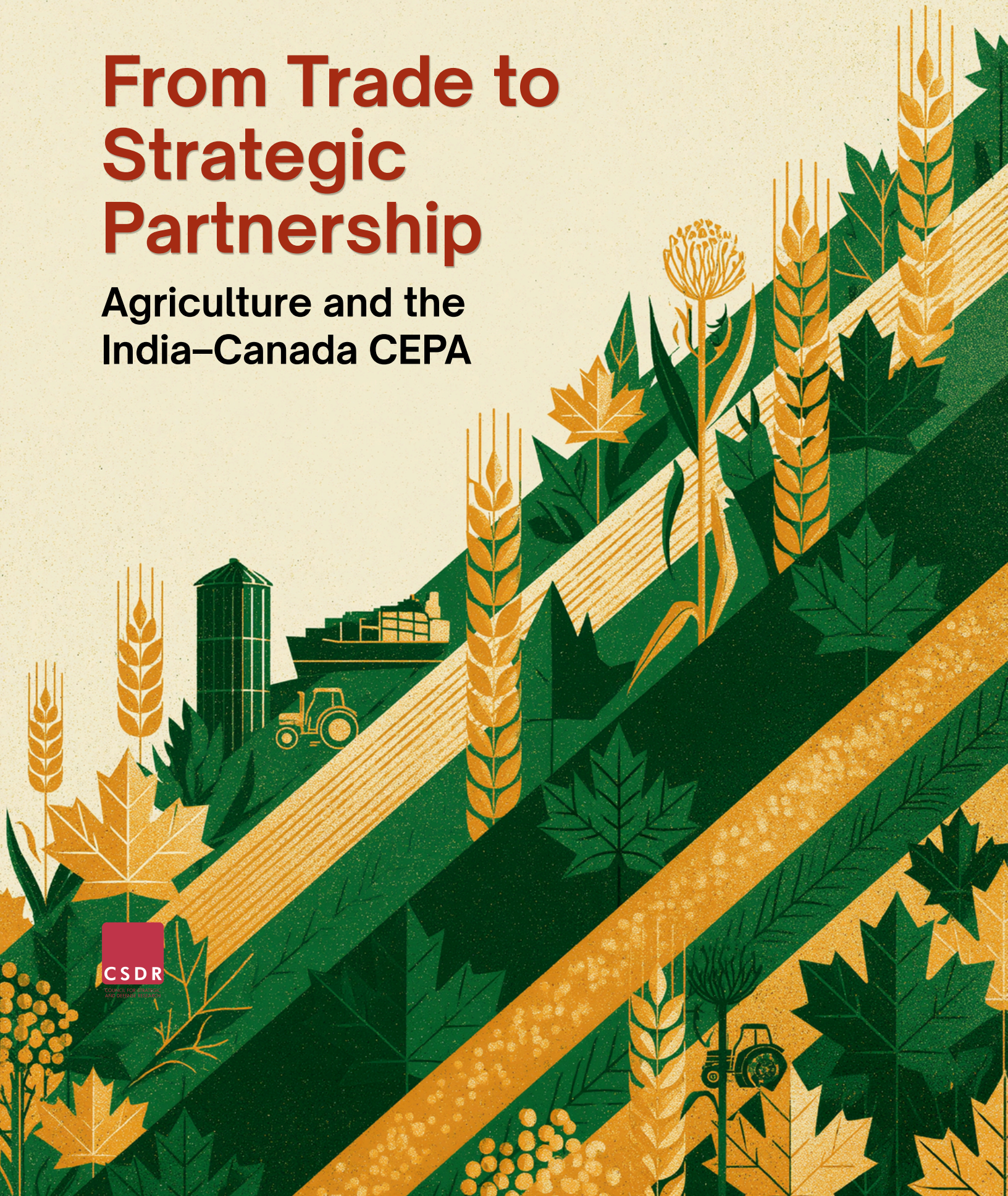
INDIA-CANADA RESEARCH INITIATIVE

AUG 2026

From Trade to Strategic Partnership

Agriculture and the India–Canada CEPA



CSDR
COUNCIL FOR STRATEGIC AND DEFENSE RESEARCH

Recommended Citation:

Naithani, Amen (2026). From Trade to Strategic Partnership: Agriculture and the India–Canada CEPA. New Delhi: Council for Strategic and Defense Research.

ABOUT THIS REPORT

This report makes the case for treating agriculture as the anchor of the India-Canada economic reset, and for institutionalizing it under the CEPA negotiations now targeted for conclusion by the end of 2026. India's demand for pulses outruns its domestic production and it imports the whole of its muriate of potash requirement; Canada leads the world in lentil and dry pea exports and produces close to a third of global potash. The corridor is nonetheless unstable. In 2025 Australia displaced Canada as India's largest pulse supplier, Canada's share of India's potash imports fell to about a quarter as Russia and Turkmenistan moved ahead of it, and a single notification took yellow peas from nil duty to 30 percent overnight. Compiled from UN Comtrade, Statistics Canada, USGS and Indian and Canadian government notifications, the report proposes a four-instrument agricultural framework within CEPA and phases its implementation across twenty-four months.

COUNCIL FOR STRATEGIC AND DEFENSE RESEARCH

The Council for Strategic and Defense Research (CSDR) is an independent, New Delhi-based think tank providing strategic analysis and policy recommendations to governments, businesses, and institutions. Its expertise spans foreign policy, geopolitical risk, connectivity and geoeconomics, defense and aerospace, strategic technologies, conflict resolution, peacebuilding, climate change, energy security, and technology policy, with a focus on the Indian subcontinent, Eurasia, and the Indo-Pacific.

INDIA CANADA RESEARCH INITIATIVE (ICRI) AT CSDR

The India-Canada Research Initiative at CSDR aims to strengthen bilateral relations between India and Canada. By establishing a robust platform for scholarly exchange, policy research, and strategic engagement, the initiative focuses on two core pillars: the India-Canada bilateral relationship and the India-Canada partnership for the Indo-Pacific region. Key areas of focus include economic cooperation and trade, people-to-people ties, security and geopolitics, science and technology collaboration, climate cooperation, and strategic engagement in the Indo-Pacific. The Asia Pacific Foundation of Canada supports the project.

AUTHOR

Amen Naithani

EXECUTIVE SUMMARY

This report analyzes the case for treating agriculture as the anchor of the India-Canada economic reset, and sets out how that relationship could be institutionalized under the Comprehensive Economic Partnership Agreement (CEPA) now under negotiation. Indian structural deficits in plant protein and soil nutrients meet Canadian export capacity in pulses and potash, across a corridor supported by decades-old commercial networks that continued to operate through the diplomatic rupture of 2023.
The report separates agri-food and seafood, in HS chapters 01 to 24, from fertilizer inputs, in HS chapter 31, because official statistics count them separately and conflating them is the most common error in this debate.

India's demand for pulses continues to outrun its domestic production, notwithstanding the Mission for Aatmanirbharta in Pulses, a funded import-substitution program targeting 350 lakh tonnes by 2030-31 against 256.83 lakh tonnes produced in 2024-25. India has no domestic potash production and imports 100 percent of its muriate of potash requirement, despite identified resources of 22,508 million tonnes that have never been established as commercially extractable. Canada is the world's largest exporter of both lentils and dry peas and produced 30.6 percent of global potash in 2025, with all ten of its mines in Saskatchewan. Dried peas (C$788.7 million) and dried lentils (C$603.9 million) together accounted for the overwhelming majority of Canadian agri-food exports to India in 2024.

That complementarity has not yet produced a stable corridor, and two policy instruments account for most of the recent movement. In 2025, Canada was displaced by Australia as India's largest pulse supplier, shipping 1.47 million tonnes against 1.99 million the previous year, while its share of India's potash imports fell from 34.8 to 24.8 percent, with Russia and Turkmenistan moving ahead. The first instrument is tariff volatility: India's duty on yellow peas moved from nil to 30 percent with effect from 1 November 2025, on a bill-of-lading trigger that caught cargoes already committed. The second is the requirement for port-of-origin methyl bromide fumigation, which is not legally impossible for Canada, as is commonly assumed, since quarantine and pre-shipment use is exempt from the Montreal Protocol phase-out, but is constrained by cost, port capacity and a 10 degree Celsius treatment floor.

The report argues that CEPA should carry a dedicated agricultural framework rather than treat the sector as a residual to be conceded elsewhere in the negotiation, and sets out four instruments, two addressing tariff policy and two addressing the underlying structure. On tariffs, it proposes a volume-capped tariff-rate quota for red lentils and yellow peas, set at a fixed in-quota rate rather than a floating proportion of the applied duty, together with seasonal windows calibrated to each crop's arrival calendar. On structure, it proposes a permanent phytosanitary settlement built on the systems approach India and Canada have trialed since March 2023, mandated to the existing Joint Working Group on agricultural cooperation, and a categorization of commodities that binds fertilizer at zero, manages deficit crops by quota and leaves sensitive crops on an exclusion list. Implementation is phased across twenty-four months, and whatever form the arrangement finally takes, durability requires accepting that a corridor capable of losing a quarter of its volume to a single tariff notification is not yet an institution.

INTRODUCTION

The Importance of Tangible Bilateral Anchors

In the ongoing effort to rebuild and institutionalize the India–Canada economic partnership, commentary across Ottawa and New Delhi has focused heavily on topical sectors such as artificial intelligence, advanced semiconductors, critical minerals, and green transition technologies.[1] While these capital and research-driven domains hold undeniable long-term value, their commercial actualization requires long-drawn regulatory alignment, complex infrastructure build-outs, and significant fund allocation.[2] They cannot provide the immediate economic push necessary to anchor a delicate diplomatic reset, especially as the relationship recovers from a period of acute political strain. By contrast, bilateral agricultural trade represents an operational, high-volume transactional bridge. Unlike young technology supply chains, agri-food trade between Canada and India is supported by old, well-established commercial networks, private-sector supply contracts, and proven logistical routes.[3] Agriculture generates immediate, measurable revenues for Canadian producers while delivering vital commodities for Indian food and soil security. Yet, because agriculture is viewed as an "established" sector, it faces a two-pronged risk of being sidelined in diplomatic discussions and treated as a bargaining chip in trade negotiations. Neglecting the agricultural architecture during the ongoing Comprehensive Economic Partnership Agreement (CEPA) negotiations would undermine the most resilient commercial pillar of the bilateral relationship.[4]

> Yet, because agriculture is viewed as an "established" sector, it faces a two-pronged risk of being sidelined in diplomatic discussions and treated as a bargaining chip in trade negotiations.

Structural Asymmetries

The primary rationale behind an efficient India–Canada agricultural partnership lies in a complementary economic asymmetry: India’s structural input deficits. As the world's most populous nation, India faces an ongoing challenge in securing affordable, high-quality plant-based protein and chemical fertilizers.[5] With evolving dietary patterns driven by increasing urbanization and a slow but steady rise in middle-class income and consumption trends, domestic demand for pulses, particularly lentils and dry peas, continues to outpace domestic production, and is projected to do so through at least the late 2020s, even on the trajectory set by India's own Mission for Aatmanirbharta in Pulses.[6] Furthermore, Indian agricultural productivity is impacted by severe soil nutrient deficiencies.[7] India has no domestic potash production and imports 100 percent of its Muriate of Potash (MOP) requirement, despite holding large but commercially undeveloped resources estimated at 22,508 million tonnes, 91 percent of them in Rajasthan.[8]

> India has no domestic potash production and imports 100 percent of its Muriate of Potash (MOP) requirement, despite holding large but commercially undeveloped resources estimated at 22,508 million tonnes, 91 percent of them in Rajasthan.

Canada, specifically the province of Saskatchewan, hosts one of the world's largest export-oriented agricultural and fertilizer bases. Saskatchewan alone accounts for a major share of global potash production and is the world's leading exporter of dry peas and lentils. Two notes on scope apply throughout. Agricultural trade here covers both agri-food and seafood, which sit in HS chapters 01 to 24, and fertilizer inputs, which sit in HS chapter 31; official statistics count the two separately and this report labels them separately. All figures are in Canadian dollars unless another currency is named. In 2024, Saskatchewan exported C$1.467 billion to India across all merchandise, not agri-food alone. Trade data indicates that pulses and potash together account for roughly 98 percent of that total, although the province's own trade report gives no commodity breakdown for India and states only that growth since 2022 has been fuelled by pulses and potash.[9]

Food Security, Climate Volatility, and Geoeconomic Shifts.

This bilateral complementarity operates within an ever-changing global environment. Climate-induced monsoon disruptions across South Asia, post-COVID supply chain bottlenecks, and geopolitical conflicts have exposed the vulnerability of global food and fertilizer supply chains.[10] For India, a sudden domestic crop shortfall led to immediate food price inflation, directly affecting consumer welfare and macroeconomic stability. For example, when domestic pulse supplies tightened in 2023–2024, Indian pulse imports reached 6.87 million metric tons (MMT) in calendar year 2024, the second-highest calendar-year total on the UN Comtrade series after 2017, to curb domestic price spikes.[11]

For Canada, meanwhile, reliance on traditional Western markets poses growing trade risks amid rising global protectionism.[12] Establishing a low-risk, predictable agricultural corridor with India acts as an economic buffer for both nations. However, transforming this potential into a stable, long-lasting economic partnership requires overcoming policy friction, unpredictable tariff structures, and non-tariff regulatory barriers.

> For Canada, meanwhile, reliance on traditional Western markets poses growing trade risks amid rising global protectionism.

EVOLUTION OF INDIA–CANADA AGRICULTURAL RELATIONS

Establishing the Foundation

Agricultural engagement between India and Canada dates back to the early post-independence era, initially framed by development assistance and scientific collaboration. Through the 1950s, Canada supplied wheat and emergency food aid under the provisions of the Colombo Plan, beginning with a C$10 million grant of wheat in 1951.[13]

Also significant to the bilateral relationship is the active collaboration between Canadian agricultural scientists and Indian research institutes during the initial phases of India's Green Revolution. A mutual respect for research that gained momentum in the 70s has now evolved into one of many MoUs, such as the one signed between the Indian Council of Agricultural Research (ICAR) and Dalhousie University, Canada in 2026, to support collaboration in digital agriculture, climate-resilient agriculture, horticulture, aquaculture and animal husbandry.[14] Early technical engagement established a layer of scientific trust between the agricultural arms of both capitals, which has encouraged present-day relations between the two in agricultural research.

As India achieved self-sufficiency in wheat and rice production during the 1980s and 1990s, the bilateral agricultural relationship shifted from development aid to commercial trade. The rapid upscaling of pulse cultivation in Western Canada during the late 20th century was directly related to the expanding Indian market demand for plant-based protein. Canadian farmers in Saskatchewan, Alberta, and Manitoba adapted crop rotations to produce yellow peas and red lentils calibrated to Indian culinary requirements,[15] turning agricultural trade into a central part of overall two-way commerce.

> The rapid upscaling of pulse cultivation in Western Canada during the late 20th century was directly related to the expanding Indian market demand for plant-based protein.

The Commercialization of Supply

By the 2000s, agricultural commodities had become a significant factor in India–Canada commercial ties. This agro-trade architecture rests on two main pillars:

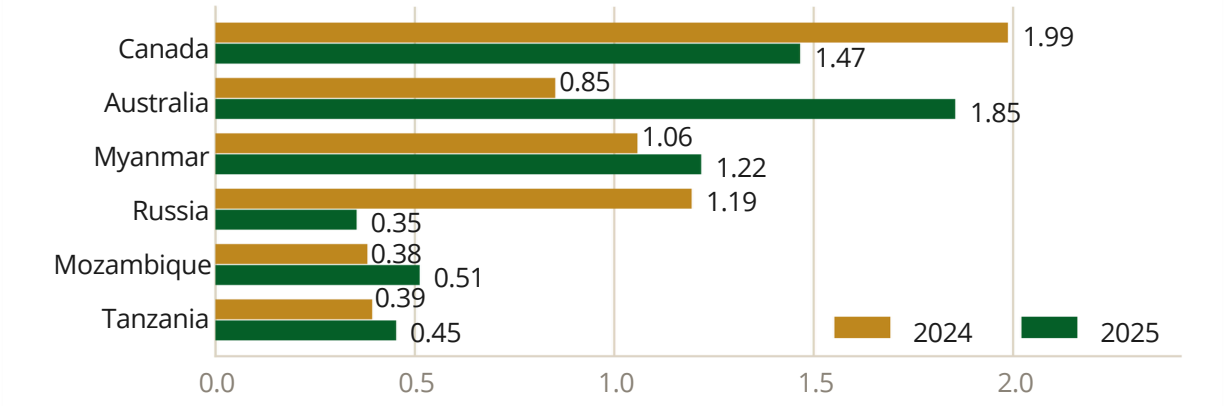
Potash supply: To secure the long-term growth of its agricultural sector, Indian fertilizer companies established long-term procurement arrangements with Canpotex—an offshore marketing company for Saskatchewan potash producers. In September 2022, Canpotex signed separate Memorandums of Understanding with three leading Indian fertilizer importers, Indian Potash Limited (IPL), Coromandel International and Chambal Fertilizers. Each covered up to 500,000 metric tons a year, giving an aggregate of up to 1.5 million metric tons (15 LMT)[16] of Muriate of Potash (MOP) annually over the three years from 1 January 2023 to 31 December 2025. The MoUs were statements of willingness rather than binding offtake contracts, expressly conditional on annual agreement on price and commercial terms, and actual volumes were set by separate annual contracts.

> In September 2022, Canpotex signed separate Memorandums of Understanding with three leading Indian fertilizer importers, Indian Potash Limited (IPL), Coromandel International and Chambal Fertilizers.

Pulse trade growth: Over time, Canadian dry pea and lentil exports grew to capture a significant share of India's pulse imports. Saskatchewan alone accounted for 87.1% of Canada's 2024 lentil exports across all destinations, and for roughly 62% of Canada's dry pea exports across all destinations. The province's total merchandise exports to India, across all commodities, reached C$1.467 billion in 2024, representing 12.2% growth on the previous year.[17]

Australia displaced Canada as India's largest pulse supplier in 2025

India's pulse imports (HS 0713) by volume, million tonnes



UN Comtrade, India as reporter, HS 0713, calendar years.

Political Barriers, Regulatory Friction, and Policy Volatility (2023–2025)

Despite a sharp uptick in agricultural trade and continued momentum in agro-tech advancements, the bilateral relationship often struggles due to political issues, friction over standardization, and gaps in policy communication between the two countries. A few of these issues are:

Non-tariff phytosanitary barriers (the fumigation rule)

For around two decades, one of the central technical disputes in bilateral agricultural trade has turned on India's plant quarantine regime, built on the Plant Quarantine (Regulation of Import into India) Order, 2003.[18] The pre-shipment Methyl Bromide requirement does not come from the 2003 Order itself, which addresses methyl bromide only for wood packaging and otherwise places treatment on the importer after arrival. It comes from the National Standards for Phytosanitary Measures and the standard operating procedures issued from 2005 onward, which apply commodity-specific special conditions to scheduled imports, including pulses, to prevent the introduction of storage pests. Despite this being a preventative measure taken by the Indian government, it presented a direct contradiction for Canada:

- In Canada's sub-zero winter temperatures, approved fumigation schedules simply run out: India's own standard, NSPM-11, sets a minimum acceptable temperature of 10 degrees Celsius, and its dosage table for non-perishables stops at 11 degrees,[19] rendering winter port fumigation technically ineffective. Canada has also phased out most domestic use and manufacture of Methyl Bromide under the Montreal Protocol, although quarantine and pre-shipment fumigation is exempt from that phase-out and remains both legal and commercially available in Canada. The practical obstacles are therefore cost, port capacity at bulk volumes, and the winter temperature floor, rather than legal prohibition.[20]

- In a bid to prevent trade halts, India has granted a rolling series of relaxations: a fee-free fumigation derogation for pulses from 2017, and from November 2021 a waiver of the fourfold inspection fee charged in lieu of Methyl Bromide fumigation on lentils from countries that have phased the chemical out. Each has been extended in short administrative increments rather than made permanent, leaving exporters and importers exposed at every expiry.[21]

> The next major vulnerability stems from New Delhi's use of placeholder tariff adjustments to balance consumer food inflation against domestic farmer incomes.

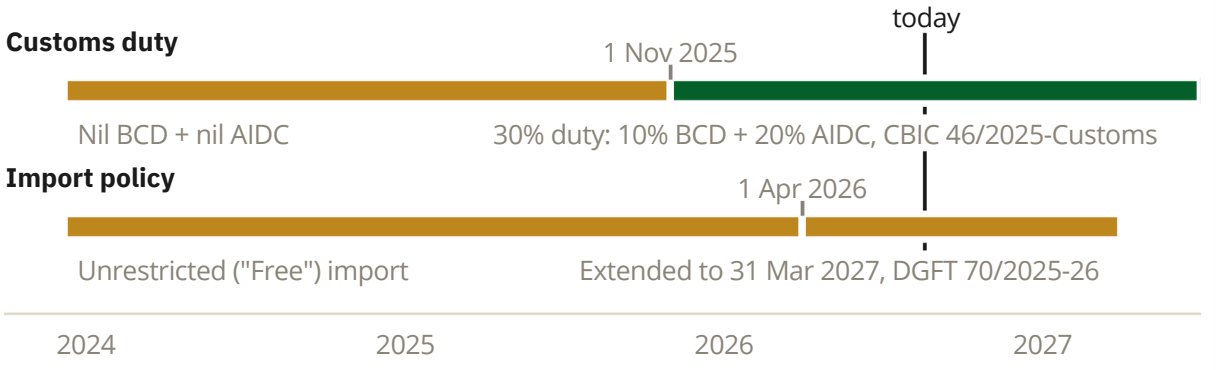
Tariff instability and policy shifts

The next major vulnerability stems from New Delhi's use of placeholder tariff adjustments to balance consumer food inflation against domestic farmer incomes. When domestic crop yields are high, the Indian government routinely reinstates import tariffs to insulate domestic farmers from foreign price competition.[22] Conversely, when domestic food inflation rises, tariffs are temporarily reduced or eliminated to ease prices for consumers.

One example of this volatility is the 2023 Duty-Free Window. In December 2023, India opened duty-free imports of yellow peas to curtail rising domestic food inflation, driving a massive surge in Canadian shipments and contributing to 6.87 MMT of total Indian pulse imports in calendar year 2024, the second-highest calendar-year total on the UN Comtrade series. However, on 29 October 2025, the Ministry of Finance issued Notification No. 46/2025-Customs, imposing a 30% duty (10% basic customs duty + 20% Agriculture Infrastructure and Development Cess) on yellow peas, effective 1 November 2025. This shift was implemented to curb cheap foreign inflows and bolster domestic produce sales.[23] While logically aligned with Indian domestic policy goals, these rapid policy shifts created severe price uncertainty for Canadian growers, who must make planting decisions months before harvest without knowing whether market access will remain open or change suddenly, increasing mistrust. In early April 2026, the Directorate General of Foreign Trade extended the unrestricted import window for yellow peas to 31 March 2027, while the 30% customs duty imposed on 1 November 2025 remained in force.[24]

India's yellow pea duty and its import window are two different things

HS 07131010. Duty is set by the Ministry of Finance; the import window by DGFT.



CBIC notifications 64/2023-Customs and 46/2025-Customs and their amendments; DGFT notifications 50/2023 and 70/2025-26.

Bilateral Tensions

Amid the deterioration of Ottawa–New Delhi ties in 2023, high-level bilateral trade negotiations, then at the Early Progress Trade Agreement (EPTA) round stage, were paused in September 2023. While private-sector commodity trade in pulses and potash continued out of mutual economic necessity, formal dialogues on sanitary/phytosanitary harmonization, joint AgTech research, and cold-chain investment stalled. With the diplomatic thaw of 2025 and the restoration of High Commissioners,[25] that pause has been comprehensively reversed. CEPA negotiations were formally launched on 23 November 2025; Terms of Reference were signed in New Delhi on 2 March 2026, with a target of concluding by the end of 2026; and three negotiating rounds had been completed by July 2026. Therefore, agricultural cooperation is no longer a pathway to be re-established but a live file inside an active negotiation.

CEPA negotiations were formally launched on 23 November 2025; Terms of Reference were signed in New Delhi on 2 March 2026, with a target of concluding by the end of 2026; and three negotiating rounds had been completed by July 2026. Therefore, agricultural cooperation is no longer a pathway to be re-established but a live file inside an active negotiation.

BILATERAL AGRICULTURAL TRADE - CURRENT STATE

The Current Agricultural Trade Profile and Key Commodities Traded

Bilateral agricultural trade between India and Canada remains heavily concentrated in a few high-volume commodity groups, creating a distinct, two-way commercial corridor. The trade structure is defined by three primary elements:

Canadian pulses and other crops: Dried legumes—primarily red/green lentils, yellow peas, and chickpeas—account for the largest share of Canada's agricultural exports to India. In strong harvest and low-tariff years, pulse exports from Western Canada (led by Saskatchewan) have exceeded C$1 billion in value, although only 2024 has done so for shipments to India specifically. [26]

Table 1: Canada's top agri-food and seafood exports to India, in Can$ million, in 2024

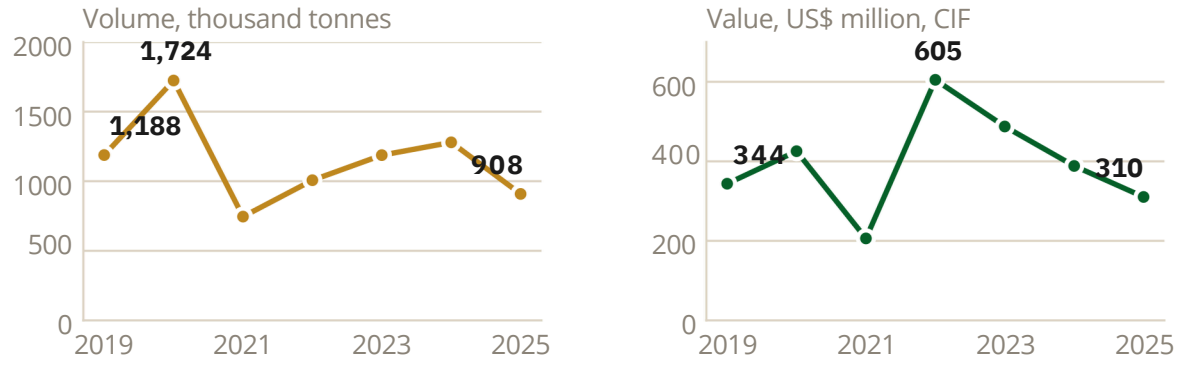
Commodity	Export value
Dried, shelled peas	**788.7**
Dried, shelled lentils	**603.9**
Lactose in solid form and lactose syrup	6.3
Dried, shelled chickpeas	6.0
Dog or cat food	2.7
Food preparations, not elsewhere specified	1.9
Preparations of a kind used in animal feeding	1.0
Active yeasts	0.9
Glycerol, crude	0.8
Oilcake and other solid residues	0.8

Source: Government of Canada

Potash and crop nutrients: Muriate of Potash (MOP) is essentially the single most valuable fertilizer export from Canada to India. Provided largely through Canpotex, the offshore marketing entity for Saskatchewan producers Nutrien and The Mosaic Company[27] potash exports provide essential soil nutrients for Indian crop production.

The fall in potash trade value is a price story, not a volume story

Canada to India, muriate of potash (HS 310420), as reported by India



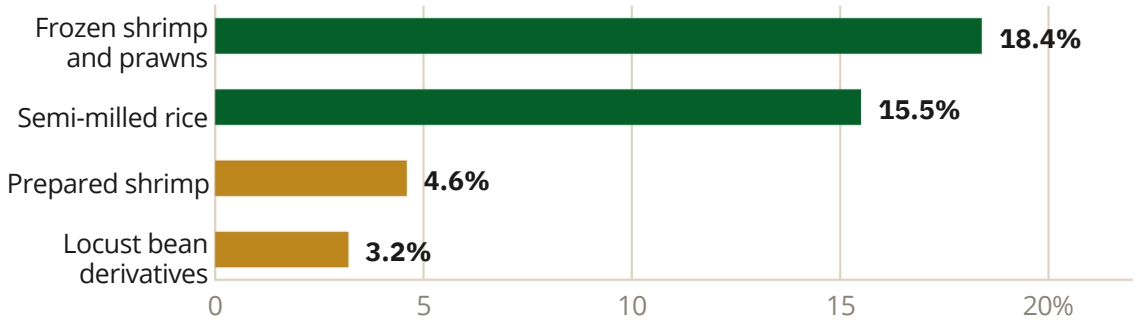
UN Comtrade, India as reporter, HS 310420.

Indian Agri-Food Trade: India's agricultural exports to Canada are predominantly of high-value processed foods, rice (Basmati), marine products, spices, and tea, totaling over $560 million annually.[28] This provides Canadian consumers with special food items while providing a meaningful counter-flow.

Top Agricultural Commodities Exported from India to Canada

Seafood and rice dominate what India sells Canada

Share of Canada's agri-food and seafood imports from India, 2023, per cent



Together these four lines are 41.7 per cent of the total.

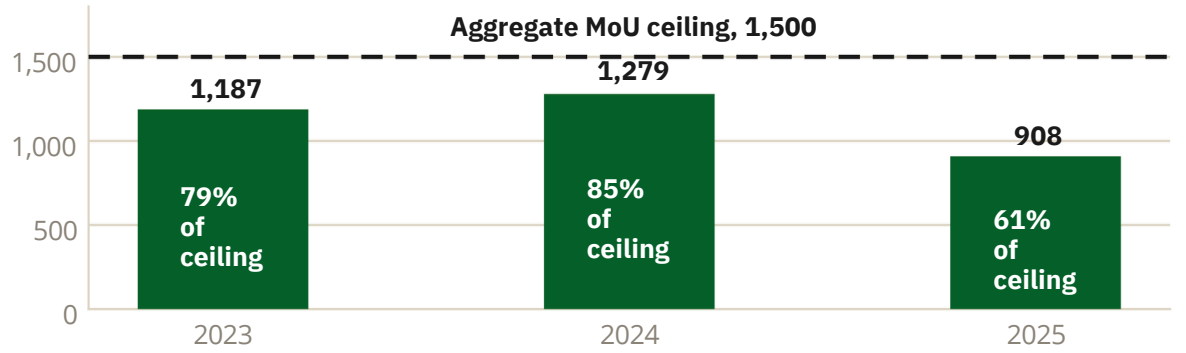
Agriculture and Agri-Food Canada, Question Period note, "Bilateral agricultural trade with India". Shares are of Canada's agri-food and seafood imports from India in 2023. Retrieved 19 August 2026.

Investment and Commercial Links

Commercial links between India and Canada's agricultural sectors extend beyond market sales to include large-scale procurement and overseas corporate integration. Long-term procurement frameworks such as the Canpotex Memorandums of Understanding, which ran from January 2023 to December 2025 with Indian Potash Limited (IPL), Coromandel International and Chambal Fertilizers, provided for annual shipments of up to 1.5 million tonnes in aggregate[29] of potash and served as a stabilizer for Indian soil nutrient security. Additionally, international grain farming companies and processors like Viterra, now part of Bunge, and Richardson International[30] operate large-scale collection and shipping networks across Western Canada serving South Asian demand.

The Canpotex ceiling was never reached in any contract year

Aggregate MoU ceiling against actual shipments, Canada to India, thousand tonnes



Ceiling: three Canpotex Memorandums of Understanding of up to 500,000 tonnes each, 1 January 2023 to 31 December 2025. Shipments: UN Comtrade, India as reporter, HS 310420. Percentages calculated.

Canadian institutional investors, including the Canada Pension Plan Investment Board (CPPIB) and Caisse de dépôt et placement du Québec (CDPQ), have invested substantial capital in Indian infrastructure,[31] modern warehousing, and supply chain logistics, thereby indirectly supporting and bolstering agri-food distribution networks.

Operational Constraints

While market demand remains strong on both sides, the agricultural corridor faces significant operational and policy constraints.

Logistical bottlenecks: Shipments face long ocean transit times from Pacific ports (Vancouver and Prince Rupert) to Indian West Coast ports (Jawaharlal Nehru Port Authority / JNPA, Mundra, and Kandla).[32] Any port congestion or rail shipping delays immediately escalate container demurrage costs.

Non-Tariff and policy friction: Sanitary and phytosanitary (SPS) friction, most notably the requirement for port-of-origin Methyl Bromide fumigation[33], and overnight tariff adjustments create severe commercial risk for exporters and importers alike.

Lack of momentum for growth opportunities: Unlocking value requires moving beyond bulk commodity trade toward cold-chain infrastructure, joint AgTech solutions, and value-added food processing within India, with infrastructural and research assistance from Canadian entities.

> Unlocking value requires moving beyond bulk commodity trade toward cold-chain infrastructure, joint AgTech solutions, and value-added food processing within India, with infrastructural and research assistance from Canadian entities.

AGRICULTURE AS A PILLAR OF BILATERAL COOPERATION

The primary vulnerability of the current India–Canada agricultural relationship is its purely transactional nature. It operates on a traditional buyer-seller relationship heavily reliant on bulk commodity shipping, leaving it vulnerable to sudden tariff shifts and geopolitical shocks. To make agriculture a significant pillar of a broader bilateral reset, both nations must look beyond spot-market transactions toward stronger institutional integration, focusing on shared R&D, value addition, and climate-resilient crops.

Strengthening Food and Soil Resilience

Rather than treating agricultural trade as a year-to-year deal for domestic shortfalls, the two nations can establish ironclad frameworks that guarantee long-term security for both Indian consumers and Canadian producers:

- Instead of relying on short-lived or emergent duty-free windows, Canada and India can negotiate dedicated, scheduled supply frameworks that integrate Canadian plant protein directly into India's social welfare fabric, such as PM POSHAN (formerly the Mid-Day Meal scheme) and the Public Distribution System.[34] This provides India with a durable protein buffer against food inflation while offering Canadian farmers a long-term demand corridor, immune to external shocks.

- Beyond bulk exports of potash and other fertilizers, Canadian agro-tech expertise can support the Soil Health and Fertility component of India's Rashtriya Krishi Vikas Yojana, formerly the standalone Soil Health Card scheme. Collaborative initiatives can seek to customize fertilizer blending, bio-fertilizer development, and precision nutrient application to restore India's low-yield soils and maximize per-hectare yields.[35]

> Beyond bulk exports of potash and other fertilizers, Canadian agro-tech expertise can support the Soil Health and Fertility component of India's Rashtriya Krishi Vikas Yojana, formerly the standalone Soil Health Card scheme.

Climate-smart Agriculture and AgTech Cooperation

Both nations face severe, extreme climate pressures, ranging from harsh monsoons and heat stress in northern India to extreme dryland moisture deficits in the Canadian Prairies. This common vulnerability creates natural scope for joint technological initiatives, a few of which are:

- Saskatchewan's AgTech ecosystem, which champions precision agriculture and drone-based input systems, offers techniques that could be adapted to Indian conditions, although the transfer is not straightforward.[36] Such technology transfers can help Indian farmers optimize water usage and reduce input waste.

- Climate-resilient crop breeding: Joint agricultural research institutions can develop drought-tolerant and heat-resistant pulse and oilseed genetics,[37] ensuring both farming ecosystems can adapt to warming temperatures and shifting weather patterns.

> Both nations face severe, extreme climate pressures, ranging from harsh monsoons and heat stress in northern India to extreme dryland moisture deficits in the Canadian Prairies.

Value-added Processing: The Pulse Protein Center of Excellence

One of the most significant leaps forward requires moving agricultural trade up the value chain. Instead of Canada exporting raw seeds for basic milling in India, the two nations are well positioned to jointly develop advanced food-processing infrastructure and cold-chain logistics to reduce post-harvest losses.

A leading example of this shift is both governments' intent to explore creating a Canada–India Pulse Protein Center of Excellence at the National Institute of Food Technology Entrepreneurship and Management (NIFTEM) in Kundli, Haryana. On 2 March 2026, the two governments signed a Declaration of Intent to explore establishing the Center and named NIFTEM Kundli and the University of Saskatchewan as co-chairs to lead its creation. The partnership will focus on advancing pulse protein processing and developing fortified foods. By pooling Canadian processing technology with Indian manufacturing scale, this Center would show how agriculture can transition from a simple trade commodity into a hub for advanced bilateral innovation.[38]

AGRICULTURE AND THE FUTURE OF CEPA

Agriculture as a Point of Friction vs. a Strategic Anchor

In previous trade negotiations between developed and developing economies, agriculture has frequently acted as a deal-breaker. Where mishandled, agricultural disputes stall broader market access across services, manufacturing, and investment. In the context of the India–Canada Comprehensive Economic Partnership Agreement (CEPA) negotiations, agriculture occupies a unique position.

For New Delhi, agricultural policy is essentially tied to social stability, rural livelihoods, and political risk. India's agrarian sector comprised 146.45 million operational holdings in the 2015-16 Agriculture Census, the most recent for which all-India results have been published; 86.08% were small and marginal, with an average holding of 1.08 hectares and falling. Any trade agreement perceived as enabling uncontrolled inflow of low-cost foreign bulk commodities risks depressing farm-gate prices, provoking rural backlash, and compromising domestic food sovereignty.[39] Consequently, Indian trade negotiators traditionally seek broad agricultural exclusions, high tariffs, and strong safeguards.

For Ottawa and Western Canadian producers, however, agriculture represents a primary interest in CEPA negotiations. As an exporting nation with a specialized pulse and fertilizer export base[40], Canada ideally seeks predictable, duty-free, exclusive market access, reduction of non-tariff phytosanitary barriers, and protection against sudden overnight policy shifts.

With trade talks resuming, treating agriculture as an all-or-nothing, low-priority battleground risks stalling the CEPA once again. The key to unlocking a broader deal lies in abandoning binary choices such as unrestricted duty-free access versus complete sector exclusion, in favor of a pragmatic, flexible agricultural framework[41] with a tangible middle ground.

> The key to unlocking a broader deal lies in abandoning binary choices such as unrestricted duty-free access versus complete sector exclusion, in favor of a pragmatic, flexible agricultural framework with a tangible middle ground.

The Realities of Indian Agriculture

To set up a practical CEPA compromise, Canadian negotiators must recognize the structural constraints and factors governing Indian agricultural policy, such as:

- Electoral and price sensitivity: Indian trade policy operates under a two-pronged mission: protecting rural farm incomes while preventing urban food price inflation. When domestic harvests fall short, New Delhi temporarily removes tariffs on imports of foreign pulses[42]; when domestic harvests replenish, tariffs are rapidly reinstated to protect domestic farm prices.

- Crop rotation cycles (Kharif and Rabi): Indian farmers rely on predictable price signals to make planting decisions for the kharif (monsoon-sown) and rabi (winter-sown) crop cycles. Sudden tariff-free, no-cap inflows during domestic harvest periods can crash local market prices below the government-mandated Minimum Support Price[43] (MSP).

- Non-tariff measures, for example, strict port-of-origin Methyl Bromide (MeBr) fumigation mandates, have historically functioned as biosecurity safeguards[44], with the incidental effect of slowing import throughput.

> When domestic harvests fall short, New Delhi temporarily removes tariffs on imports of foreign pulses; when domestic harvests replenish, tariffs are rapidly reinstated to protect domestic farm prices.

The Middle Path for CEPA

Rather than demanding immediate across-the-board tariff elimination, Canada and India can negotiate a tailored, multi-tiered agricultural plan within CEPA that balances Canadian export access with Indian domestic price stability. This middle path rests on four propositions:

Tariff-rate quotas (TRQs) (following the Australia-India deal)

A proven plan to accommodate fluctuations in India's pulse tariffs is the Australia–India Economic Cooperation and Trade Agreement (AI-ECTA).[45] Under the provisions of the trade agreement, a Tariff Rate Quota (TRQ) is provided, where India lets Australia export up to 150,000 metric tons of lentils per year, in four quarterly tranches of 37,500 tonnes, at 50 percent of India's applied MFN rate.[46]

Exports above the quota pay the full applied rate. The Australian experience carries a warning as well as a template. Because the concession is a percentage of the applied rate rather than a fixed rate, its value moves with Indian tariff policy: India's applied lentil duty was zero when the agreement entered into force in December 2022, so the preference was worth nothing, and the quota went entirely unused until India reimposed duty in March 2025. At the current applied rate of 5 percent basic customs duty plus 5 percent cess, Australia's administering department states the in-quota rate as 5 percent.

Under CEPA, Canada can negotiate a similar, volume-capped TRQ deal, which provides:

- In-Quota Concessions: Set up a baseline annual TRQ for Canadian red lentils and yellow peas at a preferential in-quota duty rate.
- Out-of-Quota Protection: Imports exceeding the annual TRQ volume from Canadian suppliers revert to prevailing MFN tariff rates, giving New Delhi a guaranteed ceiling to prevent domestic market flooding and protect its farmers.

Seasonal tariff windows aligned with domestic harvests

To prevent Canadian imports from clashing with Indian farmgate sales, CEPA can incorporate seasonal tariff calendars, where India applies lower or zero tariff rates in the lean months for each crop, ahead of the rabi arrivals of chana and masur in March and April and the kharif arrivals of tur and urad from December to February,[47] when domestic stocks are at their thinnest and import needs highest, and conversely allows India to adjust in-quota tariffs or curtail quota utilisation once domestic arrivals peak.

Permanent SPS resolutions in the CEPA provisions

Rather than relying on temporary administrative windows for Methyl Bromide fumigation waivers[48], the CEPA's Sanitary and Phytosanitary (SPS) section should set in place permanent pest-risk management protocols through the following:

- Establish alternative systems-based inspection frameworks (which consider cold-temperature treatment certification, field monitoring, or alternative pest risk assessments) that build on the systems approach India and Canada already agreed to trial in March 2023 and extended to peas in June 2024, placing that approach on a permanent footing in place of MeBr port fumigation.
- Give the existing Joint Working Group on agricultural cooperation a standing SPS mandate, with strict timeframes, to tackle phytosanitary disputes before they disrupt or delay shipments

Categorization of agricultural inputs

The CEPA can separate agricultural commodities into distinct categories, with varying sensitivities and measured impacts on the Indian farming community.

- Category A can include agricultural inputs that do not compete with domestic Indian producers, most notably Muriate of Potash (MOP), of which India imports 100 per cent[49], which could be bound at 0% tariff status in CEPA, securing Canada's export access while lowering essential fertilizer input costs for Indian farmers.
-
- Category B can include non-competing or deficit-ridden food crops (red lentils, yellow peas, canola oil) managed via preferential tariff rate quotas and seasonal windows.

- Category C can include highly sensitive domestic crops, such as wheat, rice, dairy, and specific oilseeds, which can be placed on India's exclusion list to protect smallholder livelihoods.

By adopting this middle-path architecture within CEPA, both countries achieve their primary strategic objectives: For Canada, exporters stand to gain long-term export certainty, a competitive tariff advantage over non-FTA suppliers, and a permanent or flexible resolution of non-tariff SPS disputes.

For India, policymakers can still have large-scale control over import volumes, protect smallholder incomes during harvest peaks, and secure affordable soil nutrients, fertilizers, and food imports to manage domestic price inflation.

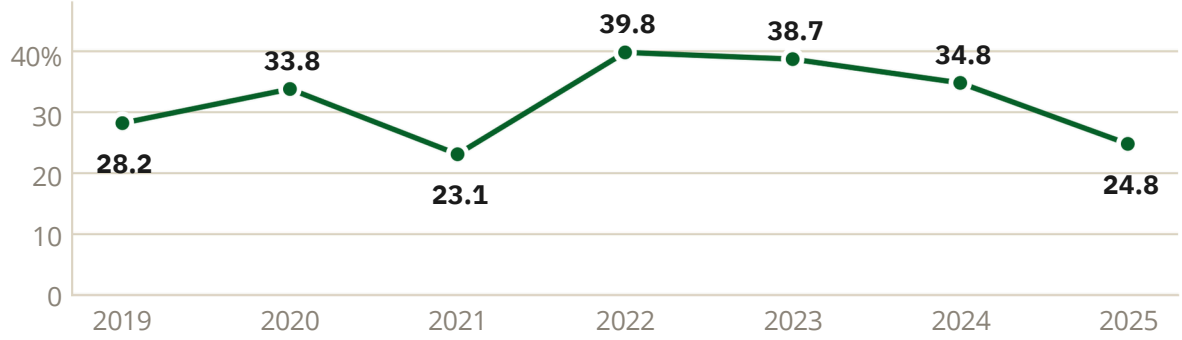
GEOPOLITICAL FACTORS: SUPPLY CHAIN RESILIENCE AND ALIGNMENT

Fertilizer Geopolitics: Canada's Role as a Non-sanctioned Anchor

The war in Ukraine and subsequent Western sanctions on Russia and Belarus eventually restructured global fertilizer trade networks. Before 2022, Russia and Belarus together accounted for about 40% of global potash exports.[50] The resulting supply shocks, sanctions, and maritime chokepoint vulnerabilities, particularly across the Black Sea, Red Sea, and Strait of Bab el-Mandeb, exposed India's extreme vulnerability to imported nutrient disruptions. In this volatile landscape, Canada represents an indispensable geopolitical stabilizer. As the world's largest potash producer, accounting for 30.6% of global production on a K2O basis and over 39% of global exports, Canada supplied roughly one-third of India's MOP imports between 2022 and 2024, at 39.8%, 38.7%, and 34.8% by value, although that share fell to about 25% in 2025 as Russia and Turkmenistan gained ground through non-sanctioned supply chains.[51] Securing long-term procurement agreements with Canadian producers like Canpotex[52] allows New Delhi to protect its domestic agricultural sector from risks posed by Eurasian or global conflicts while reducing dependence on politically unstable suppliers.

Canada's share of India's potash imports has fallen back

Muriate of potash (HS 310420), share of India's total import value, per cent

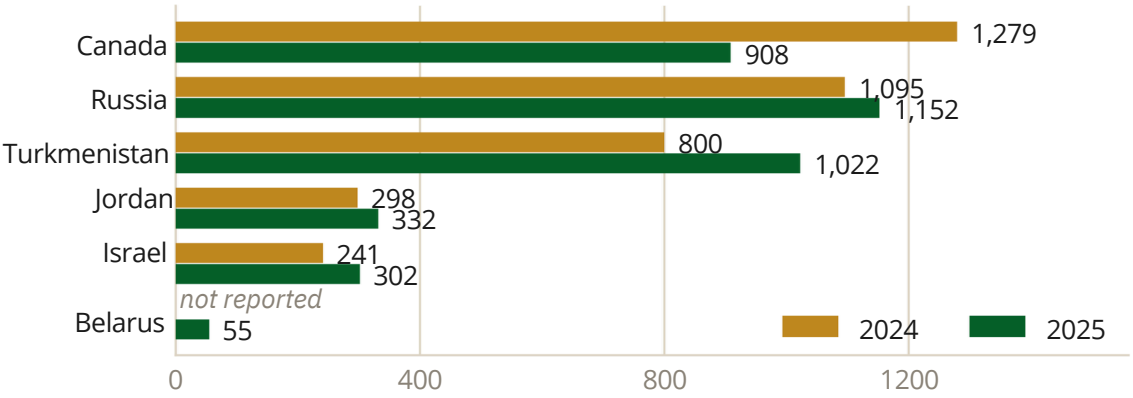


UN Comtrade, India as reporter, HS 310420. Shares calculated from published values.

> As the world's largest potash producer, accounting for 30.6% of global production on a K2O basis and over 39% of global exports, Canada supplied roughly one-third of India's MOP imports between 2022 and 2024.

Russia overtook Canada as India's largest potash supplier in 2025

Muriate of potash (HS 310420), India's imports by volume, thousand tonnes

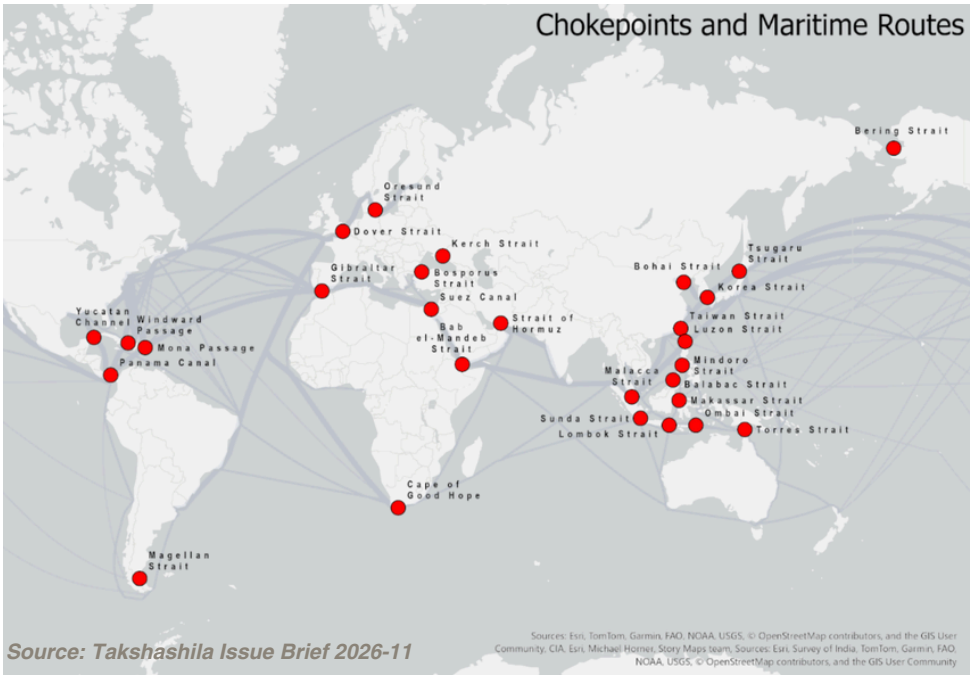


UN Comtrade, India as reporter, HS 310420, calendar years.

Supply Chain Resilience and Maritime Chokepoints

For both nations, agricultural trade serves as a shield against rising global supply chain fragility.

Indian agri-food imports shipped through European or Middle Eastern maritime corridors face recurring disruptions from attacks on shipping in the Red Sea and regional conflict. At present, Canadian imports reach India via the following route: Vancouver/West Coast → North Pacific → South China Sea → Strait of Malacca → Bay of Bengal/Arabian Sea, with an estimated sea time of roughly 30 to 35 days before port waiting.[53]



Source: Takshashila Issue Brief 2026-11

Another issue with the Port of Vancouver route is that roughly three-quarters of Canada's offshore potash exports travel approximately 2,000 kilometers by rail to reach Pacific ports that face their own infrastructure constraints, even as volumes through them reach record levels. Joint research and investments in resilient grain elevators, exploring other Canadian ports such as Churchill,[54] and most importantly, long-term cold-chain infrastructure strengthen the physical architecture bolstering bilateral trade.

Indo-Pacific Alignment

Beyond immediate commodity flows, strengthening agricultural trade ties advances both countries' broader posturing. Canada's Indo-Pacific Strategy prioritizes supply chain resilience[55] and names India a critical partner, on the grounds that its growing strategic, economic and demographic importance in the Indo-Pacific makes it central to Canada's objectives in the region. For India, partnering with a G7 commodity superpower bolsters its multi-alignment strategy, securing critical resources without encountering conditional barriers. Also, with rising protectionism, tariff barriers, and threats to multilateral trade bodies,[56] both Ottawa and New Delhi require diversified commercial partners. De-risking agricultural ties creates a long-lasting economic bridge that can withstand external geopolitical shocks and political shifts in traditional export markets.

RECOMMENDATIONS

To put agriculture as a stabilizing bridge for the broader bilateral reset, Ottawa and New Delhi should pursue a phased, three-stage plan. This framework aligns immediate administrative wins, medium-term institutional structures, and long-term economic integration.

Phase 1: Immediate De-risking

- Give the existing SPS machinery a standing mandate: the Joint Working Group on agricultural cooperation, which last met in February 2026, should be given a permanent, fast-track technical sub-group under the Ministry of Agriculture and Farmers Welfare and the Canadian Food Inspection Agency (CFIA). The immediate priority must be to prepare alternative pest-risk management protocols, such as cold-treatment certification and pre-shipment inspections that consider weather specifications, to place the systems approach trialed since March 2023 on a permanent footing in place of Methyl Bromide (MeBr) fumigation.

- Early warning alerts: New Delhi should establish a formal 12-month advance notification period before implementing extreme tariff adjustments or import duty decisions. Giving Canadian growers predictable lead times will align export supply with domestic Indian kharif and rabi planting cycles, avoiding delays and disruptions on both ends.

Phase 2: CEPA Integration

- Negotiate a fixed pulse in-quota system to formalize a capped pulse quota for Canadian red lentils and yellow peas under CEPA at a fixed rate. Volumes which exceed the quota revert to prevailing Most Favoured Nation (MFN) rates, securing Indian smallholders from market surges while guaranteeing basic level market access for Canadian growers.

- Classify non-competing, essential agricultural inputs, more specifically Muriate of Potash (MOP), under CEPA Category A for immediate, permanent 0% duty binding on essential commodities like fertilizer. This provides Canadian producers with guaranteed long-term access while stabilizing soil nutrient costs for Indian farmers. Eventually, further categorizations of sensitive and competing crops can be introduced, leaving crops in Category C (wheat, rice, dairy, and specific oilseeds) up to negotiation, as competing imports of these crops directly impact smallholder livelihoods.

Phase 3: High-value Research Partnership and Supply Chain Resilience

- Fully operationalize and proliferate research centers such as the Canada–India Pulse Protein Center of Excellence at NIFTEM (Kundli). Scale joint research into fortified food products and climate-resilient, high-yield crop breeding, integrating processed pulse protein directly into Indian national nutrition programs (PM POSHAN school meals).

- Onboard Canadian institutional investors (pension funds such as CPPIB and CDPQ) alongside Indian state agencies to invest in Indian cold-chain logistics, setting up resilient modern warehousing, and researching Pacific port export infrastructure, permanently reducing post-harvest waste and transit bottlenecks.

CONCLUSION

For over two decades, the India–Canada economic relationship has oscillated between ambitious commercial projections and very real policy volatility. As both capitals navigate a disrupted global economy, agricultural trade offers a more tangible, mutually beneficial foundation to guide the bilateral reset. Agriculture is not an ‘additional’ trade sector, and it cannot be overlooked. It is a pillar of bilateral trade that links Western Canadian farm-gate prosperity directly to India's food security, domestic inflation control, and, most importantly, soil nutrient health. By moving beyond ad-hoc commodity exchange, temporary exceptions, and adopting a pragmatic "middle path" in CEPA that combines managed pulse tariffs, permanent SPS solutions, firm zero-tariff inputs on relevant commodities, and joint research to strengthen crop yield and supply chains, Ottawa and New Delhi can replace (geo)political volatility with institutional trust. Insulating the agricultural corridor from standardization conflicts, and building it into a pillar of cooperation, provides a long-term blueprint for Indo-Pacific stability and shared economic resilience, achieving food security for future generations.

ENDNOTES

1) Nadjibulla, Vina. “Carney’s Indo-Pacific Diplomacy and Canada’s New Middle-Power Strategy.” Asia Pacific Foundation of Canada, 16 Mar. 2026, www.asiapacific.ca/publication/carneys-indo-pacific-diplomacy-and-canadas-new-middle-power.
2) Vohra, Krishna. “Australia–Canada–India: The Tech Trilateral Reshaping Green Supply Chains.” Observer Research Foundation, 6 Jan. 2026, www.orfonline.org/expert-speak/australia-canada-india-the-tech-trilateral-reshaping-green-supply-chains.
3) Saskatchewan State of Trade Report 2024. Saskatchewan Trade and Export Partnership, May 2025, sasktrade.com/wp-content/uploads/2025/05/State-of-Trade-2024-Final.pdf.
4) “Indian Fertiliser Companies Sign MoU with Canpotex, Canada One of the Largest Potash Suppliers Globally.” Press Information Bureau, Ministry of Chemicals and Fertilizers, Government of India, 28 Sept. 2022, www.pib.gov.in/PressReleasePage.aspx?PRID=1862849®=48&lang=2.
5) Dawar, Tanya, et al. “Advancing Canada–India Trade: Why a Comprehensive Economic Partnership (CEPA) Matters.” Asia Pacific Foundation of Canada, 9 Mar. 2026, www.asiapacific.ca/publication/advancing-canada-india-trade-why-cepa-matters.
6) Klein, Adam. India: Pulses Market and Policy Changes – A Review of the Last 5 Years. GAIN Report Number IN8110, USDA Foreign Agricultural Service, 28 Sept. 2018, apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Pulses%20Market%20and%20Policy%20Changes%20-%20A%20Review%20of%20the%20Last%205%20Years_New%20Delhi_India_9-28-2018.pdf.
7) “Supporting Balanced Fertilization: Nutrient-Based Subsidy Rates for Rabi 2025-26.” Press Information Bureau, Ministry of Chemicals and Fertilizers, Government of India, 5 Jan. 2026, www.pib.gov.in/PressNoteDetails.aspx?NoteId=156820&ModuleId=3®=1&lang=1.
8) Pandey, Kalpana. “Three Fertilizer Firms to Import Potash From Canada.” Maritime Gateway, 30 Sept. 2022, www.maritimegateway.com/three-fertilizer-firms-to-import-potash-from-canada.
9) Saskatchewan State of Trade Report 2024. Saskatchewan Trade and Export Partnership, May 2025, sasktrade.com/wp-content/uploads/2025/05/State-of-Trade-2024-Final.pdf.
10) Sharma, Puspa, and Saeeduddin Faridi, editors. Food Security in South Asia. South Asia Discussion Papers, Institute of South Asian Studies (ISAS), National University of Singapore, Dec. 2024, www.isas.nus.edu.sg/wp-content/uploads/2024/12/SADP_Food_Complete.pdf.
11) "Climbing the Charts: India's 2024 Pulse Imports Hit Second Highest Ever." AgPulse Analytica, 15 Mar. 2025, agpulseanalytica.com/market-insights/climbing-the-charts-indias-2024-pulse-imports-hit-second-highest-ever.
12) Grignon, Jonah. "Minister of International Trade Says New U.S. Tariffs Demonstrate Need for More Market Diversification." The Western Producer, 23 July 2026, www.producer.com/news/new-u-s-tariffs-demonstrate-need-for-more-market-diversification/.
13) Campbell-Miller, Jill. "Encounter and Apprenticeship: The Colombo Plan and Canadian Aid in India, 1950–1960." A Samaritan State Revisited: Historical Perspectives on Canadian Foreign Aid, edited by Greg Donaghy and David Webster, University of Calgary Press, 2019, pp. 27–52. Scholaris, ucalgary.scholaris.ca/server/api/core/bitstreams/07a4c106-6e16-4cdf-b4f5-a8af9bff3002/content.
14) “Dal Partners With Top Indian Research Universities to Develop Innovation Campus.” Dalhousie News, Dalhousie University, 28 Feb. 2026, www.dal.ca/news/2026/02/28/dalhousie-tirupati-innovation-campus.html.
15) Puttaswamaiah, S., et al. Promoting Sustainable Agriculture: Experiences from India and Canada. Working Paper No. 162, Gujarat Institute of Development Research, Oct. 2005, gidr.ac.in/pdf/WP-162.pdf.
16) “Indian Fertiliser Companies Sign MoU with Canpotex, Canada One of the Largest Potash Suppliers Globally.” Press Information Bureau, Ministry of Chemicals and Fertilizers, Government of India, 28 Sept. 2022, www.pib.gov.in/PressReleasePage.aspx?PRID=1862849&ref=finshots.in®=48&lang=2.

ENDNOTES

17) Saskatchewan State of Trade Report 2024. Saskatchewan Trade and Export Partnership, May 2025, sasktrade.com/wp-content/uploads/2025/05/State-of-Trade-2024-Final.pdf.
18) India, Ministry of Agriculture and Farmers Welfare. Plant Quarantine (Regulation of Import into India) Order, 2003. Department of Agriculture and Farmers Welfare, Government of India, 2003, agriwelfare.gov.in/Documents/ActAndRule/Plant_Quarantine_Order_0.pdf.
19) Vincent, L. E., et al. "Methyl Bromide Toxicity at Various Low Temperatures and Exposure Periods to Angoumois Grain Moth and Indianmeal Moth in Popcorn." Journal of Economic Entomology, vol. 73, no. 2, 1 Apr. 1980, pp. 313–17, https://doi.org/10.1093/jee/73.2.313.
20) Canada, Environment and Climate Change. “Methyl Bromide.” Canada.ca, 2 June 2025, www.canada.ca/en/environment-climate-change/services/canadian-environmental-protection-act-registry/substances-list/toxic/schedule-1/methyl-bromide.html.
21) "India's Pulse Fumigation Exemption Avoids Penalties." The Western Producer, 5 July 2017,www.producer.com/crops/indias-pulse-fumigation-exemption-avoids-penalties/.
22) Singh, Santosh K. India Increases Import Duty on Yellow Peas. GAIN Report Number IN2025-0069, USDA Foreign Agricultural Service, 24 Nov. 2025, apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=India%20Increases%20Import%20Duty%20on%20Yellow%20Peas_New%20Delhi_India_IN2025-0069.pdf.
23) Singh, Santosh K. India Increases Import Duty on Yellow Peas. GAIN Report Number IN2025-0069, USDA Foreign Agricultural Service, 24 Nov. 2025, apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=India%20Increases%20Import%20Duty%20on%20Yellow%20Peas_New%20Delhi_India_IN2025-0069.pdf.
24) “India Extends Duty-Free Yellow Peas Imports Until March 2027.” Reuters, 4 Apr. 2026, www.reuters.com/world/india/india-extends-duty-free-yellow-peas-imports-until-march-2027-2026-04-04.
25) Verma, Sanjay Kumar. “India–Canada Relations: From Rupture to Strategic Rebalancing.” Observer Research Foundation, 26 Feb. 2026, www.orfonline.org/expert-speak/india-canada-relations-from-rupture-to-strategic-rebalancing.
26) Saskatchewan State of Trade Report 2024. Saskatchewan Trade and Export Partnership, May 2025, sasktrade.com/wp-content/uploads/2025/05/State-of-Trade-2024-Final.pdf.
27) “Indian Fertiliser Companies Sign MoU with Canpotex, Canada One of the Largest Potash Suppliers Globally.” Press Information Bureau, Ministry of Chemicals and Fertilizers, Government of India, 28 Sept. 2022, www.pib.gov.in/PressReleasePage.aspx?PRID=1862849&ref=finshots.in®=48&lang=2.
28) India, Ministry of Agriculture and Farmers Welfare. India – Canada Trade Brief. Department of Agriculture and Farmers Welfare, 22 May 2023, agriwelfare.gov.in/sites/default/files/India%20Canada%20Trade%20Brief.pdf.
29) “Indian Fertiliser Companies Sign MoU with Canpotex, Canada One of the Largest Potash Suppliers Globally.” Press Information Bureau, Ministry of Chemicals and Fertilizers, Government of India, 28 Sept. 2022, www.pib.gov.in/PressReleasePage.aspx?PRID=1862849&ref=finshots.in®=48&lang=2.
30) “Find a Supplier.” Pulse Canada, pulsecanada.com/suppliers.
31) Saskatchewan State of Trade Report 2024. Saskatchewan Trade and Export Partnership, May 2025, sasktrade.com/wp-content/uploads/2025/05/State-of-Trade-2024-Final.pdf.
32) “Indian Exporters Face Mounting Challenges as West Asia Crisis Disrupts Ports and Sparks Cost Surge.” ET Supply Chain, Economic Times, supplychain.economictimes.indiatimes.com/news/logistics-and-transport/indian-exporters-face-mounting-challenges-as-west-asia-crisis-disrupts-ports-and-sparks-cost-surge/131632130.

ENDNOTES

33) India's Plant Quarantine Measures Mandating Methyl Bromide Treatment Consistent with International Agreements & Standards? Centre for Environment and Agriculture, Apr. 2022, indianagriculturalfacts.com/wp-content/uploads/indias-plant-quarantine-measures-english.pdf.
34) Spicer, Joel. “Canada’s Pulse Deal With India Shows How Trade and Development Can Align - Nutrition International.” Nutrition International - We Make a Difference Because Nutrition Is the Difference., 10 Mar. 2026, nutritionintl.org/news/all-blog-posts/canadas-pulse-deal-with-india-shows-how-trade-and-development-can-align.
35) India, Ministry of Agriculture & Farmers Welfare. Soil Health Card. Press Information Bureau, Government of India, 17 Jan. 2022, www.pib.gov.in/FactsheetDetails.aspx?Id=148602.
36) “Agriculture & Agtech Innovation.” Innovation Saskatchewan, last modified 17 July 2026, innovationsask.ca/agriculture.
37) “Agriculture & Agtech Innovation.” Innovation Saskatchewan, last modified 17 July 2026, innovationsask.ca/agriculture.
38) “Saskatchewan to Support Exploration of New Pulse Protein Centre of Excellence in India.” Government of Saskatchewan, 3 Mar. 2026, www.saskatchewan.ca/government/news-and-media/2026/march/03/saskatchewan-to-support-exploration-of-new-pulse-protein-centre-of-excellence-in-india.
39) Dawar, Tanya, et al. “Advancing Canada–India Trade: Why a Comprehensive Economic Partnership (CEPA) Matters.” Asia Pacific Foundation of Canada, 9 Mar. 2026, www.asiapacific.ca/publication/advancing-canada-india-trade-why-cepa-matters.
40) Canada, Agriculture and Agri-Food. “Agriculture and Agri-food in the Indo-Pacific Region.” agriculture.canada.ca, 11 Sept. 2025, agriculture.canada.ca/en/international-trade/agriculture-and-agri-food-indo-pacific-region.
41) “Australia-India Economic Cooperation and Trade Agreement (ECTA).” Department of Foreign Affairs and Trade, Australian Government, accessed 18 Aug. 2026, www.dfat.gov.au/trade/agreements/in-force/australia-india-ecta.
42) “Australia-India Economic Cooperation and Trade Agreement (ECTA).” Department of Foreign Affairs and Trade, Australian Government, accessed 18 Aug. 2026, www.dfat.gov.au/trade/agreements/in-force/australia-india-ecta.
43) “Minimum Support Prices (MSPs) for All Crops.” Press Information Bureau, Ministry of Agriculture and Farmers Welfare, Government of India, 4 Aug. 2026, www.pib.gov.in/PressReleasePage.aspx?PRID=2294446®=48&lang=2.
44) “Market Access.” Pulse Canada, accessed 18 Aug. 2026, https://pulsecanada.com/industry/market-access
45) “Australia-India Economic Cooperation and Trade Agreement (ECTA).” Department of Foreign Affairs and Trade, Australian Government, accessed 18 Aug. 2026, www.dfat.gov.au/trade/agreements/in-force/australia-india-ecta.
46) “Industry Advice Notice 2025-08: Quota Administration, Australia-India Economic Cooperation and Trade Agreement (AI-ECTA), Lentils Quota.” Department of Agriculture, Fisheries and Forestry, Australian Government, 12 Mar. 2025, www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/plants-plant-products/ian/2025/2025-08.
47) “Price Monitoring Division.” Department of Consumer Affairs, Ministry of Consumer Affairs, Food and Public Distribution, Government of India, accessed 18 Aug. 2026, consumeraffairs.gov.in/pages/price-monitoring-division.
48) "India's Pulse Fumigation Exemption Avoids Penalties." The Western Producer, 5 July 2017, www.producer.com/crops/indias-pulse-fumigation-exemption-avoids-penalties/.
49) Juneja, Ritika, et al. De-risking Fertiliser Supplies for India amid Rising Geopolitical Risks. Policy Brief, Indian Council for Research on International Economic Relations (ICRIER), Mar. 2026, icrier.org/pdf/De-risking-Fertiliser-Supplies-for-India-amid-Rising-Geopolitical-Risks.pdf.

ENDNOTES

50) Shefa, Mejgan, et al. “Economic Security and Prosperity: Leveraging Canada’s Potash and Strategic Partnerships - Balsillie Papers.” Balsillie Papers, 27 July 2026, balsilliepapers.ca/bsia-paper/economic-security-and-prosperity-leveraging-canadas-potash-and-strategic-partnerships.
51) Ramachandran, Narayan, et al. “Geopolitics of Fertiliser Supply in India.” Takshashila Issue Brief 2026-11, Takshashila Institution, 2 Apr. 2026, takshashila.org.in/content/publications/20260402-Fertilizer-Geopolitics.html.
52) “Indian Fertiliser Companies Sign MoU with Canpotex, Canada One of the Largest Potash Suppliers Globally.” Press Information Bureau, Ministry of Chemicals and Fertilizers, Government of India, 28 Sept. 2022, www.pib.gov.in/PressReleasePage.aspx?PRID=1862849&ref=finshots.in®=48&lang=2.
53) Ramachandran, Narayan, et al. “Geopolitics of Fertiliser Supply in India.” Takshashila Issue Brief 2026-11, Takshashila Institution, 2 Apr. 2026, takshashila.org.in/content/publications/20260402-Fertilizer-Geopolitics.html.
54) Shefa, Mejgan, et al. “Economic Security and Prosperity: Leveraging Canada’s Potash and Strategic Partnerships - Balsillie Papers.” Balsillie Papers, 27 July 2026, balsilliepapers.ca/bsia-paper/economic-security-and-prosperity-leveraging-canadas-potash-and-strategic-partnerships.
55) Canada, Global Affairs. “Canada’s Indo-Pacific Strategy.” Global Affairs Canada, 27 Nov. 2022, www.international.gc.ca/transparency-transparence/indo-pacific-indo-pacifique/index.aspx?lang=eng.
56) Mohanty, S. K. Trump's Trade Policies Peril Global Economic Stability. Research and Information System for Developing Countries (RIS), Mar. 2025, www.ris.org.in/sites/default/files/Publication/Trump%20Trade%20Policy%20Report.pdf.

C-21, 3rd Floor, Qutub Institutional Area, New Delhi, India - 110016.
Phone: 011-43104566 | Email: office@csdronline.com | Web: www.csdronline.com | Twitter:@CSDR_India