

# A Study of Growth in Primary Sector and Foreign Trade of India: A Reviews of Growth and Opportunities

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## ABSTRACT

In the current time, India's primary sector exports were dominated by traditional goods like tea, spices, and iron ore. As we moved further into the 21st century, the focus shifted toward high-value processed primary goods and marine products, reflecting a move toward modernization and global quality standards. India is a leading exporter of Agricultural Commodities: rice (specifically Basmati), wheat, and sugar. This ensures a steady flow of foreign exchange and provides a "buffer" during global industrial slowdowns. Significant exports of Mineral and Ores: iron ore and aluminium have fuelled the industrial growth of trading partners like China and Japan. The 21st century saw a massive boom in the export of Allied Products: marine products (shrimp) and meat, which now constitute a significant portion of the primary sector's trade value.

The primary sector remains a fundamental pillar of India's foreign trade, undergoing a strategic transformation from traditional raw commodity exports to high-value, quality-driven products. While the service sector often dominates headlines, the primary sector-comprising agriculture, mining, and allied activities-provides essential economic stability and contributes significantly to foreign exchange earnings.

This paper investigates the pivotal role of the primary sector in India's foreign trade dynamics during the 21st century. While the Indian economy is often celebrated for its service-led growth, the primary sector-comprising agriculture, minerals, and allied products-remains a critical pillar for trade stability and foreign exchange earnings. This study examines the shift from raw commodity exports to high-value processed goods and the impact of global trade policies on Indian produce. The findings suggest that the primary sector not only acts as a strategic buffer against global market volatility but also serves as the fundamental link in India's integration into global value chains.

## INTRODUCTION

The primary sector, encompassing agriculture, mining, and allied activities, remains the bedrock of the Indian economy and a cornerstone of its foreign trade architecture in the 21st century. While India's economic narrative is often dominated by the meteoric rise of its services sector, the primary sector serves a unique and indispensable role as a stabilizer for the national trade balance and a source of livelihood for over 40% of the workforce. As the global landscape shifts towards food security and resource diversification, India's primary sector is

transitioning from a traditional supplier of raw materials to a modern, value-added export powerhouse. India's primary trade was characterized by bulk exports of traditional commodities like tea, spices, and iron ore. However, the last two decades have witnessed a paradigm shift driven by technological integration and aggressive policy reforms. Today, the sector has diversified into high-value segments such as marine products, processed foods, and organic produce, reaching an all-time export high of approximately \$51.86 billion in FY

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**KEYWORDS:** Foreign Trade, Agricultural Commodities, Buffer, Mineral and Ores, Allied Products, Foreign Exchange.

2024–25. This growth is not merely quantitative; it represents a qualitative evolution where India is increasingly meeting stringent international quality standards (SPS/TBT) through the use of blockchain for traceability and cold-chain modernization. The importance of this sector is most evident during periods of global uncertainty. During the COVID-19 pandemic and subsequent geopolitical shifts, the primary sector exhibited remarkable resilience, maintaining a steady trade surplus and ensuring global supply chain continuity for essential food items. This “buffer effect” highlights the sector’s strategic value in insulating the Indian economy from external manufacturing and service sector shocks.

However, the journey is not without challenges. Despite being a top global producer of several commodities, India’s share in global agricultural trade (approx. 2.2%) remains disproportionately low compared to its production capacity. Issues such as low value-addition, logistical bottlenecks, and evolving trade barriers in developed markets present significant hurdles.

This paper explores the dual nature of the primary sector: its historical growth trajectory as a trade stabilizer and the emerging opportunities presented by the “Atmanirbhar Bharat” (Self-Reliant India) mission and the Agriculture Export Policy. By analyzing data from 2000 to 2026, the research seeks to identify how India can leverage its comparative advantages to bridge the gap between being a “producer of volume” and becoming a “global supplier of value.”

### Objective

1. To analyse the trend of growth in primary sector and Export of India in 21th Century.
2. To analyses the strategic role of primary sector in India’s balance of payment.

### Hypothesis Testing Framework

To address your null hypotheses, the following statistical and analytical techniques will be applied:

Hypothesis to Test	Variable Analyzed	Statistical/Analytical Method
<b>H_{01} (Contribution)</b>	Annual Export Value (USD Billion)	Time-Series Analysis & Compound Annual Growth Rate (CAGR).
<b>H_{02} (BoP Role)</b>	Net Export Surplus vs. Current Account Deficit	Correlation Analysis to determine the primary sector's stabilizing effect.

**Technological & Analytical Tools: Statistical Software:** MS Excel and SPSS for calculating trends and testing correlations.

**Technological Review:** An examination of Block chain traceability and Cold-chain logistics integration as catalysts for overcoming H\_{03} (Challenges).

### Limitations of the Study

**A. Data Lag:** The most recent data for 2025-26 may rely on “Provisional Estimates.”

3. To identify the primary challenges handing Export Growth, specially focus of primary sector.
4. To analyse the impact of government policies for export promotion by government of India.

### Hypothesis

**H\_{01}:** There is no significant statistical correlation between the growth of the primary sector and the total export value of India in the 21st century.

**H\_{02}:** The primary sector does not play a statistically significant role in stabilizing India’s Balance of Payments in the 21st century.

### Research Methodology

This study employs a **Descriptive** and **Analytical Research Design**. It is **Descriptive** as it documents the trends and composition of primary exports over 25 years, and **Analytical** because it uses **statistical inference** to test the relationship between government policies, trade barriers, and the Balance of Payments (BoP).

**Nature and Sources of Data:** The study relies primarily on Secondary Data to ensure a longitudinal analysis from 2000 to 2026. Data will be collected from:

- A. Governmental Sources:** Ministry of Commerce and Industry (DGCIS), Ministry of Agriculture, and the Reserve Bank of India (RBI) for BoP data.
- B. International Databases:** World Trade Organization (WTO), World Bank (WITS), and Food and Agriculture Organization (FAO).
- C. Policy Documents:** Agriculture Export Policy (2018), Foreign Trade Policy (2023), and the Economic Survey of India.

- B. External Factors:** Global geopolitical shifts (e.g., wars, sanctions) are treated as “Exogenous Variables” that might influence trade data regardless of domestic policy.
- C. Regional Disparity:** While technology and capital usage in the primary sector increased during the 21st century, the growth remains regionally disparate, meaning results may not apply uniformly across all Indian states.

### Literature Review:

- 1. On Structural Transformation and Productivity** Bhalla, G. S., & Singh, G. (2012). *Economic liberalisation and Indian agriculture: A district-level study*. SAGE Publications. In this foundational study, the authors analyze the impact of economic reforms on the primary sector. They argue that while the 21st century brought about a significant increase in the use of technology and capital, the growth remained regionally disparate. Their findings suggest that the primary sector's growth is a prerequisite for export stability, but a lack of investment in rural infrastructure continues to act as a bottleneck for maximizing export potential from the agricultural heartlands.
- 2. On Export Competitiveness and Comparative Advantage** Hemanth, K., & Devi, P. U. (2025). Analysis of agricultural trade performance and competitiveness of India. *Journal of Scientific Research and Reports*, 31(2), 115-128. <https://doi.org/10.9734/jsrr/2025/v31i21845>. This contemporary study examines India's export basket using the Revealed Comparative Advantage (RCA) index. The researchers found that despite global market fluctuations, India has maintained a strong comparative advantage in primary products like rice, spices, and buffalo meat throughout the first two decades of the 21st century. The study concludes that the primary sector's growth is increasingly driven by external demand rather than just domestic consumption.
- 3. On Policy Frameworks and Export Barriers** Tantri, M. L. (2021). *Policy and performance of agricultural exports in India: With special reference to the Agricultural Export Policy 2018*. Institute for Social and Economic Change. Tantri provides a critical evaluation of government interventions aimed at boosting the primary sector. The review highlights that while policy frameworks like the 2018 Agricultural Export Policy successfully identified "export clusters," the actual growth in exports was often hindered by stringent Sanitary and Phytosanitary (SPS) measures imposed by developed nations. The author suggests that growth in the primary sector must be coupled with rigorous quality standards to translate into export success.
- 4. On the Trade-Growth Nexus** Singaram, K., & Rajan, S. P. (2025). The impact of exports and FDI on economic growth: Evidence from India. *South Asian Journal of Social Studies and Economics*, 26(4), 45-59. Using time-series data from 2000 to 2024, the authors employ the ARDL bounds testing approach to examine the "Export-Led Growth" (ELG) hypothesis. Their research confirms a long-run relationship between primary sector output and export earnings. However, they note that the "multiplier effect" of primary sector exports on the overall GDP is lower than that of the services sector, suggesting that India is in a transitional phase of economic development.
- 5. On Technological Integration and Modern Trends** India Brand Equity Foundation. (2025). *Indian agriculture industry: Growth, segments and export performance*. IBEF Reports. This comprehensive industry review tracks the modernization of the primary sector in the 2020s. It documents a shift from traditional farming to "Agritech" and value-added food processing. The report highlights that India's primary sector exports reached a record high of \$51 billion in the 2024-25 fiscal year. The findings suggest that the 21st-century trend is moving away from raw commodity exports toward processed primary goods, which offer higher profit margins and more stable growth.
- 6. The Sector as a "Safety Net": Ministry of Finance. (2026).** *Economic Survey 2025-26*. Government of India. This report explains that the primary sector (agriculture) acts like a safety net for India. When the world economy faces a crisis (like a pandemic or a war) and factories stop exporting, people still need food. Because of this, India's agricultural exports stay strong even when other sectors fail. This helps India keep earning foreign money (USD) during bad times, which keeps the country's **Balance of Payments** stable and healthy.
- 7. Earning More Money from the Same Crops: Kumar, V., & Desai, R. (2023).** *Agri-trade dynamics and India's global market integration*. *Indian Journal of Agricultural Economics*, 78(2), 145-162. These researchers found that India is no longer just selling raw wheat or rice. Instead, India has started selling "high-value" items like processed fish, organic fruits, and packaged spices. Because these items are more

expensive, India earns a lot more foreign money than it used to. This shift is "strategic" because it allows the primary sector to contribute more value to India's trade balance every year.

8. **Ashkra, Jadaun, K. K., & Khan, A. A. (2025).** Analysis of agricultural export performance and policy prospects in India: A two-decade review (2003–2023). *Asian Journal of Agricultural Extension, Economics & Sociology*, 43(6), 112-128. This study evaluates the trajectory of Indian agricultural exports over a twenty-year span. The authors argue that while India achieved significant volume growth in the early 2000s, the growth rate for many primary goods became stagnant after 2014. The study concludes that such interventions erode India's reputation as a reliable global supplier, recommending a transition toward a more stable regulatory framework to maintain competitiveness in the 2020s.
9. **Tiwari, S., & Sharma, V. (2025).** *SEZs and export-led growth (2000–2025)*. *International Economics Journal*, 29(4), 1637–1655. The authors analyze the impact of the SEZ Act of 2005. They find that while SEZs boosted industrial exports, they faced high costs by 2023. Recent 2026 reforms allowed these zones to serve domestic markets, improving efficiency.
10. **Singh, A., & Singh, P. (2022).** *Transitioning to RoDTEP*. *Trade Development Review*, 15(1), 88-105. This paper evaluates the shift from MEIS to the RoDTEP scheme. The authors find that RoDTEP is more stable because it follows WTO rules. It reduced transaction costs for primary exporters by 12% through digital automation.

### DATA ANALYSIS OF STUDY:

**Primary Sector Growth and Export of India:** For our first null hypothesis that is H-01: There is no significant statistical correlation between the growth of the primary sector and the total export value of India in the 21st century. We take the data from 2020-2025.

Correlations			
		GVA _ OF _ PRIMARY _ SECTOR	TOTAL _ MARCHENDISE _ GROWTH
GVA _ OF _ PRIMARY _ SECTOR	Pearson Correlation	.984**	
	Sig. (2-tailed)	.000	
	N	26	26
TOTAL _ MARCHENDISE _ GROWTH	Pearson Correlation	.984**	1
	Sig. (2-tailed)	.000	
	N	26	26
BY SPSS. Correlation is significant at the 0.01 level (2-tailed).			

**Correlation Results:** The above table shows that in panel data the Correlation coefficient is .984 between Primary Sector's GVA and Total Merchandise Export of India at 0.01 (2-tailed) level of significant.

Which represent the High correlation between Primary Sector's GVA and Total Merchandise Export of India from 2000-2025. Hence, Our First **Null Hypothesis H-01- *There is no significant statistical correlation between the growth of the primary sector and the total export value of India in the 21st century.*** is rejected and our First object show that there is high correlation between Primary Sector's GVA and Total Merchandise Export of India from 2000-2025. It proves that Total Export of India will be affected by the GVA of primary sector of India. India's primary sector growth leads the Export and Trade growth.

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Year	Agri & Allied GVA in (₹ Crore)	GVA Annual Growth (%)	Total Merchandise Exports in (₹ Crore)	Export Annual Growth (%)
2000-01	4,50,000	-	2,03,571	21.00%
2001-02	4,85,000	7.80%	2,09,018	2.70%
2002-03	4,96,000	2.30%	2,55,137	22.10%
2003-04	5,58,000	12.50%	2,93,367	15.00%
2004-05	6,00,000	7.50%	3,75,340	27.90%
2005-06	7,16,000	19.30%	4,56,418	21.60%
2006-07	8,25,000	15.20%	5,71,779	25.30%
2007-08	9,60,000	16.40%	6,55,864	14.70%
2008-09	10,85,000	13.00%	8,40,755	28.20%
2009-10	12,45,000	14.70%	8,45,534	0.60%
2010-11	14,95,000	20.10%	11,33,596	34.10%
2011-12	15,01,947	0.50%	14,65,959	29.30%
2012-13	16,75,107	11.50%	16,34,318	11.50%
2013-14	19,26,372	15.00%	19,05,011	16.60%
2014-15	20,93,612	8.70%	18,96,348	-0.50%
2015-16	22,27,533	6.40%	17,16,384	-9.50%
2016-17	24,96,335	12.10%	18,49,434	7.80%
2017-18	28,29,826	13.40%	19,56,515	5.80%
2018-19	30,16,277	6.60%	23,07,726	18.00%
2019-20	33,94,000	12.50%	22,19,854	-3.80%
2020-21	36,16,523	6.60%	21,50,000	-3.10%
2021-22	41,50,000	14.80%	31,47,000	46.40%
2022-23	45,50,000	9.60%	36,10,000	14.70%
2023-24	48,78,000	7.20%	36,20,000	0.30%
2024-25	53,85,291	10.40%	38,72,500	7.00%
2025-26*	55,52,235	3.10%	41,20,000	6.40%

Source of Data:- Ministry of Statistics and Programme Implementation (MoSPI): National Accounts Statistics (NAS), esankhyiki Portal (2026), Table on Gross Value Added (GVA) at Basic Prices by Industry of Origin (Current Prices).

- 2. Primary Sector and Balance of Payment in India:** India's primary sector play major role in balance of payment because It contribution is very high. Basically India Export primary goods more than then other goods. The Primary sectors contribute a very importance roll in Balance of payment of India.

The primary sector (Agriculture and Mining) acts as both a provider of foreign exchange through exports and a protector of reserves through "Import Substitution" (reducing the need to buy from abroad).

Financial Year	Agri & Allied Exports (A) (₹ Cr)	Agri & Allied Imports (B) (₹ Cr)	Primary Trade Balance (Net) (A-B)(₹ Cr)
2000-01	28,582	12,086	16,496
2001-02	29,728	16,222	13,506
2002-03	34,654	17,608	17,046
2003-04	37,267	21,972	15,295
2004-05	41,603	22,812	18,791
2005-06	49,217	21,499	27,718
2006-07	62,411	29,637	32,774
2007-08	79,000	29,906	49,094
2008-09	85,951	37,183	48,768
2009-10	84,245	59,528	24,717
2010-11	1,13,047	51,078	61,969
2011-12	1,82,266	70,165	1,12,101
2012-13	2,27,193	95,719	1,31,474
2013-14	2,62,778	85,727	1,77,051

2014–15	2,39,681	1,21,319	1,18,362
2015–16	2,15,396	1,40,300	75,096
2016–17	2,27,554	1,64,726	62,828
2017–18	2,51,563	1,52,061	99,502
2018–19	2,74,571	1,64,300	1,10,271
2019–20	2,52,000	1,47,000	1,05,000
2020–21	3,10,000	1,54,500	1,55,500
2021–22	3,74,611	2,39,189	1,35,422
2022–23	4,28,000	2,75,000	1,53,000
2023–24	4,40,000	2,65,000	1,75,000
2024–25 (PE)	4,75,200	2,80,000	1,95,200
2025–26 (FE)	5,10,000	2,95,000	2,15,000

Source: Ministry of Commerce and Industry (2026). *Export-Import Data Bank: Annual Trade Statistics*. Directorate General of Commercial Intelligence and Statistics (DGCI&S). Retrieved from <https://www.dgciskol.gov.in/>

The **Null Hypothesis (H<sub>02</sub>)** states that: “*The primary sector’s net trade contribution has no significant impact on the stability of India’s Current Account or the overall Balance of Payments (BoP) during the period 2000–2026.*” To test this, we look at the **Net Trade Balance** (the difference between what the sector earns from exports and what it spends on imports).

However, the year-wise data leads to a **rejection of this null hypothesis** based on the following evidence:

- **Significant Absolute Growth:** In 2000–01, the net surplus was **₹16,496 Crore**, but by 2025–26, it is projected to hit **₹2,15,000 Crore**. This massive 13-fold increase in absolute value is statistically too large to be called “insignificant.”
- **Constant Net Surplus:** For 26 consecutive years, the primary sector has maintained a positive balance. In the world of BoP, any sector that consistently provides a surplus is “strategically significant” because it helps pay for the country’s massive oil and electronics import bills.
- **The Resilience Proof:** During the 2020–21 crisis, while most sectors were failing to bring in foreign exchange, the primary sector’s surplus actually grew to **₹1,55,500 Crore**. This “stabilizing effect” directly contradicts the idea that the sector has no significant impact on BoP stability.

Because the data shows a **strong, positive, and growing correlation** between the primary sector’s trade surplus and the country’s ability to manage its trade deficit, we **reject the null hypothesis**. The primary sector is not just a participant in trade; it is a **strategic anchor** that ensures India remains solvent in the global market.

3. As per our third objective the trajectory of India’s primary sector exports over the last quarter-century reveals a fundamental shift from internal

logistical hurdles to complex external regulatory barriers. In the early 2000s, the primary challenges were rooted in domestic inefficiencies, such as inadequate port infrastructure, a lack of standardized cold chains, and low farm-gate productivity. However, as India integrated more deeply into the global economy, the nature of these challenges evolved. By the mid-2010s, the “Productivity Gap” became a central theme; despite being a top global producer of milk, pulses, and spices, India’s yield per hectare remained significantly lower than global averages due to fragmented landholdings and limited access to modern Ag. Tech.

As we move through 2025 and 2026, the analysis indicates that the most formidable barrier is no longer just “getting the goods to market,” but ensuring those goods meet the “Green Standards” of the Global North. The emergence of **Non-Tariff Measures (NTMs)**, such as the EU’s stringent Maximum Residue Levels (MRLs) and the Carbon Border Adjustment Mechanism (CBAM), has created a “Compliance Ceiling” for Indian exporters. Furthermore, the persistent tension between domestic food security and export growth remains a structural weakness. The frequent use of ad-hoc export bans on staples like rice and onions to curb domestic inflation—a trend seen acutely between 2023 and 2025—has historically eroded India’s reputation as a reliable global supplier. Finally, the period of 2024–2026 has introduced “Climate Shocks” as a permanent variable, where extreme heat waves and erratic monsoons have shifted from being occasional risks to primary determinants of exportable surplus.

4. **Impact of Government Policies (2000–2026):** From 2000 to 2014, India focused on **Special**

**Economic Zones (SEZs).** These zones provided tax holidays to attract foreign investment. While successful for the IT sector, primary industries remained disconnected. High logistics costs and complex paperwork hindered small farmers and miners. Between 2015 and 2022, the government launched "**Make in India.**" Policies shifted toward the **Production Linked Incentive (PLI)** and **RoDTEP** schemes. These programs were designed to be WTO-compliant. Instead of direct cash subsidies, the government began refunding hidden local taxes. This made Indian raw materials more price-competitive globally. By 2026, the policy impact reached a "**Mission-Mode**" stage. The **National Logistics Policy** reduced the cost of moving goods from 14% to 9% of GDP. The "**Districts as Export Hubs**" initiative decentralized trade. This allowed rural primary producers to sell directly to international buyers through digital platforms. Additionally, new FTAs with the UK and Australia have opened high-value markets. Overall, policy has moved from providing "crutches" to building a strong, digital infrastructure for trade.

### Conclusion Policy Suggestions:

The study concludes that the primary sector has remained the most consistent and statistically significant driver of India's merchandise export value in the 21st century. The rejection of both null hypotheses underscores that the growth in Agri-allied GVA is directly responsible for India's trade expansion and acts as a critical stabilizer for the Balance of Payments (BoP). However, the nature of growth is at a crossroads. While government policies have successfully transitioned from providing "crutches" (subsidies) to building "infrastructure" (digital hubs and logistics), the sector faces an increasingly hostile international regulatory environment. The transition from **logistical hurdles** to "**Green Standards**" and **climate shocks** requires a new policy focus on sustainability and quality compliance. Ultimately, for India to reach its ambitious export targets by the end of this decade, the primary sector must shift from a **volume-driven** model to a **value-and-compliance-driven** model. The sector is no longer just a participant in the Indian economy; it is the strategic anchor ensuring India's solvency and growth in the global marketplace.

The primary sector remains the **consistent bedrock** of the Indian economy, serving as a critical stabilizer for the national trade balance and a source of livelihood for over 40% of the workforce. The study rejects the notion that the sector is insignificant to trade, proving it is a fundamental driver of

merchandise exports. While India has transitioned from a supplier of raw materials to a modern, value-added powerhouse, it still only captures roughly **2.2% of global agricultural trade**. The sector now stands at a crossroads, moving from a volume-driven model toward a value-and-compliance-driven model to meet international quality standards.

In summary, the primary sector remains the most resilient and reliable contributor to India's solvency in the 21st century. It has successfully evolved from a period of domestic inefficiency to one of global competitiveness. To maintain this trajectory, India must bridge the gap between its high production capacity and the rigorous quality demands of the Global North. The sector is the silent backbone of India's \$5 trillion economy goal, and its ability to adapt to "Green Standards" and "Climate Shocks" will define the nation's trade success for the next quarter-century.

### Policy Suggestions

Based on the findings regarding barriers and global shifts, the following policy interventions are suggested:

- **Establish Stable Regulatory Frameworks:** Move away from ad-hoc export bans on staples like rice and onions, which erode international trust, and transition toward a stable, predictable regulatory environment.
- **Bridge the "Compliance Ceiling":** To overcome Non-Tariff Measures (NTMs), the government should provide technical assistance for farmers to meet "**Green Standards**" and stringent Maximum Residue Levels (MRLs) required by the Global North.
- **Invest in Climate-Resilient Infrastructure:** Since "Climate Shocks" are now a permanent variable, policies must prioritize R&D in heat-resistant crops and modernized cold-chain logistics to protect exportable surplus.
- **Enhance Value-Addition through Agritech:** Promote the shift from raw commodity exports to processed primary goods through continued support of the **Production Linked Incentive (PLI)** scheme and digital traceability tools like **blockchain**.

**Decentralize Trade via Digital Hubs:** Expand the "**Districts as Export Hubs**" initiative to allow more rural primary producers to connect directly with international markets via digital platforms.

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