

METALWARE

Handicraft Exports from India - Strategy

Global Metalware Market

Where does India stand?

India is the largest brass metal ware producer in the world. The major cluster of brassware is Moradabad, Murshidabad, Madurai, Salem, Cuttack, and Haryana. UAE was the highest importer of metalware followed by the USA which was 30.91% and 20.71 % respectively of the total export. People of these countries have a great fascination for the Indian metal ware.

The state and regional clusters contribute significantly to handicrafts export. Exports from the sector aggregated to INR 25,500 crore. With furniture contributing to around \$1.5 billion, it amounts to only 0.5 per cent of Indian exports. There is a scope to further develop and increase furniture exports to an amount of USD 10 billion (about INR 71,000 crore) from the existing USD 400 million (about INR 2,800 crore) if market share grows to 1.2 per cent from 0.8 per cent and \$8 billion if the share touches 2.4 per cent. Indian domestic furniture market is expected to expand at a CAGR of 12.91% during the period of 2020-2024.

Way forward for India

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Moving beyond 2020

What categories should India focus on?

India is the world's second - largest manufacturer of metal works after China. Being the world's top exporter in this category, China is a fierce competitor in the global market.

- Based on the forecasting of the global demand in 2025, HS codes which would be high in demand in next five years would include 970500 (Animal Figures - 97050010), Since Indian exports are also forecasted to be doing good in these products, policy initiatives taken now can be sustained.
- HS codes 830610 (Bells Gongs - 83061000) And 920600 (Musical Instruments - 92060000) does not need any policy shift as their expected export growth and volumes are absolutely in sync with expected global demand.

Global Regional Analysis: Focus Products for 2025

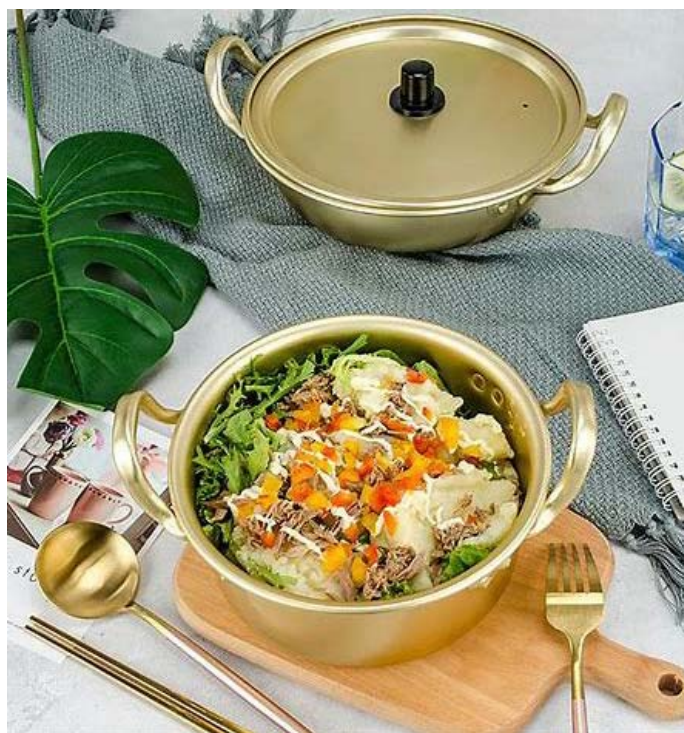
Countries	HS Code	Product
USA	970500	ANIMAL FIGURES - 97050010
	741999	ARTICLES OF BRASS - 74199930
	392310	BOXES - GIFT - 39231020
	970300	SCULPTURES - 97030010
	940510	CHANDLIERS - 94051010
EU	741999	ARTICLES OF BRASS - 74199930
	970500	ANIMAL FIGURES - 97050010
	420231	JEWELLERY BOXES - 42023110
Japan	741999	ARTICLES OF BRASS - 74199930
	960899	HOLDERS - 96089910
	970500	ANIMAL FIGURES - 97050010
	392310	BOXES - GIFT - 39231020
	940510	CHANDLIERS - 94051010
Latin America	741999	ARTICLES OF BRASS - 74199930
	392310	BOXES - GIFT - 39231020
CIS	741999	ARTICLES OF BRASS - 74199930
	940510	CHANDLIERS - 94051010
	392310	BOXES - GIFT - 39231020
Australia	392310	BOXES - GIFT - 39231020
	420231	JEWELLERY BOXES - 42023110
ASEAN	741999	ARTICLES OF BRASS - 74199930
	392310	BOXES - GIFT - 39231020
	940510	CHANDLIERS - 94051010
	420231	JEWELLERY BOXES - 42023110

countries for market growth. North America and Europe are among the major revenue generating regions owing to the higher product employment in gardens or outer spaces. North America and European countries have strong traditional houses with outdoor gardens and living spaces gardens. North America outdoor furniture industry valuation is anticipated to reach USD 6.4 billion by 2026.

Business tips for Indian companies targeting United States of America

Import Trends of Metal based household articles in USA has been found to be high in Table and kitchen household articles, and pot scourers and scouring or polishing pads, gloves, and the like, of aluminum (761510).

Country	HS Code	Product
USA	761510 732394 741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring.
	830610 830630	Bells, gongs and the like, non-electric, of base metal (excluding musical instruments)



Prospects for Indian Metalware across Global Markets

Several countries differ traditional and cultural trends, impacting the product demand. The U.S., China, Japan, India, and Brazil are among the potential



Business tips for Indian companies targeting EU

Countries like Germany, France, the United Kingdom, Spain, the Netherlands and Italy have a high acceptance for metalworks from non-EU suppliers. France and Spain may be particularly interesting since they have the highest average import prices and a positive price evolution over the last five years.

- **Germany & Netherlands** has an increasing demand for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the EU.
- Kitchen or Tableware in **France** modern kitchen uses a lot of understanding from using copper as a material for shine and ancestral Indian use.
- **France and Netherlands** have an increasing demand for photograph frame and mirrors of base metal (HS code 830630).
- Major shops in **Germany** use manual doorbell as a signal that the presence of the customer.

Country	HS Code	Product
European	761510 732394 741810	Table, kitchen or other Union household articles and (Italy, parts thereof, and pot France scourers and scouring.
Poland Netherlands	830610 830630	Bells, gongs and the like, non-electric, of (Germany) base metal (excluding musical instruments)

Business tips for Indian companies targeting Latin America

- **Ecuador and Chile** have an increasing demand for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the LAC region.
- **Mexico and Brazil** has an increasing demand for photograph frame and mirrors of base metal (HS code 830630) among all the countries in the LAC region.
- Brazilian culture maintains a high level of social involvement, and consider personal relations of primary importance in all human interactions. Many friends, family members, or

Country	HS Code	Product
Latin America	761510	Table, kitchen or other household articles and (Peru, parts thereof, and pot Brazil) scourers and scouring.
	830610 830630	Bells, gongs and the like, non-electric, of (Peru) base metal (excluding musical instruments)

business partners join together to associate. Therefore, large sized utensils for bulk cooking can be a viable option.

- LAC countries like Mexico, Columbia, Peru, Venezuela and Ecuador love bulls depicted by their bull fighting festival, hence bull shaped metallic cutlery holders (Dhokra Art) can be designed to entice their taste

Business tips for Indian companies targeting CIS Countries

- **Kazakhstan** has an increasing demand with good volume for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the CIS region.
- **Russian Federation and Azerbaijan** have an increasing demand for photograph frame and mirrors of base metal (HS code 830630).
- **CIS countries have very high number of heart ailment cases.** Hence Copper utensils can be promoted citing its cardiovascular health benefits as it helps clean plaque as well as dilate the blood vessels to increase the blood flow to the heart.



Country	HS Code	Product
CIS (Russia, Belarus, Uzbekistan, Kyrgyzstan)	761510	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring.
	830610 830630	Bells, gongs and the like, non-electric, of (Uzbekistan) base metal (excluding musical instruments)

Business tips for Indian companies targeting Japan

- Indian exporters have a huge potential for HS code 830630 i.e., Photograph frames of base metal; mirrors of base metal as it has a better stand in comparison to Chinese.



- Around 31% population in Japan follows Buddhism where gong become an integral part of Japanese culture. In many Shinto shrines there are special bells in a round shape with a long rope. At large shrines there are many bells and they are quite big, and in contrast at small shrines there is often just one bell of a small size.
- Bells are often attached to special guardian talismans called ogonori. The sound of a bell is considered to bring good luck and drive away misfortunes.

Country	HS Code	Product
Japan	830610 830630	Bells, gongs and the like, non-electric, of base metal (excluding musical instruments)

Business tips for Indian companies targeting ASEAN

- Thailand has an increasing demand in good volumes for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the ASEAN region.



- Philippines and Indonesia have an increasing demand for photograph frame and mirrors of base metal (HS code 830630).

Country	HS Code	Product
ASEAN (Thailand)	761510	Table, kitchen or other household articles and (Peru, parts thereof, and pot Brazil) scourers and scouring.
	830610 830630	Bells, gongs and the like, non-electric, of (Peru) base metal (excluding musical instruments)

Business tips for Indian companies targeting Africa

- Nigeria and Mauritius have an increasing demand for Copper based kitchenware and tableware articles (HS code 741810) among all the countries in the African region.
- South Africa and Uganda have an increasing demand for photograph frame and mirrors of base metal (HS code 830630).



- Africa is home to variety of animals, and hence inclined towards animal prints and designs. Metallic Animal shaped cutlery can be promoted in such markets.

Country	HS Code	Product
Africa (Nigeria, Mauritius)	761510 732394 741810	Table, kitchen or other household articles and parts thereof, and pot scourers and scouring.
	830610 830630	Bells, gongs and the like, non-electric, of base metal (excluding musical instruments)

The study conducted by Indian Institute of Foreign Trade (IIFT) & sponsored by O/o DC (Handicrafts), Ministry of Textiles, is available at <https://epch.in/iift-epch-study/Home-Decore.pdf>. In case of any query please write to us at policy@epch.com