

DEPARTMENT FOR PROMOTION OF
INDUSTRY AND INTERNAL TRADE
MINISTRY OF COMMERCE & INDUSTRY
GOVERNMENT OF INDIA

Toy Sector Playbook

**A Comprehensive Guide To Enable
Innovation, Manufacturing, And Global
Competitiveness In India's Toy Sector**

July 2026







“ Our country has so many ideas and concepts, and our country is very rich. Can we make games based on that? I can use the young talent of the country: make games in India and export them to India. It is said, "Let the game begin!" So, let us start the game....

....We can do two things through toys – bring back the tradition of toys in our past in our lives and also spruce up our golden future through start-up friends, to our new entrepreneurs I say teach them to make toys

There has been a rich tradition of local toys in our country. Our country has the talent and the ability to become a Toy Hub by making toys for the entire world ”

- Hon'ble PM's address in the 15th Episode of 'Mann Ki Baat 2.0' on 30th June 2019

Foreword

पीयूष गोयल
PIYUSH GOYAL



FOREWORD

The toy sector holds immense potential to contribute to India's employment generation and inclusive economic development. Industry with strong linkages to MSMEs, artisans, traditional crafts, it offers significant opportunities for value addition across the ecosystem.

Under the dynamic leadership of our Hon'ble Prime Minister Shri Narendra Modi, Government has adopted a focused and holistic approach to realise the vision of Aatmanirbhar Bharat. Through measures like the Control Order, the promotion of domestic manufacturing under the issuance of BIS licences, the recognition of toy startups and sector has witnessed significant progress. The Government of India's commitment to fostering a globally competitive toy industry through standards of quality, safety, innovation and sustainability.

As India strengthens its position in the global toy value chain, it must be driven by design excellence, innovation, intellectual property development of globally recognised Indian brands, Drawing upon the rich culture, heritage, art and craftsmanship, while leveraging modern technologies to develop capabilities, Indian manufacturers are well positioned to create toys that are original, safe, sustainable and globally competitive.

This Playbook, organised into five thematic volumes, has been developed as a comprehensive reference for stakeholders across the toy ecosystem. It provides guidance on the toy value chain, product development, manufacturing, marketing and the enabling ecosystem. I am confident that it will facilitate innovation, encourage innovation and strengthen the capabilities of enterprises, towards becoming a global hub for toy manufacturing. I convey my sincere wishes for the success of this Playbook and hope that it will inspire innovation and growth in the toy ecosystem.

Piyush Goyal



Shri Piyush Goyal

**Hon'ble Union Minister of Commerce & Industry
Government of India**

Foreword

जितिन प्रसाद
JITIN PRASADA



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FOREWORD

The toy sector occupies a distinctive place in India's manufacturing creativity, design, learning, and production. As consumer preferences shift towards safe, innovative, and high-quality toys continue to grow, the opportunities for domestic manufacturing, entrepreneurship, and value addition through a platform to showcase India's rich cultural heritage through products in domestic and global markets.

The Department for Promotion of Industry and Internal Trade, Ministry of Commerce and Industry, has undertaken several initiatives in recent years to strengthen the ecosystem and enhance the competitiveness of Indian industry. At the intersection of electronics, digital technologies, and product design are opening up new opportunities in the toy sector, enabling the development of products that combine traditional craftsmanship with technology-driven experiences. This progress is clearly reflected in the recognition of 423 new startups in the last two years alone in segments such as AR/VR-enabled immersive play experiences, STEM-based toys, and AR/VR-enabled immersive play experiences.

At a time when the Indian toy industry is undergoing rapid transformation, structured sectoral intelligence becomes increasingly important. The Department for Promotion of Industry and Internal Trade, Ministry of Commerce and Industry, has undertaken several initiatives in recent years to strengthen the ecosystem and enhance the competitiveness of Indian industry. At the intersection of electronics, digital technologies, and product design are opening up new opportunities in the toy sector, enabling the development of products that combine traditional craftsmanship with technology-driven experiences. This progress is clearly reflected in the recognition of 423 new startups in the last two years alone in segments such as AR/VR-enabled immersive play experiences, STEM-based toys, and AR/VR-enabled immersive play experiences.

I commend the efforts undertaken in preparing this Playbook and hope it will contribute meaningfully to strengthening the toy ecosystem in India. The Department continues to promote innovation, quality manufacturing, and ease of doing business. Knowledge resources will play an important role in fostering investment, and supporting the long-term growth of the Indian toy sector.

(Jitin Prasada)



Shri Jitin Prasada
Hon'ble Minister of State For Ministry of
Commerce & Industry And Ministry of
Electronics & Information Technology
Government of India

Foreword

अमरदीप सिंह भाटिया, भा.प्र.से.
सचिव
Amardeep S. Bhatia, I.A.S.
SECRETARY



उद्योग स
MINISTRY
DEPTT.



Shri Amardeep Singh Bhatia
Secretary, DPIIT
Ministry of Commerce & Industry
Government of India

FOREWORD

Over the past decade, the Department for Promotion of Trade, in collaboration with various Ministries and Government of India, has undertaken several strategic initiatives for the development of the toy industry. These efforts include the National Action Plan for Toys (NAPT), comprising 21 specific measures across 14 Central Ministries and Departments, implementation of rationalisation of tariff measures, mandatory sampling and certification of initiatives such as Toyathon and Toy India, and improved market access through Free Trade Agreements.

Collectively, these measures have sought to enhance the manufacturing capabilities and enhance the competitiveness of the toy industry. Between FY 2018–19 and FY 2024–25, toy exports increased by 71 percent, reflecting the growing presence of domestic manufacturing and India's increasing presence in the global toy market.

The Indian toy industry is well-positioned for future growth, driven by a young population, rising disposable incomes, and increasing demand for educational and STEM-based toys. Significant opportunities exist to further enhance India's share in the global toy market through improved manufacturing capabilities, and deeper integration into global value chains facilitated by Free Trade Agreements.

To better understand the sector's opportunities and challenges, consultations were undertaken with industry stakeholders and experts. This playbook comprises five volumes, each offering a unique perspective on the industry, covering the toy sector's current state, manufacturing and route-to-market strategies, skills development, compliance requirements, export promotion, and readiness.

I hope this Playbook serves as a valuable guide for stakeholders, highlighting the potential of the Indian toy industry and supporting its contribution to global value chains. I extend my appreciation to all stakeholders who have contributed to this playbook, whose valuable insights and collaborative efforts have enabled its completion.

Foreword



Dr. Pawan Kumar Goenka
Chairman SCALE, DPIIT
Ministry of Commerce & Industry
Government of India

डॉ. पवन कुमार गौयनका
Dr. Pawan Kumar Goenka



Foreword



The Steering Committee for Advancing Local Employment (SCALE) was constituted by the Ministry of Industry and Internal Trade to promote the growth of domestic value chains and improve competitiveness in global markets. The first sectors taken up by the Committee were design, engineering, and IT services. India had the design talent, the resources, and the domestic demand. What it lacked was scale, and a share of the global market that was being served almost entirely by others.

Much has changed since. Imports have declined, exports have grown, and the manufacturing base has taken root across the country. The country's manufacturing output, estimated at USD 10 billion in 2014, is now over USD 100 billion today, can reach USD 10 billion by 2032. This growth will need to be sustained as India presently accounts for about 0.3 per cent of global manufacturing output. International brands actively diversifying their sourcing bases into India as the Indian industry is both real and time-bound.

In my experience, the global competitiveness of any manufacturing sector depends on five factors: cost, scale, technology, quality and market access. India's need to advance on all five. Quality permits no compromise, as it is the parent for a child. Scale remains the challenge, and will come through contract manufacturing for global brands, and cluster-based access is steadily improving through our Free Trade Agreements and far more purposefully by industry.

It is in this context that this Playbook has been prepared. It is an extensive consultation with manufacturers, industry associations, certification agencies, academic institutions and Government, and the reader through the sector overview and value chain, many to-market strategies, design and product development, requirements, and export and market readiness. It is intended as a handbook rather than a policy document, and should serve as a setting up a new unit, an MSME preparing to export, and a global destination for India as a sourcing destination.

I urge industry to use it to assess candidly where it stands, its dimensions, and to act on the gaps. Government will continue to support this Playbook will support industry in its efforts towards this goal.

July 23, 2026



भारतीय राष्ट्रीय अंतरिक्ष संवर्धन एवं प्राधिकरण केंद्र मुख्यालय, ब्रीच, २
Indian National Space Promotion and Authorization Centre Headquarter,
email: chairman@inspire.gov.in

Defining Safe Play: Understanding Toys



What Counts as a “Toy”?

An item of entertainment used primarily by children under 14 years

Global Standards → Indian Alignment

ISO 8124 series

International Organization for Standardization



Equivalent to Indian Standards for Safety of Toys

IEC 62115

International Electrotechnical Commission



Equivalent to Indian Standards for Safety of Electric Toys

IS 9873 (Part 9):2017

— an indigenously developed Indian Standard (no direct ISO/IEC counterpart) prescribing limits on certain phthalate esters in toys and children’s products.



Mandatory Compliance

Toys (Quality Control) Order, 2020: any product designed for play by children under 14 years must conform to the standards for toys and carry the **BIS Standard Mark** under a valid BIS certification per Conformity Assessment (Schedule-II of the BIS (Conformity Assessment) Regulations, 2017).



Two Categories, Two Licenses

IS 9873 (Part 1)

Non-Electric Toys

Rattles, dolls, puzzles — no function depends on electricity.

IS 15644

Electric Toys

At least one function depends on electricity.

Separate BIS licenses are granted for each category.

Table of Content

Volumes

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Volume 2: Value Chain, Manufacturing and Route-to-Market

Volume 3: Skill, Design, and Product Development

Volume 4: Toy Sector Compliance Requirements

Volume 5: Export Promotion & Market Readiness

Acronyms & Abbreviations

Key Website Links

Annexure

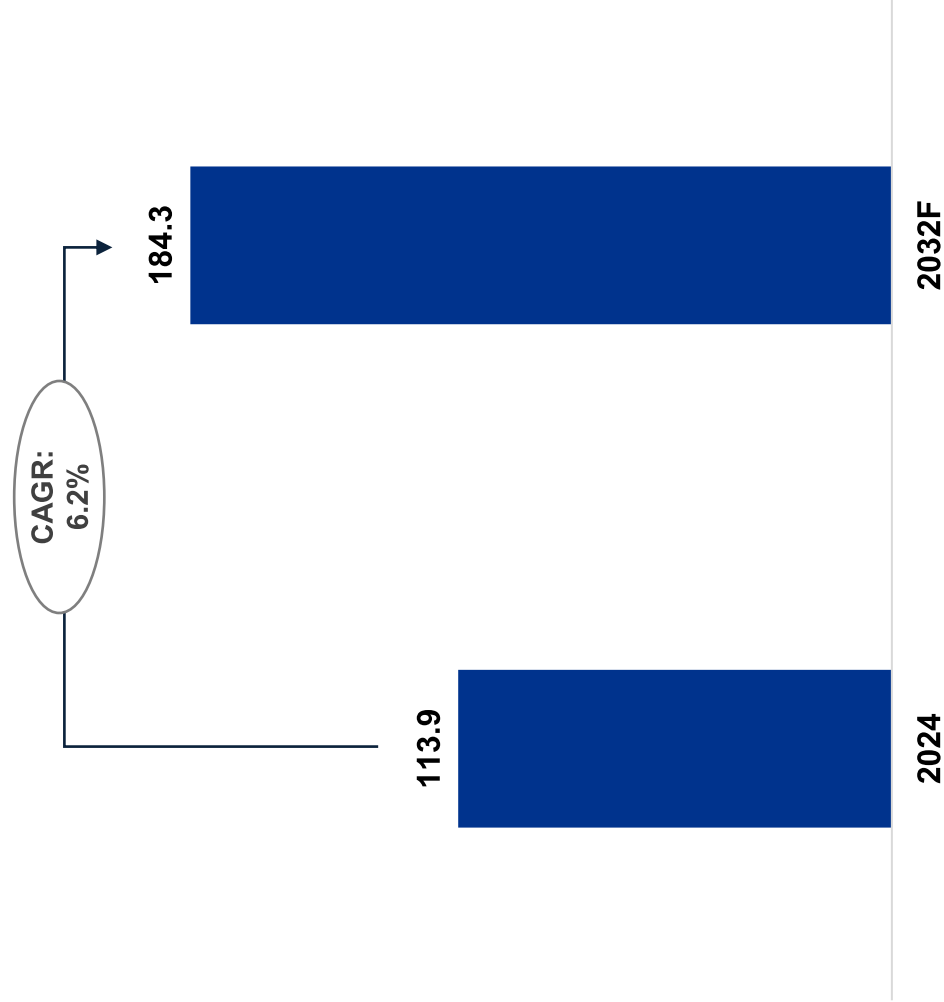
Volume 1: Toys Sector Overview

- Chapter 1: Global Toy Sector
- Chapter 2: Indian Toy Sector
- Chapter 3: Opportunity Assessment

Provides sector snapshot and market driving the global and Indian toy market outlines opportunities for Indian Toy support informed business and investment decisions

Global Toy Sector: Size and Growth

Global Toy Sector (USD Bn, 2024-2032F)¹



Key Growth Drivers

1. New Consumer Segment

A growing demographic of consumers, commonly referred to as “kidults” and aged 12 and above, is increasingly seeking toys that cater to their interests, leading to a surge in demand for action figures, design and engineering sets, and collectibles.

2. Technological Advancement

Toy manufacturers are continuously integrating advanced technologies, such as augmented reality (AR), artificial intelligence (AI), and STEM-based learning modules, aligning with the growing parental demand for educational, interactive, and screen-oriented play experiences.

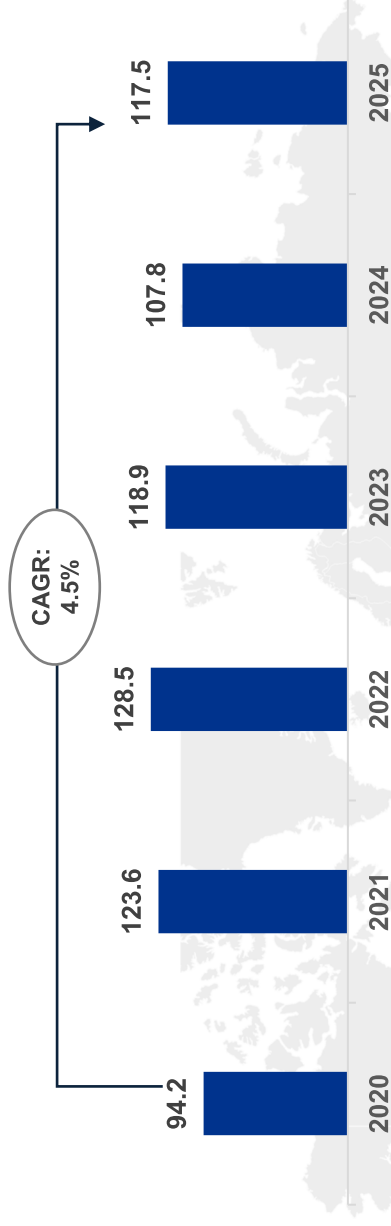
3. Pop Culture Licensing and Character-Based Demand

Box office franchises, streaming content, and social media influencers act as sustained demand catalysts for toy merchandising. Entities such as Disney, Marvel, and Warner Bros. Studios underpin multi-year product lifecycles through collaborations, including action figures, plush toys, and playsets based on established IPs (intellectual properties).

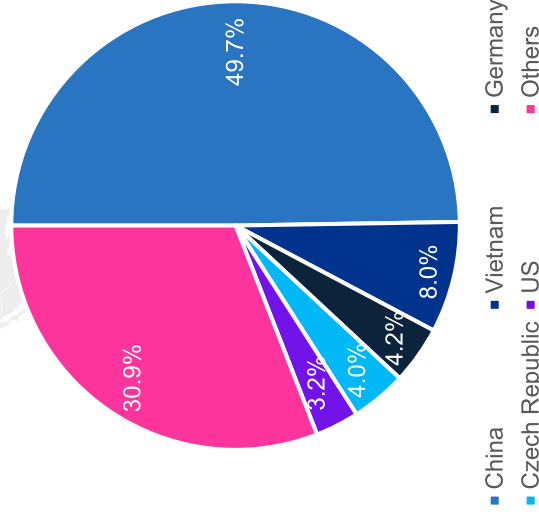
Note: 1. F-Forecasted; Value for 2032 is estimated using the 6.2% (Cumulative Annual Growth Rate) CAGR applicable to the global toy sector for the period 2024-2032
Source: “The Indian Toy Industry Report”, Exim Bank (2024); World Bank; Business Wire; A Berkshire Hathaway; Industry Consultations

Trade Analysis: Global

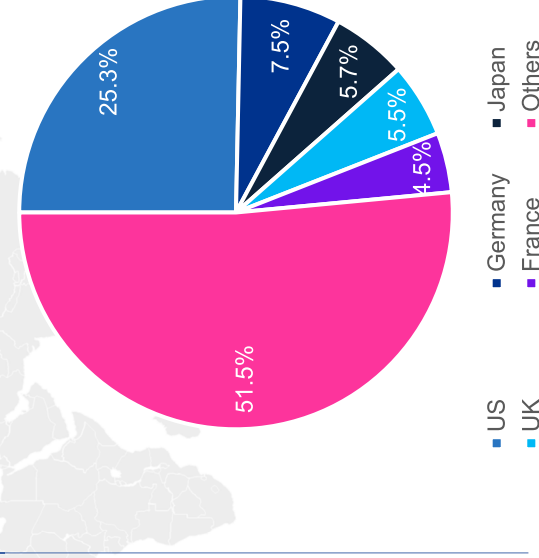
Global Exports (USD Bn, 2020-2025)



Top Exporting Countries (2025)



Top Importing Countries (2025)



Key Highlights

- The global trade for toys is a **USD 117.5 Bn** market, growing at a **4.5% CAGR** during 2020-2025
- **The demand is anchored by domestic market margin, compliance-driven economies** alone absorbs 25.3% of the demand, followed by Germany (7.5%), Japan (5.7%), UK (5.5%) and France (4.5%)
- On the export side, **China, Germany** led the market shares with **49.7%, 30.9%, 8%, and 4.2%**, respectively
- India's global toy-export share (0.8%) is expected to increase rapidly as indicated by its **CAGR of 11%** during 2020-2025, more than two-times of global average

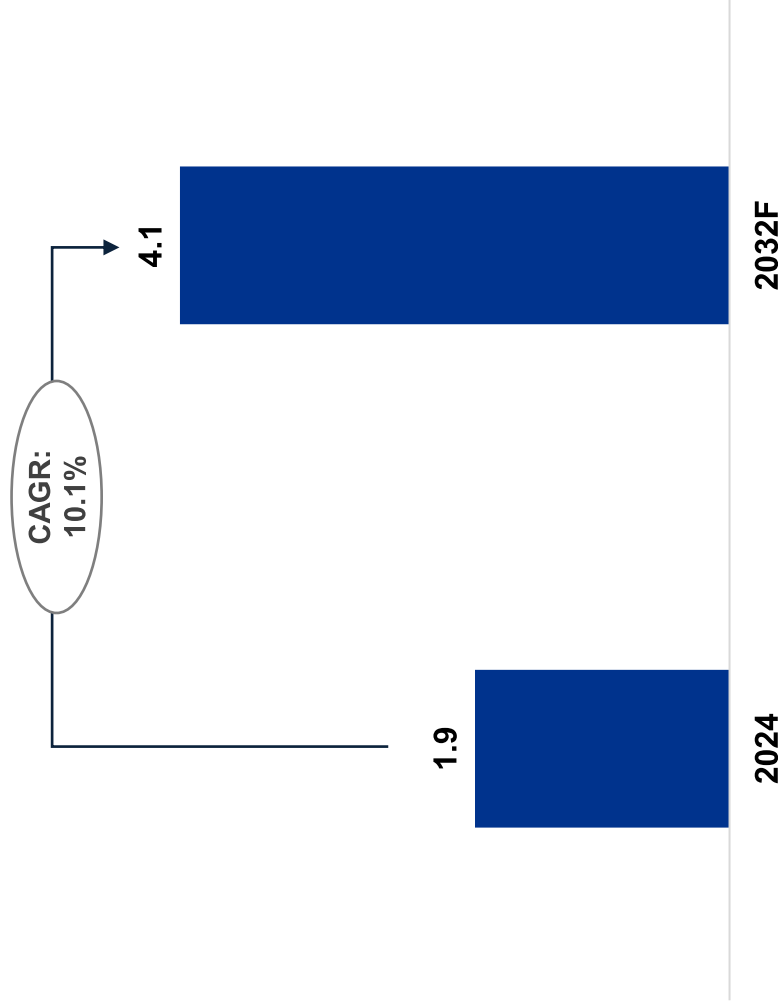


Volume 1: Toys Sector Overview

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Indian Toy Sector: Size and Growth

Indian Toy Sector (USD Bn, 2024-2032F)¹



The Indian Toy sector is projected to grow at nearly 1.5X the global average growth rate over 2024-2032. The sector is registering significant growth due to the increase in disposable income levels, a substantial young population, and the expansion of the e-commerce sector and digital accessibility.

Key Growth Drivers

1. Favorable Demographics

~25% of India's population (~357 Mn) is in the 0-14 age group, creating a substantial demand for toys due to the large and growing addressable market.

2. Rising Disposable Income

Rising disposable income is supporting increased spending, including on toys. India's per capita disposable income is estimated to increase from ₹1.5 lakh to ₹2.5 lakh in FY26. India is also projected to be the largest market for consumer durables by FY2027.

3. E-Commerce Expansion and Deepening Digital Penetration

With 954.4 Mn internet subscribers as of March 2024 (including rural) and an e-commerce market set to nearly triple to USD 345 Bn in 2024 to USD 345 Bn by 2030, led by Tier-II and Tier-III cities, the e-commerce market is broadening the addressable market well beyond the current urban-centric focus.

Note:

1. F-Forecasted; Value for 2032 is estimated using the CAGR applicable to the Indian toy industry for the period 2025-2032

Source:

"The Indian Toy Industry Report", Exim Bank (2024); World Bank; MoSPI Annual Report; Ibeif; Press Information Bureau; IBEF Ecommerce; Industry Consultations

Indian Toy Sector: Snapshot

With the consolidated efforts of the Ministries/Departments and support from the Industry, the Indian Toy sector has seen significant development

21000+

MSMEs

~50

Toy Clusters

1800+

BIS Licenses issued
(including 57 foreign
licenses)

770+

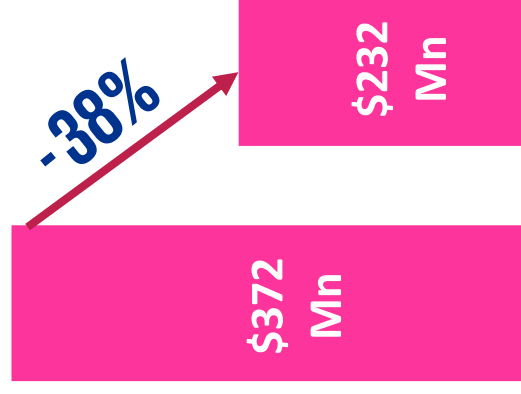
DPIIT recognized Toy
Startups

~95%

Toys adhering to quality standards
(from 33% in 2019 before QCO was
implemented¹⁾)

From Net Importer to Net Exporter

Decline in Toys
Imports



2018-19

2025-26

Rise in
Exports

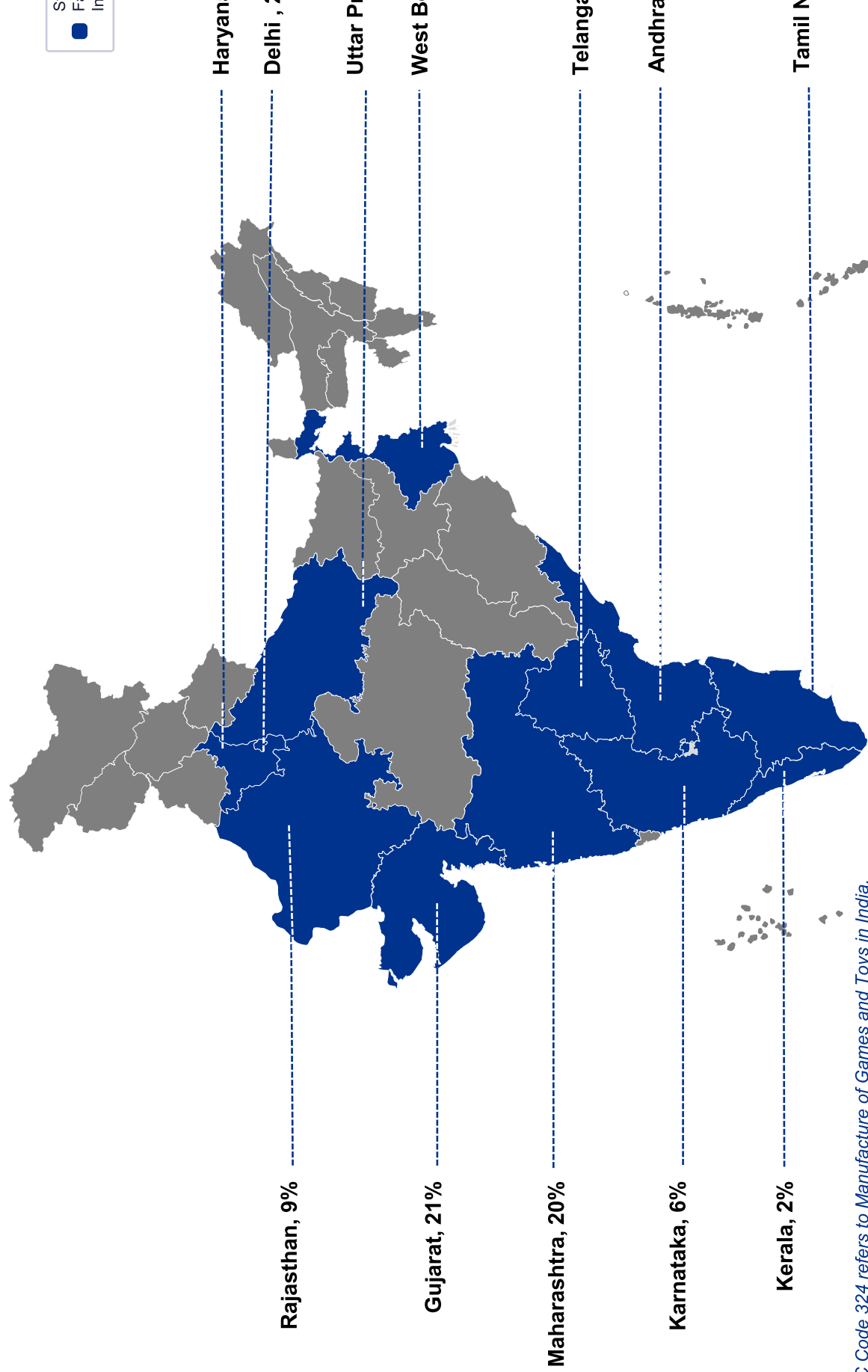
+68%+

\$203
Mn

2018-19

Note: 1. Quality Control Order (QCO) for Toys was implemented on 1st January 2021; A survey conducted in 2025 by BIS showed that 95% of tested samples conform to the quality standards. Source: MSMEs registered on Udyam Aadhaar; Toy Clusters under M/o Textiles & M/o MSME; Data received from BIS; Data received from Startup India; Tradestat; DoC; HS 9503, HS 9505, HS 9506, HS 9507, HS 9508, HS 9509, HS 9510, HS 9511, HS 9512, HS 9513, HS 9514, HS 9515, HS 9516, HS 9517, HS 9518, HS 9519, HS 9520, HS 9521, HS 9522, HS 9523, HS 9524, HS 9525, HS 9526, HS 9527, HS 9528, HS 9529, HS 9530, HS 9531, HS 9532, HS 9533, HS 9534, HS 9535, HS 9536, HS 9537, HS 9538, HS 9539, HS 9540, HS 9541, HS 9542, HS 9543, HS 9544, HS 9545, HS 9546, HS 9547, HS 9548, HS 9549, HS 9550, HS 9551, HS 9552, HS 9553, HS 9554, HS 9555, HS 9556, HS 9557, HS 9558, HS 9559, HS 9560, HS 9561, HS 9562, HS 9563, HS 9564, HS 9565, HS 9566, HS 9567, HS 9568, HS 9569, HS 9570, HS 9571, HS 9572, HS 9573, HS 9574, HS 9575, HS 9576, HS 9577, HS 9578, HS 9579, HS 9580, HS 9581, HS 9582, HS 9583, HS 9584, HS 9585, HS 9586, HS 9587, HS 9588, HS 9589, HS 9590, HS 9591, HS 9592, HS 9593, HS 9594, HS 9595, HS 9596, HS 9597, HS 9598, HS 9599, HS 9600, HS 9601, HS 9602, HS 9603, HS 9604, HS 9605, HS 9606, HS 9607, HS 9608, HS 9609, HS 9610, HS 9611, HS 9612, HS 9613, HS 9614, HS 9615, HS 9616, HS 9617, HS 9618, HS 9619, HS 9620, HS 9621, HS 9622, HS 9623, HS 9624, HS 9625, HS 9626, HS 9627, HS 9628, HS 9629, HS 9630, HS 9631, HS 9632, HS 9633, HS 9634, HS 9635, HS 9636, HS 9637, HS 9638, HS 9639, HS 9640, HS 9641, HS 9642, HS 9643, HS 9644, HS 9645, HS 9646, HS 9647, HS 9648, HS 9649, HS 9650, HS 9651, HS 9652, HS 9653, HS 9654, HS 9655, HS 9656, HS 9657, HS 9658, HS 9659, HS 9660, HS 9661, HS 9662, HS 9663, HS 9664, HS 9665, HS 9666, HS 9667, HS 9668, HS 9669, HS 9670, HS 9671, HS 9672, HS 9673, HS 9674, HS 9675, HS 9676, HS 9677, HS 9678, HS 9679, HS 9680, HS 9681, HS 9682, HS 9683, HS 9684, HS 9685, HS 9686, HS 9687, HS 9688, HS 9689, HS 9690, HS 9691, HS 9692, HS 9693, HS 9694, HS 9695, HS 9696, HS 9697, HS 9698, HS 9699, HS 9700, HS 9701, HS 9702, HS 9703, HS 9704, HS 9705, HS 9706, HS 9707, HS 9708, HS 9709, HS 9710, HS 9711, HS 9712, HS 9713, HS 9714, HS 9715, HS 9716, HS 9717, HS 9718, HS 9719, HS 9720, HS 9721, HS 9722, HS 9723, HS 9724, HS 9725, HS 9726, HS 9727, HS 9728, HS 9729, HS 9730, HS 9731, HS 9732, HS 9733, HS 9734, HS 9735, HS 9736, HS 9737, HS 9738, HS 9739, HS 9740, HS 9741, HS 9742, HS 9743, HS 9744, HS 9745, HS 9746, HS 9747, HS 9748, HS 9749, HS 9750, HS 9751, HS 9752, HS 9753, HS 9754, HS 9755, HS 9756, HS 9757, HS 9758, HS 9759, HS 9760, HS 9761, HS 9762, HS 9763, HS 9764, HS 9765, HS 9766, HS 9767, HS 9768, HS 9769, HS 9770, HS 9771, HS 9772, HS 9773, HS 9774, HS 9775, HS 9776, HS 9777, HS 9778, HS 9779, HS 9780, HS 9781, HS 9782, HS 9783, HS 9784, HS 9785, HS 9786, HS 9787, HS 9788, HS 9789, HS 9790, HS 9791, HS 9792, HS 9793, HS 9794, HS 9795, HS 9796, HS 9797, HS 9798, HS 9799, HS 9800, HS 9801, HS 9802, HS 9803, HS 9804, HS 9805, HS 9806, HS 9807, HS 9808, HS 9809, HS 9810, HS 9811, HS 9812, HS 9813, HS 9814, HS 9815, HS 9816, HS 9817, HS 9818, HS 9819, HS 9820, HS 9821, HS 9822, HS 9823, HS 9824, HS 9825, HS 9826, HS 9827, HS 9828, HS 9829, HS 9830, HS 9831, HS 9832, HS 9833, HS 9834, HS 9835, HS 9836, HS 9837, HS 9838, HS 9839, HS 9840, HS 9841, HS 9842, HS 9843, HS 9844, HS 9845, HS 9846, HS 9847, HS 9848, HS 9849, HS 9850, HS 9851, HS 9852, HS 9853, HS 9854, HS 9855, HS 9856, HS 9857, HS 9858, HS 9859, HS 9860, HS 9861, HS 9862, HS 9863, HS 9864, HS 9865, HS 9866, HS 9867, HS 9868, HS 9869, HS 9870, HS 9871, HS 9872, HS 9873, HS 9874, HS 9875, HS 9876, HS 9877, HS 9878, HS 9879, HS 9880, HS 9881, HS 9882, HS 9883, HS 9884, HS 9885, HS 9886, HS 9887, HS 9888, HS 9889, HS 9890, HS 9891, HS 9892, HS 9893, HS 9894, HS 9895, HS 9896, HS 9897, HS 9898, HS 9899, HS 9900, HS 9901, HS 9902, HS 9903, HS 9904, HS 9905, HS 9906, HS 9907, HS 9908, HS 9909, HS 9910, HS 9911, HS 9912, HS 9913, HS 9914, HS 9915, HS 9916, HS 9917, HS 9918, HS 9919, HS 9920, HS 9921, HS 9922, HS 9923, HS 9924, HS 9925, HS 9926, HS 9927, HS 9928, HS 9929, HS 9930, HS 9931, HS 9932, HS 9933, HS 9934, HS 9935, HS 9936, HS 9937, HS 9938, HS 9939, HS 9940, HS 9941, HS 9942, HS 9943, HS 9944, HS 9945, HS 9946, HS 9947, HS 9948, HS 9949, HS 9950, HS 9951, HS 9952, HS 9953, HS 9954, HS 9955, HS 9956, HS 9957, HS 9958, HS 9959, HS 9960, HS 9961, HS 9962, HS 9963, HS 9964, HS 9965, HS 9966, HS 9967, HS 9968, HS 9969, HS 9970, HS 9971, HS 9972, HS 9973, HS 9974, HS 9975, HS 9976, HS 9977, HS 9978, HS 9979, HS 9980, HS 9981, HS 9982, HS 9983, HS 9984, HS 9985, HS 9986, HS 9987, HS 9988, HS 9989, HS 9990, HS 9991, HS 9992, HS 9993, HS 9994, HS 9995, HS 9996, HS 9997, HS 9998, HS 9999, HS 10000.

State-wise Distribution of Toy Manufacturing Facilities



Note:

- 1. NIC Code 324 refers to Manufacture of Games and Toys in India.
- 2. The estimated number of organised factories under NIC 324 is 213.
- 3. ASI covers the organised/registered manufacturing sector and uses a combination of census and sample survey methods; which does not take into account complete enumeration.

Source: Annual Survey of Industries (ASI) 2023–24, Ministry of Statistics and Programme Implementation (MoSPI)

India's Evolving Toy Startup Landscape

770+
DPIIT-Recognised
Startups

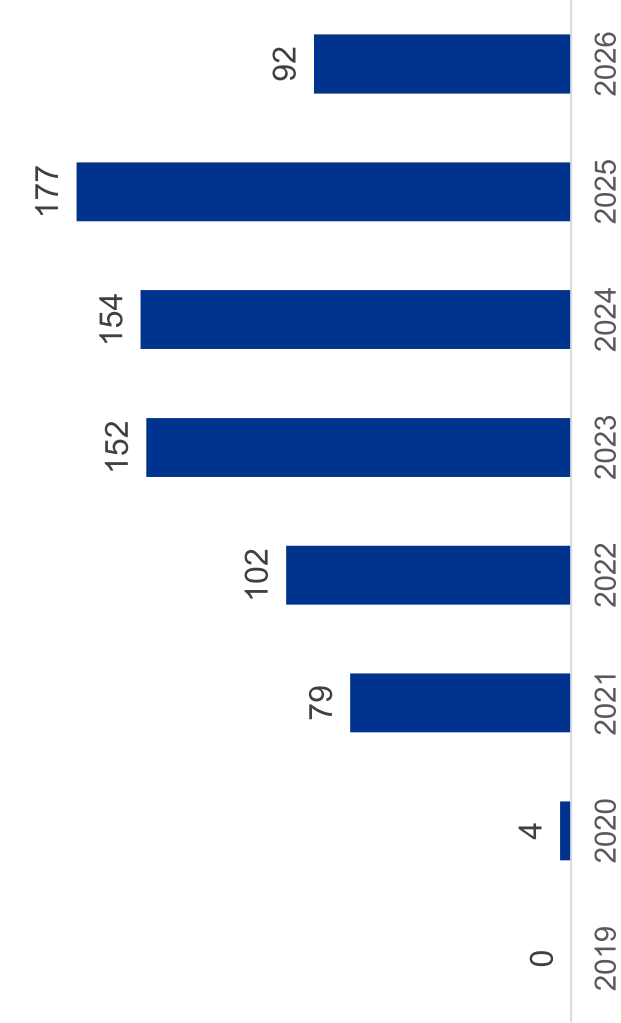
30+
DPIIT Startups
Supported

28
Patented Startups

382
Startups with Women
Director

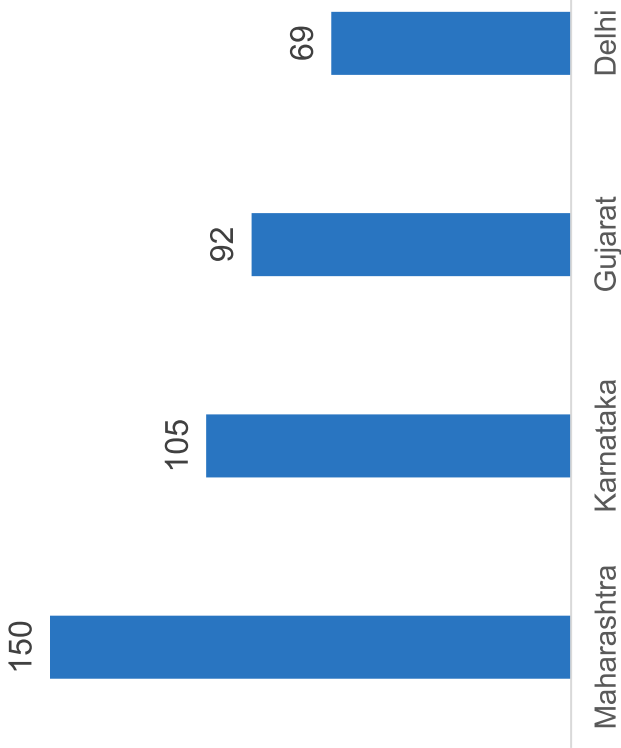
100+
Startups with
Foreign Investment

YoY Growth in the Indian Toy Startups (Numbers)



423 new recognitions in 2024-26 alone – 55.7% of the total ecosystem created in just 2 years

Top 5 States Covering 62% of Startups

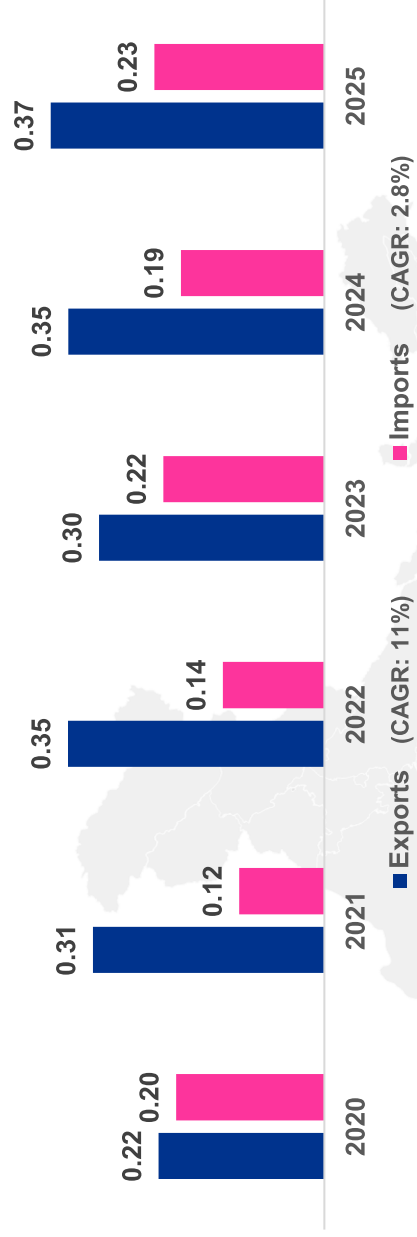


Bengaluru Urban is top metro cluster with 15% of startups. Maharashtra leads overall with 25% of startups.

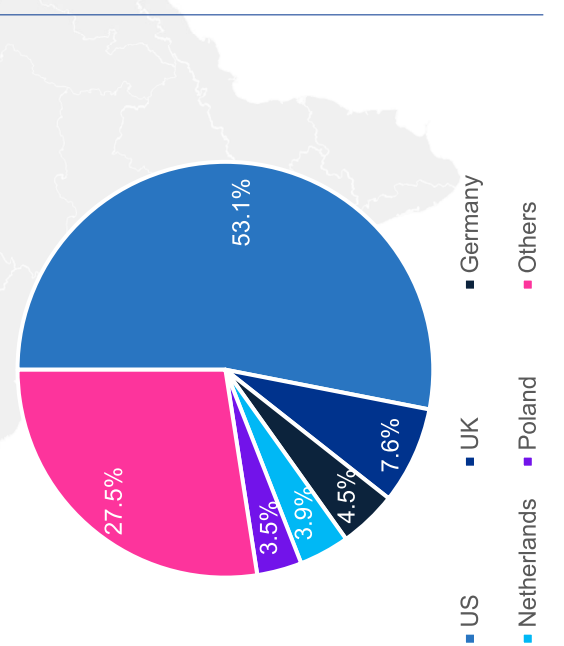
Note: 1. The data presented is updated till 31st May 2026
Source: Startup India

Trade Analysis: India

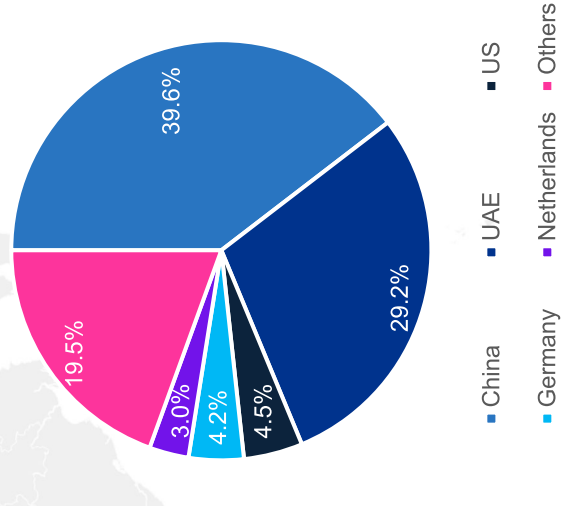
Indian Trade (USD Bn, 2020-2025)



Top Exporting Destinations (2025)



Top Importing Sources (2025)



Key Highlights

- The **Indian toy exports** grew at a 11% CAGR during the period **2020-2025**, compared with 4.5% CAGR for the US during the period.
- In 2025, India's share in global toy exports is projected to reach 11%.
- The US was the largest destination for toy exports, accounting for 53.1% of total exports in 2025.
- The significant proliferation and growth of toy start-ups in the toy sector who were able to tap into domestic demand and were successful in penetrating major markets, like the US and Europe.



Given that India accounts for ~0.3% of global toy trade, export represents a significant growth opportunity, by penetrating importing nations such as the US, UK, Germany, etc.



Volume 1: Toys Sector Overview

- Chapter 1: Global Toy Sector
- Chapter 2: Indian Toy Sector
- Chapter 3: Opportunity Assessment

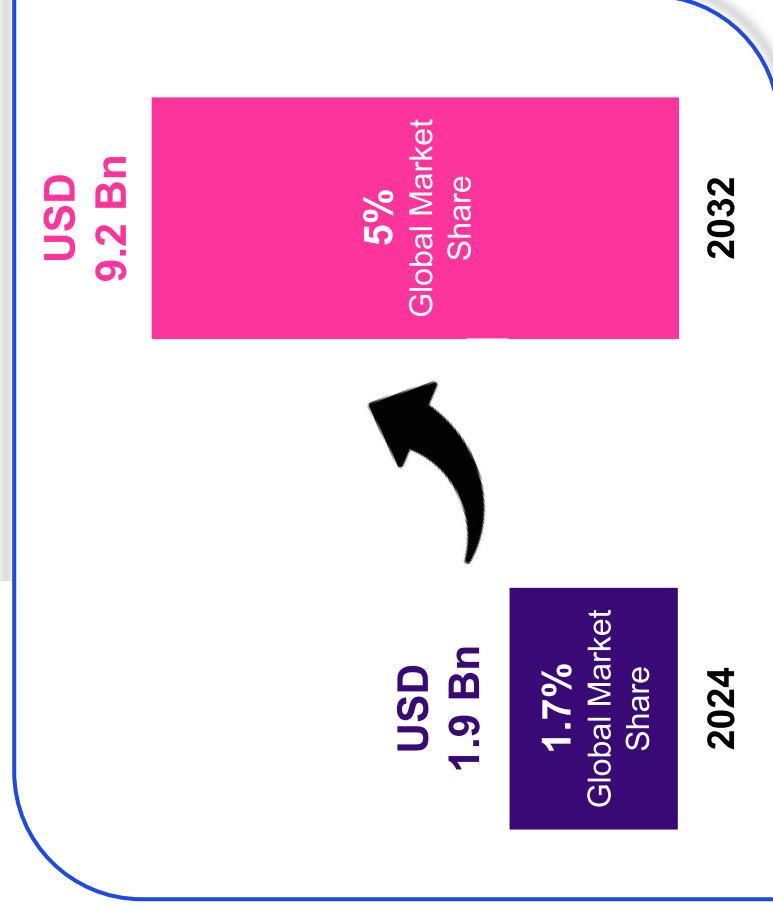
Indian Toy Sector: Strengths & Opportunities

Strengths	Opportunities
Broad MSME Base 21,000+ MSMEs and ~50 toy clusters	Global Supply Chain Realignment Global toy manufacturing diversifying beyond traditional hubs, positioning India as a leading destination for building fully integrated supply chains
Quality at Scale ~95% of toys now meet quality standards (33% pre-QCO); 1,800+ BIS licenses issued (Including 57 foreign licenses)	Accelerating Domestic Growth Potential The Indian Toy sector is projected to grow at nearly 1.5% growth rate over 2024-2032
Startup Momentum 450+ DPIIT-recognized toy startups tapping domestic and export demand	Global Sourcing & Branding Rise in sourcing for global markets and innovation & quality enable MSMEs/ Startups go global and sharply lift export potential
Outpacing the World Exports grew at 11% CAGR (2020–25) vs 4.5% global; 13.4% CAGR over 2014–25	Jobs & Upskilling Scope to create jobs and deepen design, safety & material innovation

Aspirational Scenario for India's Toy Sector

“India aims to capture a 5 per cent share of the global toy market by 2032..... Achieving this would require collective efforts and expansion of the toy industry across India and international markets”

- Address of the Hon'ble Union Minister of Commerce & Industry at Toybiz 2022



5% of the Global Market Share by 2032 (~22% CAGR)

To achieve this target, Indian toy industry needs to:

- Focus on export-led growth
- Ensure products adhere to quality and safety standards
- Invest in branding, packaging and product design
- Move beyond assembly and create a complete ecosystem, including domestic manufacturing of components India self-reliant in toy production
- Enhance manufacturing scale and become more competitive

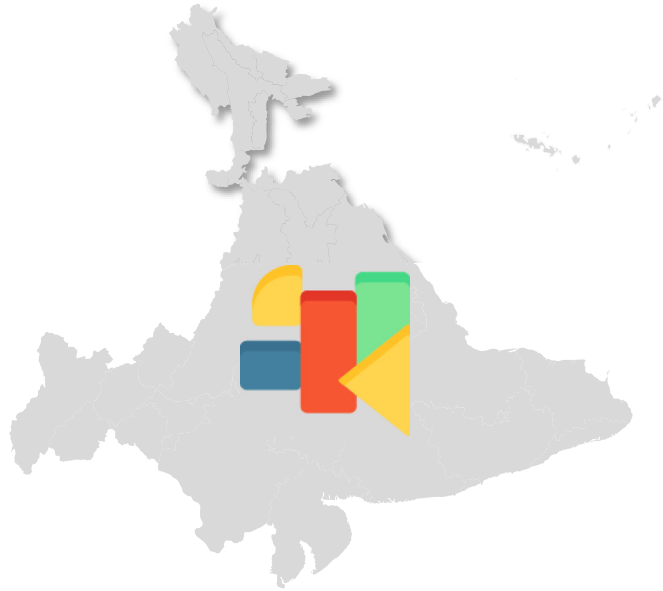
Key Assumption: The Indian toy sector will post an accelerated growth at 22% CAGR, while the global toy sector will maintain its growth at existing ~6.2% CAGR over 2024 and 2032

Current Trajectory of Indian Toy Sector



Current Scenario:

Considering the current projected growth rates for domestic (10.1%) and (6.2%) markets, the Indian toy sector is expected to attain ~4% global market share by 2047



USD
4.1 Bn

USD
1.9 Bn

2032

2024

	2024	2032
India's market size in USD Bn	1.9	4.1
Global market size in USD Bn	113.9	184.3
India's share in global market (in %)	1.7	2.2

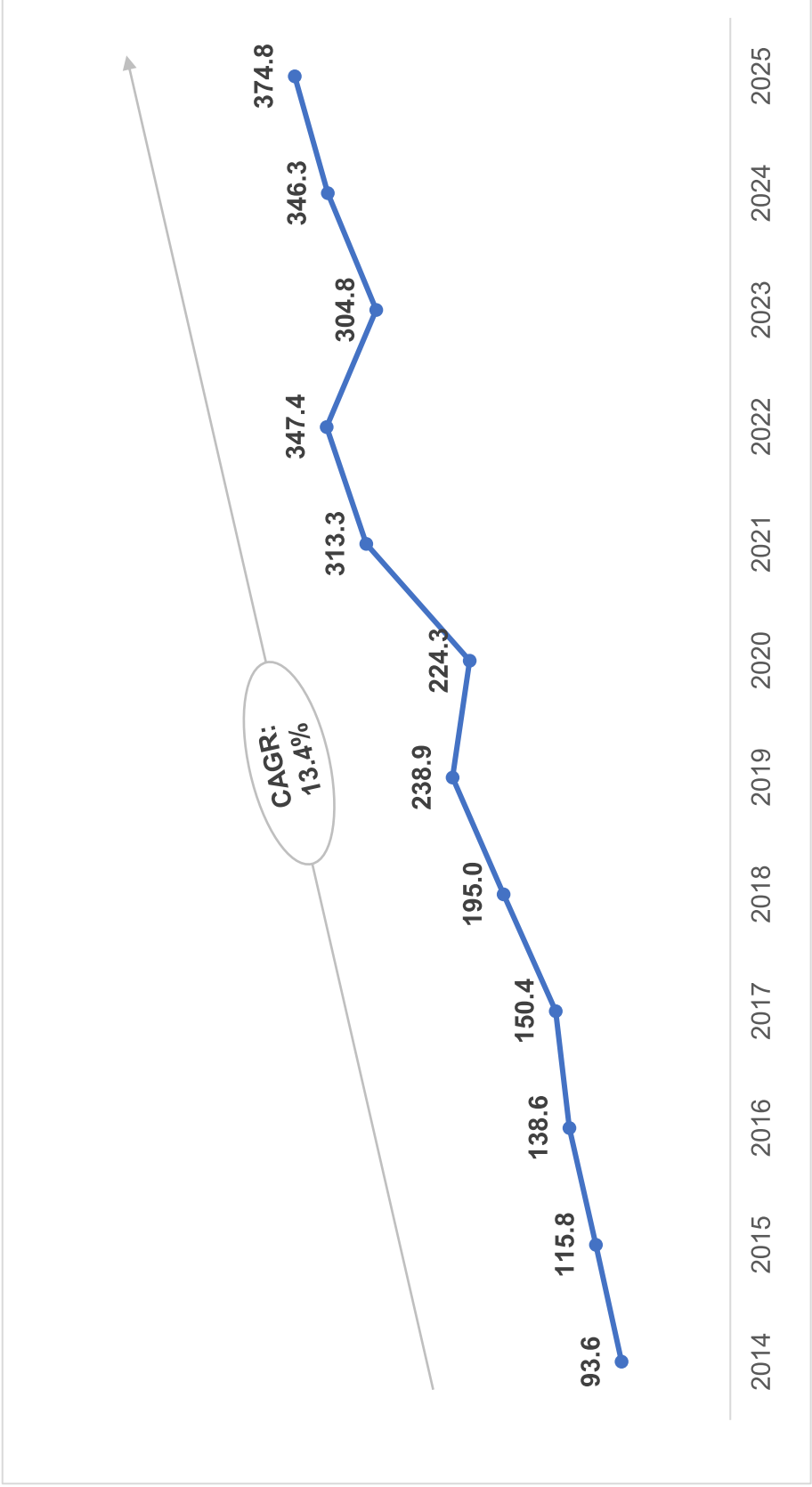
Key Assumption: The Indian and global toys sectors will maintain their CAGRs as per the current projections, i.e., the Indian toy sector will grow at 10.1% CAGR and the global toy sector will grow at 6.2% CAGR by 2047

Source: "The Indian Toy Industry Report", Exim Bank (2024); Imarc (1, 2); Industry Consultations

India's Export Momentum

India's toy exports have maintained a consistently high growth rate over the years, which is expected to sustain this momentum and allow India to occupy a much higher global market share

India Toy Exports (USD Mn, 2014-2025)



Key Highlight

Global realignment of supply chains has benefited emerging economies, including India, Vietnam, and Indonesia. Indian companies are expanding their operations into these markets.

India's toy exports have shown sustained momentum, contributing to an overall CAGR of 13.4% between 2014 and 2025.

The consistent upward trajectory of India's toy exports is evidence of the country's growing competitiveness in the global market.

Source: Trademap; HS Code: 9503, 9504, 9505

Key Export Destinations

Global Toys Import in 2025 (USD 111.5 Bn)	Toys and Games Top Exporters in 2025 (HS Codes: 9503, 9504, 9505)					
	China (1 st)	Vietnam (2 nd)	Germany (3 rd)	Czech Republic (4 th)	Other Major Exporters	India (30 th)
	USD 58.4 Bn	USD 9.4 Bn	USD 4.9 Bn	USD 4.7 Bn		USD 0.3 Bn
Top Importers						
The US (28.2 Bn)	56%	21%	0.30%	0.20%	Mexico (6%) Japan (2.6%)	0.9%
Germany (8.4 Bn)	53%	3%	-	10%	Japan (9%) Hungary (3%)	0.4%
Japan (6.3 Bn)	87%	8%	0.12%	0.1%	Thailand (1%) Taipei (1%)	0.04%
The UK (6.2 Bn)	66%	9%	1%	8.3%	US (2.8%) Japan (2.8%)	0.6%
France (5.0 Bn)	54%	3%	5%	7%	UK (4%) Japan (4%)	0.4%
Canada (3.9 Bn)	55%	9%	1%	0.3%	USA (13%) Mexico (9%)	0.8%
Poland (3.9 Bn)	19%	2%	42%	12%	Netherlands (7%) Austria (3%)	0.5%
Netherlands (3.4 Bn)	53%	3%	7%	1%	Belgium (11%) UK (5%)	0.4%
Spain (3.2 Bn)	55%	3%	10%	4%	Netherlands (10%) US (4%)	0.3%

Key Highlights	India's rapid growth in manufacturing, particularly in toys and segments like action figures and dolls, is driving its export levels across various categories. Significant expansion is seen in the import of toys and games from India.
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Emerging Opportunities/Themes for Growth



Learning Through Play

Combining playful engagement with meaningful learning outcomes

Early-childhood development · STEM & STEAM · language development · creativity & problem-solving · social & emotional learning

Learning is often most effective when it emerges naturally through play.



Alternatives to Screen-Based Entertainment

Creating meaningful offline play experiences

Family games · outdoor play · social play · construction toys · physical activity-based play

Addresses concerns around excessive screen exposure while promoting active participation.



Indian Stories, Culture & Local IP

Developing original products rooted in Indian contexts

Folklore & mythology · regional stories · Indian heroes & innovators · traditional games · craft-based play

Creates unique IP and strengthens India's global identity in the toy sector.



Inclusive & Accessible Play

Making play available to a broader range of users

Neurodiverse children · children with disabilities · multi-generational play · universal design · adaptive play systems

Expands participation while creating meaningful social impact.



Community-Driven Brands & Collectibles

Building long-term engagement beyond individual products

Collectibles · trading ecosystems · community challenges · events & competitions · creator communities

Strong communities often lead to sustained engagement and brand loyalty.



Open-Ended & Creative Play

Encouraging imagination, exploration and self-expression

Construction systems · maker kits · craft-based play · creative play

Supports creativity, experimentation and longer engagement



Hybrid Physical-Digital Experiences

Combining physical products with digital interactions

Connected toys · companion apps · augmented reality (AR) learning products

Creates richer, more adaptive play by integrating physical and digital worlds



Sustainable & Responsible Toys

Reducing environmental impact across the product lifecycle

Sustainable materials · recyclable packaging · repairable products · reduced material waste

Sustainability is increasingly an expectation among consumers



Personalized & Customizable Products

Allowing users to shape their own experiences

Modular products · personalized content · custom characters · user-generated experiences

Increases engagement, ownership and emotional connection



AI & Emerging Technologies

Using advanced technologies to create adaptive experiences

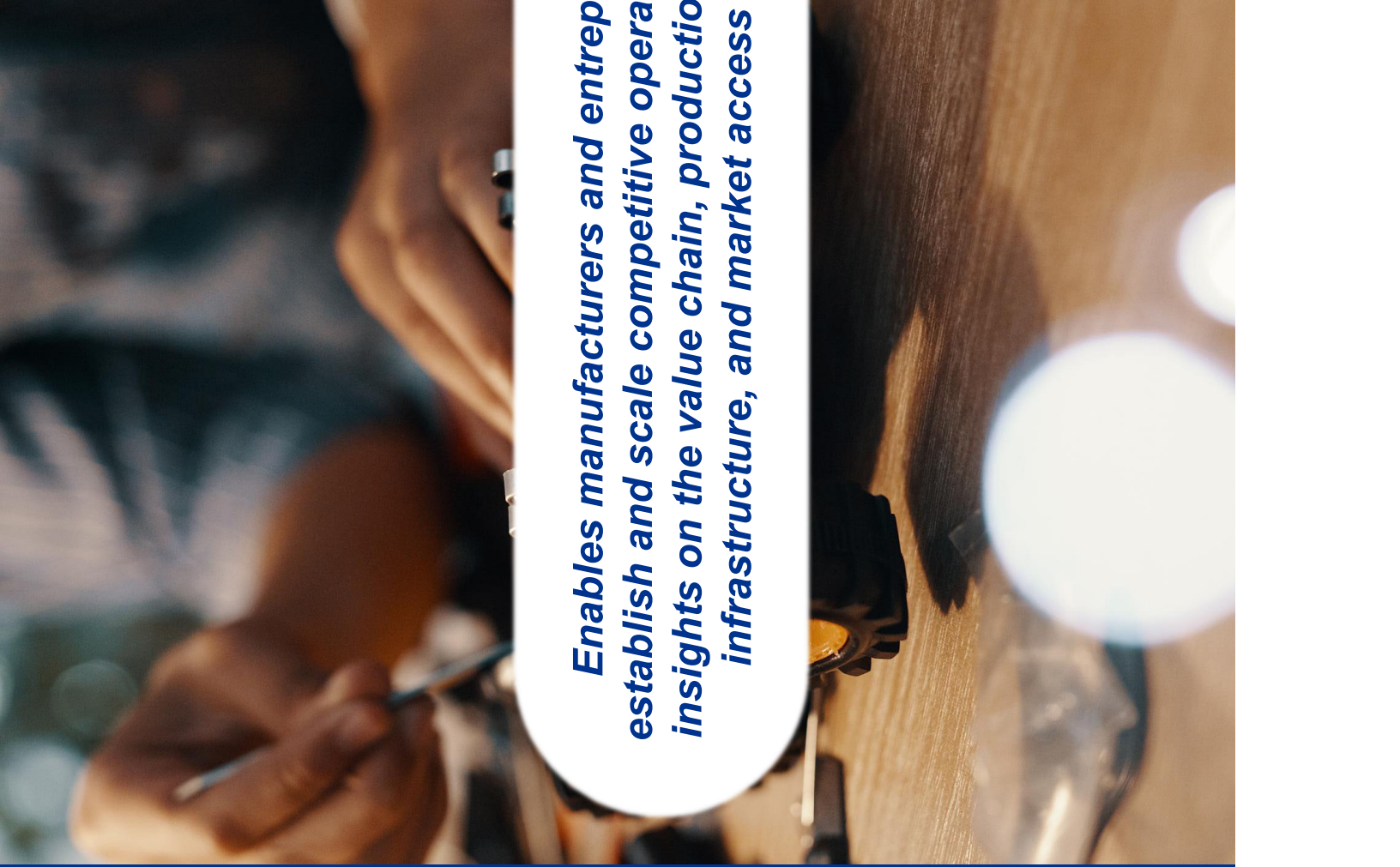
AI-assisted learning toys · adaptive gameplay · voice interactive companions

Enables more responsive, personalized and evolving play experiences

Source: Industry Consultations

Volume 2: Value Chain, Manufacturing and Route-to-Market

- Chapter 1: Value Chain and Manufacturing Process Analysis
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- Chapter 3: Raw Materials | Machinery & Technology Requirements
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- Chapter 5: State Policy Benchmarking



Enables manufacturers and entrepreneurs to establish and scale competitive operations by providing insights on the value chain, production requirements, infrastructure, and market access

Toy Value Chain Stages

Toy value chain spans five stages, where every stage adds to play value, safety, quality, and commercial viability

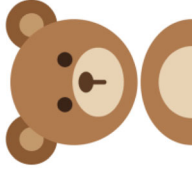


Note: 1. DFMA (Design for Manufacturing and Assembly) is a product-development method that cuts total cost and time-to-market by simplifying parts and processes. It combines Design for Manufacturing (DFM) and Design for Assembly (DFA), i.e., optimizing how parts go together and Design for Manufacturing (DFM), i.e., optimizing how each part is made so teams reduce part count, shorten assembly, and improve quality by reducing waste.

Source: Stakeholder & Industry consultations

Key Toy Segments

Five toy segments based on basic raw material used have distinct manufacturing process, durability, & playability

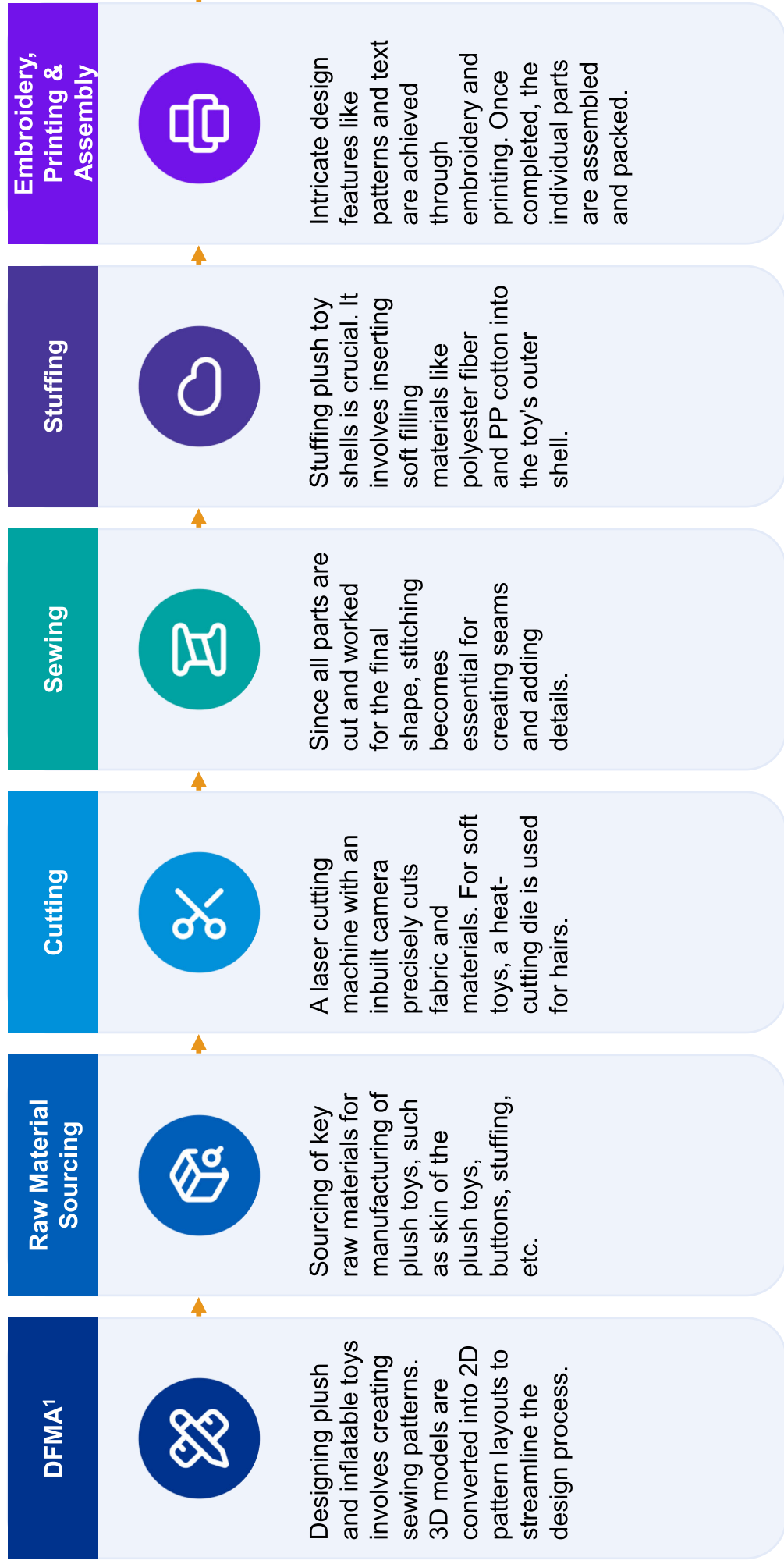
	Plush	Textile fabric-based toys with soft filling for comfort, cuddling and imaginative play. Includes • Teddy bears & soft animals • Soft dolls • Plush characters • Baby comforters • Cushion toys
	Plastic	Moulded plastics (ABS, PP, HDPE, LLDPE, PVC) based toys that are versatile, durable and low-cost at scale. Includes • Building blocks & sets • Action figures & dolls • Vehicles & ride-ons • Play sets • Bath toys
	Metal	Die-cast alloy, tin or steel-based toys that are durable, weighty, detailed and collectible. Includes • Die-cast vehicles • Tin wind-up toys • Model trains • Robots • Collectible figurines
	Wooden	Solid or engineered wood-based toys that are durable, tactile, sustainable and educational. Includes • Building blocks • Puzzles • Pull-along toys • Stacking & sorting • Learning toys
	Paper	Paper, cardboard-based toys, low-cost, eco-friendly. Includes • Board games • Card • Jigsaw • Activity • Craft

Note: Illustrative product examples; not exhaustive.

Source: Stakeholder & Industry consultations

Manufacturing Process - Plush Toys

Plush toy manufacturing is a seven-step process centered on cutting, sewing, stuffing and embroidery

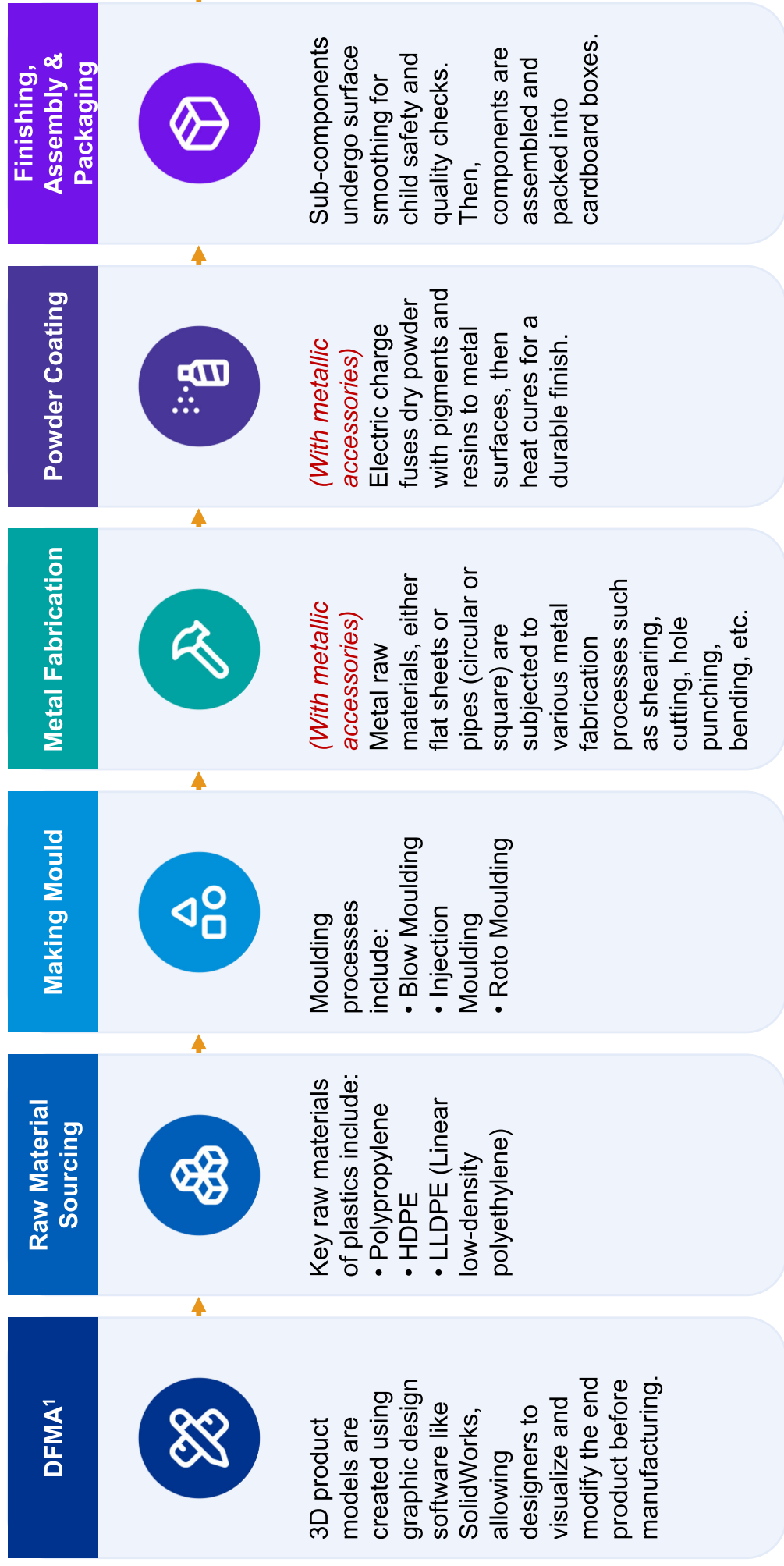


Note: 1. DFMA (Design for Manufacturing and Assembly)

Source: Stakeholder & Industry consultations

Manufacturing Process - Plastic Toys

Plastic toy manufacturing is moulding-led, with added steps for toys with metallic accessories

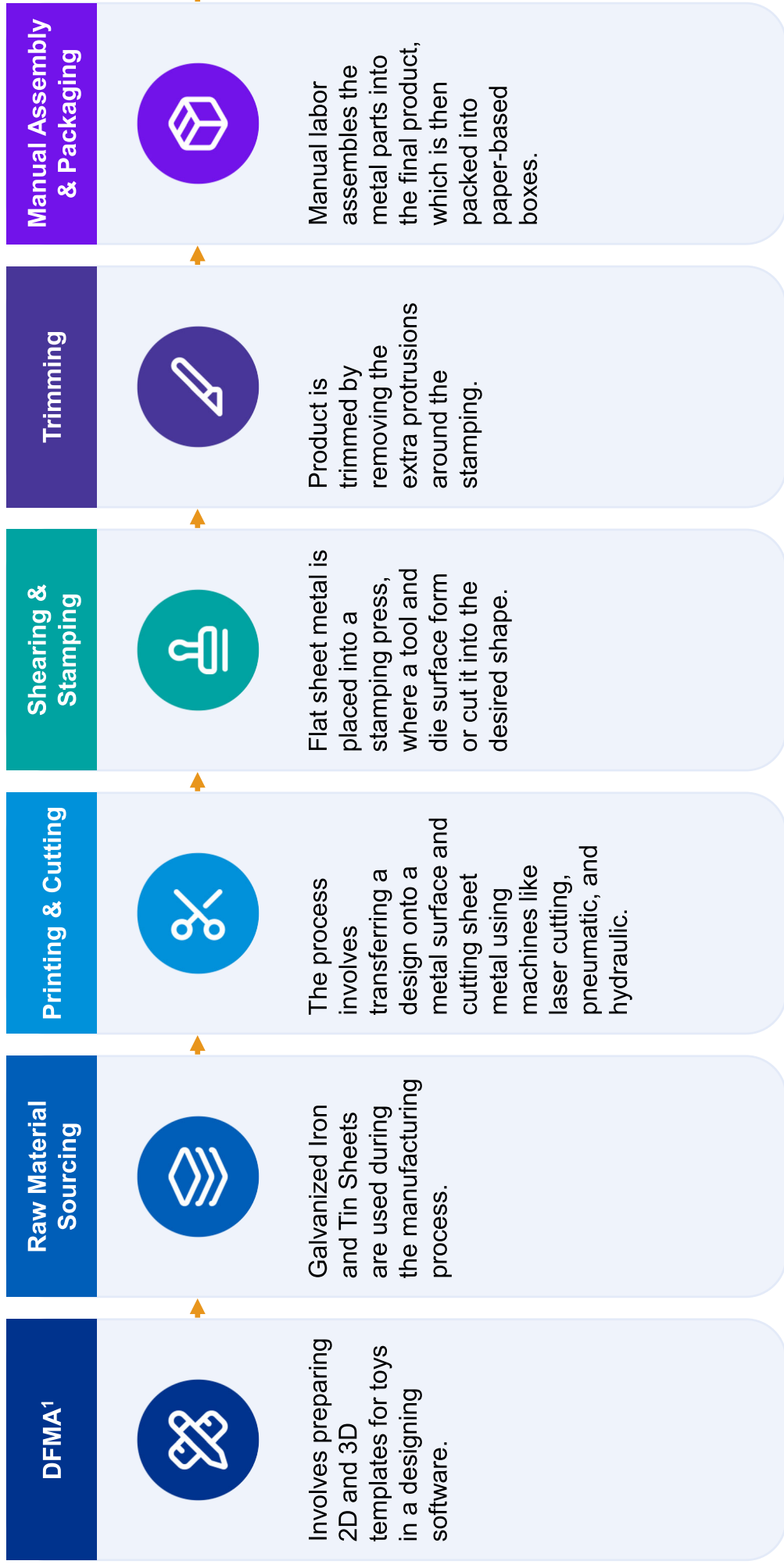


Note: 1. DFMA (Design for Manufacturing and Assembly)

Source: Stakeholder & Industry consultations

Manufacturing Process - Metal Toys

Galvanized iron and tin sheets are converted into toys via **cutting, stamping and manual assembly**

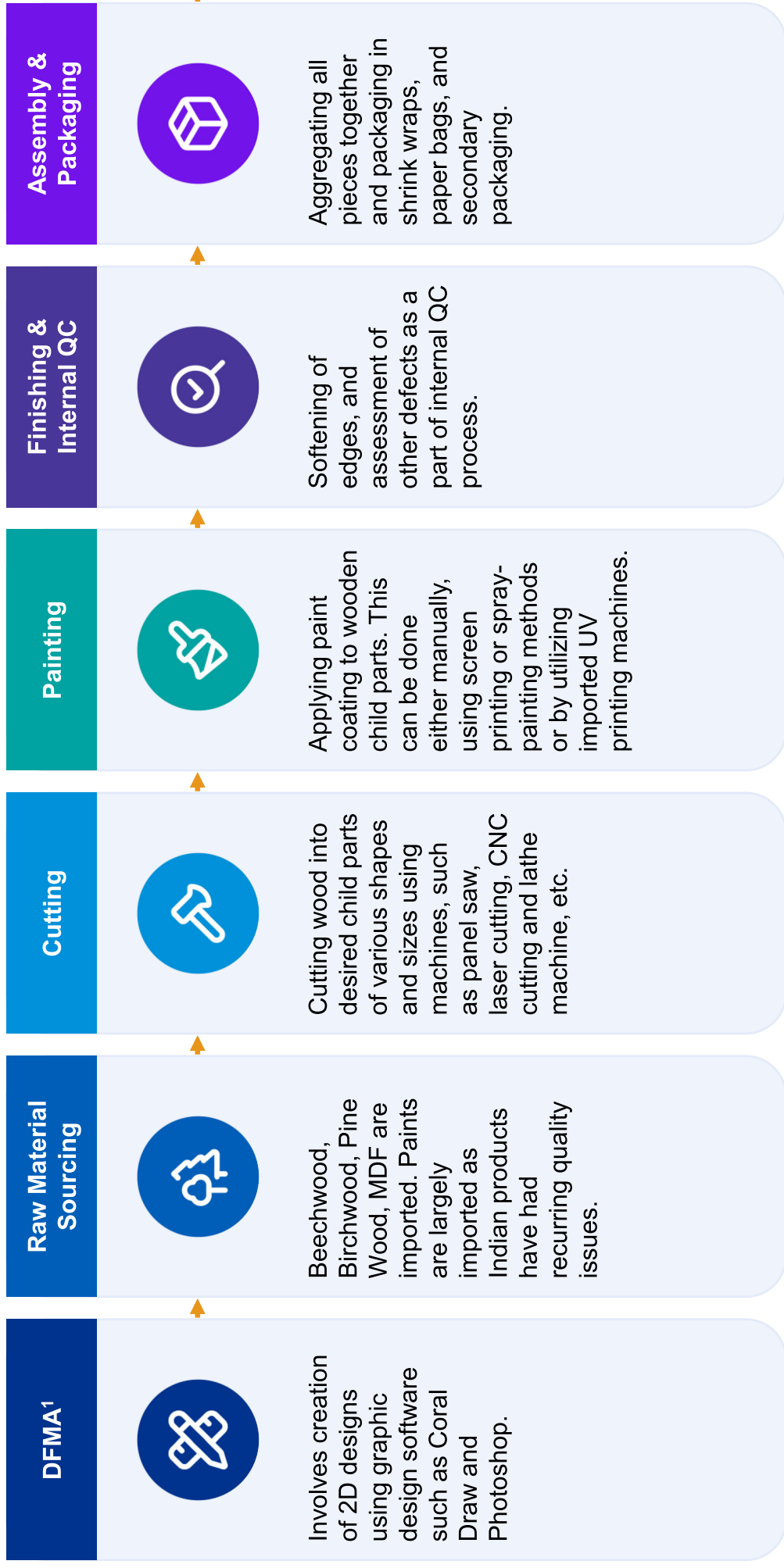


Note: 1. DFMA (Design for Manufacturing and Assembly)

Source: Stakeholder & Industry consultations

Manufacturing Process - Wooden Toys

Wooden toy making spans cutting, painting and finishing, with **key raw materials largely imported**

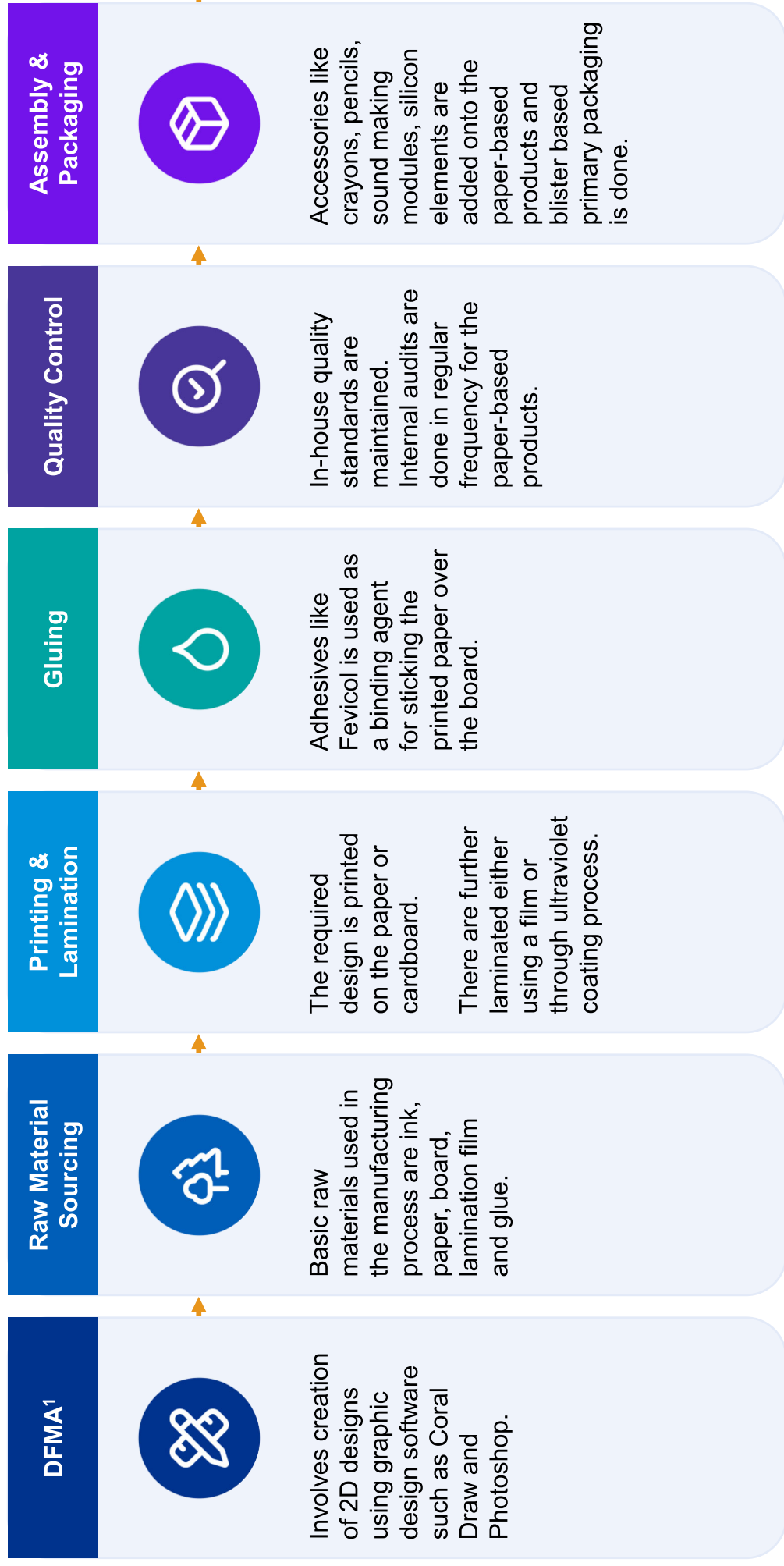


Note: 1. DFMA (Design for Manufacturing and Assembly)

Source: Stakeholder & Industry consultations

Manufacturing Process - Paper-based: Puzzles, Board, Card Games & AC

Puzzles, board & card games and activity sets follow a print, laminate and glue process



Note: 1. DFMA (Design for Manufacturing and Assembly)

Source: Stakeholder & Industry consultations

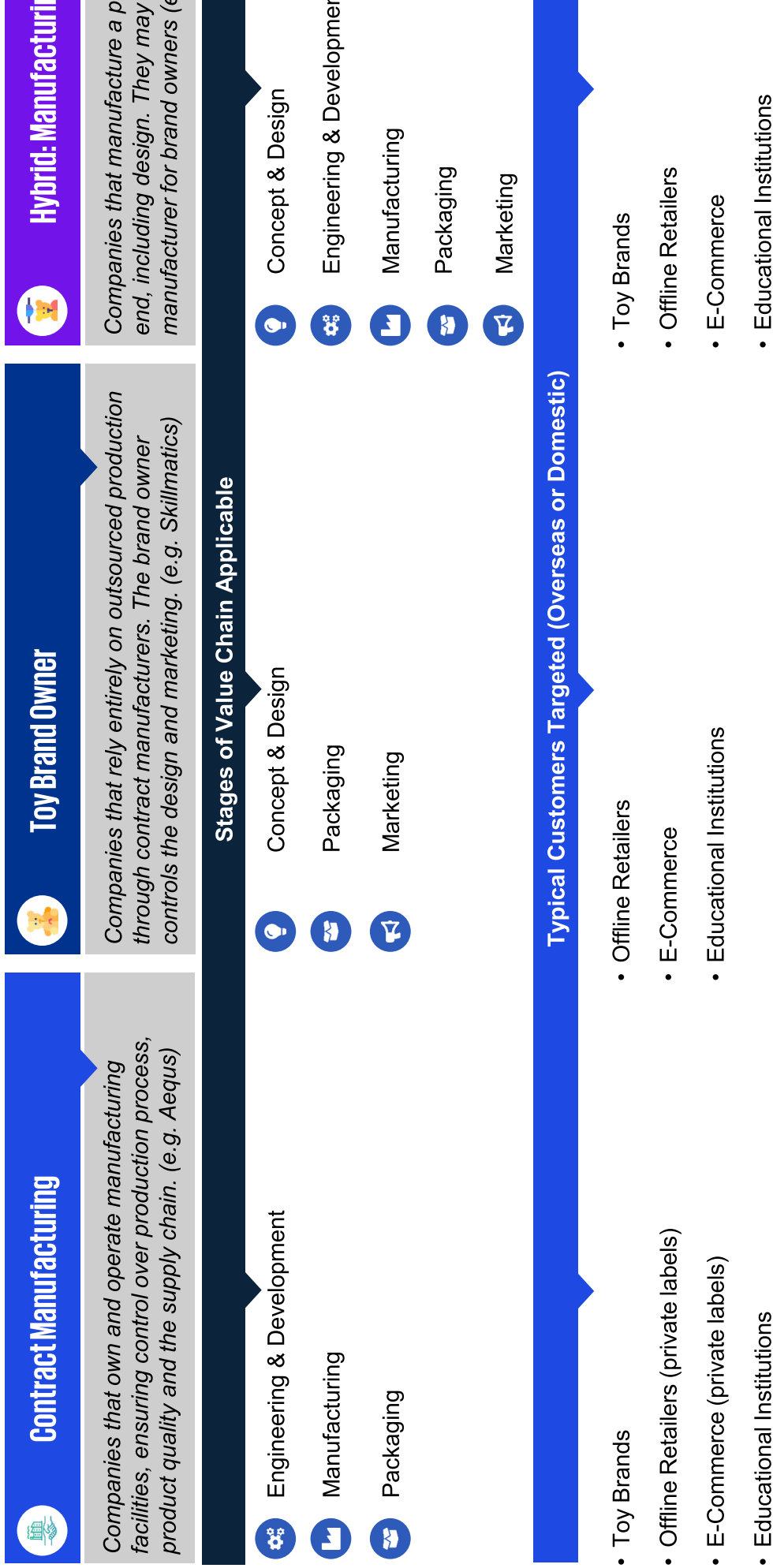
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Business Models & Applicable Value Chain Stages

Companies entering the Indian toy industry can choose one of the three business models



Source: Stakeholder & Industry Consultations

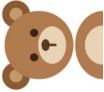
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Raw Materials, Availability and Sourcing Locations (1/3)

The table below provides an overview of key raw materials across major toy segments, along with their primary source states/cities, highlighting domestic availability.

Toy Segment	Raw Material	Primary Source States/ Cities (Domestic)
 Plush Toys ¹	Polyester Fibres (filling)	• Punjab (Ludhiana, Chandigarh) • Haryana (Panipat) • Gujarat (Surat, Dahej, Bharuch)
	Pile Fiber/Fabric	• Punjab (Ludhiana) • Haryana (Panipat)
	Cotton Blended Fabric	• Punjab (Ludhiana) • Gujarat (Surat)
	Cotton	• Tamil Nadu (Tirrupur, Karur)
 Paper-based: Puzzles, Board Games, Card Games, & Activity Sets	Paper	• Odisha (Rayagada, Balasore) • Gujarat (Surat, Vapi) • Maharashtra (Mumbai, Nashik) • Telangana (Bhadrachalam) • West Bengal (Tribeni, Hooghly)
	Board	• Gujarat (Vapi, Ahmedabad, Bharuch) • Maharashtra (Mumbai) • Uttar Pradesh (Noida)
	Glue	• Gujarat (Ahmedabad, Vadodara) • Maharashtra (Mumbai) • Local Manufacturers in Tamil Nadu
	Lamination Film	• Gujarat (Ahmedabad, Vadodara, Surat, Vapi) • Maharashtra (Mumbai, Pune) • Tamil Nadu (Chennai)

Note: Domestically Sourced Capability exists but also imported due to cost competitiveness Import-dependent

1. Plastic accessories used in plush toys (e.g., safety eyes & noses) are not widely manufactured in India at commercial scale and are largely sourced through imports to meet industry requirements.

The list is indicative and has been prepared based on inputs received from the Industry. Additional source states/cities may exist.

Source: Stakeholder and Industry Consultations

Raw Materials, Availability and Sourcing Locations (2/3)

Toy Segment	Raw Material	Primary Source States/ Cities (2019)
 Wooden Toys	Rubber Wood	- Karnataka (Channapatna) - Kerala - Tamil Nadu - Assam
	Medium-Density Fibreboard (MDF)	- Gujarat (Prantij) - Rajasthan (Behror) - Himachal Pradesh (Nalagarh) - Tamil Nadu (Thiruvananthapuram) - Andhra Pradesh (Naidupeta, Kadapa) - Punjab (Hoshiarpur)
	Imported Wood (such as Beech wood and Birch wood)	Completely Import dependent
	Brass	Uttar Pradesh (Moradabad)
 Metal Toys	Tin Plate	- Jharkhand (Jamshedpur) - Maharashtra (Tarapur)



Note: The list is indicative and has been prepared based on inputs received from the Industry. Additional source states/cities may exist.
Source: Stakeholder and Industry Consultations

Raw Materials, Availability and Sourcing Locations (3/3)

Toy Segment	Raw Material	Primary Source States/ Cities (in India)
 Plastic Toys (with Metallic and/or Electronic Accessories)	High-Density Polyethylene (HDPE)	- Gujarat (Ahmedabad, Vadodara) - Maharashtra (Mumbai, Pune) - Rajasthan (Jaipur, Bhiwadi, Alwar, Jodhpur material))
	Low-Density Polyethylene (LDPE)	
	Polypropylene (PP)	
	Acrylonitrile Butadiene Styrene (ABS) & Polyvinyl Chloride (PVC) Resin	- Gujarat (Ahmedabad, Vadodra, Surat, Rajkot) - Dadra and Nagar Haveli (Silvassa)
	Polyoxymethylene (POM)	- Gujarat (Ahemdabad, Vadodra, Surat, Vadodra) - Maharashtra (Mumbai, Pune) - Tamil Nadu (Chennai) - Delhi NCR
	Copolymer (CP)	Key polymer manufacturing and distribution hubs in India - Gujarat (Ahemdabad, Vadodra, Surat, Vadodra) - Maharashtra (Mumbai, Pune)
	Metal items (casing, shafts, pins, solder metal)	Gujarat (Rajkot)
Electronic sub-components ¹ (Resistor, Capacitor, Electrolytic Capacitor, MOSFET, Battery Charging, LED and others)	Import dependence on China but sourcing concentrated mainly in port-linked hubs in India - Tamil Nadu (Chennai) - Maharashtra (Mumbai)	

Domestically Sourced

Capability exists but also imported due to cost competitiveness

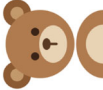
Import-dependent

Note: 1. Electronic sub-components (Resistor, Capacitor, Electrolytic Capacitor, MOSFET, Battery Charging, LED and others) are predominantly imported from China, with domestic sourcing concentrated mainly in port-linked hubs in Tamil Nadu (Chennai) and Maharashtra (Mumbai–Pune)

Source: Stakeholder and Industry Consultations

Machinery and Tooling Requirements (1/4)

The table below outlines segment-wise key machinery and tooling requirements across the Indian toy manufacturing industry, along with the major suppliers

Toy Segment	Equipment / Tooling	Domestic Suppliers (indicative)	Global Suppliers (Illustrative)
Key Machinery			
 Plush Toys	Printing Machine	- Monotech Systems - Technova Imaging	- Roland (Japan) - Konica Minolta (Japan) - Mimaki Engineering Co., Ltd. (Japan)
	CNC/ Die Cutting Machine	- Delta ModTech India - Natraj Industries	- YingYing Machinery (China) - Yihong (China) - Kunshan Haijin Machinery Co. (China) - Bullmer GmbH (Germany) - Zünd (Switzerland)
	Embroidery Machine	Usha Industrial	Brother (Japan)
	Needle Detectors	Local domestic Traders	- Lynn (China) - Hashima Co., Ltd. (Japan)
	Stuffing/ Filling Machine	- Terron India Pvt. Ltd. - Multipro Machines Pvt. Ltd. - Ramsons Garment Finishing Equipments Pvt. Ltd.	- Qingdao Caodahai Machinery Co. (China) - Kunshan Haijin Machinery Co. (China)
	Sewing Machine	No major domestic manufacturer highlighted by the industry	- Juki (Japan) - Brother (Japan) - Jack (China) - Daisen Sewing Machine Co., Ltd. (Japan) - Singer (USA)
	Laser Cutting Machine	- Mehta Cad Cam - Sahajanand Laser Technology Ltd.	- TRUMPF (Germany) - Bystronic (Switzerland) - Kasu Laser (China) - JHX Laser (China)

Note: The list is indicative and has been prepared based on inputs received from the Industry. Additional suppliers may exist..

Source: Stakeholder and Industry Consultations,

Machinery and Tooling Requirements (2/4)

Toy Segment	Equipment / Tooling	Domestic Suppliers (indicative)	Global Suppliers (If any)
Key Machinery			
 Paper-based: Puzzles, Board Games, Card Games, & Activity Sets	4 Col. Printing Machine	• Auto Coat (India)	• Komori (Japan) • Heidelberger Druckmaschinen (Germany) • Morlock (Germany) • Spinks (UK)
	Die Cutting Machine	• Natraj Industries • S.K. Engineers	• BOBST (Switzerland)
	Polar/ Perfect Machine 6 Clamp	• Local MSMEs	• Germany/Europe-based OEMs
	Cutting Machine	• Delta ModTech India • Natraj Industries	• POLAR Mohr (Germany)
	Gluing Machine	• Trio Manufacturing and Local MSMEs across Gujarat, Maharashtra, Punjab • Shaw Machines India Private Limited • Local MSMEs across Gujarat, Maharashtra, Punjab	• Baumer GmbH (Germany) • Nordson Corporation (USA) • Local suppliers in Taiwan / China
	Strapping Machine	• Local MSMEs across Gujarat, Maharashtra, Punjab • Mac Printing Solution	• Mosca GmbH (Germany) • Signode Industrial Group LLC • Local suppliers in Taiwan / China
 Wooden Toys	Panel Saw	• Umaboy • Shree Umiya Engineers • Woodmaster (India) Machines Pvt Ltd	• HOMAG Group (Germany) • SCM Group (Italy)
	Screen Printing Machine	• Inks for Toys • Impression Machinery India Pvt Ltd.	• M&R Printing Equipment, Inc. • Sakurai Graphic Systems Corp
	Spray Painting Machine	• Autocoat Engineering • Kuber Industries	• Jinda (China)

Note: The list is indicative and has been prepared based on inputs received from the Industry. Additional suppliers may exist..

Source: Stakeholder and Industry Consultations,

Machinery and Tooling Requirements (3/4)

Toy Segment		Equipment / Tooling	Domestic Suppliers (indicative)		Global Suppliers (//)
 Wooden Toys	Laser Cutting Machine		Key Machinery		
	Saw Milling		• Mehta Cad Cam • Sahajanand Laser Technology Ltd.	• TRUMPF (Germany) • Bystronic (Switzerland)	
			• Omkar Industries • Jai Industries	• SCM Group (Italy) • Biesse (Italy)	
	CNC Router		• Jyoti CNC Automation • Kovai Woodstar Automation • Jai Industries • Mehta India	• Biesse (Italy) • HOMAG Group (Germany)	
			• Monotech Systems • Axis Enterprises • Mehta Cad Cam • ColorJet Group	• Roland (Japan) • Mimaki Engineering Co., Ltd. (Japan)	
	UV Printing		• Local MSMEs • Bharat Press • Unik Technologies	• Schuler (Germany) • AIDA (Japan)	
			• Monotech Systems • TechNova Imaging Systems Pvt. Ltd.	• Heidelberger Druckmaschinen (Germany) • Komori (Japan)	
	Zinc Casting Machine		• SP Industries • Yashi Foundry Equipments	• Itaipresse Guas (Italy) • Bühler (Switzerland)	
			• Mehta Cad Cam • Sahajanand Laser Technology Ltd.	• TRUMPF (Germany) • Bystronic (Switzerland)	
 Metal Toys	Vertical Machining Center		• Jyoti CNC • Ace Micromatic,	• DMG Mori (Germany/Japan), • Haas Automation, Inc. (USA)	

Note: The list is indicative and has been prepared based on inputs received from the Industry. Additional suppliers may exist..

Source: Stakeholder and Industry Consultations,

Machinery and Tooling Requirements (4/4)

Toy Segment	Equipment / Tooling	Domestic Suppliers (indicative)	Global Suppliers (If any)
 Plastic Toys (with Metallic and/or Electronic Accessories)	Soldering Machine	Soldron, Renders India Pvt. Ltd.	- JBC (Spain) - Hakko (Japan) - Toki (Japan)
	Hot Runner Temperature Controller	- Localized operations of global players (Yudo – South Korea, Husky/Mold-Masters – Canada) - GJ Enterprises	- Yudo (South Korea) - Husky Technologies (Canada)
	Blow Moulding Machine	- Windsor Machines Ltd. - Jagmohan Pla-Mach Pvt. Ltd. - Ferromatik Milacron India Pvt. Ltd.	- Haitian International (China) - Kautex Maschinenbau System
	Injection Moulding Machine	- Asian Plastic - Ferromatik Milacron India Pvt. Ltd. - Shuangma Machinery Pvt. Ltd.	- Haitian International (China) - ENGEL Austria GmbH (Austria) - Toshiba (Japan) - Shibaura Machine Co. Ltd. (Japan)
	Roto Moulding Machine	- Excel Machinery - Pearl Engineering	- Ferry Industries (USA) - Rotoline (Italy)
 All Toy Segments	Dies, Moulds, Jigs, and Fixtures	- Maharashtra (Pune, Mumbai) - Karnataka (Bengaluru) - Toolcraft - Jyoti Plastics Works - Vikas Industries	- HASCO Hasenclever GmbH + Co. (Germany) - DME (USA) - Local exporters of China

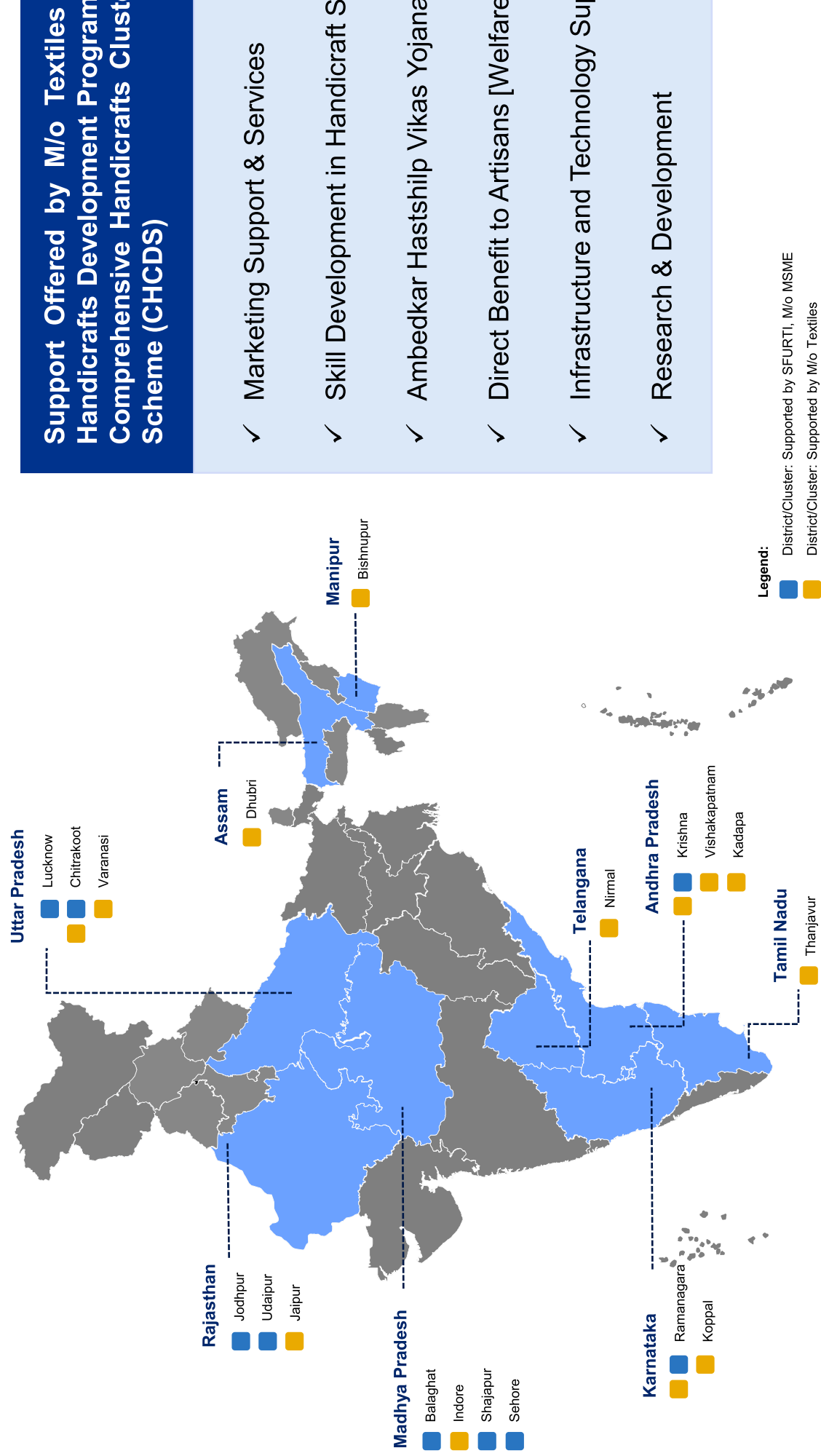
Note: The list is indicative and has been prepared based on inputs received from the Industry. Additional suppliers may exist.
Source: Stakeholder and Industry Consultations,

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Toy Clusters Supported By M/o MSME and M/o Textiles



Support Offered by M/o Textiles
Handicrafts Development Program
Comprehensive Handicrafts Cluster
Scheme (CHCDS)

- ✓ Marketing Support & Services
- ✓ Skill Development in Handicraft S
- ✓ Ambedkar Hastshilp Vikas Yojana
- ✓ Direct Benefit to Artisans [Welfare
- ✓ Infrastructure and Technology Sup
- ✓ Research & Development

Note: SFURTI under M/o MSME is currently not approving any new projects; Out of ~50 clusters previously funded/supported by ministries, only functional/active clusters currently exist.
Source: SFURTI (M/o MSME), Ministry of Textiles

For Large-Scale Toy Production Players May Avail Land at Industrial Corridors

As on May 2026, Large scale Toy industry players may also avail plug and play infrastructure in the Industrial Land at Industrial Corridors in Maharashtra, Uttar Pradesh and Madhya Pradesh offered through respective SPV's

Project	Industrial use		
	Allotted to various sectors	Remaining (Large toy players may also avail)	% area allotted
Dholera, Gujarat	6 plots (436 acre)	17 plots (1,083 acre)	29%
SBIA, Maharashtra	249 plots (3,284 acre)	34 plots (771 acres)	81%
IITGN, Uttar Pradesh	29 plots (275 acre)	15 plots (92 acre)	75%
IITVU, Madhya Pradesh	67 plots (519 acre)	2 plots (2 acre)	99%
Total	351 plots (4,514 acre)	68 plots (1,948 acre)	70%

Plug-and-Play Infrastructure in Industrial Corridors – Key Features

- World-class infrastructure in industrial corridors.
- Reduced logistics cost and time to dedicated freight corridors networks.
- Enhanced competitiveness through major industries.
- Reliable smart city-level infrastructure plot level, enabling faster industrial growth.
- Availability of common facilities like Effluent Treatment Plant, Water Treatment Plant (Sewage Treatment Plant) reducing burden on industries.
- Improved ease of doing business through single window business planning and Centre-State partnership.
- Mega-cluster approach enabling economies of scale.

Note: Potential Investors may have a virtual tour of the above locations. Refer Annexure(s) for the list of relevant portals. The land mentioned above is not exclusively demarcated for Toy Industry.

Source: Industrial Corridor & IICC, DPIIT

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Status of State Policies Promoting Toy Sector

State	Policy Name	Policy Validity	Scope	Description
Tamil Nadu	Tamil Nadu Toy Manufacturing Policy 2025	Valid for a period of 5 years from the date of notification or until a new policy is announced.	Toy Sector Focused	Sector-specific policy aimed at positioning Tamil Nadu as a global hub for toy manufacturing, spanning industrial toy production, design-led innovation, and traditional/artisanal toys
Madhya Pradesh	Madhya Pradesh MSME Development Policy 2025	Will remain in force until amended or replaced by a new policy as determined by the Government of Madhya Pradesh.	MSME Focused	Toy explicitly is listed under designated sector in MP MSME Development Policy
Haryana	Haryana Toys and Sports Equipment Manufacturing Policy	Valid for a period of 5 years from the date of notification of this policy or the date of any new policy/amendment introduced by the Government of Haryana, whichever is earlier.	Electronic Toy Focused	Sector-specific policy aimed at positioning State as a hub for electronic and technology led toy manufacturing.
Karnataka	Government of Karnataka Industrial Policy	Valid for a period of 5 years from the date of issue of the Government Order or till such time that a new policy is introduced by the Government of Karnataka.	Industrial	Special financial assistance and concessions for manufacturing units of toys and related value chain products.
Uttar Pradesh	Uttar Pradesh Industrial Investment and Employment Promotion Policy	The policy will come into effect on the date of its notification and will remain in force for the period of 5 years	Industrial	The policy includes 'promoting industrial and clusters for toys' to foster local and investment in toys and generate employment in the sector.

Tamil Nadu Toy Manufacturing Policy 2025 – Key Highlights

Capital and Land
Investment enablers

Fiscal and Utilities
Duties, tariffs, workforce

Innovation and Talent
R&D, IP, quality, skills

Sustainability
Green incentives

1 Sectoral Relevance
Dedicated toy-sector policy covering toy design, manufacturing, and ancillary/upstream entities

1 Stamp Duty Exemption
100% exemption for SIPCOT land lease/purchase; 100% back-ended subsidy for private land (up to 50 acres), MSME ; 50% reimbursement of actual value

1 Skill Development
Training subsidy INR 4,000/worker/month for 6 months (TN residents); INR 6,000 for women, transgender, PwD & SC/ST

1 Pollution & Greening
Energy Audit: 75% + 50% subsidy on recommendations

2 Capital Investment Subsidy
For projects > INR 50 Cr + 50 jobs: Fixed Capital Subsidy – 7% EFA (dist.A,5 yrs), 10% (dist.B,10 yrs), 12% (dist.C, 10 yrs)

2 Electricity Duty Exemption
5-year exemption on electricity tax for power purchased from TNPDCL or generated & consumed from captive sources

2 Product Design & Tech Upgrade
Innovation vouchers (₹2–5 lakh), TANFUND startup support, and 75% reimbursement (up to ₹30 lakh) for SME exchange listing.

2 ETP / CET
Subsidy for adopting technologies (25%) up to INR 10 lakh

3 Land
SIPCOT Land: 10% concession in A/B districts; 50% concession in C districts for land up to 20% of EFA

3 Power Tariff Subsidy
20% of power consumption charges paid to TANGEDCO for the first 36 months for new micro-enterprises or existing units under expansion

3 IP Filing Incentives
50% reimbursement of IP registration costs (Patents, Copyrights, Trademarks & GI), up to ₹1 Cr.

3 Cluster Development & Artisans
Artisan Support: Cluster tooling & storage, access, and artisan

4 Machinery
25% capital subsidy on P&M value (up to ₹1.5 Cr for Small & Medium enterprises; ₹25 Lakh for Small enterprises)

4 R&D Incentive
30% payroll subsidy for 12 months to creative studios undertaking toy design or R&D related to toys

4 Export Subsidy
50% reimbursement and stall/space charge (domestic) and ₹1

4 Export Subsidy
50% reimbursement and stall/space charge (domestic) and ₹1

5 Interest Subsidy
5% back-ended for up to 5 yrs on loans up to ₹ 2 Cr with CGTMSE coverage or INR 5 Cr (tech upgradation/ modernization)

4 ESI / PF Subsidy
EPF for first 3 yrs from commercial production if enterprise employs >20 persons, or has 25% differently-abled workforce; ceiling INR 24,000 per person p.a.

5 Quality Certification
50% cost reimbursement (up to ₹1 Cr); MSMEs: 100% reimbursement (up to ₹2 lakh national / ₹10 lakh international).

5 Market Access
Support for RBSP Programs, PSU B trade fairs, e-commerce

Source: For details regarding each incentive, please refer to Tamil Nadu Toy Manufacturing Policy 2025

Madhya Pradesh MSME Development Policy 2025 – Key Highlights

Capital and Land Investment enablers	Fiscal and Utilities Duties, tariffs, workforce	Innovation and Talent R&D, IP, quality, skills	Sustainability Green incentives
1 Sectoral Relevance  Direct MSME policy coverage for eligible manufacturing units in footwear, furniture, toys and related value-chain sectors	1 Interest Subsidy  Interest subsidy at 5% p.a. on term loans taken from banks/financial institutions for the project. Maximum limit of INR 100 lakh per year, for a duration of 5 years 2 Stamp Duty Exemption  50% reimbursement of stamp duty and registration fees paid on land/bank loan documentation for project implementation	1 IP Filing Incentives  MSMEs: 100% reimbursement for patents/IPR registration (cap INR 10 lakh/patent). R&D-linked patents: up to INR 50 lakh. 2 ESI / PF Subsidy  INR 5,000/employee/month for new hires in first 3 yrs of commercial production; 3 Skill Development  Reimbursed up to INR 10,000/employee (permanent residents of MP) 4 Product Design & Tech  50% expenditure or up to INR 5 lakh per design (max 4 designs) 5 Quality Certification  100% reimbursement (cap INR 20 lakh). Export certs: 50% (cap INR 50 lakh). ZED certification: 10/20/25% by tier. 6 R&D Incentive  25% capital subsidy up to INR 25 Cr for building/testing machines/equipment	1 Pollution Control & Greening Energy Audit: 50% (up to INR 50,000) energy-efficient equipment. Green Industrialization: waste management safety, and water conservation (up to INR 50 lakh). 2 ETP / CETP 50% financial assistance of CETP up to INR 50 lakh. 3 Cluster Development 60% subsidy for developing industrial areas/cluster. 4 Export Support Export Incentive: Assistance for export-oriented units. Export Multiplier: Up to 10% assistance based on export.

Source: For details regarding each incentive, please refer to MP MSMED Policy 2025

Haryana Toys and Sports Equipment Manufacturing Policy – Key Highlights

**Capital and Land**
Investment enablers

**Fiscal and Utilities**
Duties, tariffs, workforce

**Innovation and Talent**
R&D, IP, quality, skills

**Sustainability**
Green incentives

1

Sectoral Relevance



Dedicated toy-sector policy with focus on electronic toys

2

Capital Investment Subsidy



30% reimbursement of eligible capital expenditure (ECE) (up to INR 50 Cr. per unit).
Eligible CAPEX includes investments in construction of buildings, purchase of plant and machinery, infrastructure, manufacturing equipment, IT systems, captive renewable energy, environmental compliance facilities, and technology acquisition, payment of stamp duty on sale / deeds for setting up unit / enterprise, payment of external development charges and others

3

Dormitory



Construction of worker hostels/dormitories qualifies as FCI.. Dormitories are permitted as common social infrastructure in Manufacturing Parks/Clusters

1

Stamp Duty Exemption



Stamp duty included in eligible CAPEX and 100% reimbursement provided for industrial park developers for parks being developed in Sub-Prime and Prime/Focus Areas

2

Electricity Duty Exemption



Reimbursed as part of OPEX support, 70% of eligible expenditure incurred for a period of 5 years from the date of commencement of production/operations, max. INR 3 Cr. p.a.

3

Power Tariff Subsidy



Electricity duty reimbursement under OPEX; Renewable captive power incentives also provided (≥ 100 kW): INR 50 lakh/MW (max. INR 2.5–10 crore)

4

ESI / PF Subsidy



100% reimbursement of EPF contributions for employees recruited through HKRN, up to INR 25,000 per employee per year for 5 years

1

IP Filing Incentives



Domestic Patent: INR 50 lakh/patent (max. INR 5 crore/unit); International Patent: INR 1 crore/patent (max. INR 10 crore/unit).

2

Skill Development



Internship reimbursement: 50% stipend reimbursement, up to ₹15,000 per intern per month for 6 months, capped at 50 intern

3

Product Design & Tech



CAPEX includes technology acquisition (up to INR 1 Cr/year) CoEs and design labs/ studios supported.

4

Quality Certification



Reimbursement of certification costs under OPEX support for standards like QCO for toy manufacturing, BIS, CE, CPC, ASTM,.

5

R&D Incentive



50% capital subsidy (up to INR 10-50 Cr) and 50% OPEX reimbursement (up to INR 2 Cr/year) for R&D centres.

1

Pollution Control & Greening



Green incentives in form of reimbursement under pollution certification, air pollution

2

ETP / CETP



ETP systems included in separate subsidy. Separate cost up to INR 5-10 crore

3

Cluster Development



Capital subsidy of up to INR 10 crore for infrastructure CAPs with maximum support of INR 50 crore

4

Export Subsidy



3% annual export subsidy under CAPEX-linked export credit reimbursement also

5

Market Access



Support through B2B, GeM, ONDC integration and engagement programs

Source: For details regarding each incentive, please refer to Haryana Toys and Sports Equipment Manufacturing policy

Karnataka Industrial Policy 2025-30 - Key Highlights

**Capital and Land**
Investment enablers

**Fiscal and Utilities**
Duties, tariffs, workforce

**Innovation and Talent**
R&D, IP, quality, skills

**Sustainability**
Green incentives

**1 Sectoral Relevance**

Toys not explicitly identified as a focus sector; eligible for incentives under the state's industrial policy

**2 Capital Investment Subsidy**

Large/Mega/Ultra Mega: capital subsidy up to 25% / 20% / 10% by zone

**3 Land**

Land conversion fee reimbursement - Zone 1 & 2 at 100%; Zone 3 Nil.

**4 Machinery**

Fixed capital Investment includes P&M, R&D equipment, tools, jigs, fixtures, dies, utilities & productive assets

**5 Dormitory**

CAPEX option: Same capital subsidy rate as base subsidy, on dormitory construction cost, capped at ₹1 crore per 1,000 persons accommodated.
PLI option: One-time subsidy up to ₹1 crore per 1,000 persons accommodated

**1 Interest Subsidy**

Only MSMEs are eligible - Soft Seed Capital Assistance, interest-free loan support, and certain loan-related support measures.

**2 Stamp Duty Exemption**

Zone 1 – 100%, Zone 2 – 75%, Zone 3 – Nil (including eligible loan and industrial property documents)

**3 Electricity Duty Exemption**

MSMEs: exemption from electricity tariff tax - Zone 1: 100% for 7 yrs; Zone 2: 100% for 6 yrs; Zone 3: Nil.

**4 Power Tariff Subsidy**

MSMEs in Zone 1 & 2 only: reimbursement of INR 1 per unit of power consumed, for a period of 3 years.

**1 R&D Incentive**

Large, Mega & Ultra Mega enterprises setting up manufacturing units in Karnataka and having (or establishing) an R&D facility in the state are eligible for a 10% booster on the chosen base incentive (Capital Subsidy or PLI) for the manufacturing investment.

**2 Quality Certification**

MSMEs: 50% of application cost, capped INR 5 lakh per entity - covers ISO, BIS, FSSAI-AGMARK and others

**3 Skill Development**

Industry adoption of ITIs, customized industry-led curricula, training programs through GTTC and Nipuna Karnataka, and industry-academia collaborations to create a future-ready workforce

**1 Pollution Control Greening**

Air pollution control equipment cost, up to ₹50 lakh per facility: 50% cap

**2 ETP / CETP**

ETPs/ZLD: 50% subsidy on capital cost – up to ₹50 lakh per crore for large units

**3 Cluster Development (Artisans)**

Artisans supported in Villages, free training, study tours, concessional

**4 Export Support**

MSMEs: 50% of a maximum of INR 5 lakh per entity for export certifications.

**5 Market Access**

Vendor Development Program, Investors Meet - platform for business linkages and investment

Note: Fixed Capital Investment is a total investment made on land, building and plant & machinery including R&D equipment and other productive assets like tools, jigs & fixtures, dyes, material handling equipment and such other equipment directly related to commercial operations.

Source: For details regarding each incentive, please refer to Karnataka Industrial Policy 2025 - 30

UP Industrial Investment & Employment Promotion Policy - Key Highlights

**Capital and Land**
Investment enablers

**Fiscal and Utilities**
Duties, tariffs, workforce

**Innovation and Talent**
R&D, IP, quality, skills

**Sustainability**
Green incentives

1 **Sectoral Relevance** 

Umbrella industrial policy proposing sector-specific parks/clusters including a Toy Park

1 **Stamp Duty Exemption** 

100% exemption on stamp duty on the purchase of land by the developer.

1 **IP Filing Incentives** 

50% reimbursement of expenditure for patent, copyright, trademark and GI from in-house R&D, cap INR 1 Cr

1 **Pollution Control & Greening**

Investment in and collection, treatment effluent/emission of hazardous waste -

2 **Capital Investment Subsidy** 

25% capital subsidy on eligible FCI (including buildings, excluding land cost and hostel/dormitory housing), capped at INR 40–45 Cr for 20–30 acre parks and INR 80 Cr for parks above 100 acres

2 **Electricity Duty** 

- Measures to reduce AT&C losses (administrative measures, curbing theft & pilferage, dedicated police stations)
- Grievance redressal for electricity connections strengthened.

2 **Skill Development** 

Skill Development Centres in industrial areas/clusters/parks, and apprentice-based youth training

2 **ETP / CETP**

Pollution control, wastewater effluent treatment under P&M investment

3 **Building** 

Building cost (including factory buildings, R&D facilities, storage, office space, and worker hostel/dormitory buildings) is eligible under Capital Investment

3 **Product Design & Tech** 

Promote testing labs, quality certification labs and tool rooms. Strategic alliance framework with various design agencies

3 **Cluster Development**

Strengthening industrial corridors, Industrial Corridors Institutes and other

4 **Dormitory** 

25% capital subsidy on the cost of building Hostel/Dormitory Housing for workers (excluding land cost), up to INR 25 Cr for Private Industrial Parks of 20–30+ acres and up to INR 50 Cr for Parks of 100+ acres

4 **Quality Certification** 

Set up testing labs, quality certification labs, tool rooms. Collaboration with QCI, BIS

4 **Export Support**

Promoting EoUs under marketing assistance cargo by air, freight gateway port

5 **R&D Incentive** 

Government will reimburse 25% of the expenditure, subject to a maximum of INR 10 Cr, for standalone R&D units.

5 **Market Access**

Improving Market Access for MSME products and MSM business match making

5 **Market Access**

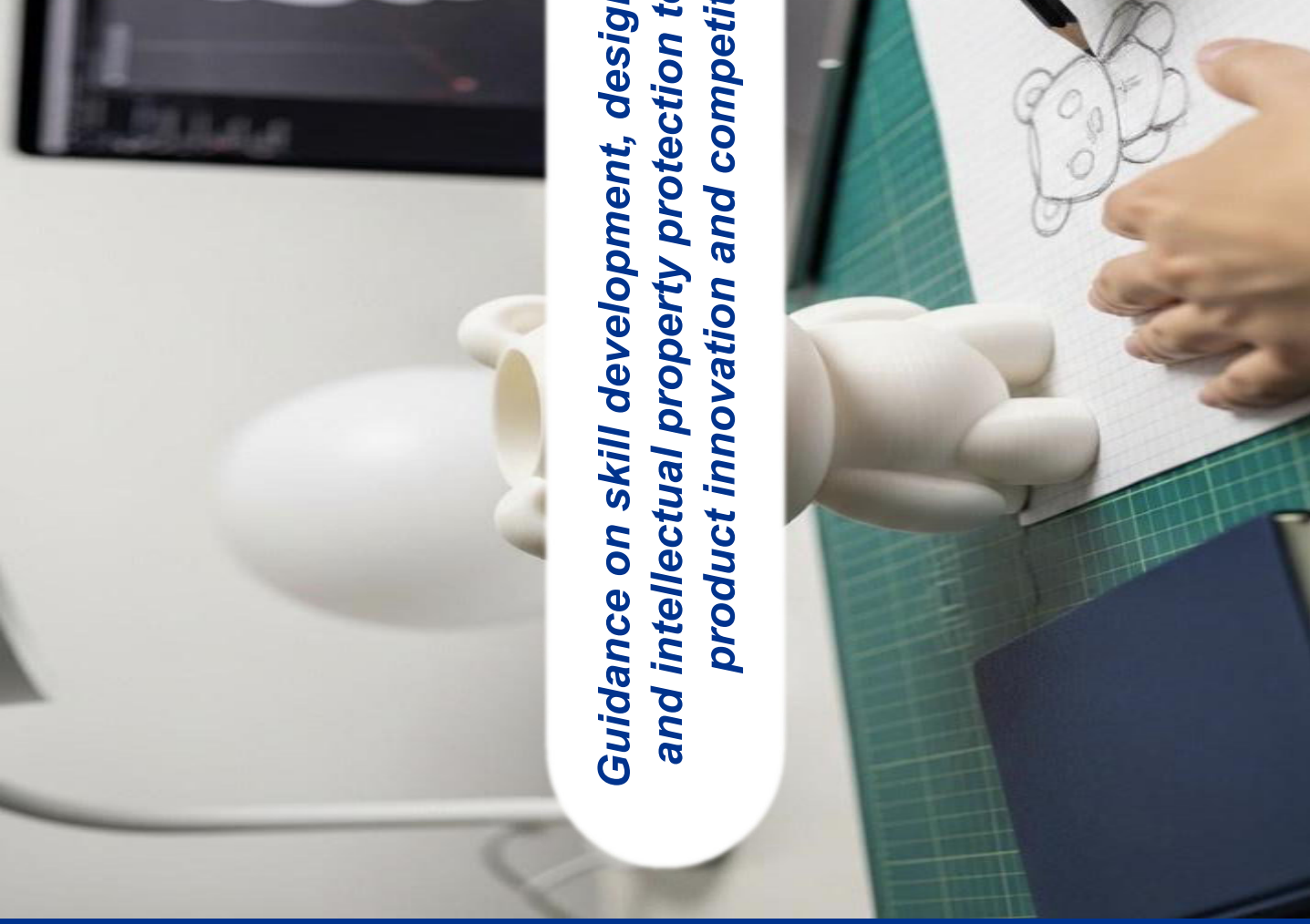
Improving Market Access for MSME products and MSM business match making

Source: For details regarding each incentive, please refer to *Uttar Pradesh Industrial Investment and Employment Promotion Policy 2022*

Volume 3: Skill, Design and Product Development

- Chapter 1: Skill and Design Requirements
- Chapter 2: IP Protection Landscape

Guidance on skill development, design and intellectual property protection to support product innovation and competition



Workforce Composition and Skill Requirements: 4 Tier Workforce

The toy industry requires a four-tier workforce, from foundational and semi-skilled roles to technical, design and supervisory roles, combining creativity, engineering, manufacturing expertise, quality assurance, and business capabilities.

Foundational & Semi-Skilled

These roles form the backbone of toy production and assembly operations

Roles: Assembly Workers, Soft Toy Makers, Painters and Surface Finishers, Packaging Operators, Screen Printing Operators, Fabric Cutters, Stitching Operators, Toy Finishing and Decoration Work

Skills: Material handling, Assembly procedures, Pattern cutting, Sewing and stitching, Surface finishing, Visual quality inspection, Packaging and labeling, Production hygiene and safety

Design & Development

These roles are responsible for creating the toy and shaping the intended play experience.

Roles: Toy Designers, Industrial Designers, Play Designers, Game Designers, Interaction Designers, Graphic Designers, Packaging Designers, Learning Experience Designers, Character Designers

Skills: Understanding play behaviour, Concept development, Prototyping, User-centred design, Visual communication, Storytelling, Experience design, Child-centred research

Technical & Skilled

These roles transform concepts into manufacturing reality

Roles: Injection Moulding Operators, CNC Machine Operators, Technicians, Mould Designers, Electronics Assembly Technicians, Assembly Technicians, CAD Modelling Engineers, Production Technicians, Quality Control Technicians

Skills: CAD software, Product engineering, Tool and Die design, Material processing, Electronics integration, Product testing, documentation and Safety compliance

Supervisory & Management

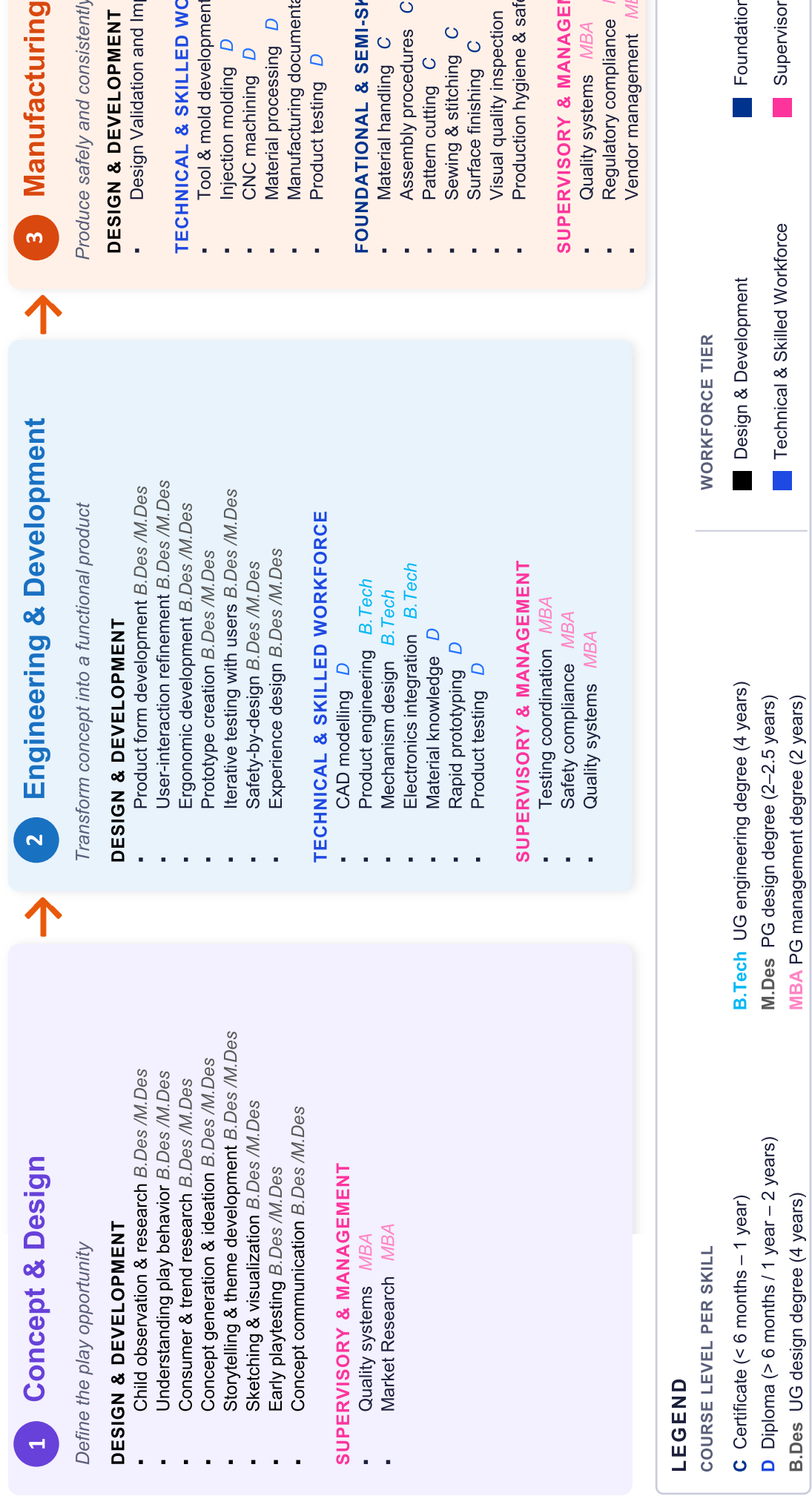
These roles ensure efficient operations and maintain quality standards

Roles: Production Supervisors, Quality Managers, Cost Engineers, Supply Chain Managers, Procurement Specialists, Production Managers

Skills: Production planning, Quality systems, Regulatory compliance, management, Cost control, Team leadership, Market strategy

Mapping of Skills across the Toy Value Chain (1/2)

Each stage of toy value chain, from concept and design to manufacturing, packaging and marketing, requires different skills



Mapping of Skills across the Toy Value Chain (2/2)

Each stage of toy value chain, from concept and design to manufacturing, packaging and marketing, requires different skills

4

Packaging

Communicate value and protect product

DESIGN & DEVELOPMENT

- Graphic design B.Des /M.Des
- Packaging structure design D
- Visual communication B.Des /M.Des
- Product storytelling B.Des /M.Des

FOUNDATIONAL & SEMI-SKILLED

- Packaging & labeling C
- Screen printing C
- Surface finishing C
- Visual quality inspection C



5

Marketing

Reach consumers and build demand

DESIGN & DEVELOPMENT

- Graphic design B.Des /M.Des
- Character & story design B.Des /M.Des
- Brand identity design B.Des /M.Des
- Communication design B.Des /M.Des
- Product photography & content C
- Content development B.Des /M.Des

SUPERVISORY & MANAGEMENT

- Branding & positioning MBA
- Market research MBA
- Digital marketing MBA
- Retail strategy MBA
- Consumer engagement MBA
- Managing Design and Product MBA

LEGEND

COURSE LEVEL PER SKILL

C Certificate (< 6 months – 1 year)

D Diploma (> 6 months / 1 year – 2 years)

B.Des UG design degree (4 years)

B.Tech UG engineering degree (4 years)

M.Des PG design degree (2–2.5 years)

MBA PG management degree (2 years)

WORKFORCE TIER

Design & Development

Technical & Skilled Workforce

Foundation

Supervisory

Note: Course level per skill are indicative and not exhaustive

Source: Stakeholder Consultations (Insights from a Faculty Member, Toy and Game Design Programme, National Institute of Design)

Distinct Skill Requirements Across Segments

Each toy product segment may demand a distinct mix of material, engineering and design skills.



Plush Toys

- Pattern making
- Fabric selection
- Stitching & sewing
- Embroidery
- Stuffing & finishing
- Accessory & safety compliance



Plastic Toys

- CAD modelling
- Tool & mould design
- Injection moulding
- Material science
- Surface finishing
- Production engineering



Electronic & Smart Toys

- PCB design & assembly
- Embedded systems
- Sensors & actuators
- Firmware integration
- Product testing
- Battery & electrical safety

Board & Game Toys

- Play design
- Game mechanics
- Graphic design
- Instructional design
- Learning design
- Playtesting

Building a Multidisciplinary Toy Design Workforce

Toy design requires multidisciplinary effort combining play, product, engineering, communication, learning and business. Companies that integrate these capabilities are more likely to create innovative, differentiated and globally competitive products.

 Play Designers <i>Designing the play experience itself</i> Play behaviour · Play opportunities · Play interactions · Engagement loops · Playtesting Makes the product genuinely engaging, enjoyable and meaningful.	 Industrial & Product Designers <i>Designing the physical toy</i> Product form development · Ergonomics · User interaction · Assembly Transforms ideas into usable and manufacturable products
 Game Designers <i>Designing structured play systems</i> Rules & mechanics · Challenge design · Progression systems · Balancing · Instruction design Creates engaging gameplay for board, card, educational and hybrid products.	 Interaction Designers <i>Designing user-product interactions</i> Physical interactions · Digital interfaces · Smart-toy interaction design Enhances engagement through physical and digital interaction
 Graphic & Communication Designers <i>Designing visual communication</i> Packaging design · Branding · Instruction design · Product graphics · Marketing communication Helps consumers understand, navigate and connect with brands.	 Learning & Educational Designers <i>Designing learning-through-play experiences</i> Educational content · Learning-objective mapping · Activity design · Assessment Ensures educational products effectively combine learning and play
 Child Development Specialists <i>Understanding children's growth and development</i> Developmental milestone analysis · Child observation · Behaviour studies · Age-appropriateness · Research with children Helps create products that are developmentally appropriate and safe.	 Content, Story & Character Designers <i>Creating narratives and intellectual property</i> Character creation · Story development · World building · Naming · Branding Builds emotional connection, brand value and long-term IP
 Toy Engineers & Technical Designers <i>Translating concepts into functional products</i> Mechanism design · Product engineering · Electronics integration · CAD development · Manufacturing coordination Bridges creativity and engineering so products work reliably.	 Material & Manufacturing Specialists <i>Optimizing materials and production processes</i> Material selection · Sustainability assessment · Tooling · Production scaling Improves quality, safety, durability, manufacturability and cost

Source: Stakeholder Consultations (Insights from a Faculty Member, Toy and Game Design Programme, National Institute of Design)

Sourcing of Skilled Workforce

Skilled work force in the toy industry is recruited from a range of disciplines, including industrial design, product design, interaction design, engineering, animation, education, psychology, and game design.



Design institutions

INSTITUTION	RELEVANT AREAS
National Institute of Design (NID)	Product, Toy & Game Design, Animation, Interaction
Indian Institute of Technology (IIT) - Bombay, Guwahati, Hyderabad, Delhi, Roorkee and Indore	Industrial & Product Design
National Institute of Fashion Technology (NIIFT)	Product & Communication Design

** Many private institutes also offer courses in Industrial and Product Design, for instance, Shrishti Manipal, Symbiosis, MIT Design, UnitedWorld Institute of Design and others*

Professionals are typically hired from engineering institutes such as Central Institute of Petrochemicals Engineering & Technology (CI PET), National Institute of Technology (NITs), engineering colleges (from Mechanical, Electronics, Manufacturing Engineering, etc.) and National Institute of Electronics & Information Technology (NIEET) and Industrial Training Institutes (ITIs).

A strong toy ecosystem depends on both design and engineering talent. The future growth of the Indian toy industry will depend on increasing collaboration between design institutions, engineering institutions, manufacturers, startups, and educational institutions to create innovative, safe, and globally competitive products.

Note: List is indicative and not exhaustive

Source: Stakeholder Consultations (Insights from a Faculty Member, Toy and Game Design Programme, National Institute of Design)

Volume 3: Skill, Design and Product Development

- Chapter 1: Skill and Design Requirements
- Chapter 2: IP Protection Landscape



IP Protection: Five-Pillar Framework for the Toy Sector

For domestic toy manufacturers, a structured IP strategy is essential to protect product appearance, technology, brand content, while supporting innovation, differentiation and scale.



A toy is often more than a physical product. Its commercial value may arise from its design, brand identity, characters, education packaging, or innovative functionality. Different forms of intellectual property protect different elements of the toy value chain.

Source: IPR Division, DPIIT

Freedom to Operate (FTO): An Essential Check Before Commercializing a Toy

Before manufacturing, branding, licensing, or selling a toy product, businesses should assess whether their product infringes on the intellectual property rights of others. FTO helps identify and mitigate such risks prior to commercialization.

What is Freedom to Operate (FTO)

- Freedom to operate means you are free to use your product or service as you have planned, without incurring legal liability for this use
- Legal liability can arise from the unauthorized use of protected intellectual property (IP) owned by a third party



Failure to assess third-party rights may expose businesses to risks

- Legal disputes and infringement claims
- Product recalls or market withdrawal
- Licensing costs after launch
- Delays in commercialization and exports
- Reputational and financial losses

FTO Assessment Areas	Example in Toy Sector
Patents	Toy mechanisms, electronics, robotics, smart features
Designs	Shape, appearance, ornamentation
Trademarks	Brand names, logos, product names, slogans
Copyrights	Characters, artwork, stories, software, packaging content



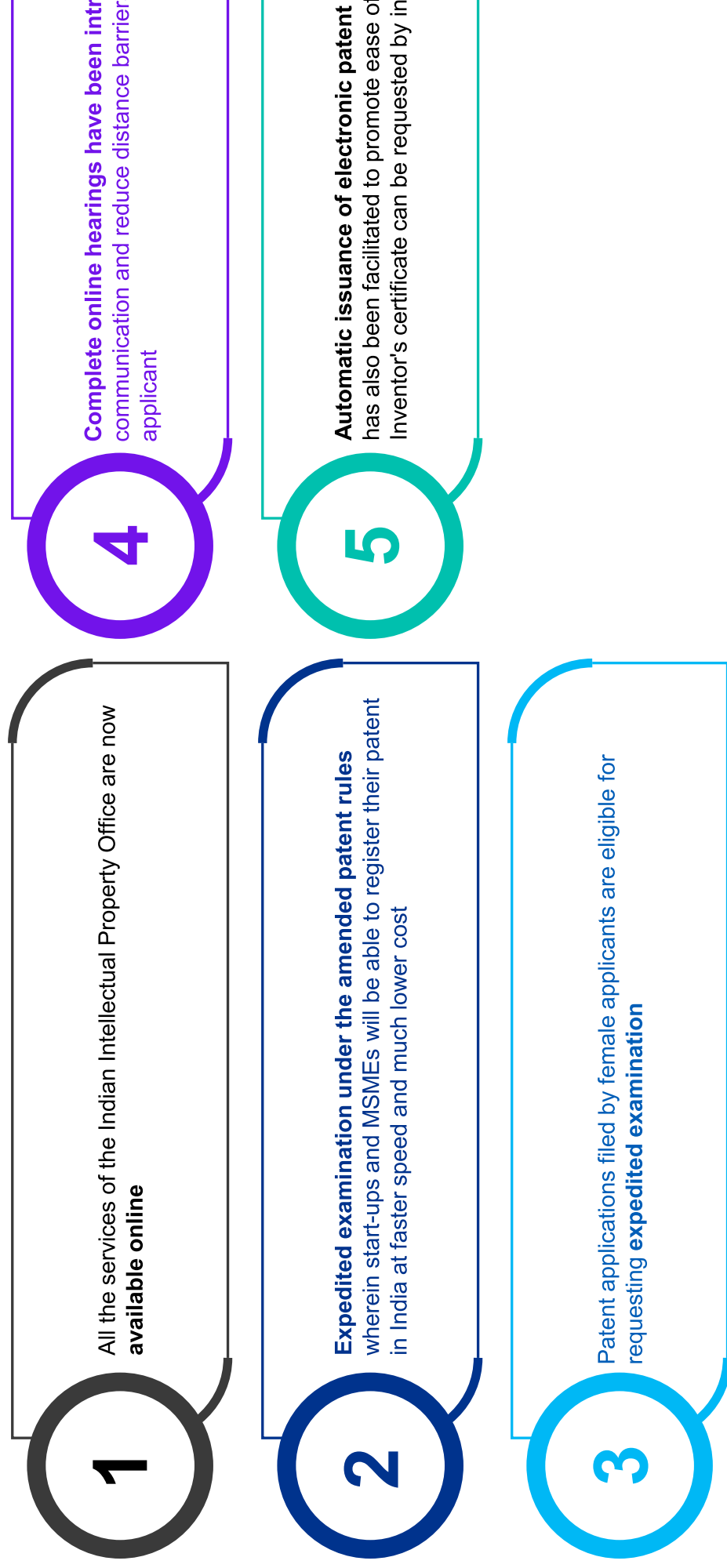
Key Questions Before Launching a Toy

- ✓ Is the toy design similar to an existing protected intellectual property?
- ✓ Does any patented mechanism or technology infringe on existing patents?
- ✓ Is the proposed brand name or logo already registered?
- ✓ Are characters, artwork, stories, or graphics protected by copyright?
- ✓ Have all necessary licenses and permissions been obtained?

Conducting an appropriate IP due diligence or FTO assessment at the concept, design, or pre-launch stage can help businesses identify potential risks early and support smoother commercialization in domestic and international markets.

Government Initiatives to Strengthen Design & Innovation

Government support measures enable toy start-ups, designers, licensors, and brands to protect and commercialize their designs effectively, while reducing the time, cost, and complexity associated with securing intellectual property rights.



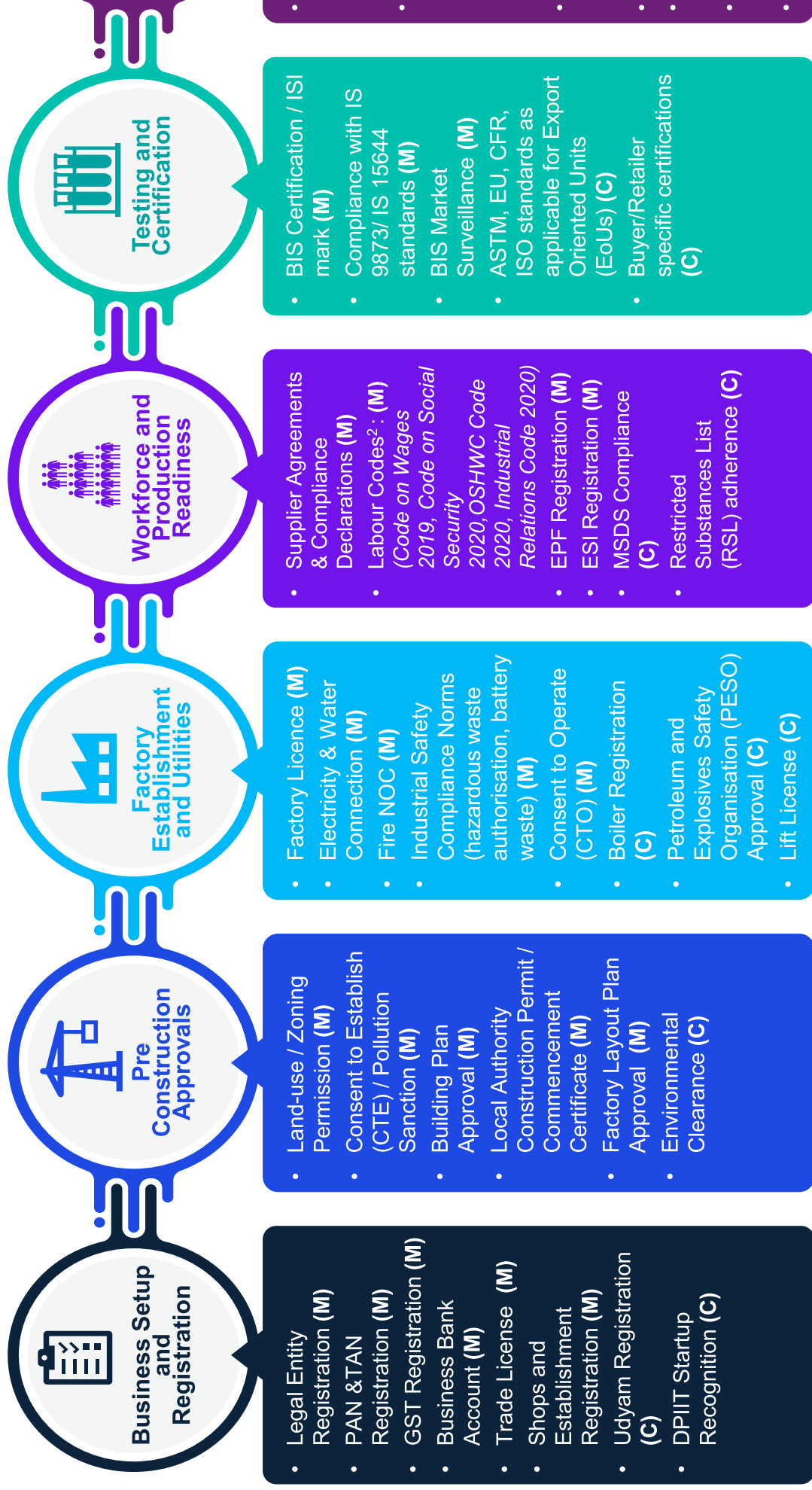
Volume 4: Toy Sector Compliance Requirements

- Chapter 1: End-to-End Compliance Mapping
- Chapter 2: Domestic: Standards, Testing and Quality Requirements
- Chapter 3: International: Standards, Testing and Quality Requirements



Consolidates regulatory compliance across companies to streamline setting up of on-going operations into a single

Toy Manufacturing Regulations & Process Compliance: An Overview



Note:

1. List is indicative and not exhaustive
2. The new Labour Codes came into effect in India on 21 November 2025, consolidating 29 existing central labour laws into four comprehensive codes.
3. Refer 'Key Website Links' for the list of relevant websites and application portals.

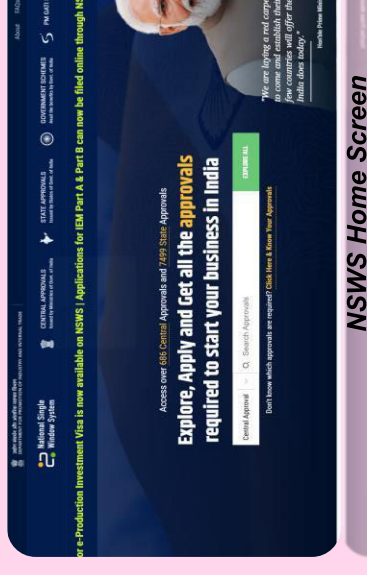
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

KYA Tool: Integrated Compliance and Approval Process via NSWS

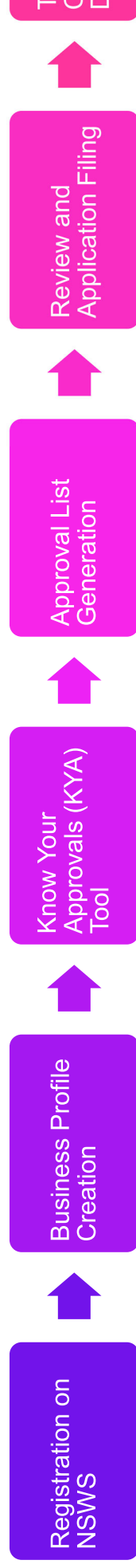
The **Know Your Approvals (KYA) Tool** by **National Single Window System (NSWS)**, developed under the aegis of DPIIT, is a questionnaire-based engine that captures project-specific inputs and, provides a single interface for identifying and facilitating access to **central and 7,000+ state-level approvals**. It generates a comprehensive, stage-wise approval roadmap enabling seamless identification of requirements, reducing ambiguity, and streamlining the end-to-end approval journey for manufacturers

The KYA Tool enables the following **benefits**:

- Unified visibility of approvals
- End-to-end to compliance mapping
- Reduction in information asymmetry
- Reduced time and effort
- Enhanced transparency for investors



Process Flow for Compliance Identification and Approvals on NSWS



Manufacturers may refer to the registration and business profile creation guide as well as the KYA tool user guide available on the NSWS portal (<https://www.nsws.gov.in/>), for a detailed understanding of the tool's functionality. The guideline outlines a step-by-step process for identifying applicable approvals.

Link to the registration and business profile creation guide: [Registration and Business Profile User Guide](#).

Link to the KYA Tool User Guide: [KYA Tool User Guide](#).

Segment-wise Compliance(s) for Setting up Toy Manufacturing

Below is the snapshot of regulatory and compliance requirements across five toy manufacturing segments

Plush Toys	Plastic Toys	Wooden Toys	Metal Toys	Paper Toys (Public Goods)
- Compliance with textile chemical restrictions (including azo dyes and formaldehyde limits) - Flammability testing - Fabric / material safety - MSDS/SDS for fabrics, dyes, and filling materials - Use of child-safe filling/stuffing materials (polyfiber, foam, etc.) - Seam strength and small part testing - Tensile strength testing - Effluent Treatment Plant (ETP) Approval - Provision of dust and lint control systems	- Compliance with Plastic Waste Management Rules, including Extended Producer Responsibility (EPR) - CTE/ CTO for plastic processing unit/ operations - MSDS/SDS for polymers, additives, and colourants - Approvals for handling of hazardous chemicals (like polymers, additives, colourants) - Phthalates / heavy metal restrictions - Mechanical Safety and Chemical Testing - Control of air emissions (including VOCs) from moulding and processing units	- Compliance with chemical safety standards for paints, coatings, and varnishes - Forest/timber sourcing permissions - Consent to Establish / Consent to Operate for dust and emissions - Control of sawdust and particulate emissions - Procurement supported by timber transit permits and traceability documentation - Workplace safety compliance for woodworking machinery	- Consent to Establish / Consent to Operate for metal processing, machining, and electroplating activities - Hazardous waste management authorisation for metal scrap and coating residues - PESO approval for storage and handling of petroleum products, compressed gases, or explosives - Industrial safety compliance for machinery and fabrication processes - Approvals for electroplating and surface treatment chemicals - Installation of ventilation and fume extraction systems	- Compliance with normal and consents - Consent to Establish / Consent to Operate for printing - Legal for packaging - Small scale - Age group - MSDS for inks, coatings - Procurement - Compliance - Source - Management - and

In addition to the segment-specific requirements outlined above, manufacturers are required to ensure full compliance with all applicable regulatory frameworks governing manufacturing, environmental protection, safety, and labour standards

Note: List is indicative and not exhaustive

Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Volume 4: Toy Sector Compliance Requirements

- Chapter 1: End-to-End Compliance Mapping
- Chapter 2: Domestic: Standards, Testing and Quality Requirements
- Chapter 3: International: Standards, Testing and Quality Requirements



Quality & Conformity Assessment: Understanding the need and procedure

Product Certification and its Importance

- **Product certification is the process of verifying that a product**
 - Meets specific **regulatory, safety, and quality** standards
 - Meets specific **performance standards**
 - Assures consumers that the product functions correctly and will **not cause harm**
- An accredited third-party organization rigorously tests and evaluates the item, granting a **certificate and a mark of conformity if it passes.**
- **Product certification ensures safety, quality, and regulatory compliance,** building trust among consumers and stakeholders.

Key Safety and Quality Tests for Toys

	Physical and Mechanical	Ensures toys are structurally safe with no s detachable parts, or injury risks during use
	Electrical Safety	Verifies that electrical toys (battery-operated, p risks of shock, overheating, or fire
	Chemical	Checks that materials used in toys are substances like lead, phthalates, and toxic ch
	Flammability	Ensures toys and materials do not ignite ea quickly when exposed to flames
	Hygiene & Workmanship	Confirms toys are clean, well-finished, and m defects that could harm children
	RoHS, REACH etc.	Ensures compliance with international re hazardous substances and ensuring chemical
	Risk Assessment	Evaluates potential hazards across design, ensure overall child safety

Toy Certification: Domestic Landscape

Quality Control Order for Toys

- India regulates toy safety through the **Toys (Quality Control) Order, 2020**, issued by **DPIIT, Ministry of Industry**. It applies to toys or materials designed/intended for play by **children under 14 years** of age.
- Toys covered by the order must conform to Indian Standards and bear the BIS Standard Mark / ISI Mark under as per **Scheme-I of Schedule-II of BIS Conformity Assessment Regulations, 2018**.
- Goods meant **only for export** are excluded from the QCO.
- BIS certification is mandatory for:
 - ✓ A **domestic manufacturer** of toys in India.
 - ✓ A **foreign manufacturer exporting** toys to India.
- ✓ An importer sourcing toys from abroad: Practically, the foreign manufacturer must hold the BIS licence; **importers cannot obtain the licence** in their own name for products manufactured elsewhere.
- ✓ A **separate licence is generally needed for each factory location** and for each broad category, i.e., electronic toys, electric toys etc.

BIS Toy Certification : Grant of License & Testing Facilities

Product certification for toys is mandatory in India due to the Quality Control Order (QCO), which ensures that toys comply with BIS safety standards.



Toy BIS Certification Process

- Classify the toy as Electric or Non-Electric and identify applicable standards (IS 9873 series / IS 15644)
- BIS Scheme-I for domestic manufacturers and FMCS for foreign manufacturers.
- Submit application through the BIS Manakonline Portal BIS conducts document scrutiny and factory inspection/audit
- Samples are tested in BIS-recognized laboratories
- Upon successful evaluation, BIS grants the licence
- Licensed products can bear the ISI Mark and are subject to ongoing surveillance and compliance requirements.

The detailed procedure for obtaining the BIS certification is provided in Annexure

BIS Recognized

- The list of testing recognized/accrue with their availability wise and IS-wise - LIMS (Laboratory Management System)
- The LIMS portal through the following <https://lims.bis.gov.in/>
- The information regarding location of the laboratory for detailed testing can be found in the portal.

Toy Certification: Domestic Landscape

Indian Standards covered under Quality Control Order for Toys, 2020

The Toys shall conform to the **corresponding Indian Standards** and shall bear the Standard Mark under a licence from BIS. The Toys shall also conform to the **IS 15644: 2006** (Safety of Electric Toys) and shall bear the Standard Mark under a licence from BIS.

Indian Standard No.	Title of the Indian Standard	Grouping Guidelines		
IS 9873 (Part 1) : 2018	Safety of Toys Part 1 Safety Aspects Related to Mechanical and Physical Properties.	Toys are classified as Electric or Non-Electric based on the scope of safety testing	Primary Standard	Secondary Standard
IS 9873 (Part 2) : 2017	Safety of Toys Part 2 Flammability.			
IS 9873 (Part 3) : 2017	Safety Requirements for Toys Part 3 Migration of Certain Elements.			
IS 9873 (Part 4) : 2017	Safety of Toys Part 4 Swings, Slides and Similar Activity Toys for Indoor and Outdoor Family Domestic Use.	Non-Electric Toys	IS 9873 Part 1	IS 9873 Part 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100
IS 9873 (Part 7) : 2017	Safety of Toys Part 7 Requirements and Test Methods for Finger Paints.			
IS 9873 (Part 9) : 2017	Safety of Toys Part 9 Certain Phthalates Esters in Toys	Electric Toys	IS 15644	IS 15644
IS 15644: 2006	Safety of Electric Toys.			

Categorization of Toys

BIS has further classified toys into 7 primary categories, further divided into 146 sub-categories for Indian Standards

BIS category	Segment description	No. of sub-categories	Typical examples	Base applicable standards
A	Toys for sensorimotor activities — first age	32	Rattles, teethingers, crib toys, playmats, bath toys, simple dolls, soft animals, stacking toys, shape sorters, push/pull	IS 9873 Part 1; plus Parts 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100, 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124, 125, 126, 127, 128, 129, 130, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140, 141, 142, 143, 144, 145, 146
B	Toys for physical activities	23	Balls, ride-ons, tricycles, scooters, swings, slides, climbing toys, inflatable	IS 9873 Part 1; plus other relevant standards
C	Toys for intellectual activities	20	Puzzles, blocks, construction sets, learning toys, sorting/matching toys	IS 9873 Part 1; Part 3 for construction toys; Part 9 for plasticized accessible toys
D	Toys that reproduce the technical world	12	Toy vehicles, trains, boats, planes, machines, construction/technical replicas, mechanical toys	Non-electric toys: IS 9873 Part 1; Electric/functional electrical toys: IS 9873 Part 2; IS 9873 Part 3 for construction toys; IS 9873 Part 4 for electrical toys; IS 9873 Part 5 for mechanical toys; IS 9873 Part 6 for electrical toys; IS 9873 Part 7 for electrical toys; IS 9873 Part 8 for electrical toys; IS 9873 Part 9 for electrical toys; IS 9873 Part 10 for electrical toys; IS 9873 Part 11 for electrical toys; IS 9873 Part 12 for electrical toys; IS 9873 Part 13 for electrical toys; IS 9873 Part 14 for electrical toys; IS 9873 Part 15 for electrical toys; IS 9873 Part 16 for electrical toys; IS 9873 Part 17 for electrical toys; IS 9873 Part 18 for electrical toys; IS 9873 Part 19 for electrical toys; IS 9873 Part 20 for electrical toys; IS 9873 Part 21 for electrical toys; IS 9873 Part 22 for electrical toys; IS 9873 Part 23 for electrical toys; IS 9873 Part 24 for electrical toys; IS 9873 Part 25 for electrical toys; IS 9873 Part 26 for electrical toys; IS 9873 Part 27 for electrical toys; IS 9873 Part 28 for electrical toys; IS 9873 Part 29 for electrical toys; IS 9873 Part 30 for electrical toys; IS 9873 Part 31 for electrical toys; IS 9873 Part 32 for electrical toys; IS 9873 Part 33 for electrical toys; IS 9873 Part 34 for electrical toys; IS 9873 Part 35 for electrical toys; IS 9873 Part 36 for electrical toys; IS 9873 Part 37 for electrical toys; IS 9873 Part 38 for electrical toys; IS 9873 Part 39 for electrical toys; IS 9873 Part 40 for electrical toys; IS 9873 Part 41 for electrical toys; IS 9873 Part 42 for electrical toys; IS 9873 Part 43 for electrical toys; IS 9873 Part 44 for electrical toys; IS 9873 Part 45 for electrical toys; IS 9873 Part 46 for electrical toys; IS 9873 Part 47 for electrical toys; IS 9873 Part 48 for electrical toys; IS 9873 Part 49 for electrical toys; IS 9873 Part 50 for electrical toys; IS 9873 Part 51 for electrical toys; IS 9873 Part 52 for electrical toys; IS 9873 Part 53 for electrical toys; IS 9873 Part 54 for electrical toys; IS 9873 Part 55 for electrical toys; IS 9873 Part 56 for electrical toys; IS 9873 Part 57 for electrical toys; IS 9873 Part 58 for electrical toys; IS 9873 Part 59 for electrical toys; IS 9873 Part 60 for electrical toys; IS 9873 Part 61 for electrical toys; IS 9873 Part 62 for electrical toys; IS 9873 Part 63 for electrical toys; IS 9873 Part 64 for electrical toys; IS 9873 Part 65 for electrical toys; IS 9873 Part 66 for electrical toys; IS 9873 Part 67 for electrical toys; IS 9873 Part 68 for electrical toys; IS 9873 Part 69 for electrical toys; IS 9873 Part 70 for electrical toys; IS 9873 Part 71 for electrical toys; IS 9873 Part 72 for electrical toys; IS 9873 Part 73 for electrical toys; IS 9873 Part 74 for electrical toys; IS 9873 Part 75 for electrical toys; IS 9873 Part 76 for electrical toys; IS 9873 Part 77 for electrical toys; IS 9873 Part 78 for electrical toys; IS 9873 Part 79 for electrical toys; IS 9873 Part 80 for electrical toys; IS 9873 Part 81 for electrical toys; IS 9873 Part 82 for electrical toys; IS 9873 Part 83 for electrical toys; IS 9873 Part 84 for electrical toys; IS 9873 Part 85 for electrical toys; IS 9873 Part 86 for electrical toys; IS 9873 Part 87 for electrical toys; IS 9873 Part 88 for electrical toys; IS 9873 Part 89 for electrical toys; IS 9873 Part 90 for electrical toys; IS 9873 Part 91 for electrical toys; IS 9873 Part 92 for electrical toys; IS 9873 Part 93 for electrical toys; IS 9873 Part 94 for electrical toys; IS 9873 Part 95 for electrical toys; IS 9873 Part 96 for electrical toys; IS 9873 Part 97 for electrical toys; IS 9873 Part 98 for electrical toys; IS 9873 Part 99 for electrical toys; IS 9873 Part 100 for electrical toys; IS 9873 Part 101 for electrical toys; IS 9873 Part 102 for electrical toys; IS 9873 Part 103 for electrical toys; IS 9873 Part 104 for electrical toys; IS 9873 Part 105 for electrical toys; IS 9873 Part 106 for electrical toys; IS 9873 Part 107 for electrical toys; IS 9873 Part 108 for electrical toys; IS 9873 Part 109 for electrical toys; IS 9873 Part 110 for electrical toys; IS 9873 Part 111 for electrical toys; IS 9873 Part 112 for electrical toys; IS 9873 Part 113 for electrical toys; IS 9873 Part 114 for electrical toys; IS 9873 Part 115 for electrical toys; IS 9873 Part 116 for electrical toys; IS 9873 Part 117 for electrical toys; IS 9873 Part 118 for electrical toys; IS 9873 Part 119 for electrical toys; IS 9873 Part 120 for electrical toys; IS 9873 Part 121 for electrical toys; IS 9873 Part 122 for electrical toys; IS 9873 Part 123 for electrical toys; IS 9873 Part 124 for electrical toys; IS 9873 Part 125 for electrical toys; IS 9873 Part 126 for electrical toys; IS 9873 Part 127 for electrical toys; IS 9873 Part 128 for electrical toys; IS 9873 Part 129 for electrical toys; IS 9873 Part 130 for electrical toys; IS 9873 Part 131 for electrical toys; IS 9873 Part 132 for electrical toys; IS 9873 Part 133 for electrical toys; IS 9873 Part 134 for electrical toys; IS 9873 Part 135 for electrical toys; IS 9873 Part 136 for electrical toys; IS 9873 Part 137 for electrical toys; IS 9873 Part 138 for electrical toys; IS 9873 Part 139 for electrical toys; IS 9873 Part 140 for electrical toys; IS 9873 Part 141 for electrical toys; IS 9873 Part 142 for electrical toys; IS 9873 Part 143 for electrical toys; IS 9873 Part 144 for electrical toys; IS 9873 Part 145 for electrical toys; IS 9873 Part 146 for electrical toys
E	Toys for development of feelings and empathy	23	Dolls, doll accessories, plush animals, puppets, pretend-care sets	IS 9873 Part 1; Part 2 strongly applicable; Part 3/9 as applicable
F	Toys for creative activities	21	Art/craft toys, modelling clay, paints, finger paints, crayons, drawing sets	IS 9873 Part 1; Part 7 for finger paints; Part 10 for migration of elements; Parts 10 and 11 for chemistry/chemical sets
G	Toys for social relationships	15	Role-play toys, pretend kitchen/doctor/shop sets, costumes	IS 9873 Part 1; Part 2 for costumes; IS 15644 if electrically applicable

The list of testing laboratories recognized/accredited by BIS, along with their available test facilities (Lab-wise and IS-wise), is specified in the BIS Laboratory Information Management System (LIMS) portal and can be accessed through https://lims.bis.gov.in/home/search_labs/

Source: Product Manual for Toys (IS 9873 series and IS 15644); Bureau of Indian Standards

Regulatory Relaxations & Industry Support under Toys (QCO) Amendment

The Government has supported the toy industry by introducing targeted regulatory relaxations through amendment of the Toys Act, 1991, to reduce the compliance burden while promoting innovation, traditional sectors, and ease of doing business.

Regulatory relaxation for R&D and Ease of Compliance

Vide S.O. 4277(E) dated 30th September 2022, the Government has allowed

- Import of up to 300 toy units per financial year (maximum 5 samples per unit) for research & development purposes by BIS-certified manufacturers or authorised persons.

These imports are exempt from QCO requirements, subject to:

- No commercial sale
- Disposal as scrap after use;
- Maintenance of year-wise records and submission of declaration to BIS.

Support Impact

- Promotes innovation and product development.
- Facilitates ease of doing business and smoother transition to compliance.
- Enables access to global samples and technology without regulatory barriers.

1 R&D Enablement & Ease of Compliance

2 Support to Artisans & GI-Tagged Products

3 Testing Flexibility through BIS-Recognised Labs

4 Alignment with International Standards

5 Grouping-Based Certification

Source: Bureau of Indian Standards, Amendments to QCO – Products under Mandatory Certification

Regulatory Relaxations & Industry Support under Toys (QCO) Amendment

The Government has supported the toy industry by introducing targeted regulatory relaxations through amendment of BIS Act, 2016, to ease compliance burden while promoting innovation, traditional sectors, and ease of doing business.

Support to Artisans and GI tagged products

Vide notification S.O. 4514(E) dated 11th December 2020, exemption from registration has been provided to:

- Toys manufactured and sold by artisans registered under the Office of Development Commissioner, Handicrafts),
- Toys produced by registered proprietors and authorized users of GI-tagged products

1 R&D Enablement & Ease of Compliance

2 Support to Artisans & GI-Tagged Products

3 Testing Flexibility through BIS-Recognised Labs

4 Alignment with International Standards

5 Grouping-Based Certification

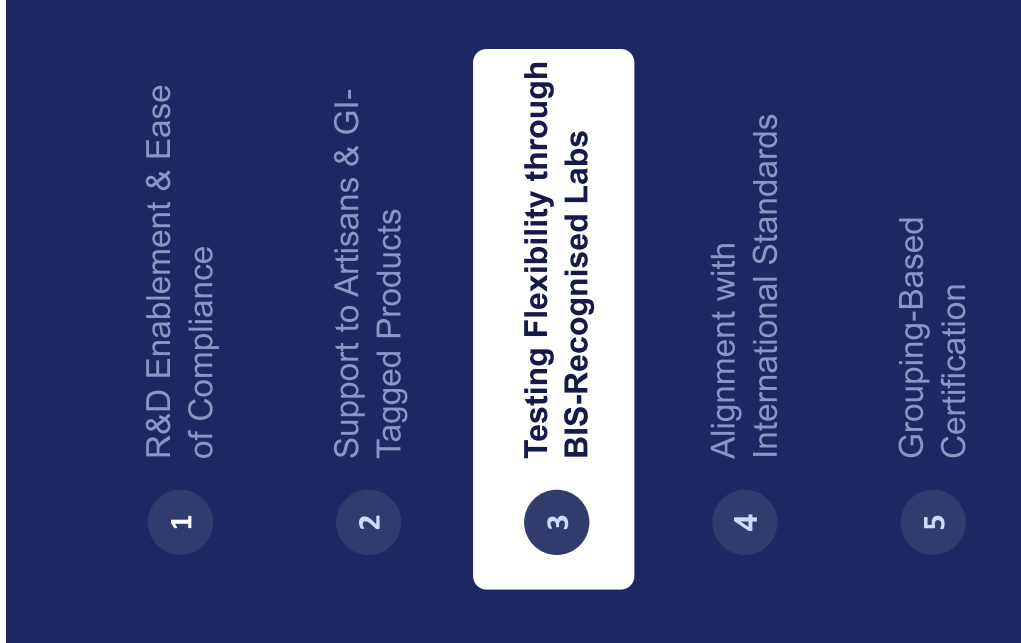
Support Impact

- Protects traditional and handicraft sectors.
- Promotes GI-tagged indigenous toy products.
- Supports rural livelihoods, cultural heritage, and local industry.

Source: Bureau of Indian Standards, Amendments to QCO – Products under Mandatory Certification

Regulatory Relaxations & Industry Support under Toys (QCO) Amendment

The Government has supported the toy industry by introducing targeted regulatory relaxations through amendment compliance burden while promoting innovation, traditional sectors, and ease of doing business.



Testing Flexibility through BIS recognized Labs

Government has provided the flexibility to test the samples from BIS recognized laboratories:

- Certain tests can be outsourced to BIS recognized labs.
- There is no need to maintain inhouse labs for testing of toys.

Support Impact

- Reduces need for high investment in in-house labs.
- Supports MSMEs and new manufacturers.

Source: Bureau of Indian Standards, Amendments to QCO – Products under Mandatory Certification

Regulatory Relaxations & Industry Support under Toys (QCO) Amendment

The Government has supported the toy industry by introducing targeted regulatory relaxations through amendment of BIS Act, 2016, to reduce compliance burden while promoting innovation, traditional sectors, and ease of doing business.

- 1 R&D Enablement & Ease of Compliance
- 2 Support to Artisans & GI-Tagged Products
- 3 Testing Flexibility through BIS-Recognised Labs
- 4 **Alignment with International Standards**
- 5 Grouping-Based Certification

Alignment with International Standards

- Indian standards for toys are aligned with international standards, such as ASTM and EN standards. BIS has adopted ISO 8124 series with a degree of equivalence as 'Identical under dual numbering'.
- The requirements as specified in Indian Standards are aligned with International Standards.

Support Impact

- Facilitates global competitiveness.
- Helps Indian manufacturers align with international requirements for export.

Source: Bureau of Indian Standards, Amendments to QCO – Products under Mandatory Certification

Regulatory Relaxations & Industry Support under Toys (QCO) Amendment

The Government has supported the toy industry by introducing targeted regulatory relaxations through amendment of BIS Regulations, thereby reducing compliance burden while promoting innovation, traditional sectors, and ease of doing business.



Grouping Guidelines by BIS

- Certification can be granted based on testing of representative sample testing every individual model.
- BIS has allowed grouping of similar toy models into a “series” based on
 - a) Similar design (in terms of safety compliance requirements)
 - b) Same material (same base material, dyes, pigments)
 - c) Same sub-category

Support Impact

- Significantly reduces testing cost, time, and duplication.
- Provides clarity and predictability in certification requirements.
- Supports manufacturers with multiple product variants, enabling efficient compliance.

Source: Bureau of Indian Standards, Amendments to QCO – Products under Mandatory Certification

Volume 4: Toy Sector Compliance Requirements

- Chapter 1: End-to-End Compliance Mapping
- Chapter 2: Domestic: Standards, Testing and Quality Requirements
- Chapter 3: International: Standards, Testing and Quality Requirements



International: Standards, Testing and Quality Requirements

Understanding export market-specific certification requirements is essential for ensuring global regulatory compliance and market entry.

Overview: Mandatory Toy Safety Regulations, Certifications, and Compliance Requirements across Key Global

Top Importers	Mandatory regulation / standard	Mandatory mark / certificate	Source for more information
US	Consumer Product Safety Improvement Act (CPSIA), ASTM F963, 16CFR 1250	Children's Product Certificate (CPC)	https://www.cpsc.gov
Germany	Toy Safety Directive 2009/48/EC, EN 71 series, REACH	CE marking, Declaration of Conformity (DoC)	https://ec.europa.eu/eurobarometer/ www.legislation.gov.uk
Japan	Japan Food Sanitation Law (JFSL) and Japanese Consumer Product Safety Act (CPSA)	Safety Toy (ST Mark), JFSL Test Report	www.mhlw.go.jp
UK	UK Toys (Safety) Regulations 2011, EN71, UK Conformity Assessed (UKCA) requirements (where applicable)	UKCA	Toys Regulations; UKCA www.gov.uk
Canada	Canada Consumer Product Safety Act (CCPSA), Toys Regulations SOR/2011-17, ASTM F963 (commonly referenced)	UKCA Mark / CE Mark (accepted for certain categories during transition period), Declaration of Conformity	Health Canada Toys Regulations www.canada.ca

Note: It is recommended to refer to the latest editions of applicable standards and regulations, as requirements may be revised, amended and updated periodically.

International: Standards, Testing and Quality Requirements

Understanding export market-specific certification requirements is essential for ensuring global regulatory compliance and market entry.

Overview: Accredited testing laboratory in India and tentative testing timelines

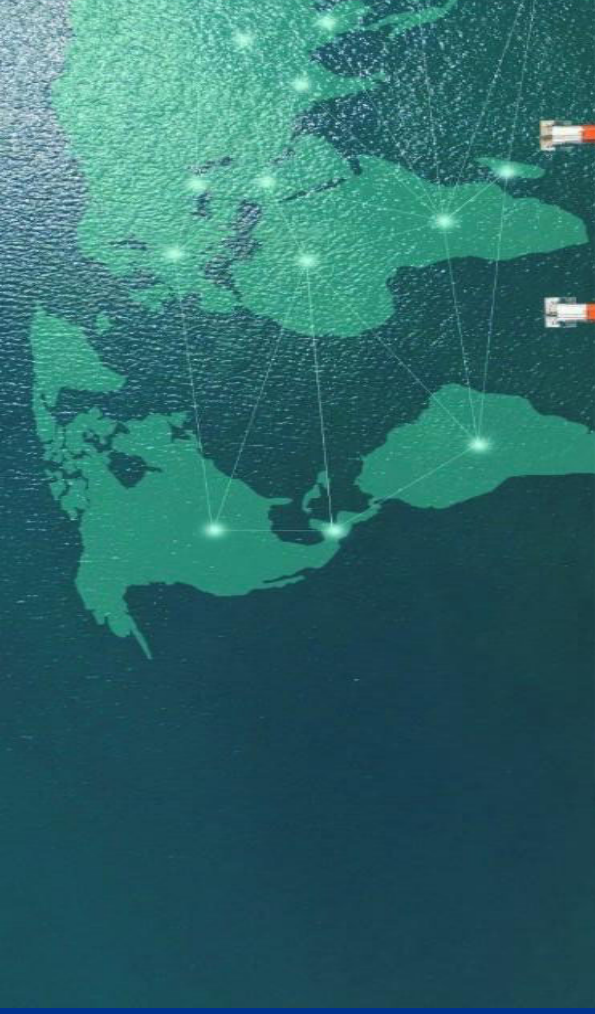
Top Importers	Accredited Third Party Labs	Tentative Testing Time	Source for more information
US	• Intertek India Pvt. Ltd., Gurugram • Bureau Veritas Consumer Products Services India Pvt. Ltd., Bengaluru • Eurofins Product Testing India Pvt. Ltd., Gurugram • Alpha Test House Pvt. Ltd., Bahadurgarh.	2-4 weeks	www.intertek.com www.bureauveritas.com www.Eurofins.com www.alphatesthouse.com
Germany	• SGS India Manesar/Gurugram and Bengaluru • Intertek India testing lab covering DIN EN 71 for Germany.	4-6 weeks	www.sgslabs.com www.intertek.com
Japan	• Intertek India	2-4 weeks	www.intertek.com
UK	• Intertek India • SGS India	4-6 weeks	www.intertek.com www.sgslabs.com
Canada	• Intertek India	4-6 weeks	www.intertek.com

Note:

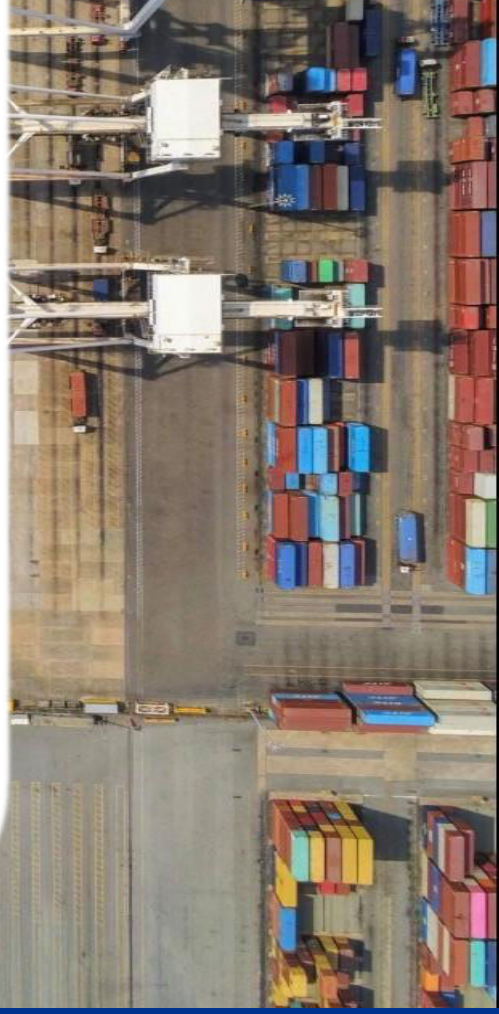
1. Testing timelines provided are indicative and may vary from time to time based on regulatory updates and laboratory capacity. Actual testing duration depends on the toy category, materials, and applicable testing requirements
2. The list of third-party testing laboratories is for reference only and is subject to change; users should verify the latest approved laboratories before testing.
3. The timeline provided above is indicative only and can vary on case-to-case basis.

Volume 5 : Export Promotion & Market Readiness

- Chapter 1: Global Market Opportunity Assessment
- Chapter 2: Global Market Entry Toolkit
- Chapter 3: Customers Landscape
- Chapter 4: Calendar of Major Trade Fairs and Summits



***Facilitate global market expansion by
market intelligence, export readiness,
prospective customer insights, and
international business opportunities***



Focus Top 10 Global Import Markets

Potential for India to promote exports of Toys products to Top 10 focus countries worth USD 71.08 Bn where the gap between countries imports and India's exports accounted for USD 70.78 Bn in 2025.

Partner Country	Partner country's demand (USD Bn) (2025)	India's supply (USD Bn) (2025)	Demand Supply Gap (USD Bn)	Share in Gap (%)	
US	28.2	0.199	28.0	39.6%	1
Germany	8.3	0.017	8.3	11.8%	
Japan	6.3	0.002	6.3	8.9%	
UK	6.1	0.028	6.1	8.6%	
France	4.9	0.007	4.9	7.0%	2
Canada	3.9	0.008	3.9	5.5%	
Poland	3.8	0.013	3.8	5.4%	
Netherlands	3.4	0.015	3.4	4.7%	3
Spain	3.2	0.005	3.2	4.5%	
Australia	2.5	0.008	2.5	3.6%	
Total	71.08	0.30	70.78		

US, Germany, Japan & UK largest contributor to the Gap, accounting for over 48.8 Bn gap.

France, Canada and Poland to 18% of the Demand-Supply Gap, the import value for these markets is valued at USD 17.6 Bn.

Netherlands, Spain, Australia account for approximately 10% of the Demand-Supply Gap, India the opportunity to increase exports to these markets valued USD 9.17 Bn in the gap.

Note: Share in Gap is calculated as the Difference between Partner Country's Demand (Imports) and India's Supply (Exports) relative to the total Demand-Supply Gap for the Top 10 focus countries

Source: ITC Trade Map

Top Imported Products Across Markets

Top three products (highlighted in green) account for USD 60.8 Bn of the total USD 70.7 Bn untapped potential across the countries in 2025

Cells (highlighted in blue) indicate products with >USD 1 Bn opportunity in the respective markets.

Products-wise Demand-Supply Gap Analysis (USD Bn, 2025)

Top Products	Products Description	US	Germany	Japan	UK	France	Canada	Poland	Netherlands	Spain
950300	Tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages; dolls; other toys	14.6	4.4	3.2	3.2	2.6	1.8	2.2	2	1.4
950450	Video game consoles and machines (excl. operated by any means of payment)	6.7	2.5	2.7	1.7	1.4	0.91	1.3	0.6	1.2
950510	Christmas articles (excl. candles and electric lighting sets, natural Christmas trees and Christmas	2.8	0.2	0.03	0.32	0.16	0.27	0.076	0.23	0.078
950590	Festival, carnival or other entertainment articles, incl. conjuring tricks and novelty jokes,	1.4	0.15	0.02	0.18	0.097	0.14	0.045	0.11	0.085
950490	Tables for casino games, automatic bowling alley equipment, and other funfair, table or parlour	1.1	0.4	0.17	0.35	0.28	0.35	0.13	0.27	0.15
950430	Games with screens, flipper and other games, operated by coins, banknotes, bank cards, tokens	0.82	0.11	0.09	0.19	0.088	0.25	0.03	0.024	0.19
950440	Playing cards	0.48	0.5	0.04	0.24	0.31	0.18	0.065	0.14	0.077
950420	Billiards of all kinds and accessories	0.07	0.01	0.004	0.025	0.01	0.01	0.003	0.008	0.005
Country Wise Gap		28.2	8.3	6.3	6.2	4.9	3.9	3.8	3.4	3.2

Note: Share in Gap is calculated as the Difference between Partner Country's Demand (Imports) and India's Supply (Exports) relative to the total Demand-Supply Gap for the importing products.

Source: ITC Trade Map

Tariff Applicable to Indian Toy Exports Across Key Market

India manufacturers have zero-duty access across most of the key toy import-market

Product-wise Tariffs Analysis for Top 10 Countries

Top Products	Products Description	US	Germany	Japan	UK	France	Canada	Poland	Netherlands
950300	Tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages; dolls; other toys	10% (MFN: 0%, TIS: 10%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% MFN: 0%	0% (MFN: 0%)	0% (MFN: 0%)
950450	Video game consoles and machines (excl. operated by any means of payment)	10% (MFN: 0%, TIS: 10%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% MFN: 0%	0% (MFN: 0%)	0% (MFN: 0%)
950510	Christmas articles (excl. candles and electric lighting sets, natural Christmas trees and Christmas	10% (MFN: 0%, TIS: 10%)	0% (MFN: 0%)	0% (CEPA: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% MFN: 0%	0% (MFN: 0%)	0% (MFN: 0%)
950590	Festival, carnival or other entertainment articles, incl. conjuring tricks and novelty jokes,	10% (MFN: 0%, TIS: 10%)	0% (GSPT: 0%)	0% (CEPA: 0%)	0% (DCTS: 0%)	0% (GSPT: 0%)	0% MFN: 0%	0% GSPT: 0%)	0% (GSPT: 0%)
950490	Tables for casino games, automatic bowling alley equipment, and other funfair, table or parlour	10% (MFN: 0%, TIS: 10%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% MFN: 0%	0% (MFN: 0%)	0% (MFN: 0%)
950430	Games with screens, flipper and other games, operated by coins, banknotes, bank cards, tokens	10% (MFN: 0%, TIS: 10%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% MFN: 0%	0% (MFN: 0%)	0% (MFN: 0%)
950440	Playing cards	10% (MFN: 0%, TIS: 10%)	0% (GSPT: 0%)	0% (CEPA: 0%)	0% (DCTS: 0%)	0% (GSPT: 0%)	0% MFN: 0%	0% (GSPT: 0%)	0% (GSPT: 0%)
950420	Billiards of all kinds and accessories	10% (MFN: 0%, TIS: 10%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% (MFN: 0%)	0% MFN: 0%	0% (MFN: 0%)	0% (MFN: 0%)

Note: MFN: Most Favoured Nations & TIS: Temporary Import Surcharge (from Feb 2026)

GSPT: Generalized System of Preferences Tariffs

ECTA: India-Australia Economic Cooperation and Trade Agreement

CEPA: Comprehensive Economic Partnership Agreements & Developing Countries Trading Scheme Standards (DCTS)

Source: India Trade Portal and ITC Market Access Map

India's Comparative Tariff Advantage in Toys

Compared to other major toy exporting nations, India has a comparative tariff advantage across various products (highlighted in green) among the targeted export markets

Comparative Assessment of tariffs applied to India, China, and Vietnam across leading import markets

Tariffs Applied by Countries	950510 Christmas articles (excl. candles and electric lighting sets)	950430 Games with screens, flipper and other games	950420 Billiards of all kinds and accessories	950300 Tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages; dolls; other toys	950450 Video game consoles and machines	950590 Festival, carnival or other entertainment articles,	950490 Tables for casino games, automata, bowling alleys, equipment, and other funfair, table or parlour
US	India (10%) China (17.5%) Vietnam (10%)	India (10%) China (17.5%) Vietnam (10%)	India (10%) China (17.5%) Vietnam (10%)	India (10%) China (10%) Vietnam (10%)	India (10%) China (10%) Vietnam (10%)	India (10%) China (10%) Vietnam (10%)	India (10%) China (10%) Vietnam (10%)
Germany	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (2.7%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)
Japan	India (0%) China (1.7%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (1.7%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)
UK	India (0%) China (0%) Vietnam (0%)	India (0%), China (0%), Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)	India (0%) China (0%) Vietnam (0%)

Note:

TIS: Temporary Import Surcharge (from Feb 2026)

PF: Preferential Tariffs

CETA: Comprehensive economic and trade agreement, Comprehensive economic partnership agreement (CEPA) & Regional Comprehensive economic partnership (RCEP)

Products highlighted in green indicate markets where India holds a tariff advantage relative to competing suppliers such as China and Vietnam

Source: India Trade Portal and ITC Market Access Map. It provide detailed product-wise and country-specific information on tariff structures.

Volume 5 : Export Promotion & Market Readiness

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Global Market Entry Toolkit

A step-by-step guide to help exporters navigate the complete export journey, from business establishment to market delivery.



Note: Detailed information for each step of the export business establishment process presented above is provided in the Annexure (Volume 5, Chapter [2]). The annexure contains country-specific requirements, and relevant references for all stages of the export journey.

Source: DGFT Report

Volume 5 : Export Promotion & Market Readiness

- Chapter 1: Global Market Opportunity Assessment
- Chapter 2: Global Market Entry Toolkit
- Chapter 3: Customers Landscape
- Chapter 4: Calendar of Major Trade Fairs and Summits



Global Toy Brands with Contract Manufacturers Opportunity for Indian C

The selected global toy brands represent a combination of high revenue and outsourced manufacturing dependencies contract manufacturing opportunities for Indian toy manufacturers.

Mattel HQ California, USA Web corporate.mattel.com/	Hasbro HQ Rhode Island, USA Web corporate.hasbro.com/en-us	Funko HQ Washington, USA Web funko.com/	Spin Master HQ Ontario, Canada Web spinmaster.com/en-US	Le HQ Web
Simba Dickie Group HQ Bavaria, Germany Web simba-dickie-group.com/en/home/	JAKKS Pacific HQ California, USA Web jakks.com/	MGA Entertainment HQ California, USA Web mgae.com/	Jazwares HQ Florida, USA Web jazwares.com/	Mo HQ Web
Relatable HQ New York, USA Web relatable.com	Fat Brain Toys HQ Nebraska, USA Web fatbraintoy.com	Melissa & Doug HQ Connecticut, USA Web melissaanddoug.com	Jumbo Group HQ North Holland, Netherlands Web jumboplay.com	Ra HQ Ger Web
Goliath HQ Gelderland, Netherlands Web goliathgames.com/	Schleich HQ Bavaria, Germany Web schleich-s.com	Bandai Namco HQ Tokyo, Japan Web bandai.co.jp/en/	TOMY / Takara Tomy HQ Tokyo, Japan Web takaratomy.co.jp/english/	Do HQ Web

Note: List is indicative and not exhaustive
 Source: Stakeholder and Industry Consultations

Global Retailers with Contract Manufacturers Opportunity for Indian Companies

Leading global toy retailers with strong market presence and high revenue offers significant contract manufacturing opportunities for Indian toy manufacturers.

Walmart
HQ Arkansas, USA
Web corporate.walmart.com/

Amazon
HQ Washington, USA
Web amazon.com

Target
HQ Minnesota, USA
Web corporate.target.com/

Dollar Tree
HQ Virginia, USA
Web corporate.dollartree.com

Ca
HQ
Web

Tesco
HQ Hertfordshire, UK
Web tescoplc.com/

Hamleys
HQ Mumbai, India / London, UK
Web hamleys.com/

Aldi
HQ Essen, Germany
Web aldi.de

Smyths Toys
HQ Galway, Ireland
Web smythstoys.com/

Fiv
HQ
Web

LuLu Group
HQ Abu Dhabi, UAE
Web luluretail.com

REWE Group
HQ North Rhine-Westphalia, Germany
Web rewe-group.com/en/

Sam's Club
HQ Arkansas, USA
Web samsclub.com/

Big W
HQ New South Wales, Australia
Web bigw.com.au

Km
HQ
Web

The Entertainer
HQ Buckinghamshire, UK
Web thetoysshop.com/

CVS Health
HQ Rhode Island, USA
Web cvshealth.com/

Canadian Tire
HQ Ontario, Canada
Web corp.canadiantire.ca/

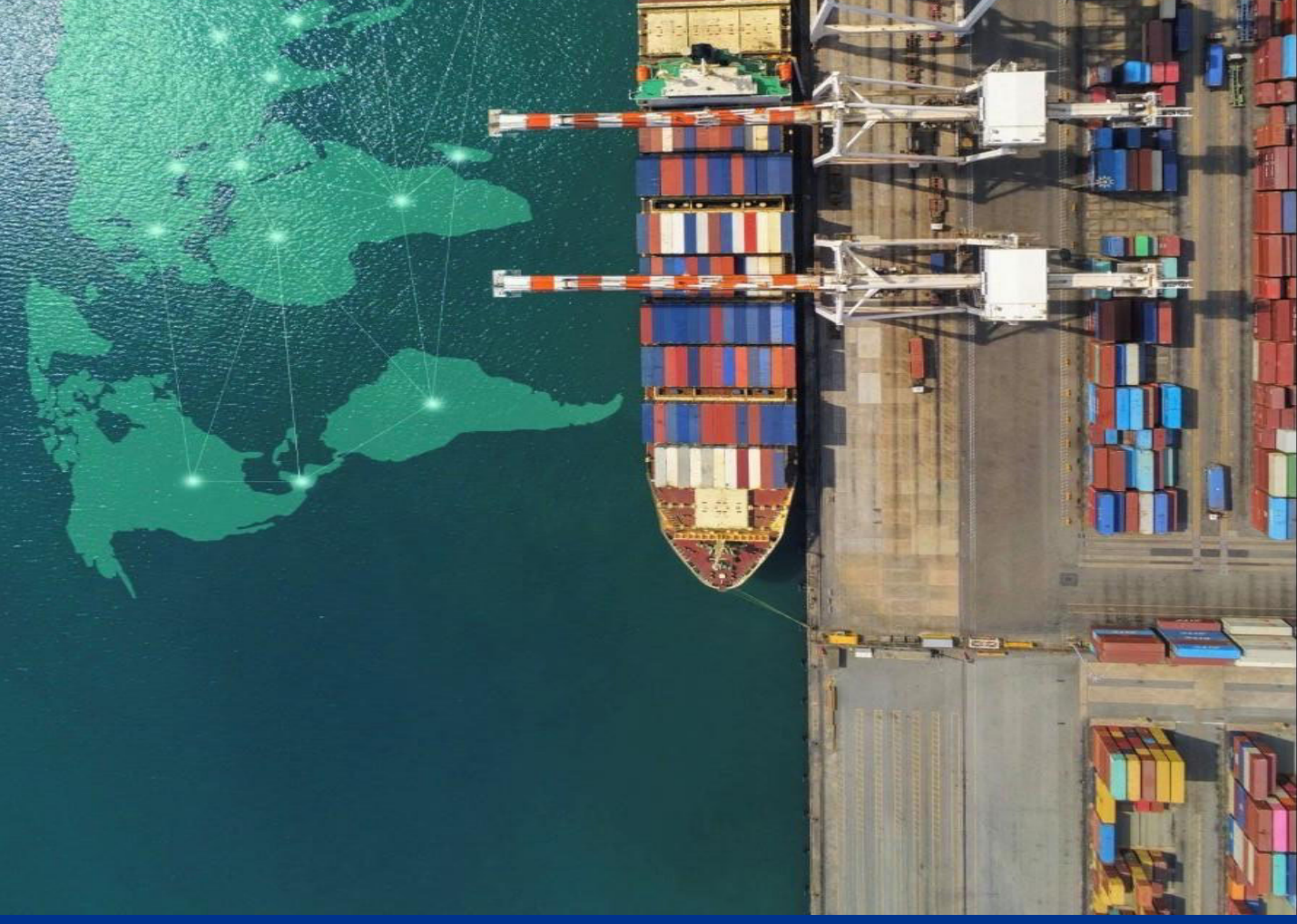
Lidl
HQ Baden-Württemberg, Germany
Web info.lidl/en

Co
HQ
Web

Note: List is indicative and not exhaustive
Source: Stakeholder and Industry Consultations

Volume 5 : Export Promotion & Market Readiness

- Chapter 1: Global Market Opportunity Assessment
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- Chapter 3: Customers Landscape
- Chapter 4: Calendar of Major Trade Fairs and Summits



Major Trade Fairs and Summits

The below listed events are scheduled to be held during 2026 and 2027. These events are typically organized annually and take place during the same months each year

NATIONAL EVENTS

Toy Biz International

-  New Delhi, India
-  15,000 footfall
-  4–7 Jul 2026
-  nicct.nl

Kids India

-  Mumbai, India
-  5,516 footfall
-  4–6 Mar 2027
-  kidsindia.co.in

INTERNATIONAL EVENTS

Canton Fair

-  Guangzhou, China
-  289,000 footfall
-  Apr & Oct 2026 / 2027
-  cantonfair.org.cn

China Toy Expo

-  Shanghai, China
-  128,000 footfall
-  21–23 Oct 2026
-  china-toy-expo.com

Spielwaren

-  Nürnberg
-  57,500
-  2–6 Feb
-  spielwarenmesse.de

Hong Kong Toys & Games Fair

-  Hong Kong, China
-  40,000 footfall
-  11–14 Jan 2027
-  hktadc.com

Toy Fair New York

-  New York, USA
-  30,000 footfall
-  20–23 Feb 2027
-  toyfairny.com

Licensing

-  Las Vegas
-  10,000–
-  25–27 Nov
-  licensingexpo.com

London Toy Fair

-  London, UK
-  10,000 footfall
-  19–21 Jan 2027
-  toyfair.co.uk

Melbourne Toy Fair

-  Melbourne, Australia
-  4,000 footfall
-  28 Feb – 3 Mar 2027
-  austoy.com.au

LEGEND

-  Host city
-  Last footfall
-  2026–27
-  Official website

Note: List is indicative and not exhaustive
Source: Stakeholder and Industry Consultations

Acronyms and Abbreviations



Volume 1: Toys Sector Overview

Abbrev.	Full Form		Abbrev.	Full Form
AI	Artificial Intelligence		DoC	Department of Commerce
ASI	Annual Survey of Industries		EFTA	European Free Trade Association
CETA	Comprehensive Economic and Trade Agreement		CAGR	Compound Annual Growth Rate
DPIIT	Department for Promotion of Industry and Internal Trade		IBEF	India Brand Equity Foundation
HS Code	Harmonized System Code		IP(s)	Intellectual Propert(y)/ies
IEC	International Electrotechnical Commission		ISI	Indian Standards Institute
IS	Indian Standard		MoSPI	Ministry of Statistics and Programme Imple
ISO	International Organization for Standardization		MSME	Micro, Small and Medium Enterprises
Mn	Million		NIC	National Industrial Classification
NAPT	National Action Plan for Toys		QCO	Quality Control Order
STEAM	Science, Technology, Engineering, Arts and Mathematics		STEM	Science, Technology, Engineering, and Ma
AR	Augmented Reality			
BIS	Bureau of Indian Standards			

Volume 2: Value Chain, Manufacturing and Route-to-Market

Abbrev.	Full Form		Abbrev.	Full Form
SIPCOT	State Industries Promotion Corporation of Tamil Nadu		SFURTI	Scheme of Fund for Regeneration of Traditional
MSME	Micro, Small and Medium Enterprise		M/o Textiles	Ministry of Textiles
EFA	Eligible Fixed Assets		SPV	Special Purpose Vehicle
P&M	Plant and Machinery		SBIA	Shendra-Bidkin Industrial Area
CGTMSE	Credit Guarantee Fund Trust for Micro and Small Enterprises		IITGN	Integrated Industrial Township Greater Noida
TNPDCCL	Tamil Nadu Power Distribution Corporation Limited		IITVU	Integrated Industrial Township Vikram Udyogp
TANGEDCO	Tamil Nadu Generation and Distribution Corporation Limited		RBSM	Reverse Buyer-Seller Meet
ESI	Employees State Insurance		PSU	Public Sector Undertaking
PF	Provident Fund		B2B	Business-to-Business
EPF	Employees' Provident Fund		IPR	Intellectual Property Rights
R&D	Research and Development		ZED	Zero Defect Zero Effect
IP	Intellectual Property		DISCOMs	Distribution Companies
GI	Geographical Indication		CAPEX	Capital Expenditure
ETP	Effluent Treatment Plant		OPEX	Operating Expenditure
CETP	Common Effluent Treatment Plant		ZLD	Zero Liquid Discharge
M&E	Machinery and Equipment		CE	Conformite Europeenne (European Confor

Volume 2: Value Chain, Manufacturing and Route-to-Market

Abbrev.	Full Form		Abbrev.	Full Form
BIS	Bureau of Indian Standards		FSSAI	Food Safety and Standards Authority of India
CPC	Children's Product Certificate		AGMARK	Agricultural Marketing Mark
ASTM	ASTM International (formerly American Society for Testing and Materials)		NID	National Institute of Design
CoE	Centre of Excellence		NIFT	National Institute of Fashion Technology
GeM	Government e-Marketplace		FCI	Fixed Capital Investment
ONDC	Open Network for Digital Commerce		AT&C	Aggregate Technical and Commercial
FCI	Floor Area Ratio / Floor Space Index		QCI	Quality Council of India
PwD	Person with Disabilities		ODOP	One District One Product
CFC	Common Facility Centres		ITI	Industrial Training Institute;
TANFUND	Tamil Nadu Fund for Innovation and Research & Development		GTTC:	Government Tool Room & Training Centre
ISO	International Organization for Standardization		NIPUNA Karnataka	New Age Integrated Programme for Upskilling and Advancement
BIS	Bureau of Indian Standards;		EoU	Export Oriented Unit
BEE	Bureau of Energy Efficiency			
ISI	Indian Standards Institution			
PLI	Production Linked Incentive			

Volume 3: Skill, Design and Product Development

Abbrv.	Full Form
CAD	Computer Aided Design
CNC	Computer Numerical Control
PCB	Printed Circuit Board
B.Des	Bachelor in Design
M.Des	Masters in Design
SIPP	Startups Intellectual Property Protection

Volume 4: Toy Sector Compliance Requirements (1/2)

Abbrev.	Full Form		Abbrev.	Full Form
PAN	Permanent Account Number		TDS	Tax Deducted at Source
TAN	Tax Deduction and Collection Account Number		EPF	Employees' Provident Fund
GST	Goods and Services Tax		ESI	Employees' State Insurance
CTE	Consent to Establish		MSDS	Material Safety Data Sheet
NOC	No Objection Certificate		RSL	Restricted Substances List
PESO	Petroleum and Explosives Safety Organisation		DPIIT	Department for Promotion of Industry and In
BIS	Bureau of Indian Standards		VOCs	Volatile Organic Compounds
ISI	Indian Standards Institute		SDS	Safety Data Sheet
IS 9873	Indian Standard 9873 (Safety of Toys)		EPR	Extended Producer Responsibility
OSHC	Occupational Safety, Health and Working Conditions Code, 2020		ETP	Effluent Treatment Plant
ASTM	ASTM International (formerly American Society for Testing and Materials)		QCO	Quality Control Order
EU	European Union		BIS	Bureau of Indian Standards
CFR	Code of Federal Regulations		IS	Indian Standard
EoUs	Export Oriented Units		LIMS	Laboratory Information Management System
MRP	Maximum Retail Price		CPSIA	Consumer Product Safety Improvement Act
DIN	Director Identification Number			
DIN	Director Identification Number			

Volume 4: Toy Sector Compliance Requirements (2/2)

Abbrev.	Full Form
CPC	Children's Product Certificate
DoC	Declaration of Conformity
JFSL	Japan Food Sanitation Law
CPSA	Consumer Product Safety Act
UKCA	United Kingdom Conformity Assessed
G-Mark	Gulf Conformity Mark
CCPSA	Canada Consumer Product Safety Act
ASTM	American Society for Testing and Materials

Volume 5: Export Promotion & Market Readiness

Abbrev.	Full Form
MFN	Most-Favoured Nation
TIS	Temporary Import Surcharge (from Feb 2026)
GSPT	Generalized System of Preferences Tariffs
ECTA	India-Australia Economic Cooperation and Trade Agreement
CEPA	Comprehensive Economic Partnership Agreements
DCTS	Developing Countries Trading Scheme Standards
PF	Preferential Tariffs
RCEP	Regional Comprehensive Economic Partnership
IEC	Importer-Exporter Code
CPSIA	Consumer Product Safety Improvement Act
RCMC	Registration cum membership certificate
ECGC	Export Credit Guarantee Corporation Ltd



Key Website Links

Volume 1: Toys Sector Overview

Document / Portal	Website Link
Toys (Quality Control) Order, 2020 (QCO)	bis.gov.in – Toy QC Order, 2020 (PDF)
BIS (Conformity Assessment) Regulations, 2018	bis.gov.in – Conformity Assessment Regulations
ISO 8124 Series – Safety of Toys	iso.org – ISO 8124-1:2022
IEC 62115 – Electric Toys (Safety)	webstore.iec.ch – IEC 62115:2017
Indian Standards for Toys (IS 9873 / IS 15644)	bis.gov.in – Indian Standards for Toys
National Action Plan for Toys (NAPT)	pib.gov.in – National Action Plan for Toys
India–UK CETA	commerce.gov.in – India–UK CETA
Bureau of Indian Standards (BIS)	www.bis.gov.in
Startup India Portal	www.startupindia.gov.in
Udyam Registration Portal (MSME)	udyamregistration.gov.in
DPIIT	www.dpiit.gov.in

Volume 2: Value Chain, Manufacturing and Route-to-Market

Document / Portal	Website Link
Tamil Nadu Toy Manufacturing Policy 2025	Tamil Nadu Toy Manufacturing Policy 2025
Madhya Pradesh MSME Development Policy 2025	MP MSMED Policy 2025.pdf
Haryana Toys and Sports Equipment Manufacturing Policy	Haryana Toys and Sports Equipment Manufacturing Policy
Karnataka Industrial Policy 2025- 30	IndustrialPolicy2025 Final .indd
Uttar Pradesh Industrial Investment and Employment Promotion Policy 2022	UTTAR PRADESH industrial Investment and employment promotion policy

Volume 3: Skill, Design and Product Development

Document / Portal	Website Link
Patents Protection Landscape for Toy Innovators	https://ipronline.ipindia.gov.in/epatentfiling/goForLogin/doLogin
Design Application Landscape for Toy Designers	https://ipindiaonline.gov.in/trademarkfiling/user/frmNewRegistration.aspx
Trademark Landscape for Toy Sector	https://ipindiaonline.gov.in/trademarkfiling/user/frmNewRegistration.aspx
Copyright Landscape for Toy Sector	https://copyright.gov.in
Geographical Indications Landscape for Toy Sector	http://www.ipindia.nic.in/

Volume 4: Toys Sector Compliance Requirements

(1/

Document / Portal	Website Link
Legal entity registration	https://www.mca.gov.in/content/mca/global/en/home.html
PAN & TAN Registration	https://www.incometax.gov.in
GST Registration	https://www.gst.gov.in/
Udyam Registration	https://udyamregistration.gov.in/
DPIIT Startup Recognition	https://www.startupindia.gov.in/
Environmental Clearance	https://parivesh.nic.in/
Petroleum and Explosives Safety Organisation	https://peso.gov.in
Labour Codes (Code on Wages 2019, Code on Social Security 2020, OSHWC Code 2020, Industrial Relations Code 2020)	https://labour.gov.in
EPF Registration	https://www.epfindia.gov.in
ESI Registration	https://www.esic.gov.in
MSDS Compliance	https://labour.gov.in

Volume 4: Toys Sector Compliance Requirements

(2)

Document / Portal	Website Link
Restricted Substances List; BIS Certification / ISI mark; Compliance with IS 9873/ IS 15644 standards; BIS Surveillance Audits	https://www.bis.gov.in
ASTM, EU, CFR, ISO standards as applicable for Export Oriented Units (EoUs)	https://www.astm.org https://www.iso.org
Adherence to Legal Metrology (Packaged Commodities) Rules; Product Recall Framework	https://consumeraffairs.nic.in
Mandatory Product Declarations (MRP, Age Grading, Safety Warnings, Manufacturer Details, BIS Marking)	https://www.bis.gov.in https://consumeraffairs.nic.in
GST Invoicing and E-Way Bill Compliance	https://www.gst.gov.in https://ewaybillgst.gov.in
TDS Compliance	https://www.incometax.gov.in
Labour and Tax Filings	https://labour.gov.in https://www.incometax.gov.in
Know Your Approvals (KYA) Tool by National Single Window System	https://www.nsws.gov.in/

Volume 4: Toys Sector Compliance Requirements

(3)

Document / Portal	Website Link
Bureau of Indian Standards	www.bis.gov.in
Manak-online Portal	https://www.manakonline.in/MANAK/login
Laboratory Information Management System	https://lims.bis.gov.in/home/search_labs/
Consumer Product Safety Improvement Act (CPSIA), ASTM F963, 16CFR 1250	https://www.cpsc.gov
Toy Safety Directive 2009/48/EC, EN 71 series, REACH	https://ec.europa.eu, www.legislation.gov.uk
JFSL and CPSA	www.mhlw.go.jp
UK Toys (Safety) Regulations 2011, EN71, UKCA requirements (where applicable)	www.gov.uk
Canada Consumer Product Safety Act (CCPSA), Toys Regulations SOR/2011-17, ASTM F963	www.canada.ca
Accredited Third party labs for international certifications (US, Germany, Japan, UK, Canada)	www.intertek.com
	www.bureauveritas.co.in
	www.Eurofins.com
	www.alphatesthouse.com
	www.sgs.com

Volume 5: Export Promotion & Market Readiness

Document / Portal	Website Link
Country and Products Wise (Tariffs)	https://indiantradeportal.in/index.jsp
Obtaining Importer-Exporter Code (IEC)	https://www.dgft.gov.in
Registration cum membership certificate (RCMC)	https://www.dgft.gov.in/CP/?opt=e-rcmc
Selection of Product	https://tradestat.commerce.gov.in; https://www.trade.gov.in
Selection of Markets	https://www.trade.gov.in
Finding Buyers	https://www.toyassociation.org
US (Standards) The Consumer Product Safety Improvement Act (CPSIA)	https://www.cpsc.gov/cgi-bin/labsearch/
EU Countries (Standards) (Toy Safety Directive 2009/48/EC	https://single-market-economy.ec.europa.eu/sectors/toys/toy-safety_en
Logistics	https://pmsgatishakti.gov.in/pmsgatishakti/login
Customs Filing	https://www.icegate.gov.in

Annexure



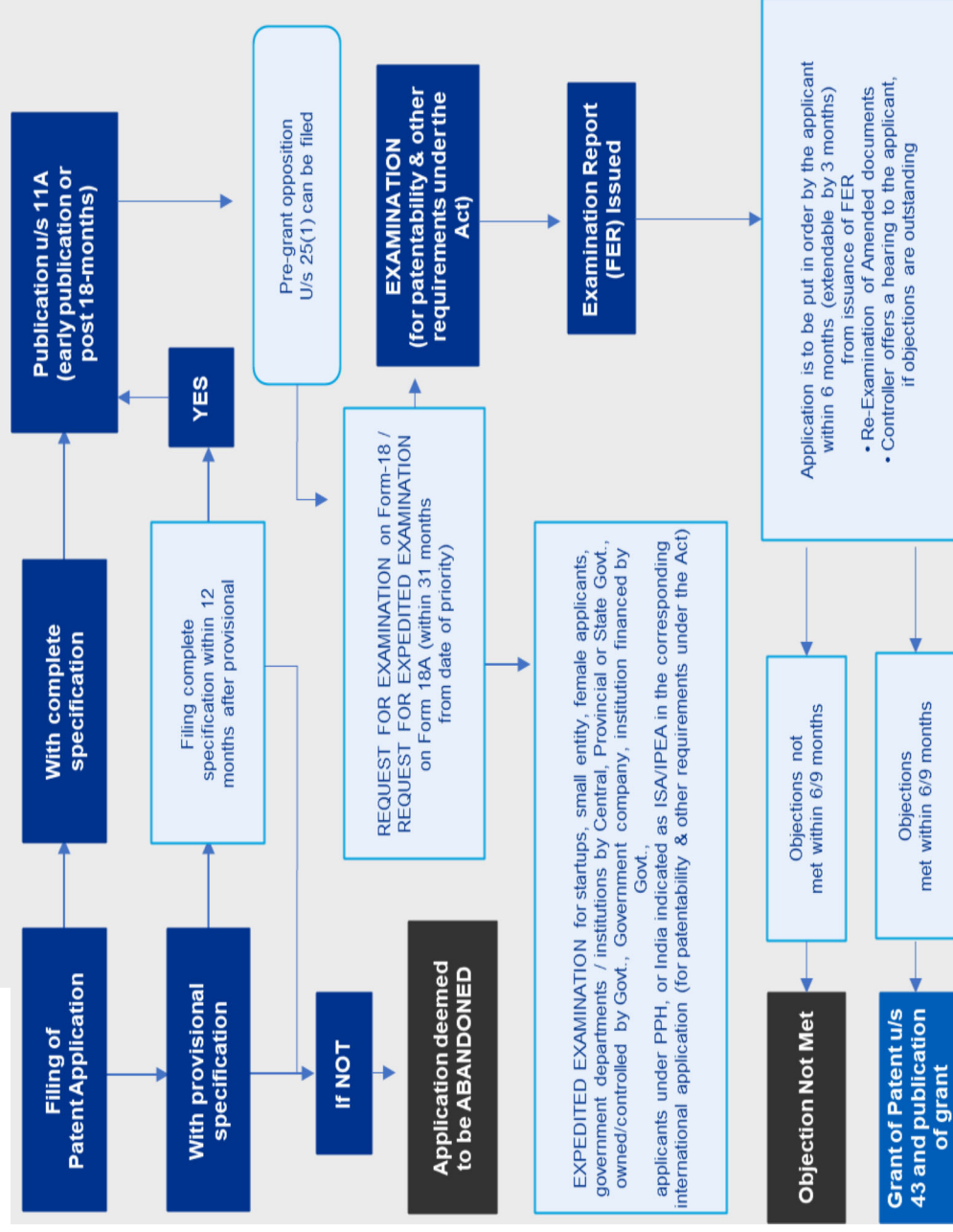
Volume 3: Skill, Design and Product Development

- Patent Protection Landscape
- Design Application Landscape
- Trademark Landscape
- Copyright Landscape
- Geographical Indications Landscape



Patents Protection Landscape for Toy Innovators

Registration Procedure



An invention is a patentable subject matter if it satisfies the following criteria:

- i) it should be novel
- ii) it should be non-obvious i.e. must be a new step
- iii) it should be industrially applicable

Invention should be technical of nature and not fall under the exemptions as specified in the provisions of the Patents Act 1970

There are four patent offices in India: Chennai, New Delhi and Kolkata. Online filing can be filed through comprehensive online portal.

<https://ipronline.ipindia.gov.in/e-patent/doLogin>

Patent Application fee for e-filing in India

- **Natural Person / Start-up / Small Entity** (Start-ups get 80% rebate on patent filing fee)
- **Others: INR 8000**

Note: Small Entity as defined under Micro, Small and Medium Enterprises Development Act, 2006, as an entity where investment in Plant and Machinery is not more than 10 crores and turnover is not more than 50 crore rupees.

Source: Cell for IPR Promotion & Management (CIPAM), DPIIT

Registration Procedure

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graph TD; A[Filing of Application] --> B[EDP, Numbering, Dating & ALLOTMENT of Application to Examiner]; B --> C[Examination of Applications]; C --> D[If no Objection]; C --> E[If Objections, then communicated to Applicant (FER)]; D --> F[Accepted for Registration]; E --> G[No response to FER]; E --> H[Compliance of Objection(s)]; E --> I[Reply to FER]; G --> J[Abandoned]; H --> K[Hearing Offered if Objection(s) not complied]; I --> L[Re-Examination]; K --> M[Compliance of Objection(s)]; L --> F; M --> F; F --> N[Notification in the Official Journal]; N --> O[Issue of certificate]; J --> P[Refusal if Objection(s) still not complied]; P --> Q[Applicant may Appeal to High Court]; Q --> R[In case of allowance of appeal]; R --> F;
```

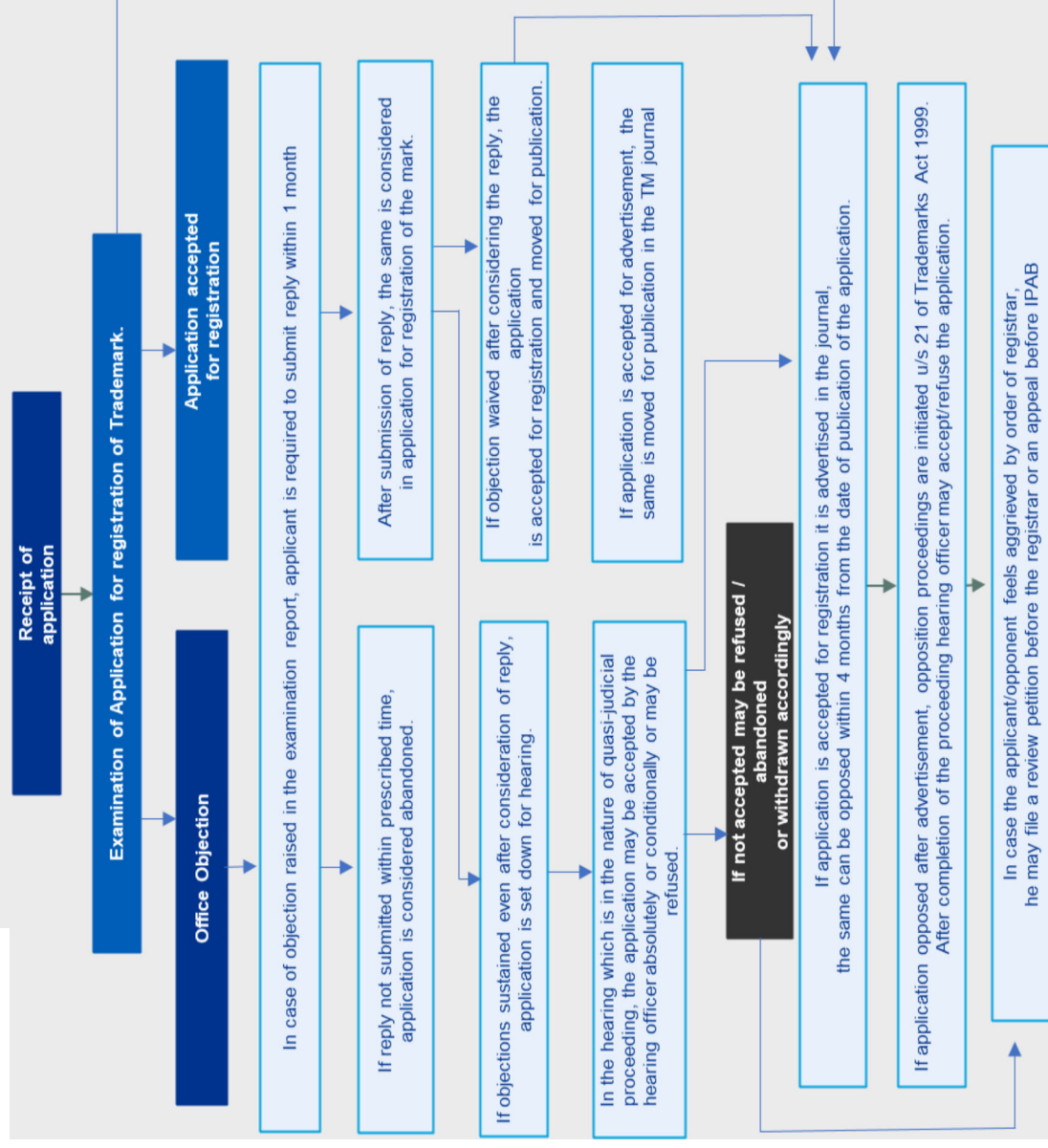
The flowchart illustrates the Design Registration Procedure. It begins with the 'Filing of Application', which leads to 'EDP, Numbering, Dating & ALLOTMENT of Application to Examiner'. This step leads to 'Examination of Applications'. From 'Examination of Applications', the process can proceed to 'If no Objection' (leading to 'Accepted for Registration') or 'If Objections, then communicated to Applicant (FER)'. From 'If Objections, then communicated to Applicant (FER)', the process can proceed to 'No response to FER' (leading to 'Abandoned'), 'Compliance of Objection(s)' (leading to 'Accepted for Registration'), or 'Reply to FER' (leading to 'Re-Examination'). 'Re-Examination' leads to 'Accepted for Registration'. 'Accepted for Registration' leads to 'Notification in the Official Journal', which leads to 'Issue of certificate'. 'Abandoned' leads to 'Refusal if Objection(s) still not complied', which leads to 'Applicant may Appeal to High Court'. 'Applicant may Appeal to High Court' leads to 'In case of allowance of appeal', which leads to 'Accepted for Registration'.

Note: Small Entity as defined under Micro, Small and Medium Enterprises Development Act, 2006, as an entity where investment in Plant and Machinery is not more than 10 crores and exceed 50 crore rupees.

Source: Cell for IPR Promotion & Management (CIPAM). DPIIT.

Trademark Landscape for Toy Sector

Registration Procedure



As explained under section 2(zb) of the Trademark Act 1999, “Trade mark” means a mark represented graphically and which distinguishes the goods or services of one person from those of others and may include words, letters, numerals, shape of goods, packaging, label. Shape of goods, and services also be registered as trade mark/service mark.

There are five Trademark Registry offices in India: Mumbai, Ahmedabad, Chennai, New Delhi, and Kolkata.

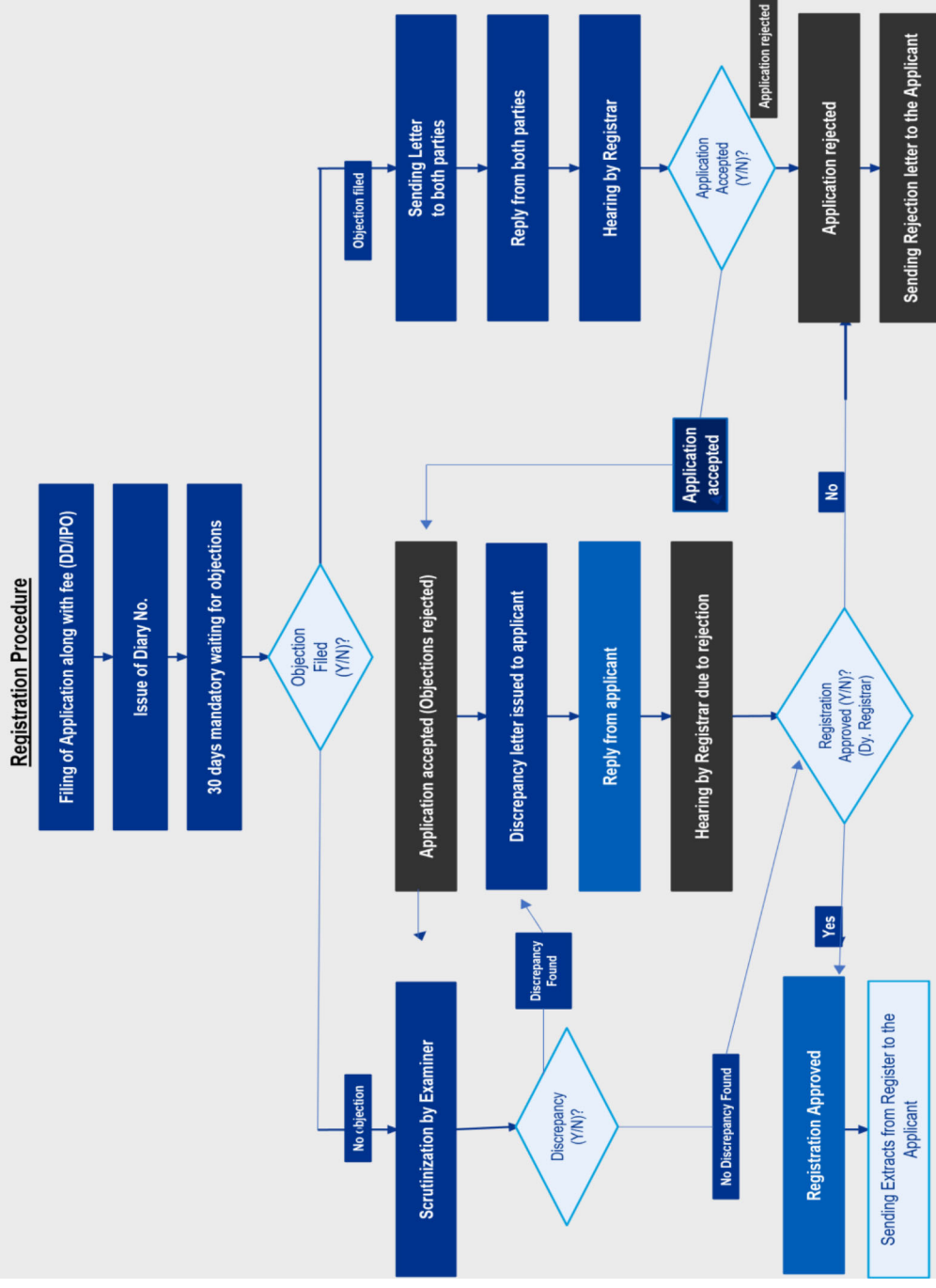
Online trademark applications can be filed through the comprehensive online filing system at: <https://ipindiaonline.gov.in/trademark/wRegistration.aspx>

Fee for filing of the Trademark application

Individual / Start-up / SMEs-
 INR 4,500 (online)
 INR 5,000 (at counter)
 Others INR 9,000 (online)
 INR 10,000 (at counter)

Copyright Landscape for Toy Sector

Registration Procedure



Copyright is a form of intellectual property law granted to the creators of original works of authorship such as literary works, programs, tables and compilations, databases which may be expressed in any form, including dramatic, musical and cinematographic films and sound recordings.

The application for the registration of the work made by applying physically in the copyright office or through speed/registered post; or through the official website of copyright.gov.in.

Fee for registration of a Copyright

Literary, Dramatic, Musical or Artistic work.

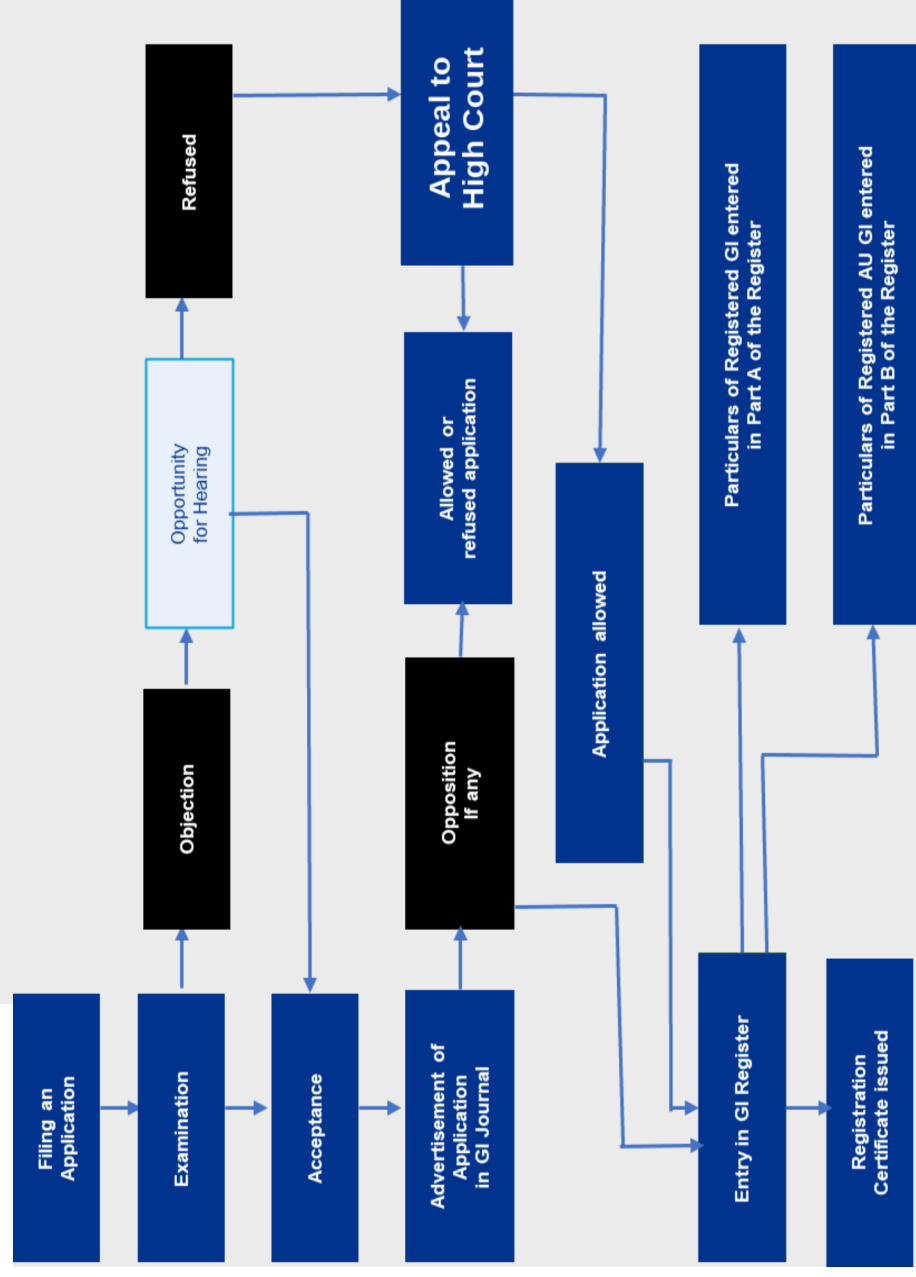
Literary or Artistic work which is used in relation to any goods or services is Rs. 2,000/- per work.

Cinematograph film Rs. 5000/- per work.

Sound Recording Rs. 2000/- per work.

Geographical Indications Landscape for Toy Sector

Registration Procedure



Geographical Indication (GI) refers to the defines the goods originating from a particular country or region or locality in that territory agricultural goods, natural goods or manufactured goods of handi- craft or goods or industrial stuff originating from a definite geographical

The application for registration of GI can be filed with the GI Registry located in Chennai.

The application can also be filed online at <http://www.ipindia.nic.in/>

Registration of GI Application :

for registration of a GI should be in the prescribed form accompanied by the prescribed fee Rs.5000/-

Volume 4: Toy Sector Compliance Requirements

- End-to-End Compliance Mapping



Stage-wise Compliance Map for Toy Manufacturing in India (1/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Business Setup and Registration	Legal entity registration	- Ministry of Corporate Affairs (MCA) - Registrar of Firms	- Companies Act, 2013 - Limited Liability Partnership Act, 2008 - Indian Partnership Act, 1932, along with applicable State Partnership Rules	- Certificate of Incorporation (for companies/LLPs), or equivalent registration certificate for other entity types - Memorandum of Association (MoA) and Articles of Association (AoA) (for companies) - Director Identification Number (DIN) - LLP Agreement or Partnership Deed as applicable
	PAN & TAN Registration	Income Tax Department	Income –tax Act, 1961	- Incorporation Certificate / Document - PAN / TAN Application Forms
	GST Registration	CBIC / State GST Departments	Central Goods and Services Tax (CGST) Act, 2017, along with SGST/UTGST Acts and GST Rules	- PAN - Incorporation Documents - Address Proof - Bank Details
	Business Bank Account	RBI – regulated Banks	RBI KYC Directions	- PAN - CoI - GST Certificate - Board Resolution (where applicable)
	Trade License	Local Municipal Authority	Applicable Municipal Laws	Entity and Premises Documents

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (2/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Business Setup and Registration	Shops and establishment Registration	State Labour Department / Labour Commissioner / Local Labour Authority	Respective State Shops and Establishments Act (e.g., Delhi Shops and Establishments Act, 1954)	• Certificate of Incorporation / Partnership Deed, PAN • Address Proof of Establishment • GST Registration (where applicable) • Rent Agreement/Ownership Documents
	Udyam Registration	Ministry of MSME	MSMED Act, 2006	• PAN • GSTIN • Aadhaar
	DPIIT Start up recognition	DPIIT	Startup India Recognition Framework	• PAN • CoI • Other business details
Pre Construction Approvals	Land-use / Zoning Permission ¹	Urban Development Authority / Industrial Development Corporation / Local Planning Authority	• Applicable State Town and Country Planning Acts; • Zoning Regulations • Industrial Area Development Regulations	• Land Ownership documents • Lease deed/allotment letter • Site plan, land records and project details

Note: 1. Land-use/Zoning Approval should be obtained before finalizing land acquisition or factory construction plans.

Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness

Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (3/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Pre Construction Approvals	Consent to Establish (CTE) / Pollution Sanction	State Pollution Control Board (SPCB)	- Water (Prevention and Control of Pollution) Act, 1974; - Air (Prevention and Control of Pollution) Act, 1981; - Environment (Protection) Act, 1986	- Application Form, Detailed Project Report (DPR) - Site Layout Plan - Manufacturing Process Details - Proposed Pollution Control Measure
	Building Plan Approval	Local Municipal Authority / Development Authority / Industrial Development Corporation	- State Building Bye-laws - National Building Code (NBC) 2016	- Building / architectural drawings - Structural Stability Certificate - Land Documents - Architect Certificate - Site Plan
	Local Authority Construction Permit / Commencement Certificate	Local Authority / Development Authority / Industrial Development Corporation	- State Building Bye-laws - Development Control Regulations	- Approved building plans - Ownership documents - NOCs
	Factory Layout Plan Approval	Directorate of Factories / Chief Inspector of Factories	- Factories Act, 1948 (or Occupational Safety, Health and Working Conditions Code, 2020, as notified) - State Factory Rules	- Factory layout drawings - Machinery layout - Process flow diagram - Safety provisions - Building plans

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (4/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Pre Construction Approvals	Environmental Clearance ¹	Ministry of Environment, Forest and Climate Change (MoEFCC) / State Environment Impact Assessment Authority (SEIAA)	- Environment (Protection) Act, 1986 - EIA Notification, 2006	- Environmental Impact Assessment (EIA) Report - Environmental Management Plan (EMP), Form - Pre-feasibility Report - Public Consultation Documents (where required)
	Factory License	Directorate of Factories / State Labour Department	- Factories Act, 1948 (or Occupational Safety and Health and Working Conditions Code, 2020, as notified) - State Factory Rules	- Approved Factory Layout Plan - Building Plan Approval - Occupancy Certificate - Manufacturing Process Detail - Machinery Details
Factory Establishment and Utilities	Electricity Connection	State Electricity Distribution Company (DISCOM)	- Electricity Act, 2003 - State Electricity Supply Code	- Application Form - Land Ownership Documents, - Factory Licence/Approvals - Load Requirement Details
	Fire NOC	State Fire Department	- Applicable State Fire Safety Rules - National Building Code (NBC) 2016 – Fire & Life Safety Provisions	- Approved Building Plan - Fire Safety System Layout - Firefighting Equipment Details - Occupancy Details

Note: 1.Environmental Clearance is applicable only for projects falling under categories specified in the EIA Notification, 2006.

Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness

Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (5/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Factory Establishment and Utilities	Water Connection	Municipal Authority / Industrial Development Corporation / State Water Supply Authority	Applicable State Water Supply Rules and Regulations	• Land Documents • Approved Building Plan • Water Requirement Details • Factory Documents
	Industrial Safety Compliance Norms	State Pollution Control Board (SPCB); Directorate of Factories	• Environment (Protection) Act, 1986 • Hazardous and Other Wastes Rules, 2016 • Battery Waste Management Rules, 2022 • OSHWC Code, 2020	• Waste Management Plan • Safety Audit Reports • Risk Assessment Reports
	Consent to Operate (CTO)	State Pollution Control Board (SPCB)	• Water Act, 1974 • Air Act, 1981	• CTE Certificate • Installation Details • Pollution Control Equipment Details • Compliance Reports
	Boiler Registration	Chief Inspector of Boilers / Boiler Inspectorate	• Boilers Act, 1923 • Indian Boiler Regulations, 1950	• Boiler Drawings • Manufacturer Certificate • Inspection Reports • Installation Documents • Layout plan of steam & bow down pipeline

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness. Certain approvals (e.g., Boiler Registration, PESO Approval, Lift Licence, Hazardous Waste Authorisation, and environmental clearances) are applicable based on the manufacturing process.

Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (6/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Factory Establishment and Utilities	Petroleum and Explosives Safety Organisation (PESO) Approval	Petroleum and Explosives Safety Organisation	- Explosives Act, 1884 - Gas Cylinder Rules, 2016 - Petroleum Rules, 2002	- Site Plan - Storage Layout - Safety Certificates, - Equipment Specifications
	Lift License	State Electrical Inspectorate / Lift Inspectorate	Applicable State Lift and Escalator Acts and Rules	- Lift Installation Certificate - Safety Inspection Report - AMC Agreement - Manufacturer Certificates
Workforce and Production Readiness	Supplier Agreements & Compliance Declarations	Suppliers / Vendors (Contractual Requirement)	- Indian Contract Act, 1872 - Product-specific Standards	- Supplier Agreements - Compliance Declarations - Quality Certifications
	Labour Codes (Code on Wages 2019, Code on Social Security 2020, OSHWC Code 2020, Industrial Relations Code 2020)	Ministry of Labour & Employment / State Labour Departments / Directorate of Factories	- Code on Wages, 2019 - Code on Social Security 2020 - Industrial Relations Code, 2020 - Occupational Safety, Health and Working Conditions Code, 2020 - State Factory Rules	- Employee Records - Wage Registers - Appointment Letters - Attendance and Training Records - Statutory Registers - Emergency Plans

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (7/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Workforce and Production Readiness	EPF Registration	Employees' Provident Fund Organisation (EPFO)	- EPF & MP Act, 1952 - Code on Social Security, 2020	- PAN - Incorporation Certificate - Employee Details - Bank Details
	ESI Registration	Employees' State Insurance Corporation (ESIC)	- Employees' State Insurance Act, 1948 - Code on Social Security, 2020	- PAN - Incorporation Certificate - Employee Details - Address Proof - Bank Details
	MSDS Compliance	Manufacturers / Suppliers; Directorate of Factories	OSHC Code, 2020	- Material Safety Data Sheets (MSDS/SDS) - Chemical Inventory Records
	Restricted Substances List (RSL) adherence	Bureau of Indian Standards (BIS) Industry Bodies; Buyers (where applicable)	IS 9873 (Part 3); Toys (Quality Control) Order, 2020	- Test Reports - Supplier Declarations - Chemical Compliance Certifications
Testing and Certification	Quality / ISI mark (Bureau of Indian Standards (BIS))	Bureau of Indian Standards (BIS)	- Bureau of Indian Standards Act, 2016 - Toys (Quality Control) Order, 2020	- BIS Application - Factory details - Quality control documents, - Test reports - Manufacturing process details

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (8/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Testing and Certification	Compliance with IS 9873/ IS 15644 standards	- Bureau of Indian Standards (BIS); - BIS-recognised Laboratories	- IS 9873 (Parts 1–9, as applicable) - IS 15644 (for electric toys)	- Product specifications - Bill of Materials - Product samples - Laboratory Test Reports
	BIS Market Surveillance	Bureau of Indian Standards (BIS);	- Bureau of Indian Standards Act, 2016 - BIS (Conformity Assessment) Regulations, 2018 - Toys (Quality Control) Order, 2020	- BIS Licence (ISI Mark) - Product test reports, - Production records, - Quality control records, - Batch Traceability Records, - Corrective Action Reports (if any), - Surveillance Audit Reports
	ASTM, EU, CFR, ISO standards as applicable for Export Oriented Units (EoUs)	- Accredited Laboratories - International Standards Bodies	- ASTM F963 - EN 71 Series - ISO 8124 (as applicable)	- Product samples - Test Reports - Declaration of conformity
	Buyer/Retailer specific certifications	- Buyers - Retailers - Third-party Certification Agencies	Buyer-specific technical specifications and compliance protocols	- Supplier Declarations - Product Specifications - Audit Reports

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (9/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Market Readiness and Distribution	Adherence to Legal Metrology (Packaged Commodities Rule)	Department of Consumer Affairs (Legal Metrology Division)	Legal Metrology Act, 2009; Legal Metrology (Packaged Commodities) Rules, 2011	- Packaging Artwork - Product labels - Declarations relating to net quantity, MRP, manufacturer details
	Mandatory Product Declarations	- Department of Consumer Affairs (Legal Metrology Division) - Bureau of Indian Standards	- Legal Metrology (Packaged Commodities) Rules, 2011 BIS Act, 2016 - Toys (Quality Control) Order, 2020	- Approved packaging artwork - BIS Licence - Product specifications
	GST Invoicing and E-Way Bill Compliance	- Central Board of Indirect Taxes and Customs (CBIC) - State GST Authorities	- CGST Act, 2017 - SGST/UTGST Acts - GST Rules - E-Way Bill Rule	- GST Registration Certificate - Invoice templates, - Transporter details - E-way bill records
	TDS Compliance	Income Tax Department (ITD)	- Income-tax Act, 1961 - Income Tax Rules, 1962	- TAN Registration - TDS Returns - Payment Records - Deduction Registers

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Stage-wise Compliance Map for Toy Manufacturing in India (10/10)

Stage	Compliance Requirement	Relevant Authority / Department	Applicable Law / Regulation	Documents Required
Market Readiness and Distribution	Labour and Tax Filings	- Ministry of Labour & Employment (MoLE) - State Labour Departments - Income Tax Department	- Code on Social Security, 2020 - Code on Wages, 2019 - Income Tax Act, 1961	- Labour Returns - Payroll Records, - Statutory Registers - Tax Returns
	Product Recall Framework	- Central Consumer Protection Authority (CCPA) - Department of Consumer Affairs	Consumer Protection Act, 2019	- Product Recall Policy - Complaint Handling SOPs - Traceability Records - Corrective Action Records
	GST Audits	- Central Board of Indirect Taxes and Customs (CBIC) - State GST Departments	- Central Goods and Services Tax (CGST) Act, 2017; CGST Rules, 2017 - State GST Acts	- GST Registration Certificate - GSTR-1, GSTR-3B, GSTR-9/9C (where applicable) - Purchase & Sales Registers - Tax Invoices, E-Way Bills, Input Tax Credit Records - Books of Accounts - Reconciliation Statements

Note: Timelines are indicative and based on typical approval processes; actual timelines may vary depending on state regulations, project complexity, and documentation completeness
Source: Stakeholder and Industry Consultations, Government Publications and Websites, Secondary Research Reports

Volume 4: Toy Sector Compliance Requirements

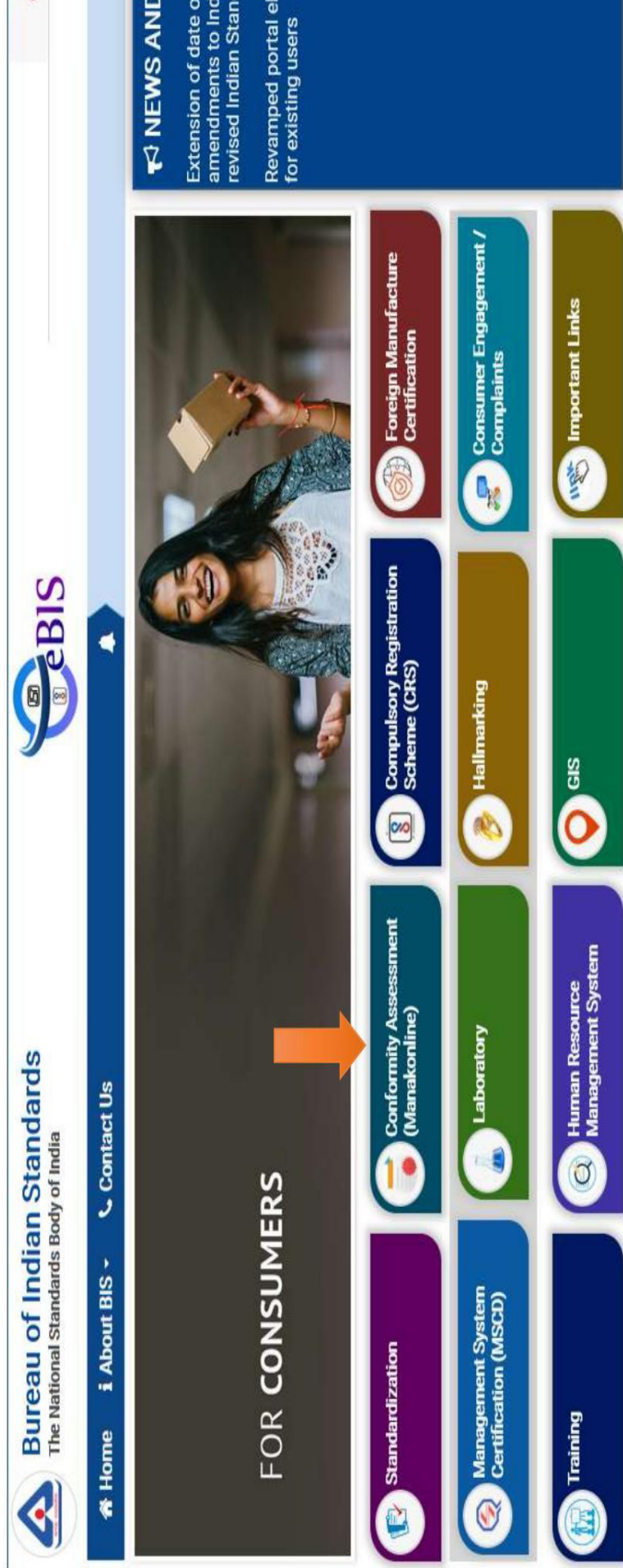
- BIS Certification – Process Flow



BIS Toy Certification : Grant of License – Process Flow

Product certification for toys is mandatory in India due to the Quality Control Order (QCO), which ensures that comply with BIS safety standards. Below is a step-by-step procedure for obtaining a BIS license.

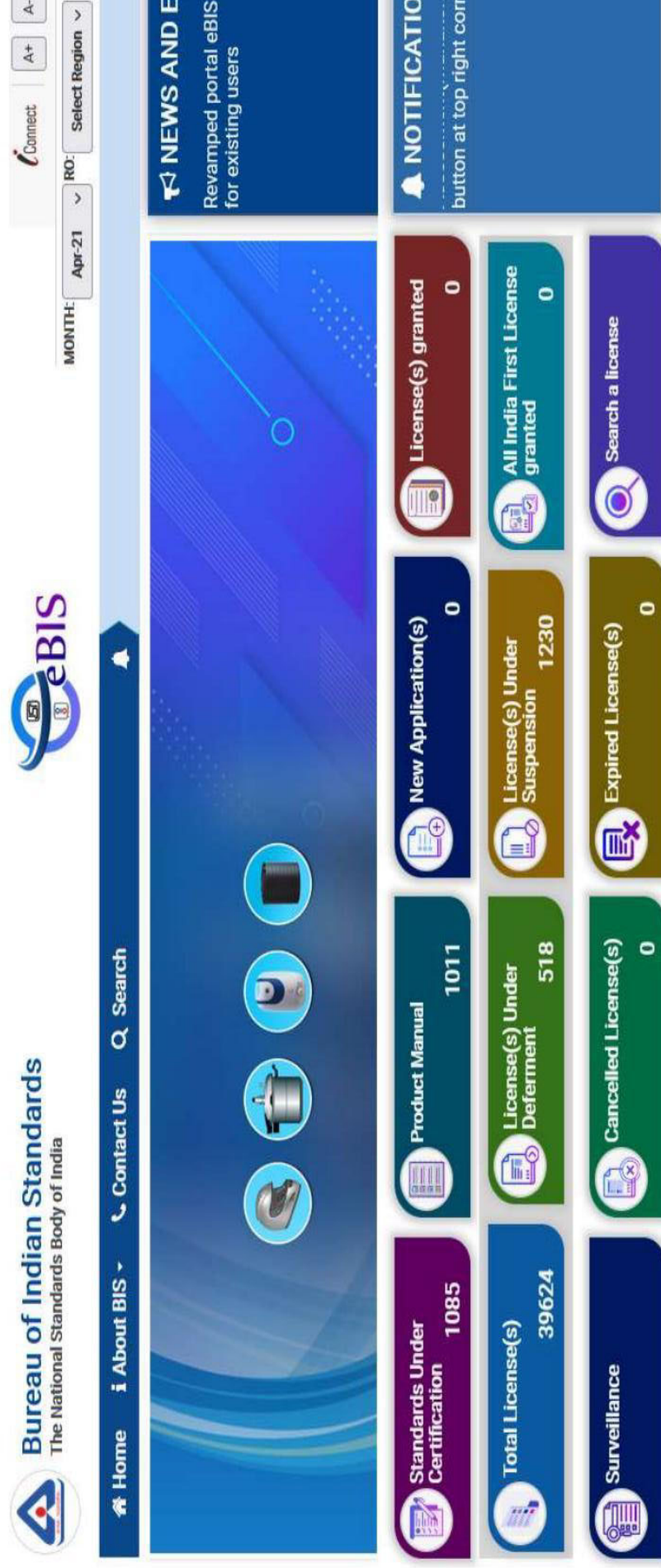
- Step 1: Enter the URL <https://www.manakonline.in/MANAK/login> in Mozilla Firefox web browser.
- Step 2: Click on the Conformity Assessment (Manakonline) tab as shown in (Fig. 1)



(Fig.1)

BIS Toy Certification : Grant of License – Process Flow

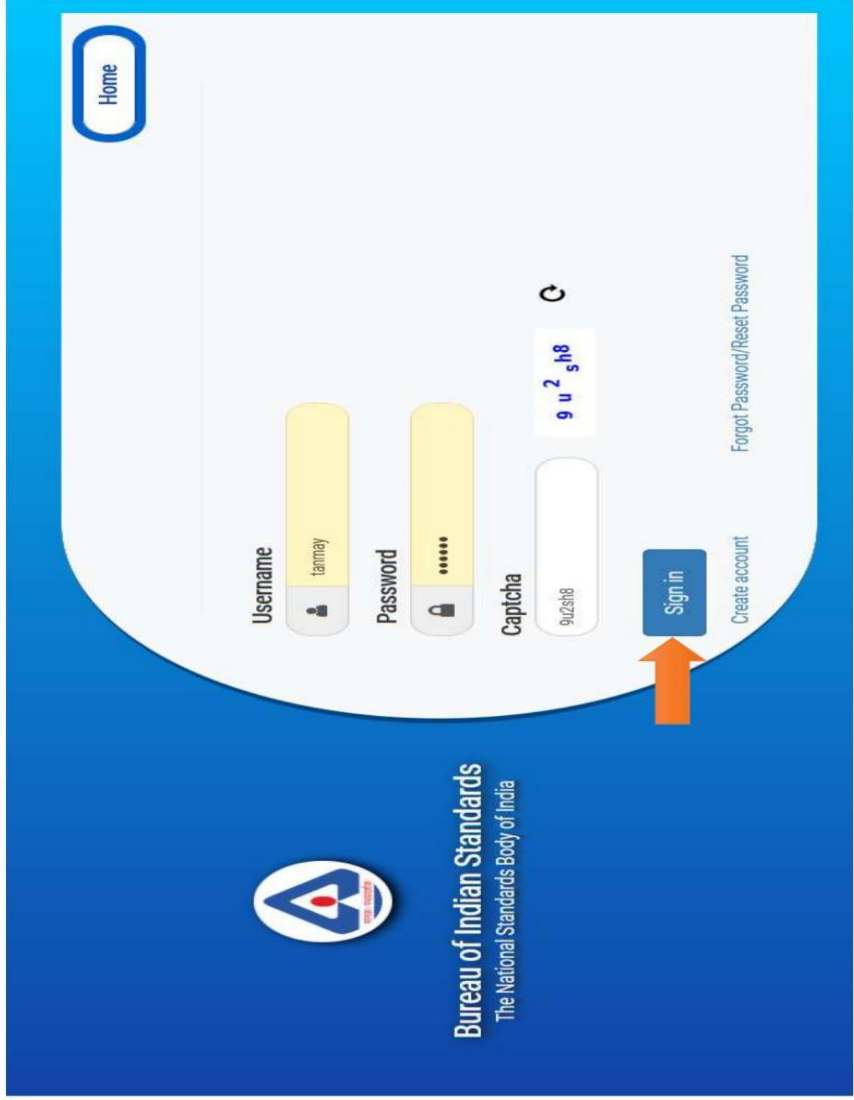
- Step 3: Click on LOGIN tab as shown in (Fig.2)



(Fig.2)

BIS Toy Certification : Grant of License – Process Flow

- Step 4: Enter the Username, Password, Captcha and click on Sign in tab as shown in (Fig.3)



(Fig.3)

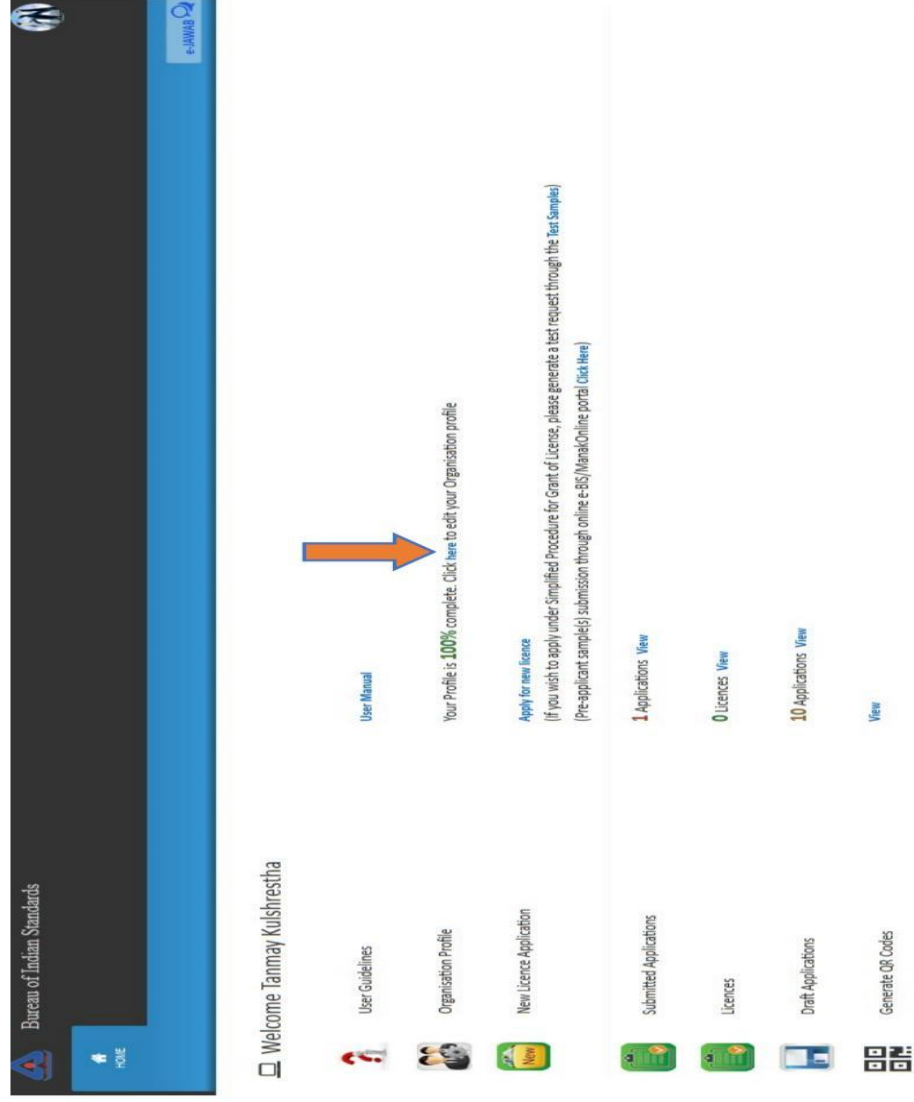
- Step 5: Click on the Product Certification as s



(Fig.4)

BIS Toy Certification : Grant of License – Process Flow

- Step 6: Click on 'Here' link against Organization profile to fill the same as shown in (Fig.5)



(Fig.5)

- Step 7: In case you have not entered your details, please fill up the organization profile.

Following Details are crucial while applying for BIS Certification License. Please fill correct details and upload corresponding documents. In case of incorrect details, your application may lead to rejection of your application.

Company/Office Profile

Organization Profile	
Firm Name: *	Enter name of Office
Registration Details	
Nature of Firm: *	Select
Scale: *	Select
Proof of Establishment of Firm: *	Select
Document(In case of Proof of Establishment of Firm): *	Browse... N
Women Entrepreneur: *	☐ Yes ☐ No
Startup: *	☐ Yes ☐ No
Registration Number: *	Enter Registration Number
GST Number: *	Enter GST Number
Business Licence Number: *	Enter Business Licence Number
PAN Number: *	Enter PAN Number
Sector: *	Select
Date Of Registration: *	DD/MM/YY
Office Details	
CEO Name: *	Enter name of CEO
Office Address: *	Enter Address
State: *	Select
City: *	Select
Address Proof Document: *	Select
Registered Mobile Number: *	7982511146
Office Email: *	Enter The Email
Landline Number: *	Country Code
	STD Code
	Enter the number
Factory Details	
Country: *	INDIA
District: *	Select
Pin Code: *	Enter pincode
Document(Address Proof): *	Browse... N
Registered Email: *	testmanak
Alternate Mobile Number: *	Enter the number

BIS Toy Certification : Grant of License – Process Flow

- Step 8: After filling all the details of the profile, click on the ‘Submit’ button as shown in (Fig.7)

Factory Details

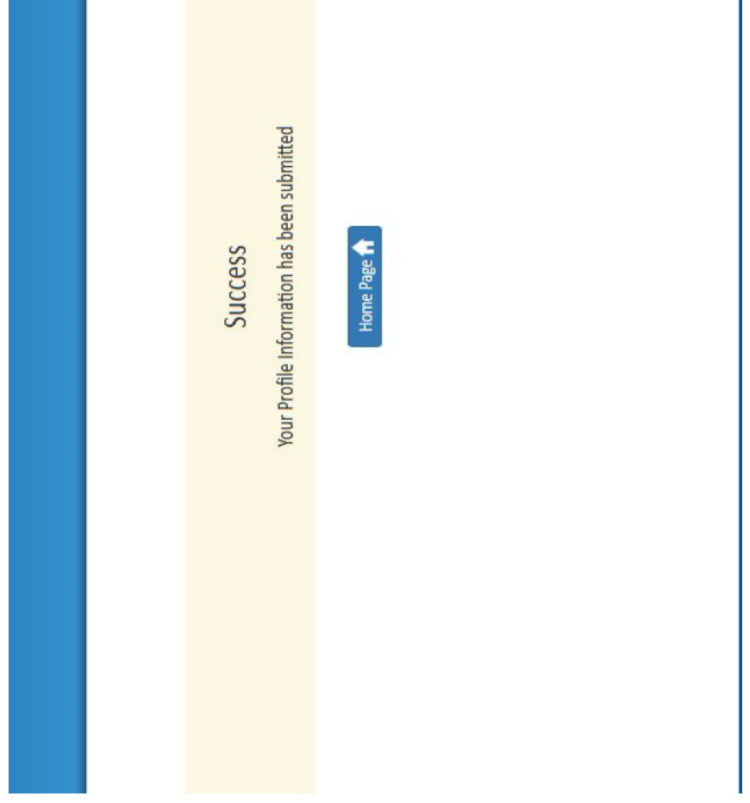
IS Factory Details Different From Office Details ? ☒ Yes ☐ No

Factory Address *	delhi ✓	Country *	INDIA
	ITO ✓		
State *	DELHI ✓	District *	DELHI ✓
City *	DELHI ✓	Pin Code *	110070 ✓
Address Proof Document *	Certificate/documentary evidence from Registe... ✓	Document(Address Proof) *	Browse... AHC 1.pdf
Registered Mobile Number *	7982511146 ✓	Registered Email *	testmanak2@yopmail.com
Factory Email *	yash@gmail.com ✓	Alternate Mobile Number	9878987632 ✓
Landline Number:	1234 ✓		
	5434 ✓		
	543265 ✓		

Submit

(fig.7)

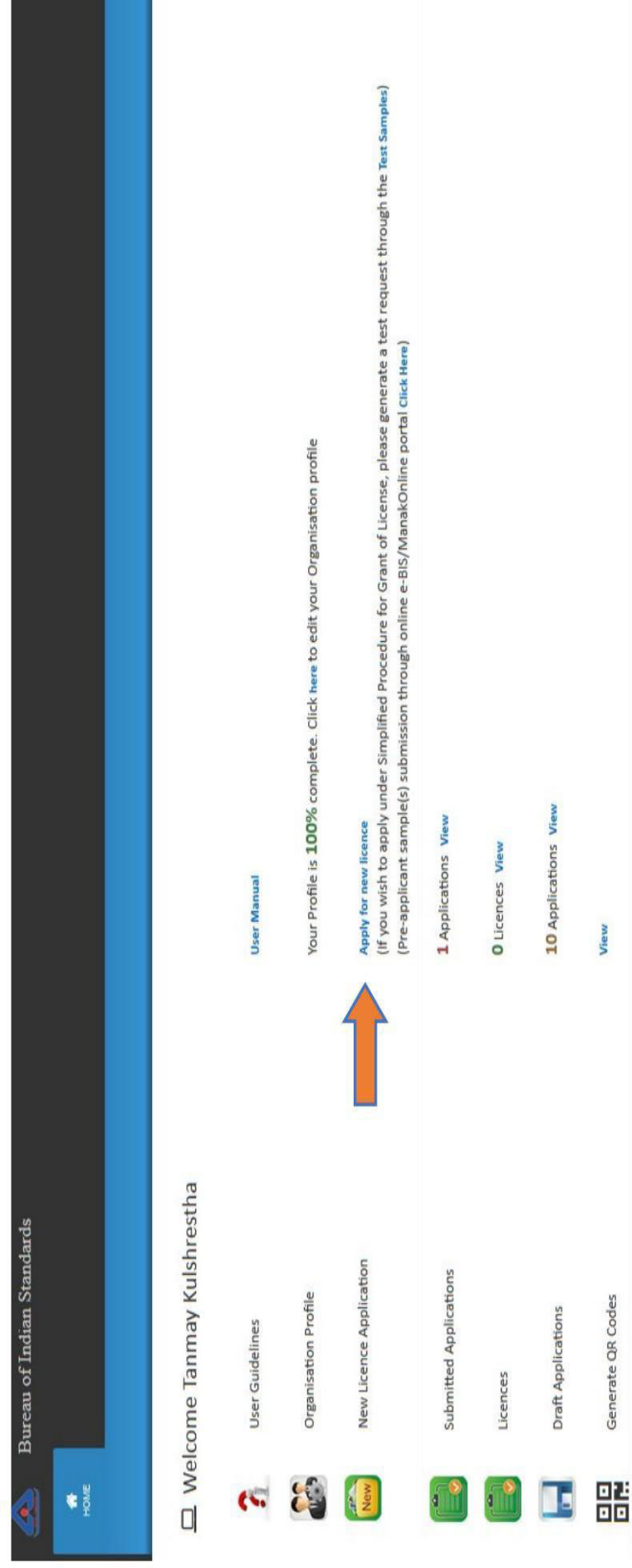
- Step 9: Then a success message will reflect after successful updation of the profile as shown in (Fig.8)



(Fig.8)

BIS Toy Certification : Grant of License – Process Flow

- Step 10: You can apply for new license when the profile is updated. Click on the 'Apply for New License' link as shown in the screenshot below (Fig.9).
- Before filling the application, please go through the guidelines provided by BIS for Grant of License. These can be accessed through the following path: Go to bis.gov.in > Conformity Assessment > Product Certification Process > Guidelines for Grant of License (or click on the link- <https://www.bis.gov.in/wp-content/uploads/2021/08/GoL-GuidelinesWebsiteHosting.pdf>)



(Fig.9)

BIS Toy Certification : Grant of License – Process Flow

- Step 12: Select option 'Yes' if you know the Indian Standard Specification (ISS) for the product against which license choose the standard accordingly as shown in (Fig. 11) <Refer Guideline on the website for proper content>

Office/Firm Details

Firm Name:
test

Test
ASTAULY

Firm Address:
test

CEO Name:
City:

District:
GAUTAM BUDDH NAGAR

State:
UTTAR PRADESH

Country:
India

PinCode:
201307

E-MailId:
nitinkumarvarshney@yopmail.com

Mobile: 9999999999

Address Proof Type:
Certificate/documentary evidence from Registrar of firm

Indian Standard Details

Do You Know Indian Standard*:
Indian Standard*:
Select Option*:
Product Manual:

Yes

14543

IS 14543:2016[Title:- PACKAGED DRINKING WATER (OTHE...]

Option 1

To view the list of such products where applications are required to be mandatorily filed under option-2, please click here

Search

Marking Fee Details

I hereby agree to pay marking fee to Bureau of Indian Standards after grant of licence to use the Standard Mark according to the following rates and in the manner stipulated as under :

i) Minimum Marking fee= ₹ 128000.00

The Actual marking fee to be calculated as under
₹ 20.00 per unit for 1st 6000.0 units
1 Unit = 1000 LITRE

ii) The marking fee is payable as follows :

(Fig 11)

BIS Toy Certification : Grant of License – Process Flow

- Option 1 (Normal Procedure): After scrutiny of application is done, a factory visit is carried out and sample is drawn the testing is completed and a report is received, the Branch Office of BIS then process for the Grant of Licence. Sample is drawn in case the Grant of License is to be consider on the basis of factory testing only.
- Option 2 (Simplified Procedure): The applicant has to submit a test report of their product along with the application is submitted, a factory visit is carried out for the verification of manufacturing infrastructure, production quality control etc. and then the license may be processed for grant of license. The test report of the sample(s) factory visit will be used for review purposes.
- Step 13: Fill the details of Top management, Technical management and Contact person (Fig.12)

The screenshot displays the 'Firm's Management Details' form. At the top, a progress bar shows steps 1 through 8: 1. Application General Inform, 2. Management Details (active), 3. Manufacturing Process, 4. Packaging Marking Branding, 5. Testing and Inspection, 6. Test Reports, 7. Declaration/Undertaking, and 8. Preview Application. The form is divided into three main sections: 'Top Management Details', 'Correspondence Details', and 'Technical Management / Quality Assurance / Control Personnel Details'. The 'Top Management Details' section includes fields for Name (anjit mishra), Designation (director), Contact No. (9997286284), Email ID (xyx@gmail.com), and DIN (if applicable) (7042128658). The 'Correspondence Details' section includes fields for Correspondence Address Communication (Office surya), Name of Contact Person (xyz@gmail.com), and E-Mail Id (xyz@gmail.com). The 'Technical Management / Quality Assurance / Control Personnel Details' section includes fields for Name (rahul), Designation (technical support), Qualification (btech), Qualification Document (Browse...), Experience (in years) (10), and Photo (Browse...). Navigation buttons 'Back' and 'Next' are located at the bottom right of the form.

Firm's Management Details				
Top Management Details				
Name *	Designation *	Contact No. *	Email ID *	DIN (if Applicable)
anjit mishra	director	9997286284	xyx@gmail.com	Enter DIN
Correspondence Details				
Correspondence Address Communication *				
Name of Contact Person *				
E-Mail Id *				
Kindly note that the above correspondence will be used for all communications/alerts from BIS.				
Technical Management / Quality Assurance / Control Personnel Details				
Name *	Designation *	Qualification. *	Qualification Document *	Experience (in years) *
rahul	technical support	btech	Browse...	10
				Photo *
				Browse... 2 001.jpg

(Fig 12)

BIS Toy Certification : Grant of License – Process Flow

- Step 14: Similarly, fill the details of ‘Testing Equipment’. Click on ‘Yes’ if you want to download the excel file, otherwise

1Application General Inform

2Management Details

3Manufacturing Process

4Packaging Marking Branding

5Testing and Inspection

6Test Reports

7Declaration/Undertaking

8Preview Application

Manufacturing Process

Manufacturing Process Details

Raw Material Details

Raw material (With Grade Details, if any) *

Bottle

Name of Supplier *

surya water supplier

Conformity of Material *

ISI Marked

Test Report From BIS Recognized Lab

How Received Batches/Lots Nature of Package *

10

Record

Yes

Do you outsource any part of the manufacturing process. (Decision on permitting outsourcing is subject to evaluation and product specific guidelines notified by the Bureau): *

No

Maintenance of Hygienic conditions (Must for Food products):

No

Process Flow-Chart Covering all Processes of Manufacture (from Raw Material to Finished Product Stage), Including Details of In-Process Controls at each stage, including for those stages which have been Outsourced *

Browse... FeeReceipt_10815983.pdf
upload pdf file(Max size 20 MB)

Enclose Layout Plan of Factory: *

Browse... EinvoiceNew4668482.pdf
upload pdf file(Max size 20 MB)

Manufacturing Machinery List: *

Browse... REFUND MODULE DETAILS.xlsx
upload Excel file(Max size 20 MB)

[Download Template](#)

(Fig 13)

BIS Toy Certification : Grant of License – Process Flow

- Step 15: Then fill the production details, accept declarations and click on 'Next' to go to the next page as shown below

Production Details(Annual)

Units of Production(as per MF) 1 Unit=*

1000 LITRE

Production Value
(If already in production, actual approx. value of production per annum, in ₹):*

1000000

Present Installed Capacity:*

10000

Back

Next

- Step 16: Fill the details of Brand details and click Next

1

Application General Information

2

Management Details

3

Manufacturing Process

4

Packaging Marking Branding

5

Testing and Inspection

6

Test Reports

7

Declaration/Undersubscribing

8

Premer Application

9

Pay Fee

Packaging And Brand Details

Packaging And Marking

Nature of Packaging:*

bottle

Marking on articles:*

15

(Please specify details being marked on the product/packaging such as Brand, product description, type, ratings etc.)

Method of Marking:*

Printing

Quantity Per Package:*

12

Form of Label(s):

Browse...

Batch or Code or Serial numbering for identifications:*

123456

Brand Details

Brand Names/Trademark(s) which would be marked on the product bearing the BIS Standard Mark (Give actual design depiction of the Brand Name/Trade Mark(s)) *

aquafina

I/We undertake to inform BIS in advance as and when we propose to use any other Brand Name(s)/Trade Mark(s) in conjunction with the operation of BIS Certification Scheme.
I/We also undertake that, as far as possible, the entire production which conforms to the specification shall be marked with BIS Mark, irrespective of Brand Name(s)/Trade Mark(s) used.
I/We understand that the above has been given only as information to BIS, that BIS has no role in permitting/approving of any Brand Name/Trade Mark, that this is not in any way be interpreted to mean that BIS has permitted/approved the use of the Brand Name(s) listed above, and that the responsibility is entirely mine/ours.

I Agree

Owned by self or others *

Self

Registered/Unregistered *

Registered

Date of Registration/Introduction

08/08/2023

Upload File *

Browse...

Invoice *

Browse...

(Fig 15)

BIS Toy Certification : Grant of License – Process Flow

- Step 17: Fill Testing and Inspection Details and then click Next Button
- Step 18: Fill Test Report Section
- Step 19: Fill Declaration & Undertaking then click on Next Button
- Step 20 : Review Application Details
- Step 21: Later an Application Fee and Contact BIS page will open. Here select the payment mode, agree to conditions and click on 'Proceed to Payment' button as shown in (Fig.20).

Application Fee and Contact BIS

Contact BIS:

Address :

Branch Contact No:

E-mail:

828AL TELEPHONE EXCHANGE COMPOUND,, GATE NO. 5, SECTOR 19, NOIDA,
DISTRICT : GAUTAM BUDDH NAGAR , UTTAR PRADESH 201303.
9999999999
noida_bis@yahoo.co.in

NOTE: Your fee will be submitted to this branch.

Fee Details:

3

Refundation Provision for MSME Units by BIS
Opt for Two Installments

No.

S.No	Fee Descriptions	Fee Amount (₹)
1	Annual License Fee	₹ 1000.0
2	Application Fee	₹ 1000.0
3	Minimum Marking Fee(Discount: Rs. 128000.0 after no discount startup & women)	₹ 128000.0
4	Preliminary Inspection Charges	₹ 7000.0
5	CERT(B.O.N)	₹ 12230.0
6	SGST(B.O.N)	₹ 12230.0
7	Total Fee	₹ 181860.0

Payment Mode

☒ Individual/Retail Banking

☐ With Corporate Netbanking

Note: In case of payment failure, if money is deducted from your account, the same would be refunded within 7 working days. Please contact your bank in case of further queries. Study do not make another attempt for payment until there is a failure.

☒ I agree to the Terms and Conditions

Note: Fees can be charged at any time during application and applicant would be required to clear all the dues before Grant of License.

Back

Proceed to Payment

(Fig 20)

Source: Manak-online, Bureau of Indian Standards

BIS Toy Certification : Grant of License – Process Flow

- Step 22: Then on Online Payment page go through the all the instructions regarding transaction charges and click on
- Step 23: Now, select the appropriate method and Make Payment as shown in figure below

The screenshot displays the online payment interface. On the left, a sidebar lists payment methods: Credit Card, Debit Card, Debit Card + ATM PIN, and Internet Banking. The 'Credit Card' option is selected, indicated by a right-pointing arrow. The main area is titled 'Pay by Credit Card' and features logos for VISA, MasterCard, American Express, and RuPay. Below these logos, the form is divided into sections: 'Card Number' with a text input field, 'Expiration Date' with separate fields for 'Month' and 'Year', and 'Card Holder Name' with a text input field. To the right of the 'Expiration Date' fields is a 'CVV/CVC' field. At the bottom right, there are two large buttons: 'Make Payment' (yellow) and 'Cancel' (blue). On the far right, a vertical sidebar contains the text 'Merchant Name: Bureaus of Indian Standards' and 'Payment Amount: ₹'.

- For more details go to [Manak Online](https://www.manakonline.in/MANAK/impLinks) <https://www.manakonline.in/MANAK/impLinks>

Volume 5: Export Promotion & Market Readiness

- Export Process Guide



Global Market Entry Toolkit: End to End user Interface (1/3)

Standard Operating Procedure for Establishing Export Business

1 Establish Business

- 1.1** Registrar of Companies (RoC)
- 1.2** Apply for Director Identification Number (DIN)
- 1.3** MOA and AOA of a Company under Companies Act
- 1.4** Apply for PAN Card
- 1.5** Opening a Bank Account, etc.

Detailed Information is provided in (Volume 4: Toy Requirements, Chapter 1).

2

Obtaining Importer-Exporter Code (IEC)

The Importer -Exporter Code (IEC) is a key business identification number which is mandatory for Exports or Imports.

WEBSITE <https://www.dgft.gov.in>

Documents Needed

- E-mail & Mobile Number
- PAN Card
- Address Proof (Aadhar Card or Passport is acceptable).
- Valid Bank Account in the name of applicant
- Fees of Rs.500/- with applicable taxes

3

Registration cum membership certificate (RCMC)

Registration-Cum-Membership Certificate (RCMC) is a certificate that validates an exporter dealing with products registered with an agency/ organization that the Indian Government authorizes.

WEBSITE <https://www.dgft.gov.in/CP/?opt=e-rcmc>

Global Market Entry Toolkit: End to End user Interface (2/3)

Standard Operating Procedure for Establishing Export Business

Selection of Product

- 4 After studying the trends of export of different products from India proper selection of the product(s) to be exported may be made by using ITC-HS Codes known as Indian Trade Classification based on Harmonized System of Coding.

WEBSITE <https://trade.gov.in>
<https://www.trade.gov.in>

Selection of Markets

- 5 The market should be selected after research covering market size, competition, quality requirements, payment terms etc. Exporting countries can be selected based on the Free Trade Agreements (FTAs).

WEBSITE <https://www.trade.gov.in>

Finding Buyers

- 6 Participation in trade fairs, buyer seller meets, exhibitions, B2B portals, web browsing are an effective tool to find buyers.

WEBSITE <https://www.trade.gov.in>

Sampling

- 7 Providing customized samples as per the demands of foreign buyers. As per FTP 2023, exports of bonafide trade and technical samples of freely exportable items shall be allowed without any limit

Pricing/Costing

- 8 Product pricing is crucial in getting buyers attention and promoting sales in view of international competition. The price should be worked out taking into consideration all expenses from sampling.

Covering Risks through Export Credit Guarantee Corporation Ltd (ECGC)

- 9 International trade has payment risks due to buyer/country insolvency. These risks can be covered by ECGC policies. If the buyer is placing order making advance payment or opening letter of Credit, it is advisable to procure credit limit on the foreign buyer from ECGC to protect against risk of payment.

Customs Procedures

- 10 It is necessary to obtain a PAN-based Business Identification Number (BIN) from Customs before filing the shipping bill. In case of Non-EDI, shipping or bills of export must be filed manually in the prescribed format under the Shipping Bill and Bill of Export (Form) Regulations, 1991.

Source: DGFT Report

Global Market Entry Toolkit: End to End user Interface (3/3)

- Exporters need to obtain market-specific certifications to meet the regulatory requirements of destination countries. Certification requirements vary across markets, such as the US and EU. Details are provided in the respective country-specific guides.
- Apart from product-specific certification, manufacturers are often required to obtain factory-level certification and SEDEX to meet the sourcing and compliance requirements of global buyers.

11 US (Standards) The Consumer Product Safety Improvement Act (CPSIA) & EU Countries (Standards) (Toy Safety Directive 2009/48/EC)

Detailed Information is provided in (Volume 4 : Toy Sector Compliance Requirements, Chapter 3)

14 Logistics

PM Gati Shakti National Master Plan, launched in 2015, is a government-backed platform integrating data from various ministries to optimize infrastructure planning and reduce logistics costs.

WEBSITE <https://pmgatishakti.gov.in/pmgatishakti>

12 Factory Level Certification for Global Buyers

Manufacturers may be required to comply with these standards to qualify for the production and sale of products supplied to retailers.

- Social Compliances: (BSCI & SEDEX)¹
- ISO 9001 Quality Management
- ISO 14001 Environment Management
- ISO 45001 Safety Management

15 Customs Filing

File shipping bill for export and clearance status can be checked on the ICEGATE Portal

WEBSITE <https://www.icegate.gov.in>

13 Quality Control

Strict quality control is essential for export goods. Certain products (like food, agriculture, fishery, chemicals) require compulsory pre-shipment inspection, and foreign buyers may also demand inspection as per their own standards through nominated agencies.

16 Certificate of Origin

The Certificate of Origin (COO) states the country where the item was produced. It is attached to the commercial invoice and bill of lading for an item in a shipment.

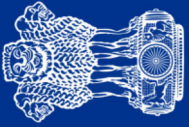
Note: ¹ Business Social Compliance Initiative (BSCI) & SEDEX for (Supplier Ethical Data Exchange for labour standards, health and safety).
Source: DGFT Report

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- Industry Associations and Sector Representatives





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