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EU–India FTA and Export Competitiveness: A HS2-Level Comparison of Türkiye and India in The EU Market

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ABSTRACT: This paper examines how the recently concluded EU–India Free Trade Agreement (EU–India FTA) is likely to affect Türkiye's export competitiveness in the EU market by comparing the HS-2-level revealed comparative advantage (RCA/RSCA) profiles of Türkiye and India. Using a three-year average of trade data for 2022–2024 and defining competitiveness with respect to the EU's import structure, the analysis classifies HS-2 chapters into a four-cell matrix: (i) direct-competition sectors where both countries have RSCA > 0, (ii) Türkiye-only advantage sectors, (iii) India-only advantage sectors and (iv) chapters where neither country shows revealed comparative advantage. The results indicate that direct competition is concentrated in textiles and clothing, fish and seafood, rubber, raw hides and some basic metals, where both countries already hold strong positions and Indian exporters are poised to benefit most directly from tariff reductions. Türkiye's exclusive advantages are found mainly in processed agricultural products, certain mineral and basic chemical chapters, plastics and some textile intermediates, many of which are only partially covered by the FTA and thus relatively insulated in the short run. India's exclusive advantages lie in coffee, tea and spices, vegetable extracts, organic chemicals, dyes, leather articles and selected labour-intensive manufactures, where Türkiye's current export presence is limited and the agreement primarily consolidates India's role.

KEYWORDS: Revealed Comparative Advantage, EU–India Free Trade Agreement, Export Competitiveness, Trade Diversion, Customs Union Asymmetry

I. INTRODUCTION

Since the early 1990s, the pattern of global trade has been reshaped by a rapid proliferation of regional and bilateral trade agreements, many of which go beyond traditional tariff-cutting and incorporate disciplines on services, investment, intellectual property and regulatory cooperation, while multilateral negotiations under the WTO have largely stalled (Bhagwati, 1993; Freund & Ornelas, 2010; Hofmann, Osnago & Ruta, 2019). In this evolving landscape, the recently concluded EU–India Free Trade Agreement (EU–India FTA) represents a major development in the EU's trade policy and is expected to become one of the largest bilateral trade deals worldwide (European Commission, 2026a; European Commission, 2026b; Bruegel, 2025; Kiel Institute, 2026). According to official EU, the agreement will eliminate or substantially reduce tariffs on the vast majority of trade between the two partners—covering more than 90 percent of tariff lines and an even higher share of trade value—and will gradually open markets in goods, services and public procurement once the ratification process is completed (European Commission, 2026a; European Commission, 2026b).

Türkiye is already deeply integrated into the EU market through the Customs Union, which has provided almost full tariff-free access for industrial goods since 1996, but this framework does not automatically extend to preferential agreements that the EU signs with third countries (Ministry of Trade Republic of Türkiye, 2020; Directorate of EU Affairs, 2022). When the EU grants tariff preferences to a country such as India, Indian products can enter the EU market under reduced or zero tariffs, and—thanks to the free circulation of goods within the Customs Union—some of these products may indirectly access the Turkish market, while Turkish exporters do not receive reciprocal preferences in India unless a separate bilateral agreement is negotiated (Directorate of EU Affairs, 2022; Ministry of Trade Republic of Türkiye, 2020; YASED, 2026). Recent policy reports underline that this asymmetric architecture may lead to trade diversion and a loss of competitiveness for Turkish producers in key sectors if new EU mega-agreements are not accompanied by parallel arrangements with Türkiye Akman, 2017; Özer, 2020).

At the same time, India has strengthened its position as a major supplier of both primary and manufactured products, and has become an increasingly important partner for the EU in sectors such as textiles and clothing, chemicals, machinery, pharmaceuticals and information-technology-related services (European Commission, 2026a; Bruegel, 2025; Kiel Institute, 2026). By securing preferential access to the EU under the new FTA, Indian firms are expected to improve their cost competitiveness vis-à-vis Türkiye, in several HS 2-digit product groups where both countries already compete for EU market share (European

Commission, 2026a; European Commission, 2026b; YASED, 2026). Commentators have therefore warned that the EU–India agreement could significantly reshape sourcing patterns, supply-chain configurations and market-entry strategies in the EU, with potential negative spillovers for Turkish exporters in sensitive sectors such as textiles, steel and automotive-related industries.

Against this background, assessing the impact of the EU–India FTA on Türkiye cannot rely on nominal tariff changes alone. A more informative approach is to analyse how the agreement interacts with the existing export specialisation patterns of Türkiye and India in the EU market (YASED, 2026; Kiel Institute, 2026). Building on the literature that uses revealed comparative advantage (RCA) indices to infer countries' sectoral strengths from observed trade flows, this paper compares the HS 2-digit RCA profiles of Türkiye and India for their exports to the EU (Balassa, 1965; Utkulu & Erlat & Erlat, 2012; Sanidas & Shin, 2010; Kim & Thunt, 2017). Earlier studies have shown that RCA-based analysis can provide a tractable yet powerful way to identify sectors where countries enjoy persistent export advantages, and have increasingly applied this tool to evaluate how mega-regional and deep trade agreements may affect third-country competitiveness (Balassa, 1965; Hofmann, Osnago & Ruta, 2019; Kim & Thunt, 2017).

The central research question of this study is therefore twofold. First, how do Türkiye's and India's HS2-level RCA patterns in the EU market compare across major product groups, particularly in sectors that are heavily covered by the EU–India FTA (European Commission, 2026a; YASED, 2026)? Second, to what extent might the tariff preferences and regulatory provisions granted under the agreement reinforce or weaken these existing competitive positions, potentially generating trade diversion away from Turkish exports or, alternatively, leaving room for Türkiye to maintain or enhance its role in European value chains thanks to geographical proximity, production capabilities and institutional ties with the EU ((Directorate of EU Affairs 2022; Kiel Institute, 2026)?

The remainder of the paper is organised as follows. Section 2 reviews the relevant literature across four sub-strands: the foundations and measurement of the RCA index, Türkiye's export competitiveness in the EU market and India's export competitiveness in the EU market. Section 3 presents the methodological framework, defining the Balassa RCA index and its symmetric transformation (RSCA), the four-cell classification matrix used to structure the bilateral comparison, and the data sources and period of analysis. Section 4 reports the empirical results, organising the 97 HS 2-digit chapters into the four competitive-position cells and discussing the most commercially significant chapters within each. Section 5 provides an extended discussion that situates the findings in the context of the existing literature and addresses four thematic dimensions: the nature of the competitive shock in direct-competition sectors; the degree of insulation available to Türkiye in sectors where it holds exclusive advantage; the consolidation of India's strengths in India-only chapters; and the regulatory overlay of CBAM, REACH and SPS standards, before concluding with an analysis of the structural asymmetry of the Customs Union and its policy implications. Section 6 summarises the main findings, acknowledges the limitations of the static RCA framework employed, and outlines directions for future research.

II. LITERATURE REVIEW

A large empirical literature measures export competitiveness by inferring sectoral strengths from observed trade patterns rather than from underlying factor prices or technology. In this context, Balassa's revealed comparative advantage (RCA) index has become the standard tool to identify products and industries in which a country exhibits relatively strong export performance (Balassa, 1965; Vollrath, 1991). The basic idea is that a country is competitive in those product groups whose export share exceeds the corresponding share in world (or partner-market) exports, with RCA values greater than one interpreted as revealed export advantage. Subsequent contributions have refined this approach by proposing symmetric or normalised RCA measures to address scale and distribution issues, and by emphasising that RCA should be complemented with additional indicators when drawing policy conclusions (Vollrath, 1991; Laursen, 2015; Sanidas & Shin, 2010). Empirical assessments generally confirm that, despite its simplicity, RCA provides a tractable and informative summary of export specialisation patterns and their evolution over time (Sabonienė, 2009; Kim & Thunt, 2017).

The asymmetric distribution of the Balassa RCA index—bounded below at zero but unbounded above—has motivated several alternative formulations. Vollrath (1991) proposed three alternative measures, including the Relative Trade Advantage (RTA) and the logarithm of the relative export advantage, designed to correct for additive inconsistencies in the original index. The symmetric transformation proposed by Dalum, Laursen and Villumsen (1998), which maps the Balassa index onto the [−1, +1] interval, has achieved the widest subsequent adoption in empirical work, particularly for panel econometric applications where distributional symmetry is required (Laursen, 2015). Sanidas and Shin (2010) offer a comparative evaluation of multiple RCA variants and conclude that the choice of index can meaningfully affect the identification of comparative advantage, particularly for countries with heterogeneous export structures—an observation with direct methodological relevance for the present Turkey–India comparison.

RCA-based analysis has been extensively applied in country-wide and sector-specific competitiveness studies. For a wide range of emerging economies, RCA indices at disaggregated HS or SITC levels are used to identify core export strengths, track structural change in the export basket and evaluate progress towards more sophisticated, technology-intensive products (Sabonienė, 2009; Sanidas & Shin, 2010). A growing strand of work also focuses on the dynamics of RCA, distinguishing

between 'rising' and 'declining' comparative advantages or between stable and unstable specialisation paths, often by combining static RCA with simple trade-mapping techniques or dynamic RCA measures (Edwards & Schoer, 2002; Ekmen-Özçelik & Erlat, 2013; Assadzadeh et al., 2013). Kim and Thunt (2017), for instance, uses HS-4-digit RCA indices to show that Myanmar's export competitiveness remains heavily concentrated in primary sectors—natural resources, agriculture and fishery—while many of these advantages exhibit a downward trend, and only a limited set of manufactured products, such as garments, displays sustained revealed advantage.

For Türkiye, a rich literature uses RCA to examine export competitiveness vis-à-vis the European Union and other major partners. Utkulu and Erlat & Erlat (2012) and Erlat & Erlat (2025) compute various RCA measures for Turkish exports to the EU-15 and document that Turkey's revealed advantages are concentrated in traditional labour-intensive sectors such as textiles and clothing, as well as certain resource-based and low-technology manufactures, while comparative disadvantage persists in many high-technology and research-intensive products. Serin and Civan (2008) extend this analysis with a focus on agri-food and manufactured sectors, confirming Turkey's strong bilateral RCA in these chapters and providing early HS-level evidence of the competitive structure documented in the present study. Şimşek, Seymen and Utkulu (2010) compare multiple RCA variants for Turkish EU exports—including the Balassa, Vollrath and symmetric indices—and confirm that, regardless of measurement approach, Turkey's comparative advantage is consistently concentrated in labour-intensive and resource-based manufactures. Similar conclusions emerge from studies that analyse Turkey's competitiveness in the EU-15 market, which confirm that Turkey tends to be competitive in labour- and, to some extent, capital-intensive industries, but lags behind in easy-to-imitate and hard-to-imitate R&D-based goods (Erlat & Erlat, 2025; Demir, Aydın & Utkulu, 2024).

Several papers deepen this analysis by distinguishing between static and dynamic RCA and by linking RCA patterns to technology-based classifications. Using SITC and technological categories, Şimşek et al. (2007) show that Turkey has a strong competitive position in raw-material and labour-intensive exports, while its competitiveness in easy-to-imitate and hard-to-imitate research-driven products remains weak. More recent work applies static and dynamic RCA measures and export-similarity indices to Turkey's bilateral trade with specific partners or sectors—for example, cereals or wheat flour exports to the EU—highlighting both persistent strengths and 'missed opportunities' in high-value product groups (Ekmen-Özçelik & Erlat, 2013). Overall, the consensus is that Turkey's revealed comparative advantages have gradually shifted but remain largely anchored in lower and medium-low technology segments, even as some upgrading is visible in medium-technology manufactures.

An important institutional dimension of Türkiye's EU export competitiveness is the Customs Union itself. Togan (1997) assessed the trade and welfare effects of the 1996 Customs Union and documented gains concentrated in industrial goods, with Turkey's export specialisation reinforced in labour-intensive sectors through deeper integration into EU supply chains. More recently, Limao (2016) has discussed how preferential trade agreement proliferation affects third-country exporters, and Güneş and Tan (2017) provide a comparative static and dynamic RCA analysis of Turkey and Russia that illustrates the sensitivity of Turkish export specialisation to institutional trade arrangements. The literature consistently identifies the structural asymmetry of the Customs Union—Türkiye adopts the EU Common External Tariff but cannot participate in EU FTA negotiations—as a source of growing competitive vulnerability (Togan, 2015).

Although the India-focused RCA literature is thinner in the specific context of EU-bound exports, existing studies for other markets confirm that India typically exhibits strong RCA in labour-intensive manufactures (such as textiles and clothing), selected chemicals and pharmaceuticals, and certain services-related products, while still relying on a mix of resource-based and low-technology exports (Batra & Khan, 2005; OECD, 2019). These findings, taken together with Turkey's RCA profile in the EU, suggest that both countries compete in overlapping product groups—especially in textiles, some intermediate manufactures and selected labour-intensive industries—making an HS-based RCA comparison particularly relevant for analysing how the EU–India trade agreement may affect their relative export competitiveness in the EU market.

The role of non-tariff measures in shaping India's EU market access has received growing attention. The EU's regulatory framework—encompassing REACH chemical regulations, sanitary and phytosanitary (SPS) standards, and increasingly the Carbon Border Adjustment Mechanism (CBAM)—constitutes a de facto barrier that partially offsets tariff preferences for developing country exporters (Cefic, 2025; EcoMundo, 2024; Regulation (EU) 2023/956). For India, compliance costs in textiles (azo dye regulations), leather (chromium content standards), and organic chemicals (REACH substance registration) represent non-trivial fixed costs that may moderate the competitive impact of tariff liberalisation even after the FTA enters into force. The extent to which India's export supply can respond rapidly to the new preference regime is thus conditioned by the regulatory compliance capacity of Indian exporters, a factor that moderates the trade diversion risk for Türkiye identified in the empirical analysis.

III.METHODOLOGY

This study investigates the competitive positions of Türkiye and India in the European Union (EU) market by employing a product-level trade analysis. The analysis is conducted at the HS-2 level of product disaggregation, which allows for a tractable yet sufficiently detailed assessment of sectoral specialisation and export structure across a broad set of product categories.

Working at the HS-2 level also facilitates the link between the empirical results and the sectoral structure of the EU–India trade agreement, which is typically discussed in terms of HS chapters.

To evaluate the relative specialisation of each country, the study employs the revealed comparative advantage (RCA) index originally proposed by Balassa (1965). The RCA index measures whether a country is relatively more specialised in exporting a particular product group compared with the structure of a reference market. In this study, the reference market is defined as the EU's import structure from the world, so competitiveness is assessed specifically in terms of access to the EU market rather than global trade.

The RCA index is calculated as:

$$RCA(i,j) = \frac{\frac{X(i,j)}{X(i)}}{\frac{X(j)}{X}} \qquad \text{(Eq. 1)}$$

X(i,j): Country i's (either Türkiye or India) exports of product j to the EU.
X(i): Country i's (either Türkiye or India) total exports to EU (all products).
X(j): Total EU imports of product j from all countries.
X: Total EU imports from all countries.

An RCA value greater than one indicates that the share of product group j in country i's exports to the EU exceeds the corresponding share in the EU's total imports from the world, and is therefore interpreted as a revealed comparative advantage in that HS-2 chapter; values below one imply a revealed comparative disadvantage.

Since the RCA index is asymmetric and bounded between zero and infinity, the results are transformed into the Symmetric Revealed Comparative Advantage (RSCA) index, as proposed by Dalum, Laursen and Villumsen (1998) and further discussed by Laursen (2015), in order to facilitate comparison across product groups and between countries. The RSCA index is defined as:

$$RSCA(i,j) = \frac{RCA(i,j) - 1}{RCA(i,j) + 1} \qquad \text{(Eq. 2)}$$

The RSCA index ranges between −1 and +1, where positive values indicate the presence of revealed comparative advantage and negative values indicate revealed comparative disadvantage. This transformation makes it easier to compare specialisation patterns across HS-2 chapters and between Türkiye and India in a consistent way (Laursen, 2015; Sanidas & Shin, 2010).

To reduce short-term fluctuations and capture more stable trade patterns, trade data are averaged over the 2022–2024 period. For each HS-2 product group, exports to the EU and EU imports from the world are avaraged over these three years, and RCA and RSCA indices are computed using this average values. This three-year averaging approach smooths out cyclical or temporary shocks and allows the analysis to focus on structural patterns of overlapping specialisation and competitive interaction between Türkiye and India in the EU market.

Based on the RSCA values of Türkiye and India, HS-2 product groups are classified into four categories in order to identify patterns of competitive interaction in the EU market. Formally, the classification matrix is:

Table 1. RCA Comparison Matrix

	India RSCA > 0	**India RSCA ≤ 0**
Türkiye RSCA > 0	(i) Direct Competition	(ii) Türkiye's Comparative Advantage
Türkiye RSCA ≤ 0	(iii) India's Comparative Advantage	(iv) No Comparative Advantage

Note: Categories reflect the sign of the RSCA index for each country. RSCA > 0 implies RCA > 1 (revealed comparative advantage); RSCA ≤ 0 implies RCA ≤ 1 (no revealed comparative advantage).

Category (i) captures HS-2 chapters where both countries have RSCA > 0, indicating direct competition in exporting to the EU. Category (ii) includes chapters in which Türkiye demonstrates comparative advantage (RSCA > 0) while India does not, representing areas of relative strength for Türkiye. Category (iii) comprises chapters where India exhibits comparative advantage but Türkiye does not, suggesting potential or existing competitive pressure for Turkish exporters. Finally, category (iv) covers chapters where neither country displays a revealed comparative advantage in the EU market (RSCA ≤ 0 for both). This classification provides a systematic framework for linking the EU–India FTA's sectoral coverage to pre-existing patterns of

revealed comparative advantage and for discussing where Türkiye is most likely to face increased competitive pressure in the EU market as a result of India's new preferential access.

IV. RESULTS

In this section, HS-2 level RSCA values for Türkiye and India in the EU market are reported using the four-cell classification introduced in the methodology. The distribution of chapters across the four categories is first summarised, and then the main patterns in each group are briefly highlighted with selected examples.

A. Direct Competition

In the first category, HS-2 chapters are included in which both Türkiye and India exhibit positive RSCA values in the EU market. These chapters correspond to sectors where both countries are relatively specialised suppliers and where direct competition in the EU is most pronounced. The RSCA results indicate that this group includes, among others, certain resource-based products (such as fish and other aquatic products, rubber and raw hides) and a cluster of textile and clothing-related chapters, including cotton and a range of fabrics and apparel products. In these chapters, both Türkiye and India register RSCA values above zero and non-negligible shares in EU imports, implying that tariff preferences granted to India under the EU–India FTA may alter the relative competitive positions of the two suppliers.

Table 2. Direct Competition Sectors (Both Türkiye and India RSCA > 0)

HS	Product Description	RSCA-TR	RSCA-IND
03	Fish and crustaceans, molluscs and other aquatic invertebrates	0.03	0.32
40	Rubber and articles thereof	0.31	0.28
41	Raw hides and skins (other than furskins) and leather	0.11	0.33
52	Cotton	0.83	0.81
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	0.18	0.70
54	Man-made filaments; strip and the like of man-made textile materials	0.62	0.30
55	Man-made staple fibres	0.71	0.45
57	Carpets and other textile floor coverings	0.76	0.81
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	0.58	0.57
61	Articles of apparel and clothing accessories, knitted or crocheted	0.68	0.46
62	Articles of apparel and clothing accessories, not knitted or crocheted	0.62	0.51
63	Other made-up textile articles; sets; worn clothing and worn textile articles; rags	0.61	0.70
68	Articles of stone, plaster, cement, asbestos, mica or similar materials	0.20	0.28
69	Ceramic products	0.45	0.38
72	Iron and steel	0.18	0.41
73	Articles of iron or steel	0.44	0.21
76	Aluminium and articles thereof	0.37	0.25

B. Chapters Where Only Türkiye Has Comparative Advantage

The second category consists of HS-2 chapters in which Türkiye's RSCA values are positive while India's RSCA values are non-positive. This group can be interpreted as comprising product lines where Türkiye holds a revealed comparative advantage in the EU market and India does not. The RSCA results show that this category contains several processed agricultural and food products, selected mineral and basic chemical chapters, certain plastic-related items and some textile-related intermediate goods. In these chapters, Türkiye's specialisation is reflected in both higher RSCA values and larger import shares in the EU relative to

India. The extent to which this advantage will be affected by the EU–India FTA depends on the depth and timing of tariff concessions in the corresponding HS-2 chapters, an issue that is taken up in the discussion section.

Table 3. Türkiye-only Advantage Sectors (Türkiye RSCA > 0, India RSCA ≤ 0)

HS	Product Description	RSCA-TR	RSCA-IND
07	Edible vegetables and certain roots and tubers	0.20	-0.35
08	Edible fruit and nuts; peel of citrus fruit or melons	0.45	-0.24
20	Preparations of vegetables, fruit, nuts or other parts of plants	0.52	-0.18
25	Salt; sulphur; earths and stone; plastering materials, lime and cement	0.59	-0.01
26	Ores, slag and ash	0.16	-0.50
28	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals,...	0.18	-0.16
39	Plastics and articles thereof	0.07	-0.35
43	Furskins and artificial fur; manufactures thereof	0.61	-0.54
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	0.51	-0.26
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable...	0.21	-0.19
60	Knitted or crocheted fabrics	0.82	-0.73
70	Glass and glassware	0.24	-0.15
74	Copper and articles thereof	0.27	-0.60
83	Miscellaneous articles of base metal	0.08	-0.07
86	Railway or tramway locomotives, rolling stock and parts thereof; railway or tramway track fixtures...	0.19	-0.56
87	Vehicles other than railway or tramway rolling stock, and parts and accessories thereof	0.35	-0.52
93	Arms and ammunition; parts and accessories thereof	0.44	-0.04
94	Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings...	0.17	-0.10

C. Chapters Where Only India Has Comparative Advantage

The third category comprises HS-2 chapters in which India exhibits positive RSCA values while Türkiye's RSCA values are non-positive. These chapters correspond to sectors where India holds a revealed comparative advantage in supplying the EU, whereas Türkiye does not. According to the RSCA results, this group includes traditional Indian strengths such as coffee, tea and spices, various vegetable extracts and plaiting materials, as well as selected organic chemicals, dyes and pigments, leather articles and other labour-intensive manufactures. In these chapters, India combines positive RSCA values with noticeable EU import shares, while Türkiye's RSCA values remain at or below zero. For many of these products, the EU–India FTA foresees substantial tariff reductions in favour of India, suggesting that existing Indian advantages are likely to be reinforced by preferential access.

Table 4. India-only Advantage Sectors (India RSCA > 0, Türkiye RSCA ≤ 0)

HS	Product Description	RSCA-TR	RSCA-IND
09	Coffee, tea, maté and spices	-0.70	0.43
13	Lac; gums, resins and other vegetable saps and extracts	-0.79	0.72
14	Vegetable plaiting materials; vegetable products not elsewhere specified	-0.32	0.81

HS	Product Description	RSCA-TR	RSCA-IND
	or included		
24	Tobacco and manufactured tobacco substitutes; products, whether or not containing nicotine,...	-0.31	0.14
29	Organic chemicals	-0.74	0.57
32	Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring...	-0.39	0.29
36	Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations	-0.05	0.15
42	Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles...	-0.28	0.65
46	Manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork	-0.83	0.37
50	Silk	-0.87	0.34
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	-0.20	0.03
64	Footwear, gaiters and the like; parts of such articles	-0.39	0.43
67	Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles...	-0.71	0.12
71	Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad...	-0.17	0.56
79	Zinc and articles thereof	-0.73	0.36
82	Tools, implements, cutlery, spoons and forks, of base metal; parts thereof of base metal	-0.42	0.05
85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television...	-0.33	0.02

D. Chapters Where Neither Country Has Comparative Advantage

The fourth category includes HS-2 chapters in which both Türkiye and India display non-positive RSCA values in the EU market. These chapters represent sectors where neither country can be regarded as a particularly specialised supplier. They are mainly found among highly protected or heavily regulated agricultural and food products, as well as in certain capital- and technology-intensive manufactures dominated by EU or other third-country producers. Although some trade creation effects may arise from the EU–India FTA in these areas, the absence of revealed comparative advantage for both Türkiye and India suggests that they are less central to the current pattern of competitive interaction between the two exporters in the EU market. More detailed sector-specific implications of the FTA are therefore discussed with reference to categories (i)–(iii) rather than to this residual group.

Table 5. No Revealed Comparative Advantage (Both Türkiye and India RSCA ≤ 0)

HS	Product Description	RSCA-TR	RSCA-IND
01	Live animals	-0.98	-1.00
02	Meat and edible meat offal	-0.99	-1.00
04	Dairy produce; birds eggs; natural honey; edible products of animal origin, not elsewhere...	-0.90	-0.98
05	Products of animal origin, not elsewhere specified or included	-0.22	-0.16
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	-0.49	-0.62

HS	Product Description	RSCA-TR	RSCA-IND
10	Cereals	-0.42	-0.06
11	Products of the milling industry; malt; starches; inulin; wheat gluten	-0.66	-0.67
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal...	-0.33	-0.04
15	Animal, vegetable or microbial fats and oils and their cleavage products; prepared edible fats;...	-0.62	-0.18
16	Preparations of meat, of fish, of crustaceans, molluscs or other aquatic invertebrates, or...	-0.71	-0.67
17	Sugars and sugar confectionery	-0.02	-0.22
18	Cocoa and cocoa preparations	-0.70	-0.93
19	Preparations of cereals, flour, starch or milk; pastrycooks products	-0.28	-0.87
21	Miscellaneous edible preparations	-0.30	-0.38
22	Beverages, spirits and vinegar	-0.67	-0.98
23	Residues and waste from the food industries; prepared animal fodder	-0.90	-0.41
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral...	-0.57	-0.19
30	Pharmaceutical products	-0.84	-0.07
31	Fertilisers	-0.26	-0.93
33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	-0.40	-0.41
34	Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial...	-0.20	-0.62
35	Albuminoidal substances; modified starches; glues; enzymes	-0.39	-0.53
37	Photographic or cinematographic goods	-0.89	-0.99
38	Miscellaneous chemical products	-0.70	-0.37
44	Wood and articles of wood; wood charcoal	-0.39	-0.66
45	Cork and articles of cork	-0.94	-0.94
47	Pulp of wood or of other fibrous cellulosic material; recovered (waste and scrap) paper or...	-0.98	-1.00
48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	-0.14	-0.58
49	Printed books, newspapers, pictures and other products of the printing industry; manuscripts,...	-0.51	-0.45
65	Headgear and parts thereof	-0.20	-0.44
66	Umbrellas, sun umbrellas, walking sticks, seat-sticks, whips, riding-crops and parts thereof	-0.43	-0.56
75	Nickel and articles thereof	-0.81	-0.56
78	Lead and articles thereof	-0.33	-0.41
80	Tin and articles thereof	-0.94	-0.40

HS	Product Description	RSCA-TR	RSCA-IND
81	Other base metals; cermets; articles thereof	-0.31	-0.45
84	Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	0.00	-0.20
88	Aircraft, spacecraft, and parts thereof	-0.36	-0.58
89	Ships, boats and floating structures	-0.09	-0.92
90	Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical...	-0.62	-0.37
91	Clocks and watches and parts thereof	-0.92	-0.88
92	Musical instruments; parts and accessories of such articles	-0.60	-0.25
95	Toys, games and sports requisites; parts and accessories thereof	-0.76	-0.46
96	Miscellaneous manufactured articles	-0.35	-0.21
97	Works of art, collectors' pieces and antiques	-0.87	-0.82

V. DISCUSSION

The HS-2 level RSCA results confirm that the EU–India trade agreement does not generate a uniform competitive shock; its effects vary substantially across product groups depending on the interaction between tariff preferences, regulatory requirements and pre-existing specialisation patterns (Viner, 1950; Panagariya, 2000; Limao, 2016). The four-cell classification adopted in this study makes it possible to identify where India's new preferential access poses a direct threat, where Türkiye retains structural advantages, and where competitive implications are more indirect. This heterogeneity of impact is consistent with the broader finding in the preferential trade agreement literature that trade diversion is concentrated in sectors where the preference margin is large and where the newly preferred exporter already holds strong revealed comparative advantage (Freund & Ornelas, 2010; Limao, 2016).

From a theoretical standpoint, the trade diversion risk identified in the direct-competition cell is consistent with Viner's (1950) classical framework: the EU's tariff preferences for India will make Indian goods relatively cheaper in the EU market compared with Turkish goods in those sectors where both countries are currently competing. Panagariya (2000) demonstrates that such preference-induced price wedges can reduce the market share of the excluded exporter even when the excluded country's products are not qualitatively inferior, since price-sensitive EU buyers in competitive segments—such as fast-fashion apparel or commodity textile inputs—may substitute toward the newly preferred source. The magnitude of this substitution depends on the price elasticity of EU import demand and the degree of product homogeneity between Turkish and Indian varieties in each sector (Freund & Ornelas, 2010; Limao, 2016).

The most immediate risk is concentrated in the direct-competition cell—primarily textiles and clothing, fish and seafood, rubber and raw hides—where both countries already exhibit positive RSCA values and non-negligible EU import shares. Previous RCA-based studies have documented the persistence of this overlapping specialisation and highlighted that Türkiye's clothing competitiveness has been under pressure from lower-cost Asian suppliers since the end of the MFA quota regime (Erlat & Erlat, 2025). The EU–India FTA's tariff reductions are expected to amplify this long-standing pressure, particularly in price-sensitive segments (YASED, 2026).

Within the textile cluster, the RSCA values indicate that both countries hold comparably strong positions in cotton (HS 52, RSCA-TR: 0.83; RSCA-IND: 0.81) and carpets (HS 57, RSCA-TR: 0.76; RSCA-IND: 0.81), suggesting very close competitive proximity. Utkulu and Erlat & Erlat (2012) and Erlat & Erlat (2025) documented the persistence of this textile and clothing specialisation for Türkiye over the 1990s and early 2000s, and the comparative advantage in these chapters remains structurally anchored in the more recent period. The bilateral symmetry in RSCA values across most textile sub-chapters implies that the preference gains accruing to India from tariff elimination will translate most directly into competitive pressure precisely in those chapters where Türkiye's existing position is strongest.

The dynamic perspective introduced by Ekmen-Özçelik and Erlat (2013) and Edwards and Schoer (2002) is relevant here: the question is not merely whether current RSCA values overlap, but whether the trend in Türkiye's textile comparative advantage is already declining. If Türkiye's revealed advantage in clothing (HS 61, 62) has been eroding even before the FTA—consistent with the broader pattern documented for labour-intensive sectors in middle-income countries—then the FTA may accelerate an ongoing structural adjustment rather than initiating an entirely new competitive dynamic. This distinction matters for policy: a

long-term structural decline calls for proactive industrial upgrading, while a transitory preference shock may require more targeted trade adjustment assistance.

For steel (HS 72: RSCA-TR 0.18; RSCA-IND 0.41) and aluminium (HS 76: RSCA-TR 0.37; RSCA-IND 0.25), both countries hold positive but relatively modest RSCA values, placing these chapters at the margin of the direct-competition cell. The EU–India FTA's steel provisions—which reportedly include tariff-rate quota (TRQ) mechanisms and phase-in schedules—moderate the immediate trade diversion risk in these sectors (Kiel Institute, 2026; SMM, 2026). Moreover, the Carbon Border Adjustment Mechanism (CBAM), fully operational from 2026, applies equally to Indian and Turkish steel and aluminium exporters, partially neutralising any tariff-based advantage that India might otherwise gain in these carbon-intensive sectors (Regulation (EU) 2023/956 (Directorate of EU Affairs, 2024). This regulatory instrument therefore acts as a partial equaliser in the competitive dynamics between Türkiye and India in carbon-intensive manufactures.

In chapters where only Türkiye holds comparative advantage—processed agricultural products, certain minerals, inorganic chemicals and plastics—the FTA offers relatively limited or gradual liberalisation for India, providing short- to medium-term insulation. In processed agri-food products such as preparations of vegetables and fruit (HS 20, RSCA-TR: 0.52) and edible fruits (HS 08, RSCA-TR: 0.45), Türkiye's geographical endowments—Mediterranean climate, proximity to EU markets, and established distribution networks—constitute durable sources of advantage that are not easily replicated by Indian exporters even if tariff barriers are reduced. The RCA literature has consistently emphasised that geographical and climatological advantages underpin agri-food competitiveness in ways that tariff preferences alone cannot overcome (Utkulu & Erlat & Erlat, 2012).

The automotive sector (HS 87, RSCA-TR: 0.35; RSCA-IND: −0.52) is a particularly important case in which Türkiye's exclusive comparative advantage reflects deep integration into EU supply chains built over decades of Customs Union participation. Togan (1997) argued that the Customs Union's industrial coverage generated precisely this type of investment-driven, supply-chain-embedded comparative advantage in capital goods and automotive components. Hofmann, Osnago and Ruta (2019) note that deep trade agreements generate not only trade creation but also FDI reorientation; in this respect, the EU–India FTA may attract European automotive investment toward India over the long run, gradually eroding the supply-chain advantage that Türkiye has accumulated in this sector. This longer-horizon risk is not captured by the static RSCA analysis but is an important consideration for industrial policy.

Türkiye's exclusive position in knitted or crocheted fabrics (HS 60, RSCA-TR: 0.82; RSCA-IND: −0.73) and certain other textile intermediates reflects upstream specialisation in the textile value chain that complements rather than directly overlaps India's strength in downstream garments. To the extent that EU apparel producers source Turkish fabrics for assembly with Indian garments—or vice versa—the FTA may even create complementary opportunities in textile value chains, a channel that the bilateral RCA comparison does not capture but that deserves attention in future research on value-chain reconfiguration.

In India-only advantage chapters—coffee, tea and spices (HS 09), organic chemicals (HS 29), dyes and pigments (HS 32), leather articles (HS 42), footwear (HS 64) and gems and jewellery (HS 71)—the agreement reinforces India's existing strengths. Because Türkiye's export presence in these chapters is already limited, with RSCA values consistently negative, the direct impact on Turkish competitiveness is expected to be modest (YASED, 2026; Kiel Institute, 2026). The indirect pressure through value-chain linkages may, however, emerge over time as Indian suppliers, benefiting from preferential access, deepen their integration into EU production networks in chemicals, leather processing and jewellery manufacturing.

India's strong pharmaceutical position—reflected in its RSCA of −0.07 in HS 30 and consistently documented in the literature (OECD, 2019)—deserves special mention. Although India's RSCA in pharmaceuticals is marginally negative on a bilateral EU basis, the sector is among India's most globally competitive, and the FTA's intellectual property provisions and regulatory cooperation chapters may generate additional market access gains in this sector. Türkiye's RSCA of −0.84 in pharmaceuticals indicates negligible competitive presence, so the FTA's pharmaceutical provisions are largely irrelevant to the Turkey–India competitive dynamics, but they do illustrate the broader point that the agreement's effects are multidimensional and extend well beyond the sectors identified in the direct-competition cell.

Beyond tariffs, regulatory and climate-policy instruments are increasingly central to effective market access in the EU, and they interact with the FTA's competitive implications in non-trivial ways. CBAM acts as a double-edged instrument for Türkiye: it raises compliance costs in carbon-intensive export sectors—particularly steel, aluminium, fertilisers and cement—but simultaneously imposes equivalent costs on Indian competitors in these same sectors, partially neutralising India's tariff advantage (Regulation (EU) 2023/956; (Directorate of EU Affairs, 2024; Mayer Brown, 2025). The competitive implications of CBAM are therefore most important precisely in the sectors—iron and steel (HS 72, 73) and aluminium (HS 76)—where the RSCA analysis indicates partial competitive overlap between Türkiye and India.

Similarly, Türkiye's accumulated experience with REACH and SPS requirements—facilitated by the Customs Union's alignment obligations and long-standing exposure to EU regulatory standards—provides an initial compliance advantage over India in chemicals, textiles and food products (Togan, 2015; Cefic, 2025; EcoMundo, 2024). However, this advantage is conditional on continued investment in testing infrastructure, certification capacity and regulatory monitoring. As the EU–India FTA includes provisions for regulatory cooperation and mutual recognition in certain sectors, India's compliance costs may

decline over time, narrowing the regulatory competitive advantage currently enjoyed by Turkish exporters. This dynamic underscores that the competitive challenge from the EU–India FTA is not static: it evolves as India's institutional alignment with EU standards deepens.

Underlying all of these findings is the structural asymmetry of the EU–Turkey Customs Union: Türkiye adopts the EU's common external tariff and aligns with its commercial policy but cannot participate directly in the negotiation of new EU trade agreements (Togan, 2015). The deep bilateral trade integration that gives the CU its economic value, and therefore clarify what is at stake if successive EU FTAs progressively erode Turkey's preference margins in the EU market. Each new EU FTA effectively grants the partner country preferential access to the Turkish market as well—through the free circulation principle—while Turkish exports continue to face MFN tariffs in the partner country (Nordic Monitor, 2026). The EU–India agreement is the most commercially significant illustration of this pattern to date, given the size of the Indian economy and the breadth of the agreement's product coverage.

From a policy perspective, the challenge for Türkiye is therefore twofold. First, managing sector-specific adjustment through product upgrading, regulatory compliance and value-chain repositioning is necessary in the sectors—textiles, clothing, steel—identified by the RSCA analysis as most vulnerable. This firm-level and sectoral response is well within the scope of Turkish industrial policy. Second, and more fundamentally, seeking a structural resolution to the underlying asymmetry through the long-discussed modernisation of the Customs Union is necessary (European Parliament, 2020; YASED, 2026; Hekim & Ertürk, 2021). Limao (2016) demonstrates that the cumulative preference erosion generated by successive PTAs can substantially reduce the value of existing preferential relationships, a finding that applies with particular force to Türkiye's position: as the EU concludes deep agreements with successive major trading partners, the residual value of Customs Union membership in terms of preferential access to EU industrial goods markets progressively diminishes. Without structural reform, the competitive pressures documented in this paper are likely to intensify with each successive EU trade agreement.

CONCLUSIONS

This paper has analysed the prospective impact of the EU–India Free Trade Agreement on Türkiye's export position in the EU by combining an HS-2-level RSCA comparison with a four-cell classification of competitive interaction. The empirical results show that the agreement does not generate a uniform competitive shock. Instead, its effects are concentrated in a limited but economically significant set of chapters where both Türkiye and India currently enjoy revealed comparative advantage—above all in textiles and clothing, fish and seafood, rubber and selected basic metal products. In these sectors, Indian exporters are likely to convert tariff preferences into stronger price-based competition, reinforcing pressures that Turkish firms have already faced from Asian suppliers since the dismantling of quantitative restrictions.

At the same time, the RSCA patterns reveal sizeable segments in which Türkiye retains exclusive advantages, particularly in processed agricultural products, mineral-based goods, inorganic chemicals, plastics and some textile intermediates. The EU–India FTA provides only partial or delayed liberalisation for many of these chapters, which limits the scope for immediate trade diversion away from Turkish exports. Conversely, in India-only advantage sectors such as coffee, tea and spices, vegetable extracts, organic chemicals, dyes and leather articles, the agreement largely consolidates India's established strengths, while the direct impact on Türkiye is muted by its limited presence in these markets. The main channel through which the FTA may affect Türkiye in these cases is indirect, via changes in input sourcing and value-chain configurations in the EU.

A key conclusion of the study is that tariff preferences cannot be evaluated in isolation from the evolving regulatory environment. Instruments such as CBAM, REACH and SPS measures have become central components of effective market access, particularly in carbon-intensive and regulation-sensitive sectors. For Türkiye, long-standing integration into EU value chains and experience with EU technical standards provide an initial advantage over India, but this advantage is conditional on continued investment in compliance and on timely adaptation to new regulatory requirements. Tariff-rate quotas in sensitive sectors, including passenger cars, certain steel and aluminium products and specific agricultural items, further suggest that competition with India will be phased in rather than abrupt, yet the gradual expansion of quota volumes implies that this breathing space must be used for structural adjustment rather than for preserving the status quo.

These findings carry broader implications for Türkiye's trade policy. The EU–India FTA illustrates how the institutional asymmetry of the EU–Turkey Customs Union exposes Turkish exporters to systematic preference erosion whenever the EU signs deep agreements with major third countries. Sector-specific upgrading strategies—emphasising product differentiation, quality, environmental performance and reliability—can mitigate some of the pressures identified in this paper, but they cannot fully offset the underlying institutional disadvantage. From this perspective, the modernisation of the Customs Union, with provisions that either discipline or internalise the effects of new EU FTAs on Türkiye, appears as a necessary complement to firm-level and sectoral strategies. Without such an update, the cumulative impact of successive EU agreements with key partners is likely to further narrow Türkiye's policy space and erode its relative position in the EU market over time.

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