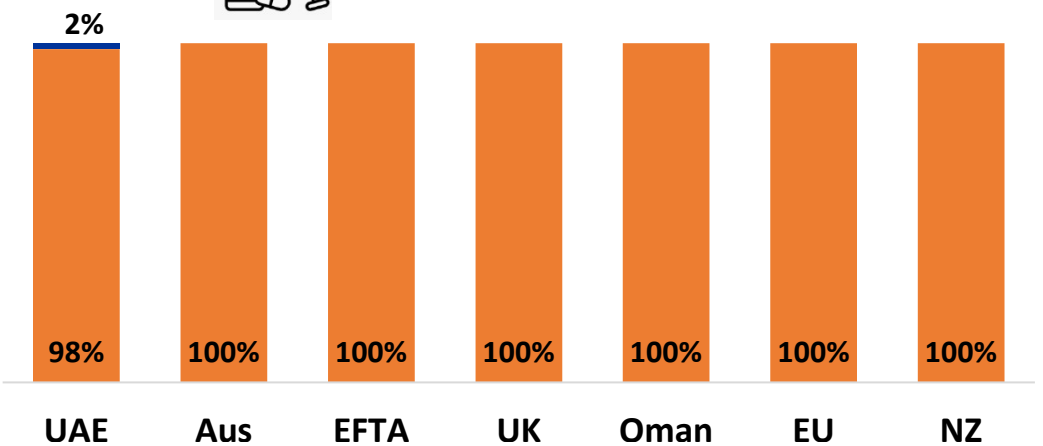
Electronics



Chemicals



Pharmaceuticals



Duty Free Access



TRQ



Excluded

Conceptual framework for FTA Utilization Plan

- **Category I : Scale up exports**
 - Already holding > 15% market
 - Tariff advantage achieved; hence scale up existing products
- **Category II: Diversify to FTA markets**
 - Holding <15% market
 - With tariff advantage – opportunity arisen to expand market share
- **Category III: Focus Supply side issues**
 - Tariff already at “0” still India’s share is limited
 - Address NTMs, NTBs , supply side issues affecting exports
- **Category IV: Add New Export Products**
 - Import demands for hitherto not-exported goods
- **Category V: Realign export**
 - Import demand low
 - May realign export for long run

A close-up, artistic photograph of several spools of thread in various colors including gold, red, green, and blue. The spools are arranged in a way that creates a sense of depth and texture, with some in sharp focus and others blurred in the background.

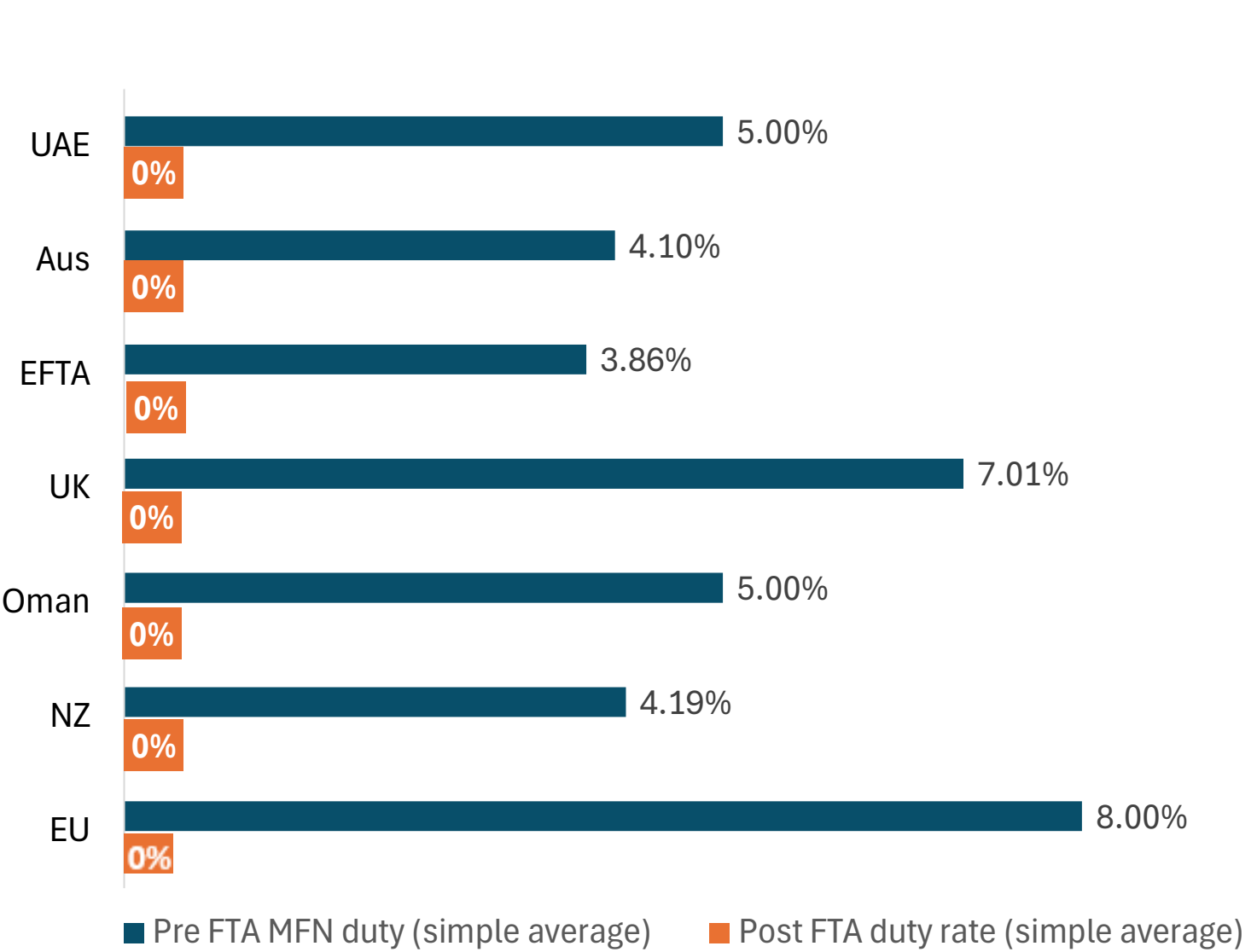
TEXTILE AND APPAREL

Export advantage for India across recent FTAs

- **Global Exports of T&A is US\$ 897,028 mn**
- **Share of India in global exports is 4.1% with total export value of US\$ 36,705 mn**
- **India ranks 6th in global Textile and Apparel exports**
- **Other major global exporters:**
 - **RMG: China, Bangladesh, Vietnam & Indonesia**
 - **Cotton Made ups: Pakistan and Turkey**
 - **Man made fibers and yarns: China & USA**

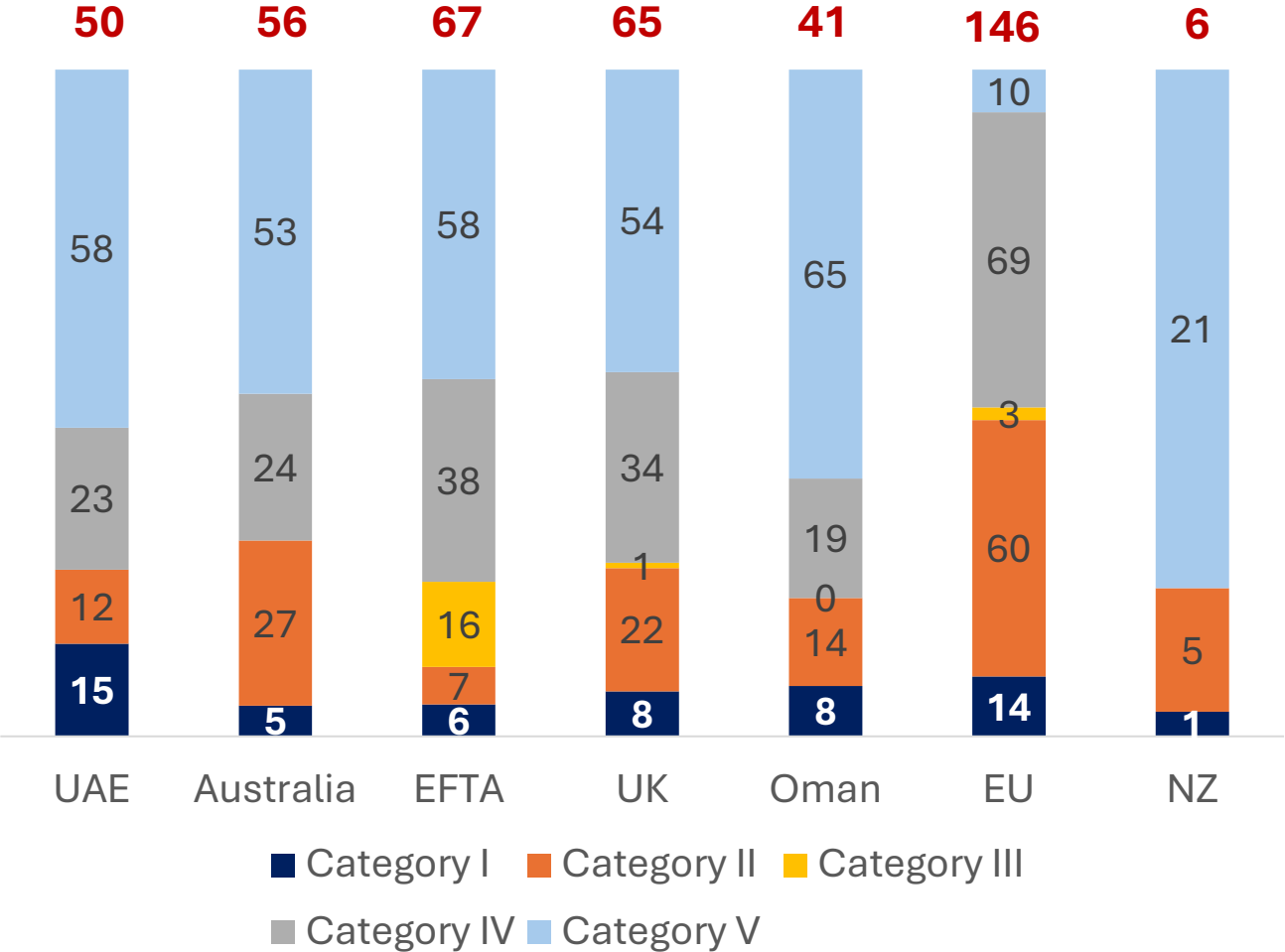
Existing status of Indian Textile and Apparel exports across FTAs

Newly signed FTAs give export opportunities to Indian textile industry to the tune of US\$359 billion



FTA	Total imports from World	Share of India in Imports (%)
UAE	12,041	14.01%
Australia	12,116	6.28%
EFTA	18,020	3.36%
UK	32,009	5.70%
Oman	618	10.84%
NZ	2,045	6.54%
EU	281,954	3.39%

Category-wise distribution of tariff lines of Textile across FTAs



Category-wise Import value of Identified focus tariff lines in US\$ MN
(% contribution to total imports)

FTA	Category I	Category II	Category III	Category IV	Total
UAE	2383.5 (19.8%)	1962.7 (16.3%)		2465.3 (20.5%)	6811.6 (56.6%)
Australia	729.9 (6.0%)	4549.0 (37.5%)		2687.8 (22.2%)	7966.7 (65.8%)
EFTA	687.0 (3.8%)	1824.3 (10.1%)	3058.6 (17.0%)	5055.5 (28.1%)	10625.4 (59.0%)
UK	1678.1 (5.2%)	9114.3 (28.5%)	479.8 (1.5%)	7359.6 (23.0%)	18631.8 (58.2%)
Oman	71.6 (11.6%)	205.1 (33.2%)		180.5 (29.2%)	457.2 (74.0%)
EU	7570.6 (2.7%)	111375.8 (39.5%)	3404.4 (1.2%)	107763.5 (38.2%)	230114.3 (81.6%)
NZ	25 (1.2%)	301 (14.7%)			326 (15.9%)

Stack bar indicates number of tariff lines to be focused against each category across FTAs. Value in red above each stack bar is the total number of tariff lines across categories (I + IV) against each FTA.

Product-wise categorisation across FTAs for Textiles & Apparel

Product Label	India's Export to World (US\$mn)	UAE	Aus	EFTA	Oman	UK	EU	NZ	Export Opportunity #
Cotton knitted T shirts	1723.36	572.4 (34%)	641.7 (11%)	525.9 (7%)	33.9 (11%)	1480.5 (8%)	14960.9 (6%)	95.4 (10%)	18310
Toilet/kitchen linen	1169.64	45.7 (42%)	148.6 (37%)	81.2 (11%)	2.6 (11%)	200.9 (27%)	1620.2 (12%)		2050
Cotton yarn (85% or more cotton)	1048.16	4.4 (99%)	0.1 (20%)	0.9 (18%)	0.1 (100%)	0.7 (11%)	179.3 (22%)		179
Bedspreads (all textile materials)	931.08	10.3 (68%)	4.8 (56%)	9.3 (15%)	0.7 (11%)	12 (30%)	130.2 (25%)		130
Bulk containers for packing goods	885.85	13.8 (68%)	53.2 (0%)	51.3 (22%)	6.2 (96%)	89.5 (72%)	1014.8 (39%)		1126
Women's/girls' cotton dresses	858.20	246.1 (12%)	159.2 (19%)	148.2 (21%)	15.3 (2%)	210.8 (40%)	1797.1 (19%)		2577
Baby's cotton garment	795	161 (50%)	140 (20%)	71 (15%)	12 (6%)	320 (25%)	2435 (12%)	25 (16%)	3163
Interior cotton furnishing	772.36	15.7 (75%)	10.8 (71%)	12.9 (49%)	0.9 (48%)	24.3 (42%)	199.8 (33%)		199
Men's cotton shirt	707.35	149.5 (37%)	218 (8%)	203.3 (11%)	8.9 (47%)	329 (14%)	3358.2 (10%)	28.8 (9%)	4295
Women's SF dresses	587.32	180.1 (18%)	204.9 (3%)	226 (11%)	6.5 (4%)	432.8 (13%)	2937.4 (8%)		3988
Handbags	527.43	393.7 (3%)	209 (2%)	203.8 (2%)	11 (2%)	505.7 (5%)	4785.5 (2%)		6109
Articles of bedding	519.71	124.1 (21%)	284.3 (7%)	177.3 (5%)	25.5 (0%)	479.8 (5%)	2653.2 (5%)		3744
Cotton bedlinen	493.60	49.5 (41%)	193 (22%)	86.6 (6%)	2.2 (0%)	223.6 (16%)	1402.7 (5%)		1906
Carpets	287.33	11.2 (17%)	30.7 (25%)	32.9 (10%)	4.2 (1%)	63.4 (20%)	529.4 (17%)		592.8

Total import demand in those FTAs where the product fall under Categories I- III is taken as export opportunity for India, if the suggested action as per categories mentioned is taken
Row values indicate the nation's total imports from the world; bracketed figures show India's share of those imports. Values reported in USD MN

Category I : Scale	Category II: Diversify into FTA market	Category III: Focus on supply side issues	Category IV: Opportunities for New Products	Category V: Consider realigning in long run
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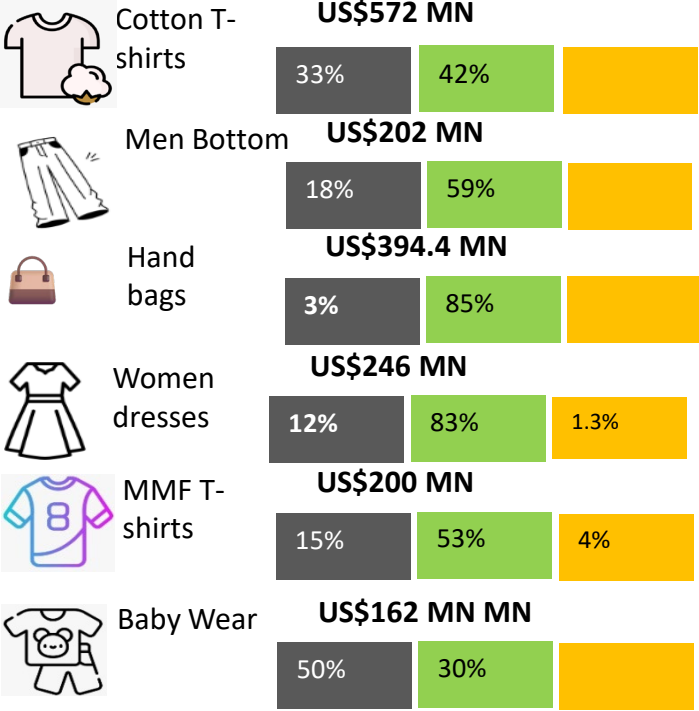
Opportunity assessment for India against Competing Suppliers for Category I & II products

Existing share of India pre-FTA and post FTA Additional opportunity against competing countries



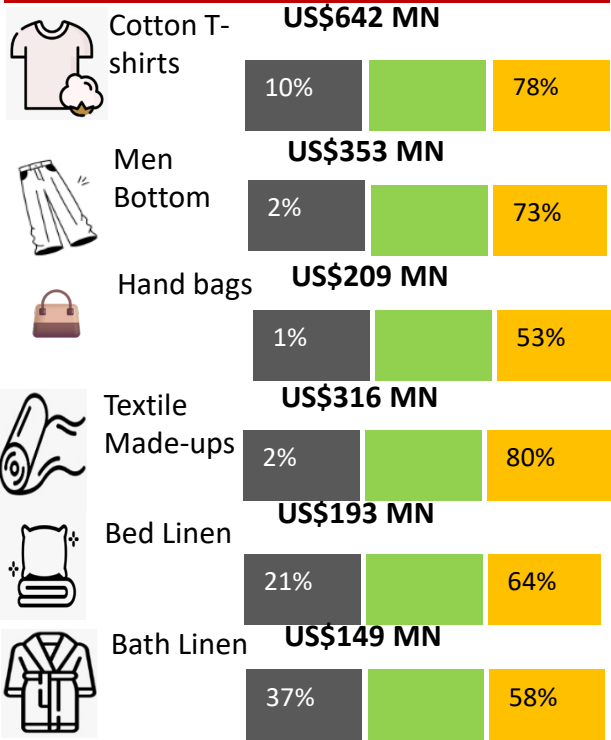
UAE

Pre FTA duty across products: 5%



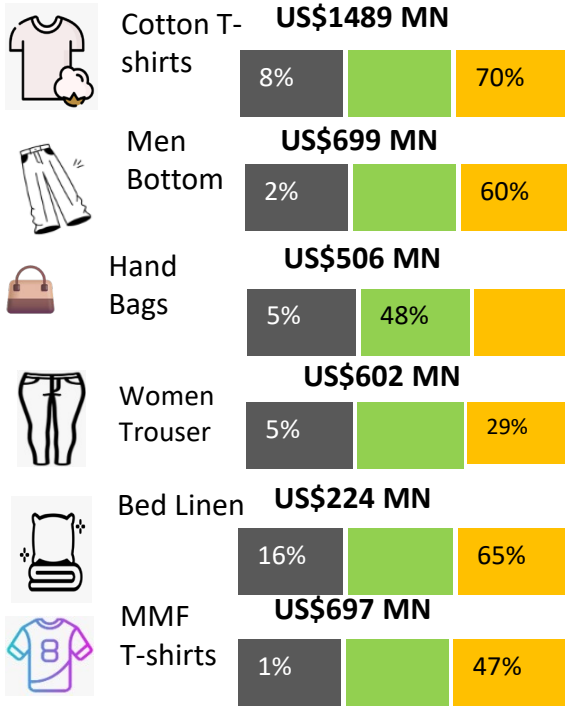
Australia

Pre FTA duty across products: 5%



UK

Pre FTA duty across products: 6-10%



India's current share in the country's imports from the world

Total share of major competing countries against which India will have a tariff advantage post FTA

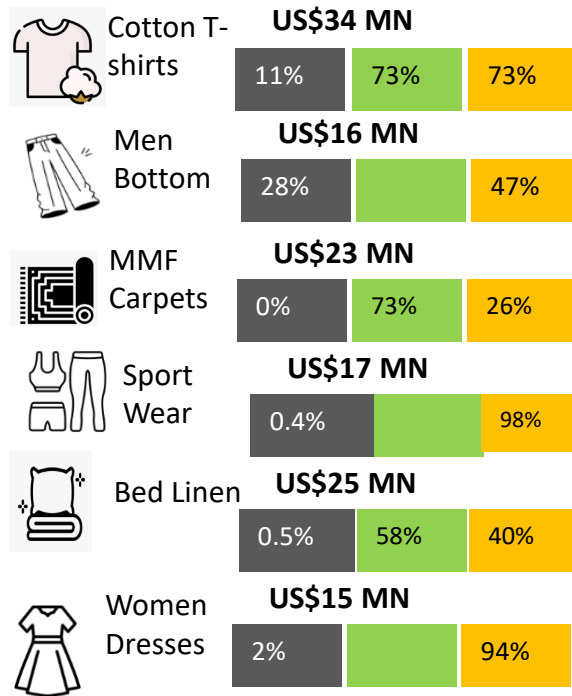
Total share of major competing countries already having duty-free access, where India will also be at par post FTA

Opportunity assessment for India against Competing Suppliers for Category I & II products

Existing share of India pre-FTA and post FTA Additional opportunity against competing countries

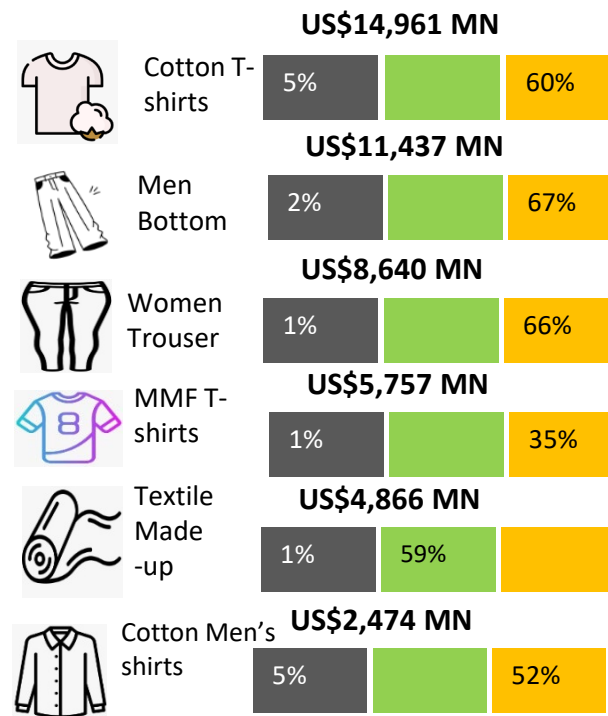
Oman

Pre FTA duty across products: 5%



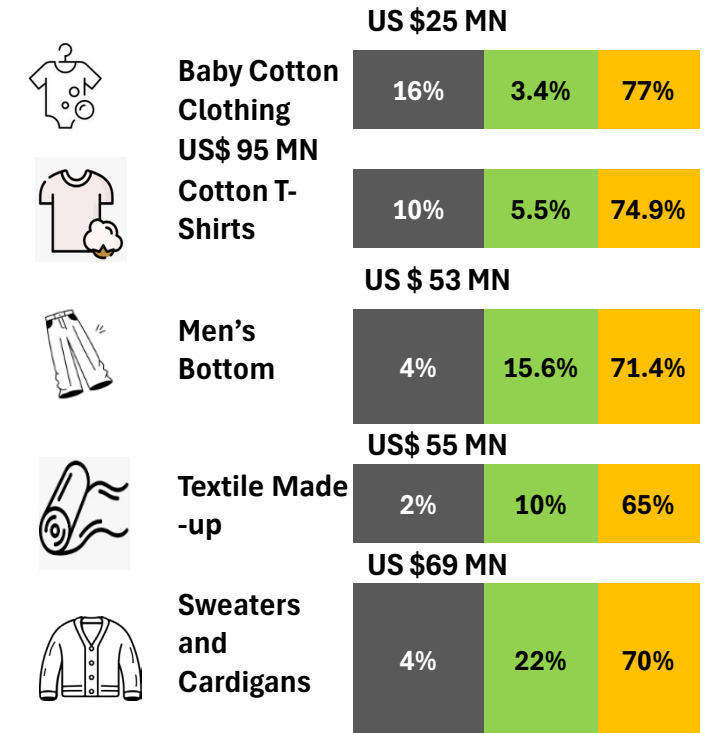
EU

Pre FTA duty across products: 6-10%



New Zealand

Pre FTA duty across products: 5-10%



 India's current share in the country's imports from the world

 Total share of major competing countries against which India will have a tariff advantage post FTA

 Total share of major competing countries already having duty-free access, where India will also be at par post FTA

New product (Category IV) opportunity for T&A sector across FTAs

Product Label	Council	India's Export to World (US\$mn)	UAE	Aus	EFTA	Oman	UK	EU	NZ	Export Opportunity #
Women's Synthetic trouser (woven)	AEPC	87.34	59.5 (3%)	134.7 (2%)	239.8 (1%)		264.5 (2%)	3520.2 (1%)		4218.74
Men's synthetic trousers (woven)	AEPC	85.24	94.1 (9%)	168 (1%)	257.7 (1%)	6.1 (7%)	429.2 (1%)	3843.3 (1%)		4798.32
Blankets,rugs of synthetic fibres	MATEXIL	84.18	62.2 (7%)			13.5 (2%)		636.3 (2%)		711.95
Worn clothing	TEXPROCIL,HEP C,PEDEXCIL	75.45	199.1 (5%)			9.4 (0%)		696 (1%)		904.56
Women's dresses of synthetic fibres	AEPC	72.69	62.5 (7%)	91.4 (3%)	122.9 (2%)		263.1 (4%)	1958.7 (2%)		2498.61
Brassieres of all types of textile materials	AEPC	64.19	103.7 (6%)	182.5 (2%)	203 (1%)	6.6 (4%)	320.5 (1%)	3424.1 (1%)		4240.29
MMF Carpets	CEPC	59.81	60.5 (2%)			23.1 (0%)		750.1 (3%)		833.68
MMF Jerseys, pullovers	AEPC	41.33	116.5 (1%)	348.8 (0%)	530.1 (1%)	5.6 (1%)	1220.3 (1%)	10338.9 (1%)		12560.20
Knee/Full-length stockings, socks	AEPC	31.00	73.8 (6%)	116.9 (1%)	131.9 (2%)		356.5 (2%)	3221.3 (0%)		3900.43
Hats made up from lace	EPCH	30.79	71.8 (2%)	143.6 (1%)	172.8 (1%)		244 (1%)	2638.2 (1%)		3270.35
Woollen Jerseys, pullovers	WWEPC	30.68	64.4 (3%)	69.5 (0%)	228.2 (0%)		213.1 (0%)	2422.1 (0%)		2997.27
Women's Synthetic trouser (knitted)	AEPC	27.71	92.3 (2%)	190.3 (1%)	200.7 (1%)	7.1 (0%)	475.6 (1%)	3829.6 (1%)		4795.56
Men's synthetic trousers (knitted)	AEPC	26.72	60.2 (5%)	79.9 (1%)			184.5 (1%)	1108.6 (0%)		1433.15

Total import demand in those FTAs where the product fall under Category IV is taken as export opportunity for India, Row values indicate the nation’s total imports from the world; bracketed figures show India’s share of those imports. Values reported in USD MN

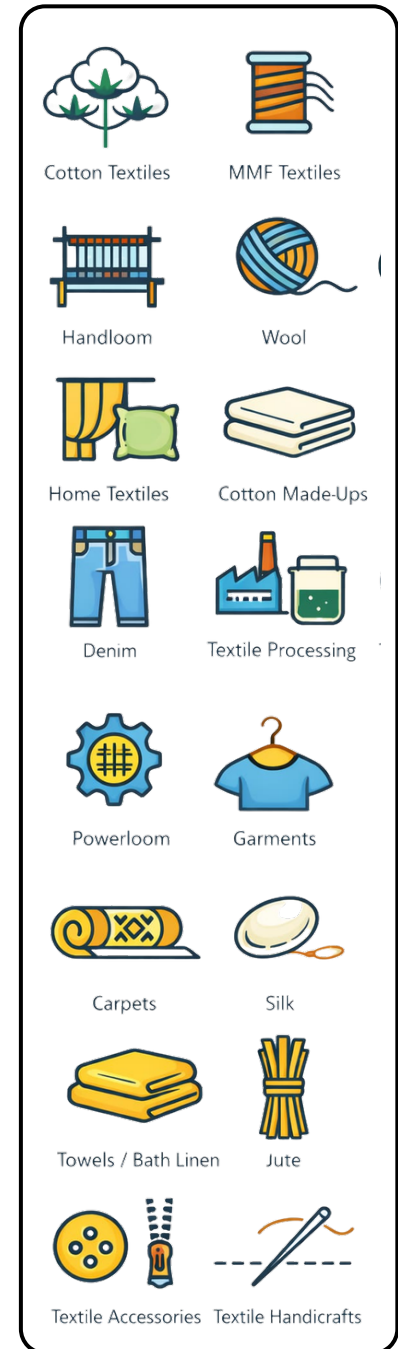
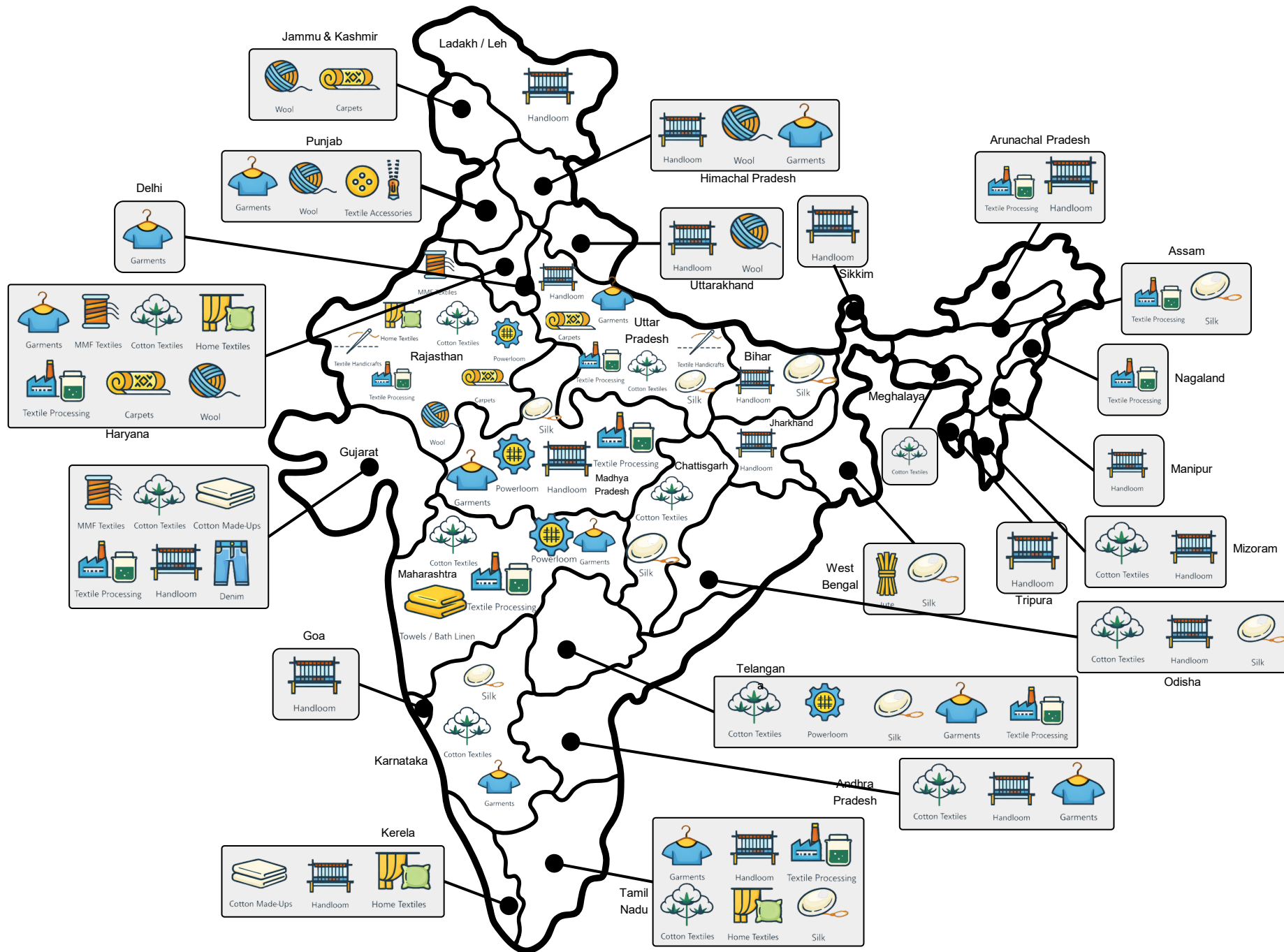
New Emerging opportunities across FTAs: Long Run focus products for States

 UAE	 Australia	 EFTA	 UK	 OMAN	 EU
Sustainable & Eco-Friendly Apparel <i>Organic cotton garments</i> <i>Recycled polyester apparel</i> <i>Bamboo fiber clothing</i>	Sustainable & Eco-Friendly Apparel Hemp and bamboo fiber clothing, Regenerated cellulose fabrics	Sustainable & Eco-Friendly Apparel Hemp and bamboo fiber clothing, Regenerated cellulose fabrics	Sustainable & Eco-Friendly Apparel Bamboo and hemp garments, Regenerated fibers (lyocell)	Sustainable & Eco-Friendly Apparel Organic cotton clothing Recycled polyester fabrics Sustainable home textiles	Sustainable & Eco-Friendly Apparel EU countries aim for textile products to contain 50% sustainable materials by 2030, boosting demand for eco-friendly textiles
Technical & Functional Textiles Flame-retardant fabrics, Geotextiles for construction, Medical textiles, Protective workwear	Technical & Industrial Textiles Geotextiles, Industrial filtration fabrics, Automotive textiles, Protective workwear	Performance Apparel Waterproof jackets, Thermal outdoor clothing Hiking and ski apparel Insulated	Seamless & Shapewear Apparel Body shapers Seamless sportswear	Apparel Traditional Abayas, Thobes (dishdasha fabrics)., Hijabs and scarves	Outerwear & Technical Performance Clothing 78% of outerwear imports use synthetic fibres for performance features such as water resistance and durability.
Smart Textiles & Wearable Clothing-IoT-enabled fabrics	Athleisure Apparel Sportswear. Yoga and gym apparel	Sportswear Performance T-shirts Yoga wear and leggings	Athleisure & Activewear yoga wear, Sports bras Performance T-shirts	Technical & Functional Textiles Geotextiles for construction Industrial fabrics Protective workwear Medical textiles	Technical & Industrial Textiles • Medical textiles • Geotextiles • Industrial filtration fabrics • Protective workwear
Hospitality & Home Textiles	Outdoor & Performance Apparel Waterproof jackets, Protective sun clothing	Technical & Functional Textiles	Technical & Functional Textiles Medical textiles, Geotextiles, Protective workwear		

States with Production Potential				
Sustainable & Eco-Friendly Apparel	Technical & Functional Textiles	Athleisure Apparel	Performance Apparel	Seamless & Shapewear Apparel
Tamil Nadu, Karnataka, Rajasthan,Gujarat,Uttarakhand, HP, Mizoram, Karnataka	Gujarat, Maharashtra(Geotextiles) Tamil Nadu, Hry, MS(Automotive tex) Punjab, Delhi-NCR, Guj (Protective work wear) TN, Guj, MS, UP, MP, Haryana (Medical Textiles)	Tamil Nadu, Karnataka, Uttar Pradesh/Haryana, Punjab	Karnataka, Tamil Nadu, Uttar Pradesh/Haryana	Tamil Nadu, Punjab, Karnataka

Suggested Action Points

Immediate to Short run measures		Medium to Long run measures	
Category I Scale	Category II Market Diversification	Category III Focus Supply side constraints	Category IV Diversification to new products
Value Chain Integration Ensure Plug and Play facility in integrated textile parks- with Zero liquid discharge	Sustainability Compliance To meet ESG compliance and to overcome non-tariff barriers – Focus on certifications, recognition/creation of common testing labs and promoting green manufacturing Global Buyer Integration - Facilitate sourcing partnerships with global brands, - Participation in International fairs and exhibitions and hotel shows, - Focused Export Delegation to Priority markets Market Intelligence & Branding - Identification of potential buyers in FTA markets - Develop real-time demand dashboards - Promote Indian textiles with “Brand India” campaigns	Value Chain Integration Ensure Plug and Play facility in integrated textile parks- with Zero liquid discharge Logistics & Infrastructure - Improve connectivity to ports, warehousing, and textile export hubs - Develop Integrated Textiles Parks Easy and affordable credit to enable effective participation with FTA partners	Export Diversification - Promote technical textiles, man-made fibre apparel, and high-value segments - Reduce raw material import dependence Accelerate Diversification into Man-Made Fibres (MMF) and Technology Upgradation - Promote MMF adoption through targeted incentives - Technology upgradation and investment in the sector



Suggested Action Points

Immediate to Short run measures		Medium to Long run measures	
Category I Scale	Category II Market Diversification	Category III Focus Supply side constraints	Category IV Diversification to new products
Safeguarding Domestic Manufacturing under PLI Framework	Regulatory Harmonisation and Market Access Facilitation Pursue Mutual Recognition Agreement (MRA) High compliance cost (€60,000–€300,000 annually),	Enhanced Export Finance and Credit Access for MSMEs	
	Mutual Regulatory Recognition of Indian Approvals	Facilitate access to EXIM Bank export financing and credit guarantee schemes for MSME exporters	
	Strategic Institutional Buyer Engagement in Key Markets		

THANKYOU