Policy Brief No. 15

India's Strategic Rise in Global Automobile Industry

July 2025

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Introduction

The automobile sector is more than a mode of mobility; it's a strategic anchor of industrial capability, trade competitiveness, and technological leadership. Contributing nearly 3% to global GDP, and significantly more in countries like India (around 7%) and China (over 9%), the sector stands at the intersection of manufacturing scale and innovation. Its linkages span across steel, electronics, chemicals, and logistics making it one of the most integrated and influential sectors in any modern economy.

Globally, the automotive industry ranks among the top four traded sectors, with exports and imports exceeding USD 1.8 trillion each. Its global value chain is widely distributed and complex, involving design centres in Europe, component suppliers in East Asia, and assembly hubs in South and Southeast Asia. This global integration has made the sector both resilient and vulnerable resilient due to diversified sourcing, and vulnerable due to high exposure to geopolitical and supply chain disruptions.

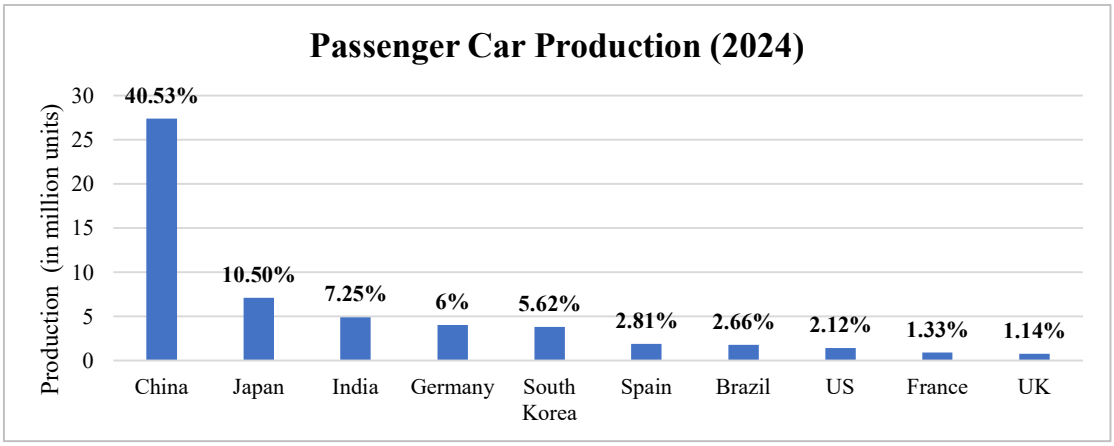
As global supply chains evolve and new consumption patterns emerge, India's automobile sector stands at a strategic crossroads. No longer confined to domestic assembly and sales, the sector is now actively integrating into international markets, particularly through the export of small and mid-sized internal combustion engine (ICE) vehicles. This shift is not just about expanding trade volumes; it reflects India's growing role in supplying cost-competitive, reliable vehicles to a diverse set of global markets still reliant on ICE infrastructure. At the same time, the global push toward electrification presents both a challenge and an opportunity for India to adapt and reposition itself within the next generation of automotive value chains.

India's auto industry has traditionally played the role of an assembler, anchored in low-cost manufacturing and high-volume domestic consumption. However, that identity is beginning to shift. With strong policy push through the PLI and FAME schemes, and increasing participation in global trade, India is evolving into a significant exporter of small and mid-sized ICE petrol vehicles. Yet, this export-led expansion is happening against the backdrop of a broader global transition, the rise of electric vehicles, software-defined cars, and carbon-neutral manufacturing.

Global Automobile Trade: Key Trends

Global passenger car production in 2024 was concentrated in a handful of countries, led by China, followed by Japan, India, and Germany. These four together account for more than half of global output. While China continues to dominate both in scale and speed of transition to electric vehicles, India's rise to the third-largest car producer globally reflects a realignment in the manufacturing geography of the auto sector.

Figure 1: Market share of the major passenger car-producing countries



Source: OICA

But production alone doesn't tell the full story. What's striking is the divergence in how countries use their production capacity. Countries like Japan, South Korea, and Germany consistently produce far more cars than their domestic markets consume highlighting their strong export orientation. By contrast, countries like the United States and the United Kingdom register significantly more cars than they produce, indicating heavy dependence on imports and outsourced manufacturing.

Table 1: Passenger Car supply and demand in 2024

Countries	**Supply** (in million units)	**Demand** (in million units)	**Net Supply** (in million units)
China	27.47	22.93	4.54
Japan	7.14	3.71	3.43
India	4.99	4.36	0.63
Germany	4.07	2.81	1.26
South Korea	3.84	1.41	2.43
Spain	1.92	1.01	0.91
Brazil	1.89	1.93	-0.04
US	1.43	12.7	-11.27
France	0.91	1.71	-0.8
UK	0.77	1.95	-1.18

Source: OICA and ACEA[1]

The table above uses a demand–supply lens, where supply represents the number of cars produced by these countries and demand indicates the number of registrations in these countries. Although the table is indicative and does not fully capture the complexity of global trade, it highlights key structural patterns.

The United States, for instance, shows a demand-supply mismatch of over 11 million units, making it one of the most import-reliant auto markets in the world. The UK and France also display similar deficits, each importing over a million cars more than they produce. In contrast, Japan and South Korea operate on the opposite end of the spectrum with exports effectively subsidizing their domestic industries. For them, the domestic market is a testing ground; the real scale lies in global reach.

[1] ACEA- Economic and Market Report Global and EU auto industry: Full year 2024

India finds itself in a transitionary space with a modest production surplus that reflects its ability to serve domestic demand while gradually expanding exports. This balance positions India not as an export-oriented country but as a country that can build sustainable trade relationships without relying on artificial surpluses or protectionism. It suggests that Indian automakers are pacing their expansion carefully, ensuring that exports grow in line with capabilities. This is evident in India's growing footprint in regions like South Africa, Mexico, the UAE, and more recently, Japan where India's small and mid-sized petrol vehicles are gaining traction.

The bigger takeaway from this data is not just who makes how many cars but how countries are repositioning within the global value chain. For instance, China remains a dual force exporting aggressively while sustaining massive internal demand. Its electric vehicle push is reshaping both domestic policy and global pricing. Japan, Germany, and South Korea are doubling down on value-added exports, investing in software integration, autonomous driving, and next-gen battery tech.

India is carving a niche in the affordable ICE vehicle segment targeting markets that still lack EV infrastructure or cost readiness. This opens up a strategic window for India as richer economies shift focus to EVs, the vacuum in the global ICE segment is widening. India, with its proven manufacturing base and improving trade logistics, is well-positioned to fill that gap if it acts quickly and decisively.

India's Automotive Trade Footprint: Current Patterns and Emerging Shifts

India's automobile sector contributes around 7% to the national GDP and employs over 30 million people. According to ACEA, India produced approximately 4.9 million passenger cars in 2024, solidifying its position as the 3rd-largest auto producer globally. Domestic sales stood at 4.4 million units, marking a 4.8% year-on-year increase, while exports also showed strong growth.

Box 1: Employment Generation in Automobile Sector[2]

The Indian automobile sector plays a crucial role in employment generation, supporting approximately 30 million jobs, of which 4.2 million are direct and 26.5 million are indirect, as per the Annual Report 2024–25 of the Ministry of Heavy Industries. This extensive employment base reflects not only the scale of the industry but also its centrality to India's broader manufacturing ecosystem.

Given the sector's reliance on cutting-edge engineering and a wide range of horizontal skills, such as welding, precision machining, electronics integration, and materials handling, automotive production creates a pool of technically skilled manpower. These skills are highly transferable and generate positive spillover effects into other sectors such as defence manufacturing, heavy engineering, railways, and capital goods, all of which require similar technical competencies.

As India expands its footprint in global automobile trade, sustaining and upgrading this skilled workforce becomes critical for maintaining competitiveness. The growth of the automobile sector not only fuels direct job creation but also enhances India's manufacturing capabilities across multiple sectors, amplifying its impact on industrial development and long-term employment generation.

[2] Press Information Bureau, Government of India, *India Becomes the 3rd Largest Automobile Market in the World*, January 15, 2024, https://www.pib.gov.in/PressNoteDetails.aspx?NoteId=154025&ModuleId=3.

India's passenger car segment is not only expanding domestically but also making a growing impact globally. The table below outlines global exports of passenger cars by engine type from 2020 to 2024. The vehicle engine categories used in this table are defined in the Annex.

Table 2: India's Passenger Car Export landscape

Engine Category	Global Exports in USD Million (2020)	Global Exports in USD Million (2024)	Percentage Share of Total Exports (2024)	5-Year CAGR (%)
Large ICE Diesel	2.68	2.87	0.04	1.38
Large ICE Petrol	1.85	6.87	0.10	30.05
EV	0.77	82.67	1.26	154.58
Hybrid Diesel	0.00	0.03	0.00	5.71
Hybrid Diesel Plug-In	0.00	0.00	0.00	0.00
Hybrid Petrol	1.87	2.74	0.04	8.00
Hybrid Petrol Plug-In	0.02	0.56	0.01	98.66
Mid-Size ICE Diesel	69.42	86.19	1.31	4.42
Mid-Size ICE Petrol	1952.71	5039.94	76.57	20.88
Small ICE Diesel	61.03	47.60	0.72	-4.85
Small ICE Petrol	624.74	836.06	12.70	6.00
Upper Mid-Size ICE Petrol	1418.61	476.40	7.24	-19.61
Total	**4133.71**	**6581.93**	**100.00**	**9.75**

The table highlights the evolving global demand patterns for various engine types in Indian car exports, offering insights into which categories are gaining export volumes and shaping India's position in the international automobile market. With a total export value of approximately $6.58 billion, India's automobile exports have grown at a CAGR of 9.75% over the past five years which is a modest yet stable expansion.

Mid-Size ICE Petrol vehicles dominate the export basket, contributing over 76.5% to the total export value. This overwhelming share can be attributed to several factors. First, India has a well-established production base for this segment, with economies of scale, cost efficiencies, and a proven track record in overseas markets. These vehicles strike a balance between affordability and performance, making them attractive in price-sensitive yet growing markets like South Africa, Latin America, and parts of Southeast Asia. The infrastructure to support ICE vehicles is also more widespread in these regions, helping Indian manufacturers maintain strong demand abroad.

Interestingly, Electric Vehicles, while still a small part of the export mix in absolute terms only 1.26% of the share in 2024 have demonstrated rapid growth, with a five-year CAGR of 154.58%. This reflects a significant transformation in consumer preference and policy support for green mobility in key export markets. While the volume is still low, the growth trajectory is steep, indicating that EVs may become a more substantial part of India's export portfolio in the coming years. This might partly explain the decline in the export of Upper Mid-size ICE Petrol cars, which recorded a negative growth of -19.61%. Buyers in premium segments seems to be pivoting toward EVs due to evolving environmental regulations, incentives, and a growing global trend toward decarbonization.

Similarly, Hybrid vehicles both petrol and diesel, have not gained much traction. Hybrid Diesel exports are virtually non-existent, and Hybrid Petrol Plug-In vehicles, despite their technological promise, have

shown inconsistent or declining trends. This suggests that hybrids are not yet a competitive export category for India, possibly due to higher costs or lack of production specialization in this area.

Another notable trend is the decline in Small ICE Diesel vehicles, which saw a negative CAGR of -4.85%, indicating a phase-out in global demand likely driven by emission norms tightening across regions. In contrast, Small ICE Petrol cars still maintain a respectable share of 12.7%, though growth has plateaued. Their appeal likely persists in budget-conscious markets, although they face increasing competition from compact EVs.

Box 2: The Case of Maruti Alto Affordability in India

Over the last two decades, small ICE vehicles like the Maruti Alto have become considerably more affordable for Indian consumers. In 2005, the cost of purchasing an Alto was over 10 times the average per capita income, but by 2025, this affordability ratio is expected to fall to just 2.5, despite consistent increases in the vehicle's price. This trend highlights a significant shift in India's automotive landscape, where ownership of entry-level four-wheelers has become increasingly accessible to a larger section of the population.

Year	Per Capita Income (₹)	Maruti Alto Price (₹)	Affordability Ratio (Price ÷ Income)
2005	28,000	290,000	10.4x
2010	54,000	299,000	5.5x
2015	87,000	325,000	3.7x
2020	134,000	354,000	2.6x
2025	200,000	500,000	2.5x

However, despite this improvement in affordability, the Indian market continues to show a strong preference for two-wheelers. This is not merely a matter of price; several structural and behavioural factors contribute to this pattern. Traffic congestion in urban areas, lack of parking space, and the relatively lower maintenance and operational costs of two-wheelers make them a more practical option for daily commuting. Additionally, two-wheelers offer greater fuel efficiency for shorter distances and provide easier navigation through congested streets. Cultural familiarity also plays a role, as two-wheelers are often seen as the default first vehicle for many households. As a result, while small cars like the Alto have become financially more attainable, broader factors such as infrastructure, total cost of ownership, and lifestyle convenience continue to shape consumer mobility preferences in India.

Overall, India's automotive exports are undergoing a structural transformation. While ICE vehicles, particularly mid-sized petrol cars, still dominate, there is a visible emergence of EVs as a future growth engine. India's strong foothold in mid-sized ICE petrol cars presents a key opportunity in global markets where this segment continues to thrive. Countries such as Saudi Arabia, South Africa, Mexico, and several others remain heavily dependent on ICE infrastructure, making them ideal targets for India's cost-efficient and reliable petrol vehicles. By reinforcing trade ties and catering to these markets' existing demand structure, India can further consolidate its export presence before the global shift to electrification becomes dominant.

Table 3: India's Top Passenger Car Destinations in 2024

Countries	**India's Export** (in USD Million)
Saudi Arabia	1205.90
South Africa	1130.74
Mexico	835.98
Japan	683.43
UAE	485.49
Chile	264.89
Indonesia	146.92
Peru	100.25

The table presents India's top passenger car export destinations, illustrating the diverse set of markets where Indian-manufactured vehicles are in demand. Saudi Arabia, South Africa, and Mexico are the largest importers, accounting collectively for nearly half of India's total car exports. Japan, the UAE, and several Latin American countries like Chile and Peru also figure prominently. This diverse list includes both developed and developing nations, indicating that India is successfully catering to a wide spectrum of global automotive needs.

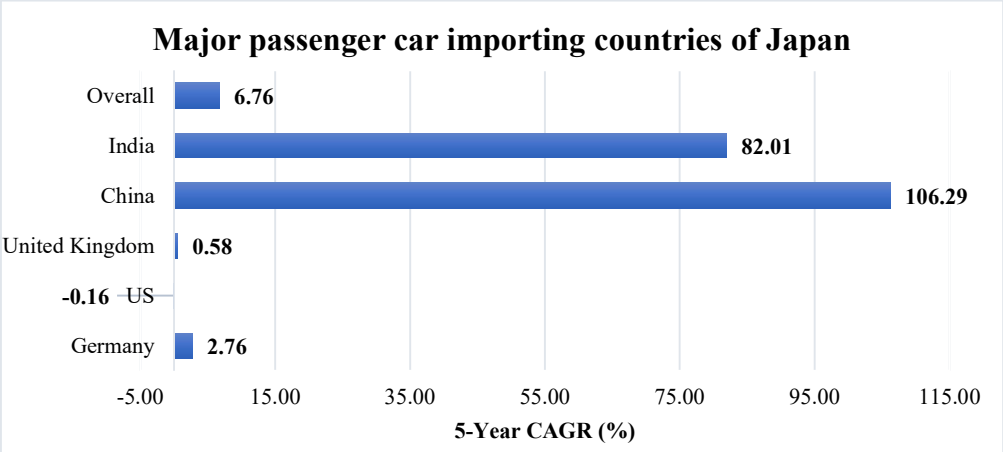
The export success across such varied markets demonstrates India's adaptability and competitiveness in producing vehicles suitable for different regions. A key factor behind this is the high demand for mid-sized ICE petrol vehicles, which dominate India's car export portfolio. These cars are particularly well-suited to the infrastructure and fuel availability in many of these importing countries, most of which still rely heavily on ICE technology. Countries like South Africa, Mexico, and Indonesia have extensive ICE-supporting infrastructure, making mid-sized petrol vehicles a practical choice for their consumers.

Reversing Trade Flows: India's Car Exports to Japan

The Indian automobile industry, which traditionally focused on markets in Africa and Latin America, is now beginning to enter developed markets (like Japan) with globally competitive models. Japan has played a foundational role in building India's automobile sector over the past few decades. Japan increasingly leverages countries like India, Thailand, and Indonesia for manufacturing entry-level and mid-range vehicles.

The graph below (Figure 2) represents Japan's passenger car import trends over the past five years, highlighting a clear shift in export orientation toward emerging Asian markets, particularly India. While Germany has remained the top importer (in terms of value) with steady growth in imports with a CAGR of 2.76%, India has shown far more rapid expansion. Japan's passenger car imports from India surged from USD 34.4 million to USD 686.4 million over the same period, recording a CAGR of 82%, significantly outpacing traditional partners like Germany and the United States with a CAGR of -0.16%. This shift reflects Japan's growing preference for India as a strategic supply base, driven by the latter's rising manufacturing competitiveness and ability to cater to developed markets, where customers typically have much higher expectations of standards and features that are available in the market.

Figure 2: Japan's import growth rate of passenger cars



Leading Japanese automakers such as Suzuki, Toyota, Honda, and Nissan have not only established manufacturing bases in India but have also infused the industry with advanced technologies and production systems. Maruti Suzuki, for example, is India's largest car manufacturer and a joint venture that has become synonymous with affordable mobility. Japanese firms brought in practices like lean manufacturing, just-in-time inventory, and strict quality control, dramatically improving the efficiency and global competitiveness of Indian auto production. This long-standing investment has fostered strong industrial linkages and deepened economic cooperation between the two countries.

Traditionally, Japan was an exporter of vehicles to India, but in a reversal of roles, India has begun exporting cars to Japan. According to data from India's Commerce Ministry and the Society of Indian Automobile Manufacturers (SIAM), car exports to Japan jumped significantly to 616.45 USD Million in the first nine months of the financial year 2024-25. The momentum was driven by the launch of exports of the India-made Suzuki Jimny and Honda Elevate.

In FY25, India's car exports to Japan surged primarily due to the growing trust in India's manufacturing quality, cost competitiveness, and production capacity. Japanese automakers like Suzuki and Honda increasingly relied on their Indian plants to produce globally accepted models such as the Jimny and Elevate, which met Japan's high safety and design standards. This shift reflects Japan's strategy to diversify its supply chain and reduce costs, while recognizing India as a credible hub for high-volume, export-quality vehicle production.

Despite growing exports of finished vehicles from India to Japan, the overall auto trade still favours Japan. India continues to import high-end auto components, hybrid vehicle technology, and automotive electronics from Japan. These parts, which are critical for manufacturing advanced and fuel-efficient vehicles, reflect Japan's dominance in upstream parts of the value chain. However, as India builds more localized supply chains and ramps up capabilities in electric vehicles and clean tech, the trade gap is gradually narrowing. India's export of fully built cars to Japan is a signal that it is starting to move up the value chain, from an assembly base to a complete manufacturing and export platform.

For Japan, leveraging India's cost-competitive and high-capacity manufacturing infrastructure allows it to manage costs and improve supply chain security. For India, this trade represents a breakthrough in credibility, being able to export cars to Japan signals to other developed markets that Indian-made vehicles are globally competitive in quality and reliability. India's automobile exports to Japan have seen a significant surge, driven by multiple factors such as cost advantages for Japanese brands like Suzuki and Honda manufacturing in India, and the improving quality and efficiency of Indian-made cars.

The growing global acceptance is reflected in the competitive per-car export cost of Indian vehicles, which stands at approximately 8,000 USD (6.8 lakhs). In contrast, India's overall per export cost for Motor vehicles/ cars to Japan has dropped from last year, from around 16,000 USD (INR 13.6 lakhs) to 12,000 USD (INR 10.2 lakhs) highlighting the growing value proposition of Indian exports. India's exports of ICE mid-sized cars to Japan have jumped from USD 6 Million in 2023 to USD 591 Million in 2024. While Japan also imports Motor vehicles from countries like China, Germany, and Thailand with average per-car costs ranging between 28,000 USD (INR 23.8lakhs) and USD 48,000 (INR 40.8lakhs) these are predominantly hybrid petrol, electric, and ICE diesel cars, suggesting that India is carving a strong niche in the mid-sized ICE car segment to Japan.

Suzuki's sharp rise in car imports to Japan is primarily fueled by the popularity of Indian-manufactured models like the Jimny Nomad and Fronx compact SUVs. This surge has elevated Suzuki to the position of Japan's leading car importer, overtaking Mercedes-Benz as of June. The growth has been dramatic, with imports increasing by 230 times compared to the same month last year.

Strategic Roadmap for India's Automotive Sector

India's growing success in exporting cars to Japan, a developed and quality-conscious market demonstrates its ability to produce high-quality vehicles at competitive costs**.** This achievement reflects India's maturing capabilities in automotive design, assembly, and value engineering. The fact that Japan, known for its stringent standards and advanced auto industry, is increasingly sourcing vehicles from India is a strong signal that Indian manufacturers are capable of meeting international benchmarks. This opens the door for India to target other untapped but similar developed markets. In essence, replicating the successful Japan model in other similarly structured middle-income economies offers a clear path for India to expand its automobile export footprint. This approach not only diversifies India's trade portfolio but also ensures resilience against over-reliance on a few markets, reinforcing its position as a global hub for affordable, quality vehicles.

Middle-income countries like Chile, Peru, Indonesia, and Brazil, many of which already feature among India's export destinations offer significant growth opportunities. These countries share characteristics such as growing urban populations, established ICE infrastructure, and rising demand for affordable, mid-sized personal vehicles. India's dominance in manufacturing mid-sized ICE petrol cars, which continue to drive export growth, aligns well with the needs of these markets.

India can strategically harness tools of international integration to strengthen its position in the global automobile sector. By entering into bilateral and regional trade agreements, India can gain preferential access to key export markets, leveraging its cost-efficient supply chains and robust manufacturing capabilities. Such agreements can help Indian automobile manufacturers reduce export-related costs through tariff concessions and improved regulatory alignment with partner countries.

In addition, trade diplomacy can play a vital role in addressing and negotiating the removal of non-tariff barriers, such as complex certification standards or import quotas, which often hinder smooth market access. Collaborating with trading partners on technology transfer, quality benchmarking, and mutual recognition of standards can further enhance India's export competitiveness. By deepening integration with both developed and developing economies, India can not only diversify its export markets but also position itself as a key hub in the evolving global automotive value chain.

Establishing automobile manufacturing clusters, both within India and in strategic international locations, can significantly benefit the Indian automobile sector. Such clusters encourage collaborative ecosystems where automakers, component suppliers, logistics providers, and research institutions operate in close proximity. This setup fosters innovation, knowledge-sharing, and the adoption of advanced technologies, enabling Indian manufacturers to stay competitive in a rapidly evolving global market.

Domestically, expanding and modernizing industrial clusters through policy support, infrastructure investment, and skill development initiatives can lead to greater economies of scale, reducing intermediate production costs. These clusters become engines of employment generation and regional development, especially in Tier-2 and Tier-3 cities. Furthermore, such agglomerations create a fertile ground for startups, R&D units, and ancillary industries, enhancing the overall competitiveness and resilience of India's automotive export ecosystem.

The global shift towards clean technologies, especially in developed countries, presents a strategic opportunity for India to reposition itself in the EV supply chain. To prepare for this transition and scale up its leadership in clean mobility, India must proactively strengthen its manufacturing and innovation to scale its EV ecosystem.

India has taken important steps to support the adoption of electric vehicles (EVs) and battery technologies through policies like FAME-I and FAME-II, the Production-Linked Incentive (PLI) schemes, and fuel efficiency standards under the CAFE framework. While these efforts have laid a strong foundation, the EV market is still in its early stages of growth. To accelerate EV penetration and unlock the full potential of this sector, India could focus on leveraging from these initiatives along with the tax concessions in place such as the reduced GST and import duties on EVs for companies that commit to invest in local production to attract greater FDI in EV manufacturing and battery production backed by strategic support for skill development and innovation.

A useful parallel can be drawn from Indonesia, which has successfully leveraged its abundant nickel reserves to attract significant FDI from global EV players. India can adopt a similar strategy by capitalizing on its low-cost manufacturing advantage by combining FDI inflows with increased public investment in subsidized R&D, especially in labour-intensive areas like battery production.

Apart from this, the Make in India initiative can be leveraged to attract FDI for MSMEs involved in EV component manufacturing as well, boosting technological know-how while also bringing in initiatives to upskill the labour force. This combined approach can help build a collective market for EV components, scaling up the sector and achieving economies of scale.

Additionally, to reduce its import dependency for critical minerals, Indian automakers such as Tata Motors and Mahindra & Mahindra, leveraging their established manufacturing presence and operational experience in South Africa, can pursue strategic partnerships and targeted investments in critical mineral processing and battery manufacturing. By tapping into South Africa's substantial reserves of key minerals essential for lithium-ion battery production, such an initiative could simultaneously lower India's reliance on external supply chains and elevate South Africa's role within the global EV value chain. However, to incentivize large firms to undertake such high-risk, capital-heavy ventures, proactive government support will be essential, both to mitigate financial risk and to ensure long-term strategic returns.

While these measures help reduce EV costs by lowering import dependency, building efficient infrastructure is equally important. A robust charging network requires coordinated efforts between the government and private players, with support in the form of power supply facilitation and land subsidies to encourage private investment in public and home charging points, follow-up services, along with investment in R&D for innovation in charging technologies.

Overall, this paper highlights important opportunities in India's automobile sector, particularly as it navigates a rapidly evolving global landscape. India has carved a niche in the global market for mid-sized petrol vehicles, driven by its manufacturing excellence and cost competitiveness. Building on this trend and taking advantage of the shifting automobile landscape toward cleaner mobility, India can strategically pivot to scale up its EV ecosystem to boost exports. Through domestic efforts like policy support, R&D investment, and MSME development, and internationally by forging trade partnerships and attracting FDIs in key areas in EV technology, India can cater to the growing demand in developed markets. This presents a timely opportunity to move up the global value chain and strengthen its role in the future of mobility.

Annexure

The table below outlines the distribution of vehicles into specific engine categories, based on fuel type and engine capacity.

Engine Category	Description
Small ICE Petrol	Petrol vehicles with internal combustion spark-ignition engine and cylinder capacity ≤ 1000cc.
Mid-Size ICE Petrol	Petrol vehicles with internal combustion spark-ignition engine and cylinder capacity between 1000cc and 1500cc.
Upper Mid-Size ICE Petrol	Petrol vehicles with internal combustion spark-ignition engine and cylinder capacity between 1500cc and 3000cc.
Large ICE Petrol	Petrol vehicles with internal combustion spark-ignition engine and cylinder capacity ≥ 3000cc.
Small ICE Diesel	Diesel vehicles with internal combustion compression-ignition engine and cylinder capacity ≤ 1500cc.
Mid-Size ICE Diesel	Diesel vehicles with internal combustion compression-ignition engine and cylinder capacity between 1500cc and 2500cc.
Large ICE Diesel	Diesel vehicles with internal combustion compression-ignition engine and cylinder capacity > 2500cc.
Hybrid Petrol	Petrol hybrid vehicles.
Hybrid Diesel	Diesel hybrid vehicles.
Hybrid Petrol Plug-In	Plug-in hybrid petrol vehicles.
Hybrid Diesel Plug-In	Plug-in hybrid diesel vehicles.
Electric Vehicles (EV)	Completely Built Unit (CBU) electric vehicles not registered prior to importation, with CIF value > US $40,000 or engine capacity > 3000cc (petrol) / > 2500cc (diesel).

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ABOUT THE CENTRE

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