

India's Northeastern States: Export Landscape and Policy Insights



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**India's Northeastern States:
Export Landscape and Policy Insight**

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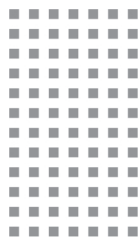
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Executive Summary

India's North-Eastern Region (NER), comprising eight states viz., Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura, is rich in biodiversity and spans across two major global biodiversity hotspots, namely, the Indo-Burma and Himalayan regions. NER is strategically vital for India, supporting its foreign policy pillars of 'Act East' and 'Neighbourhood First' owing to its unique geographic location. Each state in the region shares an international border spanning the neighbouring countries of Bangladesh, Bhutan, China, Myanmar, and Nepal. In terms of domestic connectivity, NER is heavily dependent on the Siliguri Corridor, a 22 km narrow and congested strip of land that functions as a critical logistical lifeline, connecting the region to the rest of India.

This Study analyses the NER's macroeconomic and trade landscape to identify high-potential export commodities. It also reviews the region's existing trade connectivity channels and highlights the need for robust infrastructure to leverage the NER's strategic geographic location. By adopting a multi-pronged approach, the Study puts forward recommendations to unlock unexplored opportunities, enabling the region to transform into a dynamic hub for trade, connectivity, and socio-economic development.

Economic overview

Over the past decade, from 2014-15 to 2023-24, NER's Gross State Domestic Product (GSDP) has seen a steady rise, from ₹ 2.8 trillion in 2014-15 to ₹ 5.1 trillion in 2023-24, growing at a compound annual growth rate (CAGR) of 6.2%. During the same time period, Assam remained the largest state economy in the NER. In 2023-24, the state's GSDP at constant prices amounted to ₹ 3.2 trillion, contributing to a substantial share of 63.5% of the NER's total economic output. In terms of per capita Net State Domestic Product (NSDP), in the same year, it is worth noting that Sikkim and Mizoram exceeded that of India, at ₹ 292.3 thousand and ₹ 151.7 thousand, respectively, reflecting strong economic development.

The NER's economy is largely service-driven. In 2023-24, as per the broad sectoral segregation, the tertiary sector dominated the region's economic output, accounting for a share of 41.9% of NER's total Gross State Value Added (GSVA) at basic prices. At the disaggregated level of economic activities, agriculture, forestry and fishing remain as the largest segment. The region is renowned for its rich flora and fauna, perennial water supply and diverse agro-climatic zones. Sikkim became the world's first fully organic state, practicing organic farming exclusively since 2003, with 80.0% of its rural population engaged in agriculture. Major industries in the region include tea, spices, bamboo, sericulture, and renewable energy, to name a few.

Export Trends

NER's geostrategic location makes it instrumental in advancing India's trade flows, particularly to the neighbouring countries and the ASEAN market. Despite the potential, the region's contribution to India's export flows remains minuscule at a share of 0.1% in 2024-25. By value, in the same year, exports from India's north-eastern states amounted to US\$ 629.6 million, showing a growth of 30.8% from the previous year's US\$ 481.4 million. The export basket of NER has remained largely unchanged over the last few years, showing major concentration in select products. Tea remained the largest exported product in 2024-25 at a value of US\$ 266.4 million, accounting for a share of 42.3% in NER's total exports. It is worth noting that this share has been recording a decline over the years. At the 6-digit HS Code level, it was observed that over 70.0% of India's exports of coke and semi-coke of coal, lignite, or peat, whether or not agglomerated (HS 270400), were attributed to NER.

NER's exports are highly concentrated, with Assam alone accounting for 87.4% of the region's total exports in 2024-25. Commodities from the region were mainly exported to India's neighbouring countries of Bhutan, which received goods worth US\$ 139.8 million, holding a share of 22.2% of NER's total exports, followed by Bangladesh (19.6%). Petroleum products were the top exports to both these countries. Notably, exports to other top markets were largely concentrated in tea and herbal products. Given the landlocked nature of the NER, exports are dependent on being routed through land ports in the region or sea ports located in other states. In the said year, about 36.0% of the NER's total exports were routed through the Kolkata Port.

Export of Agriculture and Allied Sector Products

In the NER's overall export scenario, the agriculture and allied sector plays a particularly pivotal role, despite seeing a declining share. In 2024-25, exports of agriculture and allied products from the NER amounted to US\$ 294.2 million, making up almost half of the region's export basket. In this sector, a clear dominance of tea exports from the region is observed, contributing to an overwhelming share of about 91.0% of NER's total exports of agriculture and allied products, and about 30.0% of India's total exports of the commodity. The top export markets for such goods are more diversified, with the UAE being the largest destination in 2024-25, with a share of 16.2% of total agricultural exports from the region. Upon analysing the NER's agricultural output and export trends, it was also observed that the majority of this production is absorbed within the domestic market rather than being exported. Infrastructural constraints and strained connectivity may be hindering the growth of exports from the agricultural and allied sector. Notably, NER also houses India's first organic farming state, Sikkim.

Export Competitiveness of NER

The Study undertakes a granular analysis of the NER's export competitiveness using the concept of Revealed Comparative Advantage (RCA) to map the export products from the region that demonstrate a comparative advantage relative to the global import demand for the same. The identification of export-competitive products will support the NER in leveraging its strategic location and serve as India's gateway to the ASEAN market, in particular.

At the 6-digit HS Code level, the exported items from the NER are classified into four product categories - Product Champions, Underachievers, Lagging in Declining Sectors, and Winners in Declining Markets. In the short to medium term, the NER can focus on leveraging the opportunities arising in the Product Champions segment, given that the region is already performing well in the same, in terms of significant export value.

In the medium to long term, the region should focus on capacity building in the Underachievers product segment.

At the 6-digit HS Code level, 184 export items from NER have been considered for the RCA analysis. These products amount to a total of US\$ 576.8 million, covering a share of 97.9% of the region's total exports in 2024. Of these analysed products, 57 items worth US\$ 232.1 million, constituting a share of 39.4% of NER's total exports in 2024, were classified as Product Champions. In this classification, commodities under minerals fuels and oils (HS 27) were the most recurring export product, and the largest in terms of export value as well.

To accelerate exports in the long run, the region must allocate resources and focus policy direction towards the 14 items identified as 'Underachievers', with exports worth US\$ 2.7 million.

Trade Connectivity and Cross-border Infrastructure

For a landlocked region like NER that is home to harsh terrain and shares international borders with 5 countries, trade connectivity and cross-border infrastructure are crucial to maintain flow of trade and commerce. Its overdependence on the congested Siliguri Corridor that links NER to the rest of India further necessitates establishing a robust trade connectivity ecosystem, that can support the NER in serving as India's gateway to Southeast Asia.

Land Customs Stations (LCS) serve as the backbone of the NER's trade connectivity, enabling and streamlining commerce with neighbouring countries. As of 2025, NER has the highest number of functional LCSs with Bangladesh. For Bhutan, the region's largest export destination in 2024-25, LCSs were utilised to route over 60.0% of NER's total exports to the country, highlighting its significance for the region's cross-border trade infrastructure. Integrated Check Posts (ICPs) are also increasingly being established as consolidated facilities that enable the smooth movement of both cargo and passengers. In 2024-25, the NER exported goods worth US\$ 17.7 million through ICPs, primarily to Bangladesh. However, ICPs continue to be constrained by several operational bottlenecks that need to be addressed for optimal utilisation of these facilities. Further, trade along the border of these North-Eastern states is also marked by the presence of 'border haats', designated marketplaces to facilitate the exchange of locally produced goods on a tax-free basis. Although these 'haats' account for only a negligible share of the total India-Bangladesh trade, they have generated positive welfare outcomes for the local communities involved and have served as an important instrument in the formalisation of border trade.

The Government of India has also been initiating several international connectivity projects in the NER to leverage its geographic location, alongside strengthening its domestic connectivity. Siliguri Corridor, the NER's primary logistic artery, is also expected to undergo a connectivity boost to minimise road congestion. The key international connectivity projects broadly hold the objective of either improving the region's transportation linkage to India via Bangladesh or increasing the region's accessibility to Southeast Asian markets. The Kaladan Multi Modal Transit Transport Project (KMTTP) and the India-Myanmar-Thailand Trilateral Highway (IMT-TH) are some of these ongoing notable projects.

Way Forward

Exim Bank's Scenario Analysis of NER's Export Target

In recent years, NER's contribution to India's total merchandise exports has stagnated within the narrow range of 0.1% to 0.2%. With India aiming to achieve a merchandise export target of US\$ 1 trillion by 2030, states across the country must focus on augmenting export growth to support meeting this target. At present, state-wise contribution to India's exports remains concentrated majorly in select few states, further highlighting the growing need to accelerate exports from the NER, in accordance with well-defined targets.

In this regard, the Study makes suitable assumptions and sets export targets for NER under different possible scenarios. As per the different growth rates considered, Exim Bank's scenario analysis sets NER's export target within the range of US\$ 929.2 million to US\$ 1500.0 million by 2029-30, from the present export recorded at US\$ 629.6 million in 2024-25.

The export growth is expected to be the highest in the scenario in which NER should follow India's expected CAGR of 18.0% to reach US\$ 1 trillion by 2030, thus resulting in the state exports reaching US\$ 1.7 billion. Alternatively, in a scenario where NER targets to more than double its exports by 2029-30 to US\$ 1.5 billion, a CAGR of 15.6% must be maintained.

Expanding Export Horizons

NER must continue to leverage its product champions, that is, products that hold a comparative advantage and experience high global import demand as well. Among the 57 identified 'Product Champions,' the top 10 alone accounted for a share of almost 33.4% of NER's total exports in 2024, with considerable dominance of other petroleum oils and oils obtained from bituminous minerals. At the same time, it is worth noting that items exported from NER, such as coke and semi-coke of coal or lignite, quartz, and other seeds and fruits used primarily in pharmacy, have a smaller but notable share of 0.3%, 0.2%, and 0.1%, respectively, in the world exports in 2024. The focus must be on further enhancing trade in these identified products to increase their share in the global export of the respective items.

NER, through policy intervention, may also focus on market diversification of the 'Winners in Declining Sectors' category of products, that is, products which are export competitive but face weak import demand. For instance, NER's top export destinations for limestone flux (HS Code 252100) are not in accordance with the top global importers. The region's export of this commodity is wholly concentrated in Bangladesh, which receives 100% of the total exports of this commodity and needs to be diversified. To better realise the product's export potential, new markets with growing demand, like the Netherlands and Taiwan, may be focused on.

Overall, the export profile of NER reflects a significant degree of product concentration. In 2024-25, the share of agriculture and allied sector products contributed to 46.7% of the region's total exports, out of which the tea exports alone constituted a share of 42.3%. Moreover, nearly 17.6% of the region's total tea exports were directed to the UAE. In this context, adoption of a more diversified export strategy, both in terms of product and market diversification, can be beneficial for the region. By reducing export reliance on tea, NER can diversify its export basket by mapping to the import demand of other commodities. Simultaneously, diversification of export destinations can also be explored.

Lastly, the creation of a North East Export Promotion Council (NEEPC) can be explored to streamline region-specific export promotion efforts, tailored to the economic landscape of NER. This will help narrow down any institutional gaps and trade information asymmetry which presently hinders export growth from the region. The proposed EPC can serve as nodal agency for the NER's export community, operating with focus on areas like enabling increased NER participation in domestic and international trade fairs, facilitating buyer-seller meets, organising export-specific capacity building and skill development programmes, providing assistance in adhering to international quality standards, and maintaining an exporter database. NER's coordination with various export facilitation agencies can also be provided by the proposed EPC along with housing help desks of various national trade bodies, insurance companies, and banks.

Accelerating Agriculture and Allied Sector Exports

Although the agriculture and allied sector continues to be the backbone of NER's economy, its contribution to India's agri and allied sector exports remains negligible. From 2020-21 to 2024-25, NER's exports from this sector have contracted by a CAGR of (-) 0.2%. Therefore, to align with India's broader export ambitions and leverage NER's potential in this sector, Exim Bank projects NER's agri and allied sector exports to reach between US\$ 600 million and US\$ 671.5 million by 2029-30, underscoring the need for structured policy support and targeted interventions.

The export growth is expected to be the highest in the scenario in which NER follows India's expected CAGR of 14.7% to reach US\$ 1 trillion by 2030, thus resulting in the state exports reaching US\$ 671.5 million. Alternatively, in a scenario where NER targets to more than double its exports by 2029-30 to US\$ 600 million, a CAGR of 12.6% must be maintained.

For the NER to meet the outlined targets, several infrastructural and operational growth constraints need to be addressed. A key pathway lies in scaling processed food exports by leveraging the region's diverse agro-climatic strengths. Establishing product-specific agro-processing clusters, integrated with Farmer Producer Organizations (FPOs), can build transparent value chains, provide common facilities, and ensure value addition at the state level. Strengthening quality testing infrastructure and compliance with international standards will further enable access to geographically near high-demand markets, like those in ASEAN.

Locating these clusters near cross-border connectivity projects and Integrated Check Posts (ICPs) can reduce logistics costs and enhance trade linkages. Together, these measures can transform NER's agricultural surplus into an export-ready ecosystem, driving inclusive growth and position the region as a competitive hub for processed food exports.

NER's agricultural sector holds ample economic potential which, when coupled with the region's geographic proximity to ASEAN, makes the latter an ideal destination for NER's agricultural exports. By analysing the complementarity between NER's agricultural exports and ASEAN's agricultural import demand, the Study highlights the opportunity to leverage NER's diverse chilli produce, including several GI-tagged varieties, to develop a product value chain to meet ASEAN's demand for preparations for sauces and prepared sauces (HS 210390), among other such identified commodities.

For NER to accelerate its agricultural exports to ASEAN, Government trade bodies such as APEDA may also consider setting up ASEAN-dedicated trade desks across the region to reduce information asymmetry regarding bloc-specific trade information and documentation required under the India-ASEAN FTA. With the review

of ASEAN-India Trade in Goods Agreement (AITIGA) underway, India may address regulatory bottlenecks which are impeding NER's export flows to meet its potential in the regional bloc. To strengthen institutional engagement and increase agricultural trade flows, NER may also consider establishing a dedicated department along the lines of the Act East Policy Affairs Department set up by the Assam Government.

Strengthening Transportation Infrastructure

Among the primary growth constraints faced by NER is the lack of adequate infrastructure. Although road connectivity continues to be the dominant mode of transportation between the region and the rest of India, poor road conditions and climate-sensitive infrastructure frequently result in delays, product deterioration, and economic losses. Limited rail and air networks, and inadequate warehousing and cold storage facilities continue to hinder trade, tourism, and logistics. High transportation costs and lack of seamless port access further constrain competitiveness, particularly for agricultural and other perishable commodities.

Over the past decade, railway expansion in the NER has been stepped up. This is expected to reshape regional connectivity, leading to the opening of new trade corridors and economic opportunities across the border. Projects such as the Bairabi Sairang Railway Line, Jiribham-Imphal railway line, and the ongoing Rangpo new railway line project might prove beneficial to transform the trade and economic environment in the region.

Further, inland waterways also offer a cost-effective and sustainable alternative in the region. With 19 operational National Waterways along the Brahmaputra and Barak rivers, the region already has a strong base to build upon. However, limited development of terminals, weak infrastructure, and a lack of modern navigation systems restrict the efficiency. Strengthening multimodal transport, investing in climate-resilient technologies, and enhancing cooperation among riparian states are critical to unlocking NER's trade potential and integrating it more closely with mainland India and Southeast Asia.

Building a Competitive Tourism Sector

NER, despite its remarkable natural and cultural assets, remains largely unexplored. In 2024, NER was the least visited region of India in terms of both Domestic Tourist Visit (DTV) and Foreign Tourist Visit (FTV). Tourism development in the region faces persistent challenges stemming from, inter alia, poor transportation facilities, limited connectivity, weak marketing, territorial boundary issues, and restrictive permit systems.

These challenges can be addressed through improving infrastructural facilities and strengthening multimodal connectivity, including road, rail, and air networks. Expanding community-based tourism, such as the Hornbill Festival of Nagaland, can also be beneficial in unlocking the tourism potential of the region. A regional community-based tourism scheme, centred on sustainable planning and greater community participation, could boost NER's tourism prospects. Key enablers include mapping cultural and natural assets, building local capacity, providing business skills training, improving infrastructure, and leveraging digital promotion. The region also holds vibrant prospects for spiritual tourism, enriched by its ancient temples, Buddhist monasteries, and tribal heritage, which can be further promoted.



India's North-Eastern Region: A Macroeconomic Profile

India's North-Eastern Region (NER) comprises eight states viz., Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura. Occupying about 8% of India's land area and home to less than 4% of its population, NER exhibits a wide variety of terrain, flora and fauna, cultures owing to its location across two global biodiversity hotspots, namely, the Indo-Burma and the Himalayas.

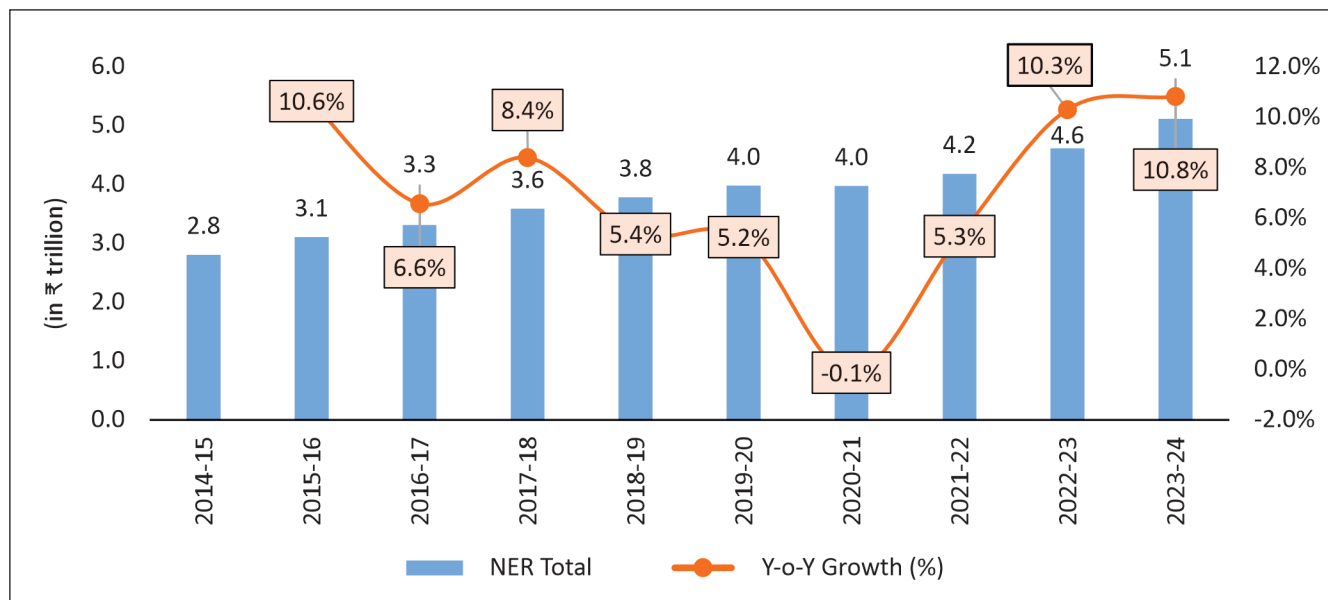
NER is of immense strategic significance to India due to its geographic location, advancing the foreign policies of 'Act East' and 'Neighbourhood First', and serving as India's vital gateway to Southeast Asia. The region's unique geographical location is also highlighted by the fact that each state in the region shares an international border with at least one Southeast Asian nation. In total, NER shares a total international border spanning 5182 kilometres (km) - China in the north, Myanmar in the east, Bangladesh in the south-west, Nepal in the west, and Bhutan in the north-west. The region's connectivity is heavily reliant on the Siliguri Corridor, often referred to as the 'Chicken's Neck', a narrow and congested strip of land that functions as a critical logistical lifeline.

Macroeconomic Profile

A state's Gross State Domestic Product (GSDP) is a key measure of its economic growth trajectory. During the period of 2014-15 to 2023-24, the NER's GSDP at constant (2011-12) prices, comprising 8 states, has recorded a steady increase from ₹ 2.8 trillion in 2014-15 to ₹ 5.1 trillion in 2023-24, growing at a compound annual growth rate (CAGR) of 6.2% (**Figure 1.1**). The region's total GSDP showed moderate contraction at (-) 0.1% in 2020-21 potentially owing to the COVID-19 pandemic induced economic uncertainties. Notably, NER's contribution towards India's GDP has remained stagnant at around 3.0% over the same time period.

At current prices, the total GSDP of NER has risen from ₹ 3.3 trillion in 2014-15 to ₹ 9.1 trillion in 2023-24, at an CAGR of 10.6%.

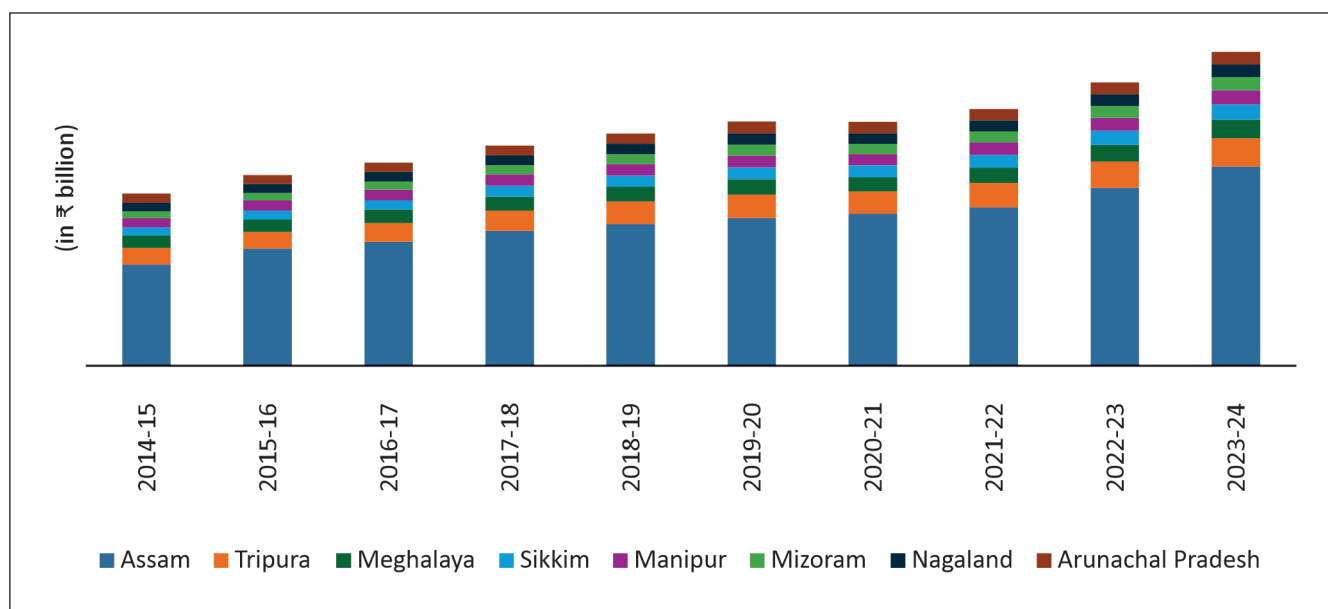
Figure 1.1: GSDP of the North-Eastern Region at Constant (2011-12) Prices



Source: Ministry of Statistics and Programme Implementation (MoSPI), Exim Bank Research

Over the same decade, Assam remained as the largest state economy in NER (**Figure 1.2**). At constant (2011-12) prices, Assam’s GSDP has almost doubled from ₹ 1.7 trillion in 2014-15 to ₹ 3.2 trillion in 2023-24. According to Quick Estimates (QE), Assam’s GSDP has risen moderately to ₹ 3.5 trillion in 2024-25 and is expected to reach ₹ 3.8 trillion in 2025-26, as per advance estimates (AE).¹ The state’s contribution to NER’s total GSDP has jumped from 58.9% in 2014-15 to 63.5% in 2023-24. In 2023-24, Arunachal Pradesh was the smallest economy in NER at a GDSP of ₹ 204.5 billion.

Figure 1.2: State-wise Contribution to GSDP of the North-Eastern Region at Constant (2011-12) Prices

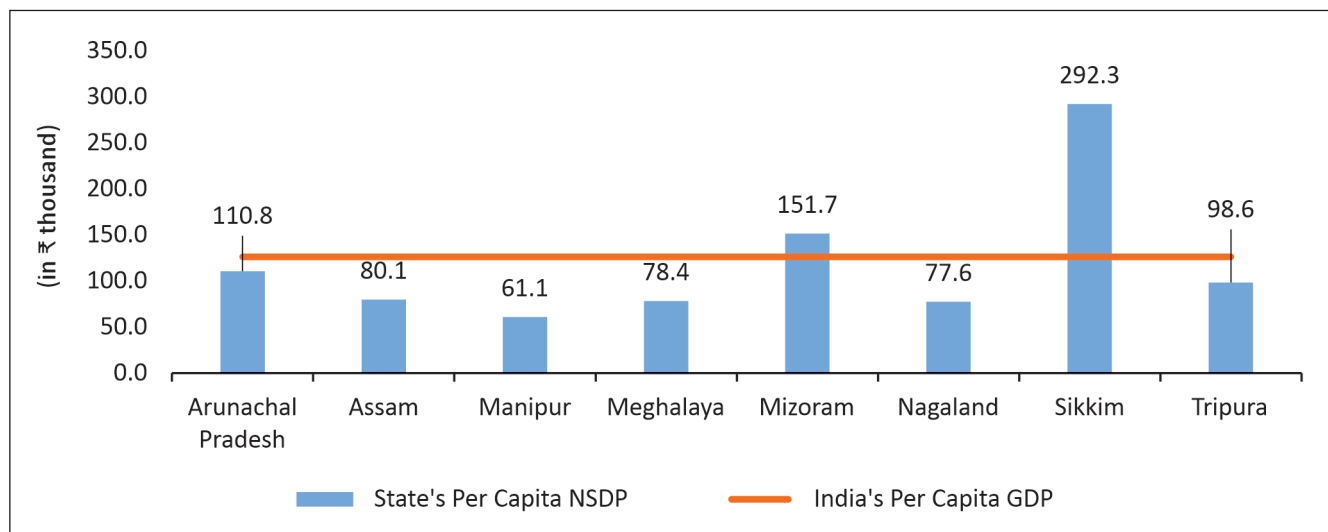


Source: Ministry of Statistics and Programme Implementation (MoSPI), Exim Bank Research

¹ Economic Survey Assam 2025-26

In 2023-24, the per capita Net State Domestic Product (NSDP) of two states in NER, namely, Sikkim and Mizoram, exceeded that of India, at ₹ 292.3 thousand and ₹ 151.7 thousand, respectively, reflecting strong economic development (**Figure 1.3**). Sikkim has also consistently ranked among India's states with the highest per capita NSDP, due to both strong economic growth and its relatively smaller population.

Figure 1.3: North-Eastern Region's State-wise Per Capita Income NSDP vis-à-vis India in 2023-24
(in ₹ thousand)



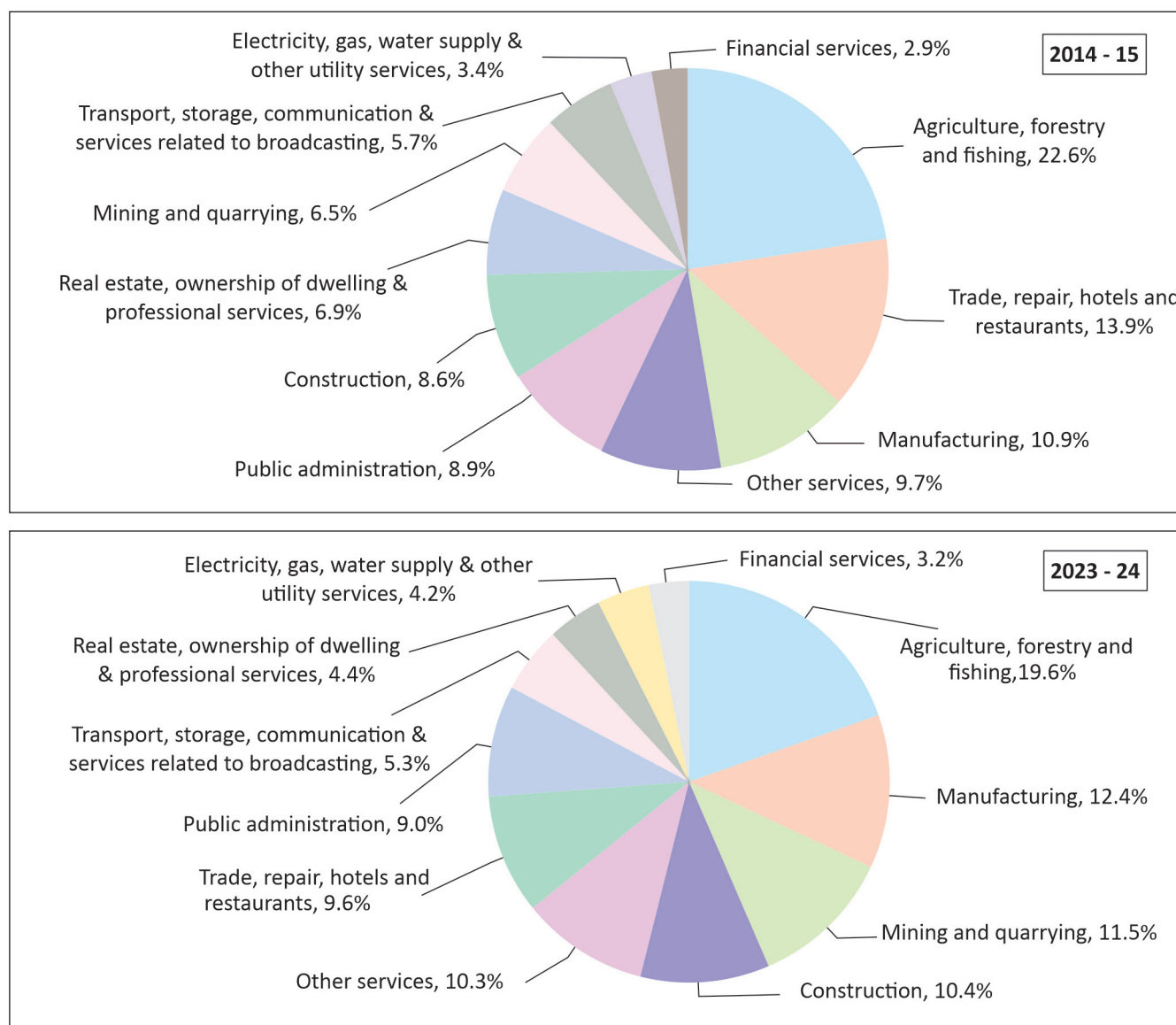
Source: Ministry of Statistics and Programme Implementation (MoSPI), Exim Bank Research

Sectoral Composition

NER is a services-driven economy with the tertiary sector continuing to dominate the region's economic landscape despite seeing a slight fall in its share from 48.1% of NER's total Gross State Value Added (GSVA) at basic prices in 2014-15 to 41.9% in 2023-24. The primary sector accounted 31.1% of NER's total GSVA in 2023-24, followed by the secondary sector at 27.0%.

Under the further disaggregation of NER's economic activities, however, agriculture, forestry and fishing remain as the largest segment despite witnessing a decrease in share from 22.6% in NER's total GSVA in 2014-15 to 19.6% in 2023-24. It was also observed that among all the economic activities, agriculture, forestry and fishing; electricity, gas, water supply and other utility services; and construction have been growing the fastest.

Figure 1.4: Sectoral Composition of North-Eastern Region's Total GSVA at Constant (2011-12) Prices: 2014-15 vs 2023-24



Note: Data for 2024-25 is unavailable for some states in NER, hence NER total GSVA is calculated using state-wise data for 2023-24

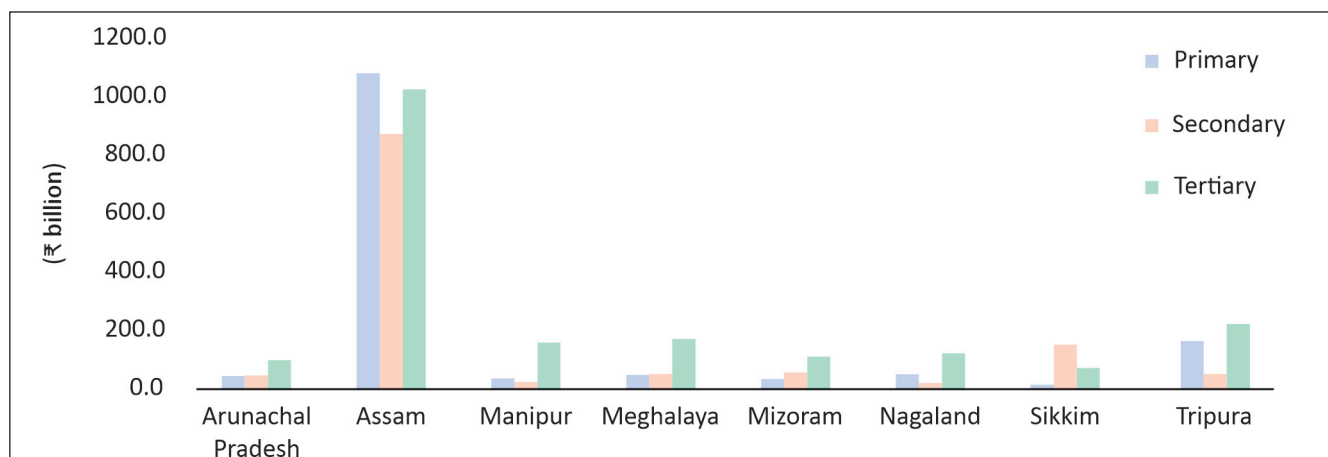
Source: Ministry of Statistics and Programme Implementation (MoSPI), Exim Bank Research

In 2023-24, the tertiary sector dominated the economic structure of the majority of NER's states, with the exception of Assam and Sikkim (Figure 1.5).

In Assam, the region's largest economy, the primary sector accounted for 36.3% of the state's GSVA, primarily driven by agriculture, forestry and fishing which took up 56.1% of the state's primary sector, followed by mining and quarrying activities (43.9%). Agriculture remains as the main source of occupation, providing livelihood to 70% of the state's rural population. Mining and quarrying, on the other hand, continues to be a major revenue-generating activity, with crude oil, natural gas, coal and limestone contributing substantially to the State exchequer. However, from 2014-15 until 2021-22, in Assam too, the tertiary sector had held the largest share in GSVA.

Over the period 2014-15 to 2023-24, Sikkim’s secondary sector has consistently held the largest share in the state’s GSVA, within the range of 60% to 65%. In this sector, manufacturing activities dominated, accounting for 56.7% of the state’s secondary sector in 2023-24. Sikkim has emerged as a thriving pharmaceutical manufacturing hub in the country, owing to its attractive industrial policies and tax incentives along with a pollution-free environment. This has led to the state housing over 50 pharma companies, including large players like Sun Pharma and Cipla along with a network of small and medium enterprises (SMEs) specialising in organic-based formulations. Food processing is another such growing industry supporting the expansion of Sikkim’s manufacturing base.

Figure 1.5: North-Eastern Region’s State-wise Sectoral Composition of GSVA at Constant (2011-12) Prices in 2023-24



Source: Ministry of Statistics and Programme Implementation (MoSPI), Exim Bank Research

Consumer Price Index (CPI)

Price trends is another important factor that majorly influences the various economic aspects viz. production, investment, purchasing power, among others, of which the CPI rate is a vital measure. Thus, a year-on-year CPI (Base 2012=100) analysis for NER’s states vis-à-vis India has been conducted over the period of a decade, from 2015-16 to 2024-25 (Table 1.1).

Table 1.1: North-Eastern Region’s State-wise Annual CPI Change (Base 2012=100) vis-à-vis India

State	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Assam	4.8	2.6	4.4	5.9	6.0	8.5	4.0	6.5	4.6	5.1
Manipur	5.1	10.1	12.4	8.7	6.9	6.7	1.8	1.4	10.0	6.5
Meghalaya	7.5	0.6	1.5	2.2	2.8	9.2	3.3	4.3	4.1	4.0
Mizoram	4.0	2.1	1.9	2.5	5.1	10.3	6.2	7.9	4.5	3.4
Nagaland	5.8	5.1	3.4	6.0	3.8	4.8	6.3	6.1	3.4	4.0
Sikkim	7.0	9.9	4.0	3.9	3.2	7.1	7.3	6.8	3.5	2.5
Tripura	2.7	4.1	3.4	4.3	6.3	9.5	3.8	7.0	6.1	4.6
India	4.9	4.5	3.6	3.4	4.8	6.2	5.5	6.7	5.4	4.6

Note: CPI data for Arunachal Pradesh is unavailable. Red indicates CPI rates greater than that of India in the respective financial year.

Source: Handbook of Statistics on Indian States 2024-25, Exim Bank Research

NER's Agriculture and Allied Industry – a Major Growth Driver

India's North-Eastern Region is abundant in natural resources and home to rich flora and fauna. Its perennial water supply and diverse agro-climatic zones positions the region's agriculture and allied industry as a cornerstone in the region's economy, providing livelihood to over 70.0% of its population. The region shows diverse agricultural practices being followed, right from the more traditional shifting agricultural system of jhum cultivation to organic farming practices. Sikkim here, is known to be the first in the world to practice exclusive organic farming since 2003 with 80.0% of its rural population engaged in agriculture.² Further, the expanding food processing infrastructure in the region which includes Mega Food Parks, cold chain projects, testing laboratories, among others, is supporting growing allied sectors. Despite producing a variety of foodgrains, production of rice dominates, holding a share of 86.0% in the region's total food grain output in 2023-24.

The horticulture sector, encompassing the production of fruits, vegetables, plantation crops, medicinal and aromatic plants, flowers, and spices, is another important segment of the region's agricultural industry. In 2022-23, NER, with over 5.0% of India's area under horticulture, contributed to 3.6% of the national production.

Plantation crops like tea, jute, rubber and bamboo are also widely grown in the region. The state of Assam in NER is India's largest tea producing state, accounting for more than 50.0% of the country's total tea production, while also being a hallmark name in the tea industry globally. For jute too, NER contributes to a significant share in India's total jute production. In NER, Tripura is the leading producer of natural rubber and bamboo. It is India's second-largest rubber producer and home to 28.0% of the country's bamboo stock.³ The states of Nagaland and Mizoram boast of Geographical Indication (GI) tags for their pungent chilli varieties, namely, the Naga Mircha (King Chili) and the Mizo Chili, respectively. In the area of spices, Sikkim is India's second-largest producer of black cardamom. These achievements offer an insight into NER's robust agricultural industry.

Among the major agri allied sectors in NER, sericulture, fisheries and floriculture finds a mention due to their established presence in the region.

The major industries of NER's states, including agriculture and allied, is listed in **Table 1.2**.

Table 1.2: Major Industries of the North-Eastern Region

State	Focus Sectors
Arunachal Pradesh	Tourism, hydropower, agri-horti and food processing, hydrocarbons and minerals
Assam	Agriculture and food processing, ESDM, renewable energy, tourism, aerospace and defence manufacturing
Manipur	Bamboo, agro-horti food processing, handicraft and handloom, tourism, IT and ITES
Meghalaya	Hotels and hospitality, tourism, agriculture and food processing, textiles, sports, IT and ITES, health, power, education

² Food Processing - Towards Sustainable Growth Opportunities, State Profile of Sikkim, Ministry of Food Processing Industries, Government of India

³ Export Preparedness Index 2024, NITI Aayog (January 2026)

State	Focus Sectors
Mizoram	Sports, handloom and handicraft, agri-horti food processing, tourism, bamboo and forestry
Nagaland	Agro-based industries and food processing, handicraft and handloom, tourism
Sikkim	Agri-horti food processing, pharmaceutical, tourism, information technology
Tripura	Rubber, bamboo, agri-horti food processing, agarwood, IT, tourism

Note: ESDM - Electronics System Design and Manufacturing; IT and ITES - Information Technology and Information Technology Enabled Services

Source: State Profiles, Rising Northeast Investors Summit 2025

Key Recent Industrial Policies in the North-Eastern Region

NER, serving as India's gateway to the East, receives strategic policy support from the Government of India, with focus on inclusive development through improved transportation linkages with the rest of the country. Development initiatives to strengthen the region's key sectors like agriculture, power, water supply, education, among others, have also been implemented. The Ministry of Development of North Eastern Region (MDoNER), GOI, the only Ministry with a territorial jurisdiction, oversees and coordinates all developmental efforts pertaining to the region.

The central government scheme of Uttar Poorva Transformative Industrialization Scheme, 2024 (UNNATI - 2024) was launched for a period of 10 years with a financial outlay of ₹ 10,037 crore. Implemented by the Department for Promotion of Industry and Internal Trade (DPIIT), GOI, this scheme offers tailored incentives to foster industrial development across the 8 states of NER. To promote sustainable growth in the region, the Scheme maintains both a 'positive list' of sectors as well as a 'negative list', the latter being select sectors considered detrimental to the region's environment like plastic, cement, etc.

The Prime Minister's Development Initiative for North East Region (PM-DevINE) Scheme is another such flagship central government initiatives introduced to accelerate the development of NER. Implemented over a 4-year period from 2022-23 to 2025-26 with a total outlay of ₹ 6,600 crore, the PM-DevINE Scheme holds the objectives of boosting infrastructure expansion and also focus on aspects of social development.

Other schemes implemented by the MDoNER include the North East Special Infrastructure Development Scheme (NESIDS), Schemes of North Eastern Council (NEC) and Special Development Packages. NER's state-wise industrial policy support as well as other sector-specific initiatives are listed in **Table 1.3**.

Table 1.3: North-Eastern Region's State-wise Recent Key Industrial Policy Support

State	Policy
Arunachal Pradesh	<ul style="list-style-type: none"> Arunachal Pradesh Startup Policy (2022-23) Arunachal Pradesh State Industrial & Investment Policy (2020)
Assam	<ul style="list-style-type: none"> Assam Industrial and Investment Policy (Amendment) (2023) Assam Startup and Innovation Policy (2025) Assam Aerospace and Defence Manufacturing Policy (2025) Assam Electronics (Semiconductor etc.) Policy (2023) Assam Logistics and Warehousing Policy, 2022

State	Policy
Manipur	<ul style="list-style-type: none"> • Industrial and Investment Promotion Policy of Manipur (2022) • Manipur Startup 2.0 Policy (2022) • Manipur Tourism Policy (2022) • Manipur Integrated Logistics Policy (2022)
Meghalaya	<ul style="list-style-type: none"> • Meghalaya Industrial and Investment Promotion Policy (2024) • Meghalaya Power Policy (2024) • Meghalaya State Organic and Natural Farming Policy (2023) • Meghalaya Tourism Policy (2023)
Mizoram	<ul style="list-style-type: none"> • Industrial & Investment Policy of Mizoram (2021) • Mizoram Sustainable Investment Policy (2024) • Mizoram State Logistic Policy (2022) • Health Policy of the Mizoram State (2022)
Nagaland	<ul style="list-style-type: none"> • Industrial Policy of Nagaland • Nagaland Tourism Policy (2024)
Sikkim	<ul style="list-style-type: none"> • Sikkim Industrial and Investment Policy (2024) • MSME Policy of Sikkim (2022) • Sikkim Film Policy (2021)
Tripura	<ul style="list-style-type: none"> • Tripura Industrial Investment Policy (2024) • Tripura Startup Policy (2024) • Vehicle Scrapping Policy (2024) • Tripura Homestay Policy (2024) • Tripura Integrated Logistics Policy (2022)

Source: *Policies & Incentives, Rising Northeast Investors Summit 2025*

Scope of Study

The North-Eastern Region's immense potential to transform into a trade and connectivity hub to serve as India's gateway to Southeast Asia remains largely untapped. Factors including the region's abundant natural resources, vast biodiversity, immense hydroelectric potential and a population with a high literacy rate are major advantages that support NER's economic growth and development. By analysing the economic and trade scenarios of the North-Eastern Region, the Study aims to develop strategies for harnessing high potential export commodities that can propel the region's economy onto a higher growth trajectory, thereby fostering socio-economic development. Considering the region's strategic geographic location that necessitates the development of a robust trade enabling infrastructure, the Study also reviews the region's current channels of trade connectivity. Therefore, by using a multi-pronged approach, the Study aims to tap into NER's unexplored economic opportunities, which will help the region to leverage its strategic position.



Trade and Investment Trends

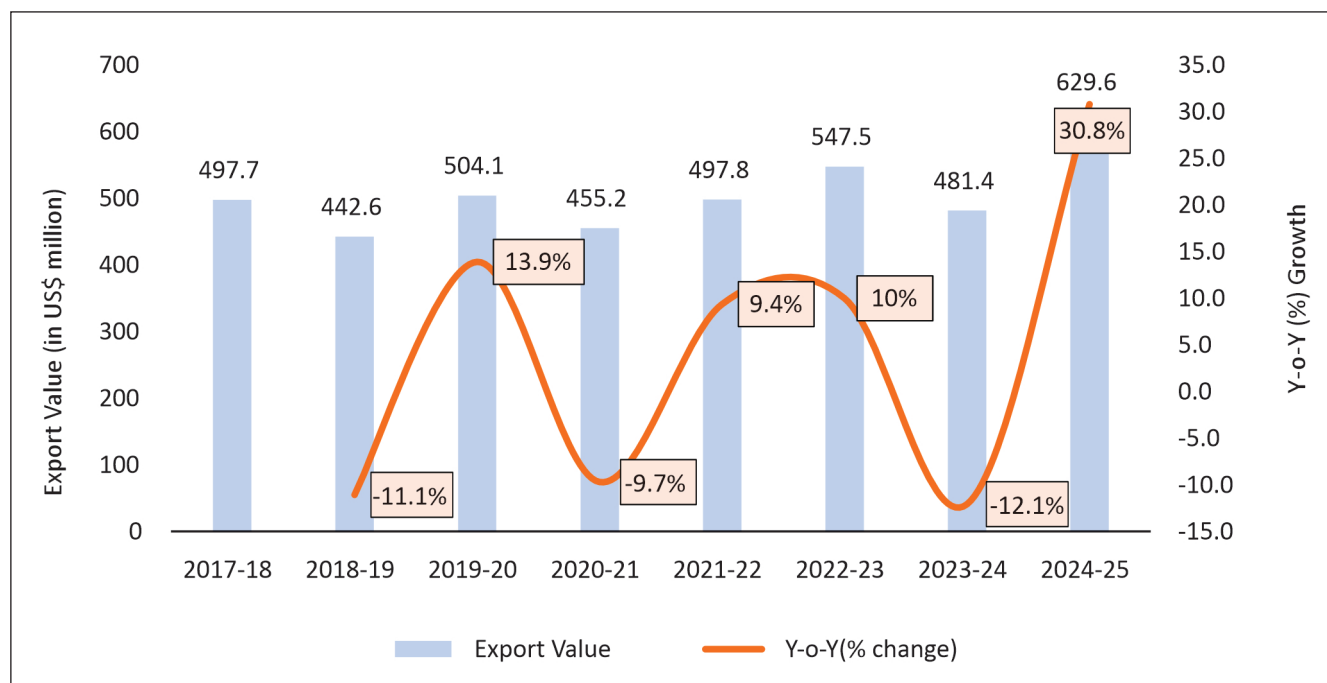
The NER has a geostrategic location in India's external economic engagement. It shares 99% of its 5,300 km long borders with its neighbouring countries, namely Bangladesh, Bhutan, China, Myanmar, and Nepal, which makes it conducive to international trade. The region holds considerable potential as a gateway for India's trade with South Asia and Southeast Asia. It also acts as a bridge for India's participation in geoeconomic institutional forums, including the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC) and the South Asia Subregional Economic Cooperation (SASEC) program. Furthermore, the region's proximity to Myanmar offers great potential to integrate India with the Association of Southeast Asian Nations (ASEAN) countries.

Merchandise Exports from North-Eastern Region

Despite its geographic advantages and rich resource base, the region's participation in India's international trade is minuscule. According to the Directorate General of Commercial Intelligence and Statistics (DGCIS), exports from NER stood at US\$ 629.6 million in 2024-25 accounting for merely 0.14% of India's total exports. However, given the resources and diverse economic base of the region, its export performance implies significant untapped potential.

Between 2017-18 to 2024-25 the exports from NER have shown considerable fluctuations. The export by value increased from US\$ 497.7 million in 2017-18 to US\$ 629.6 million in 2024-25, registering a growth rate of approximately 26.5%. During the same period, the Compound Annual Growth Rate (CAGR) of exports from the region stood at 3.4%. NER's exports have dipped across multiple years in the mentioned time period. While the contraction in 2020-21 can largely be attributed to the COVID-19 pandemic-induced disruptions, the decline in the remaining years possibly exist due to structural bottlenecks such as logistical constraints, demand fluctuations, and commodity concentration in the export basket of the region.

Figure 2.1: North-Eastern Region's Export Performance (US\$ million)



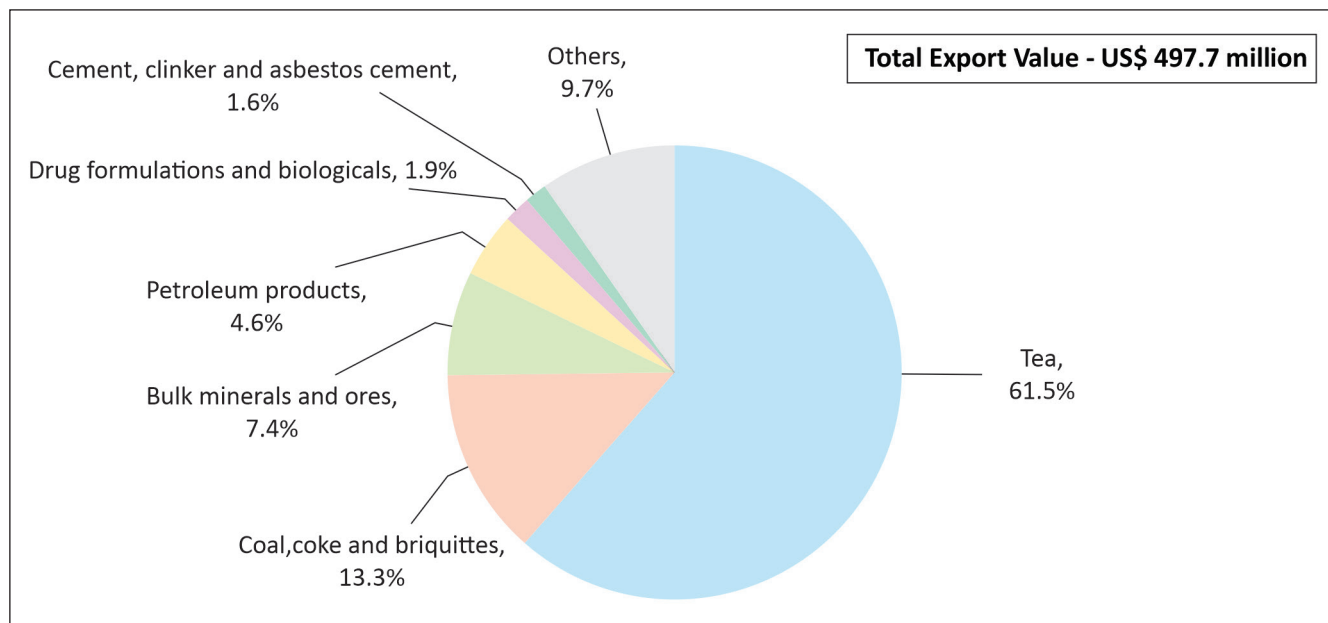
Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

Exports from the NER presents a mix of both opportunities and persistent challenges. While on one side, the region benefits from targeted policy support, diverse agricultural resources, dominance in tea exports, growing sectors such as floriculture, renewable energy and GI-tagged products, on the other side, structural bottlenecks such as reliance on a single commodity for exports, high logistics cost, limited connectivity, and lack of industrial development put a constraint on the region to leverage its strengths optimally. This highlights the potential for expansion of trade base from the region.

North-Eastern Region's Trade Composition

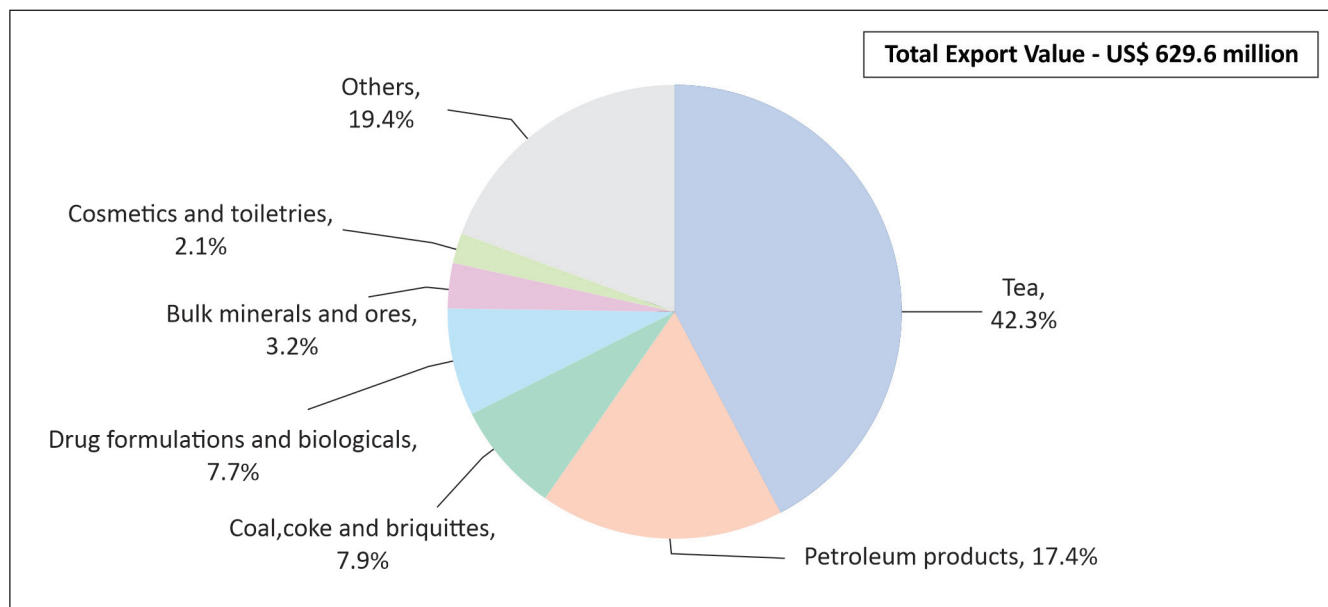
Figure 2.1 and 2.2 draws a comparison between the top exported commodities from the NE region in 2017-28 viz-a-viz 2024-25. The composition of the region's export basket has been observed to be largely unchanged during the same period, though the relative shares have shifted. In 2024-25 tea remained the top exported commodity from the region with exports worth US\$ 266.4 million, constituting a share of 42.3% of the total exports value. This represented a decline from the earlier share of 61.5% in the year 2017-18. While the share of coal, coke, and briquettes was at 13.3% of total export value in 2017-18, the percentage share declined to 7.9% in the year 2024-25. Although the region holds substantial coal reserves, the demand for the same has been reduced in the recent years due to its high sulphur content which necessitates enhanced processing techniques. The share of petroleum products in the total export value of the region has risen significantly, as the share increased from 4.6% in 2017-18 to 17.4% in 2024-25.

Figure 2.2: Principal Commodity-wise Top Exports of North-Eastern Region (2017-18)



Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Figure 2.3: Principal Commodity-wise Top Exports of North-Eastern Region (2024-25)



Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Table 2.1 lists the region's top exported commodity in 2024-25 in terms of value, disaggregated at 6-digit HS Code level. Accordingly, other black tea (fermented) and other partly fermented (HS Code 090240) was the region's highest exported commodity with an export value of US\$ 243.5 million, constituting about 38.7% of the total exports from the region and accounting for 35.2% of India's total export of the product in the same year. This underscores NER's significance in the country's tea exports. Similarly, coke and semi-coke of coal, lignite, or peat (HS Code 270400) from the region constituted about 71.3% of the India's export of the product, indicating strong concentration in specific resource-based commodities.

Table 2.1: Top Exports of North-Eastern Region at 6-Digit HS Code Level (2024-25)

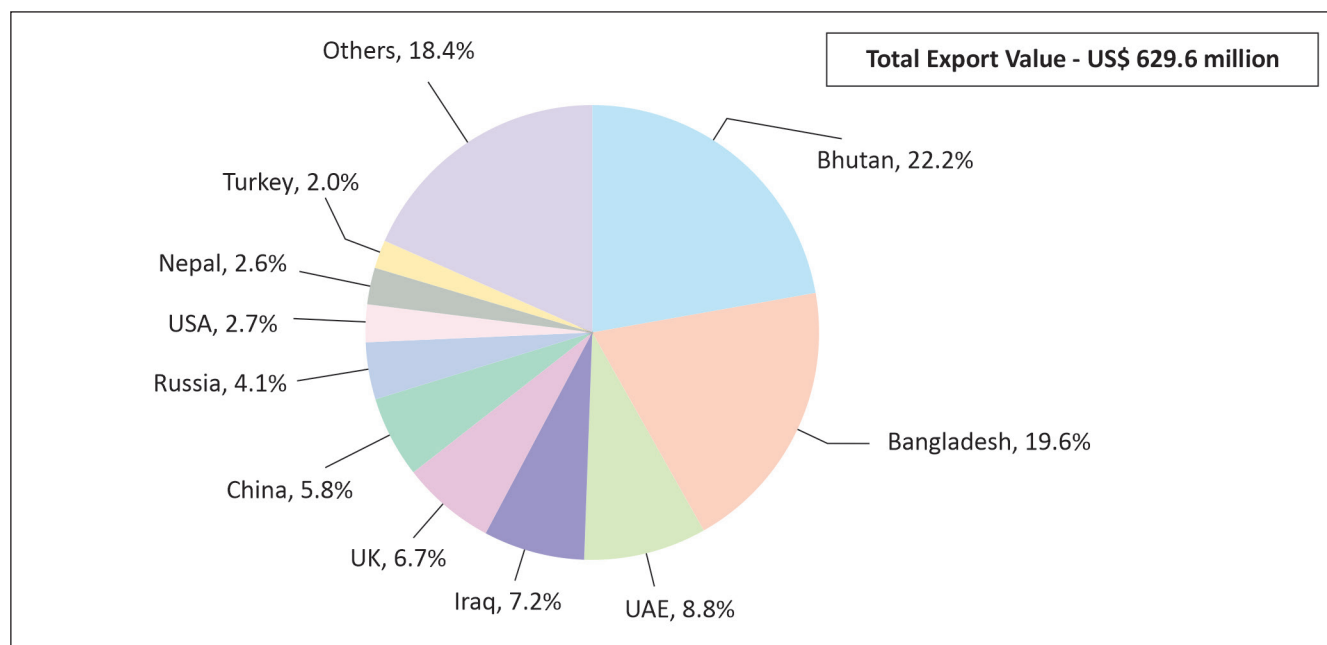
6-Digit HS Code	Product	Export Value (in US\$ millions)	Share in NER's Total Exports (%)	Share of NER in India's Export of the Product (%)
090240	Other black tea (fermented) and other partly fermented	243.5	38.7	35.2
271019	Other Petroleum oils and oils obtained from bituminous mineral	86.1	13.7	0.2
300490	Other medicine put up for retail sale	36.7	5.8	0.2
270400	Coke and semi-coke of coal, lignite, or peat whether or not agglomerated	29.1	4.6	71.3
270119	Other coal	20.4	3.2	11.1
252100	Limestone flux; limestone and other calcareous stone	20.2	3.2	35.9
090230	Black tea (fermented) and partly fermented tea in immediate packing	20.1	3.2	17.3
841199	Parts of other gas turbines	11.0	1.7	5.0
271012	Light oils and preparations	10.2	1.6	0.1
251690	Other monumental or building stone	9.4	1.5	17.9

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

In 2024-25, Bhutan was the top export destination for NER's exports, receiving approximately 22.2% of the region's total exports (**Figure 2.4**). It was followed by Bangladesh (19.6%), UAE (8.8%), Iraq (7.2%), UK (6.7%), and China (5.8%). The top ten destinations for NER's exports accounted for a share of over 81.6% of its total exports. Some of the major principal commodities exported to these top export destinations from NER include petroleum products, tea, coal, coke and briquettes, and cosmetics and toiletries.

Composition of the commodities varies significantly across destinations. The top commodities exported to Bhutan from the region included petroleum products which formed 37.2% of the total export by value (**Table 2.2**). It was followed by coal, coke, and briquettes (25.0%), other wood and wood products (6.1%), processed minerals (3.7%), and other cereals (3.7%). While the region's exports to Bhutan and Bangladesh are dominated by petroleum products and coal related items, the UAE and the UK primarily import tea from NER, with the share of the product in the countries' total imports from the region at 84.9% and 99.7%, respectively. Iraq, on the other hand, imports a high proportion of Ayush and herbal products (62.7%) as well as cosmetics and toiletries (34.0%) from the region.

Figure 2.4: Major Export Destinations for North-Eastern Region (2024-25)



Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Table 2.2: Principal Commodities Exported to North-Eastern Region's Top Export Destinations (2024-25)

Export Destination	Principal Commodity	Share in NER's Total Export to the Country (%)
Bhutan	Petroleum products	37.2
	Coal, coke and briquettes	25.0
	Other wood and wood products	6.1
	Processed minerals	3.7
	Other cereals	3.7
Bangladesh	Petroleum products	44.4
	Bulk mineral and ores	16.3
	Coal, coke and briquettes	11.4
	Granite, natural stones and products	7.6
	Auto components/parts	2.9
UAE	Tea	84.9
	Cosmetic and toiletries	5.0
	Packaging materials	2.2
	Drug formulations, biologicals	2.0
	Spices	1.2
Iraq	Ayush and herbal products	62.7
	Cosmetic and toiletries	34.0
	Drug formulations, and biologicals	3.3
	Individual machinery for dairy	0.1

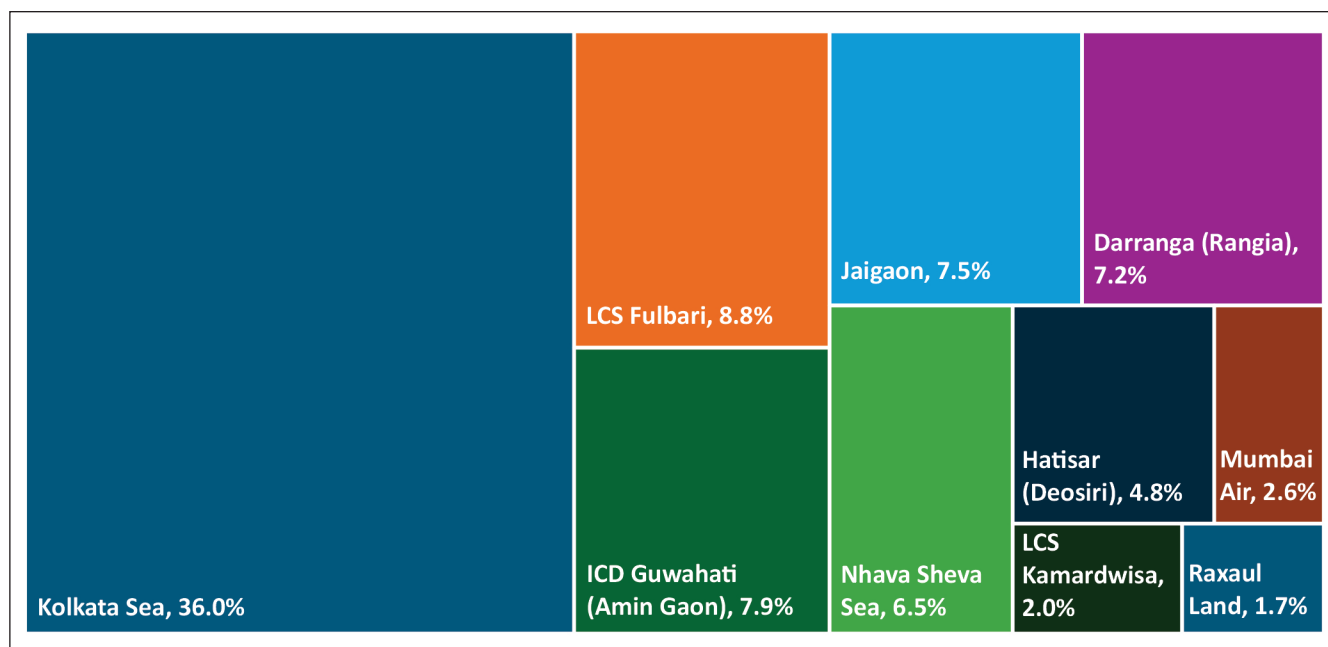
Export Destination	Principal Commodity	Share in NER's Total Export to the Country (%)
UK	Tea	99.7
	Drug formulations, and biologicals	0.08
	Niger seeds	0.06
	IC engines and parts	0.05
	Electronics instrument	0.04

Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

The development of efficient logistics and connectivity has been one of the major bottlenecks of the region for the longest time, which has limited trade and access to essential services and markets. In 2024-25 it was observed that Kolkata Port, in West Bengal, was the dominant hub for NER trade with an approximate 36.0% of the region's exports getting routed through Kolkata Port, highlighting the region's dependency on the port and limited availability of high-capacity export infrastructure within the region itself.

Other significant ports include Land Custom Station (LCS) Fulbari (8.8%), Inland Container Depot (ICD) Guwahati (7.9%), Jaigon (7.5%), and Darranga (7.2%). This reflects the region's transportation dependency on West Bengal, to a certain extent, on Assam for routing its exports. The export exit routes of Nhava Sheva Port, Mumbai (6.5%) and Mumbai Airport (2.6%) reflects that the western gateways also play a role, however, to a lesser extent. Smaller share of the region's exports is also routed through stations like Hatisar (4.8%), Kamardwisa (2%), and Raxaul (1.7%), among others indicating a possibility of existing diversification of trade routes.

Figure 2.5: Port-wise Exports from North-Eastern Region (2024-25)



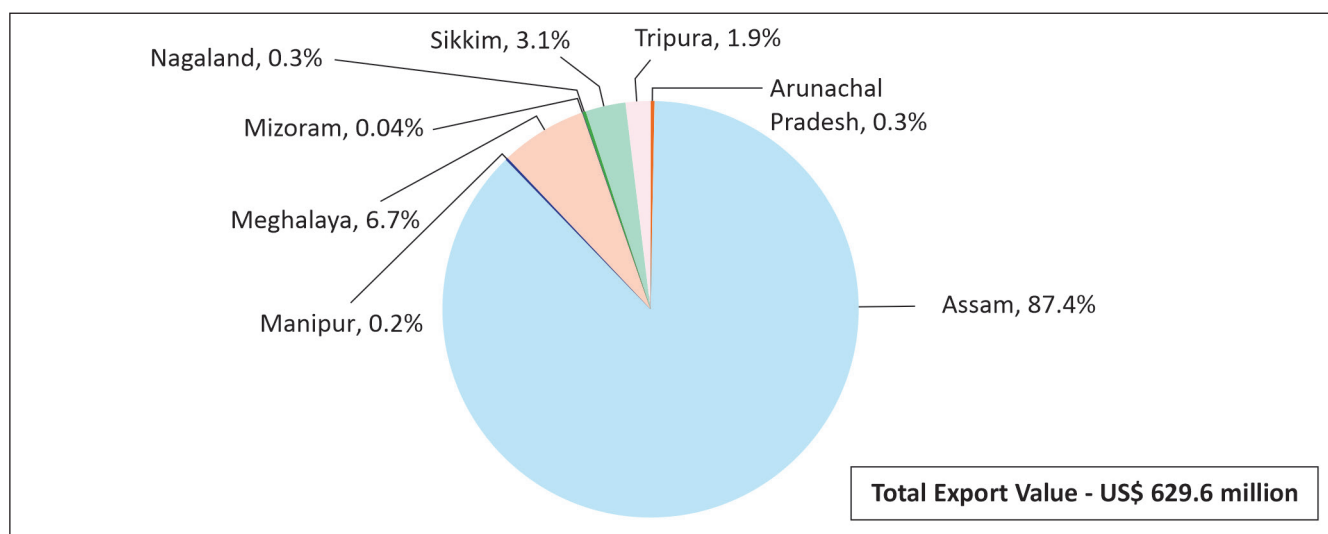
Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Top Exporting North-Eastern States

NER's exports are highly concentrated; with three states namely Assam, Meghalaya, and Sikkim constituting to around 97.2% of the total export value from the region. With an export value of US\$ 550.6 million, Assam was the largest exporting state in the NER in 2024-25 contributing to over 87.4% of the total exports from the region (**Figure 2.6**). The top commodities exported from Assam in the same year included tea which constituted 48.4% of the total value exported from the state, followed by petroleum products (19.9%), coal, coke and briquettes (6.8%), and drug formulations, and biologicals (6.0%) (**Table 2.3**).

In terms of top exporting states, Assam was followed by Meghalaya (6.7%), Sikkim (3.1%), and Tripura (1.9%). The remaining states formed a very low proportion of the total exports, for instance Arunachal Pradesh constituted 0.3% of the exports, followed by Nagaland (0.3%), Manipur (0.2%), and Mizoram (0.04%).

Figure 2.6: State-wise Share of Exports from the North-Eastern Region (2024-25)



Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Table 2.3: Principal Commodity-wise Major Exports of North-Eastern Region (2024-25)

Exporting State	Principal Commodity	Share in NER's Total Exports from the State (%)
Arunachal Pradesh	Iron and steel	59.8
	Auto components/parts	10.8
	IC engines and parts	9.8
	Other miscellaneous engineering items	5.3
	Tea	2.9
Assam	Tea	48.4
	Petroleum Products	19.9
	Coal, coke and briquettes	6.8
	Drug formulations, and biologicals	6.0
	Cosmetic and toiletries	2.4

Exporting State	Principal Commodity	Share in NER's Total Exports from the State (%)
Manipur	Moulded and extruded goods	15.6
	AC, refrigeration machinery	12.7
	Auto components/parts	12.1
	Individual machinery for dairy	8.2
	IC engines and parts	7.1
Meghalaya	Bulk minerals and ores	47.6
	Coal, coke, and briquettes	26.5
	Processed minerals	7.4
	Other wood and wood products	3.1
	Granite, natural stones and products	2.6
Mizoram	Spices	92.1
	Fresh fruits	6.8
	Paint, varnish and allied products	0.5
	Floriculture products	0.3
	Individual machinery for dairy	0.2
Nagaland	Coal, coke and briquettes	71.4
	Plywood and allied products	22.3
	Handloom products	3.3
	Bulk minerals and ores	1.3
	Handicrafts (excluding handmade carpets)	0.9
Sikkim	Drug formulations, biologicals	78.2
	Miscellaneous processed items	8.5
	Cereal preparations	5.2
	Medical and scientific instruments	4.7
	Cosmetics and toiletries	0.5
Tripura	Electric machinery and equipment	90.2
	Spices	2.3
	Drug formulations, and biologicals	1.1
	Essential oils	1.0
	Other cereals	0.9

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

Investment Trends in the North-Eastern Region

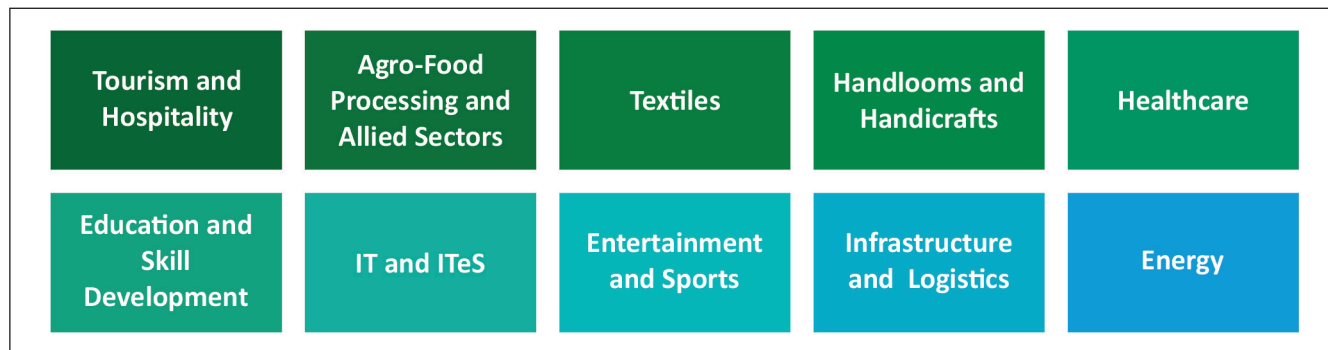
Lately, NER has emerged as a hub of global partnership and mutual interest. The NER has attracted several major investment projects in the recent years. The Uttar Poorva Transformative Industrialization Scheme (UNNATI), launched in 2024 with a budget allocation of ₹ 10,037 crores, aims to develop industry and services sector in the region, consequently catalysing the regional progress driving economic growth and

development.⁴ At the Rising Northeast Investors Summit in May 2025, the region attracted an unprecedented investment of ₹ 4.3 lakh crore.⁵ The region is also emerging as a vibrant startup hub with 2,109 Department of Industrial Policy and Promotion (DPIIT)-recognised startups as of 31st January 2025.⁶ Between 2020-2024, these ventures have attracted significant investment and are reported to have created over 23,000 direct jobs across the region.

The international engagement of the region has strengthened as well. In February 2024, Japan invested JPY (Japanese Yen) 60 billion in diverse infrastructure projects in Northeast India and a healthcare development project in Nagaland.⁷ In 2025, Japan also invested in the Assam State Aquaculture Promotion and Livelihood Improvement Project. The Japan International Cooperation Agency (JICA) continues to be instrumental in financing and implementing various initiatives to improve connectivity and promote the development of the region. Targeted events to secure investments for the region organised regularly, such as the Astalakshmi Mahotsav, Ambassadors' Meet organised by Ministry of Development of North-Eastern Region (MDoNER), GOI, and the Annual Northeast Investment Roadshows conducted across India, have played a pivotal role in catalysing investment flows into the region. As a result, investment of over ₹ 1.10 lakh crore has been received for all 8 NER states so far. During Astalakshmi Mahotsav, 2024, a total of ₹ 2,500 crores worth of project proposals were received under the B2G sessions.⁸

The region has considerable potential to attract investments in the areas of agriculture, sports, tourism, economic corridor, infrastructure, textiles and handicrafts, and animal husbandry (**Figure 2.7**).

Figure 2.7: Potential Sectors for Investments in the North-Eastern Region



Source: *Investment in North-Eastern Region, Press Information Bureau (PIB), March 2026*

Despite the policy initiatives, the FDI inflows in the NER has remained modest and volatile. During the period between 2020⁹ to 2024, the Foreign Direct Investment (FDI) equity inflows in the NER has declined from US\$ 16.3 million in 2019-20 to US\$ 4.5 million in 2024-25, registering a decline of approximately (-) 72.5%, over the period. The lowest value for investment inflows has been observed in the year 2023, where the FDI inflows declined to US\$ 0.6 million as compared to US\$ 3.9 million in the preceeding year registering a decline of (-) 85.9%. According DPIIT, Ministry of Commerce and Industry, GOI, while in the recent years the FDI inflows in India has increased significantly, investments in the NER has remained minimal as compared

⁴ Cabinet approves Uttar Poorva Transformative Industrialization Scheme, 2024, PIB (March 2024)

⁵ Over 4 Lakh Crore Investment Proposals: Rising North- East Summit Concludes on a Successful Note, PIB (May 2025)

⁶ Start-up Ecosystem in North Eastern States, PIB (March 2024)

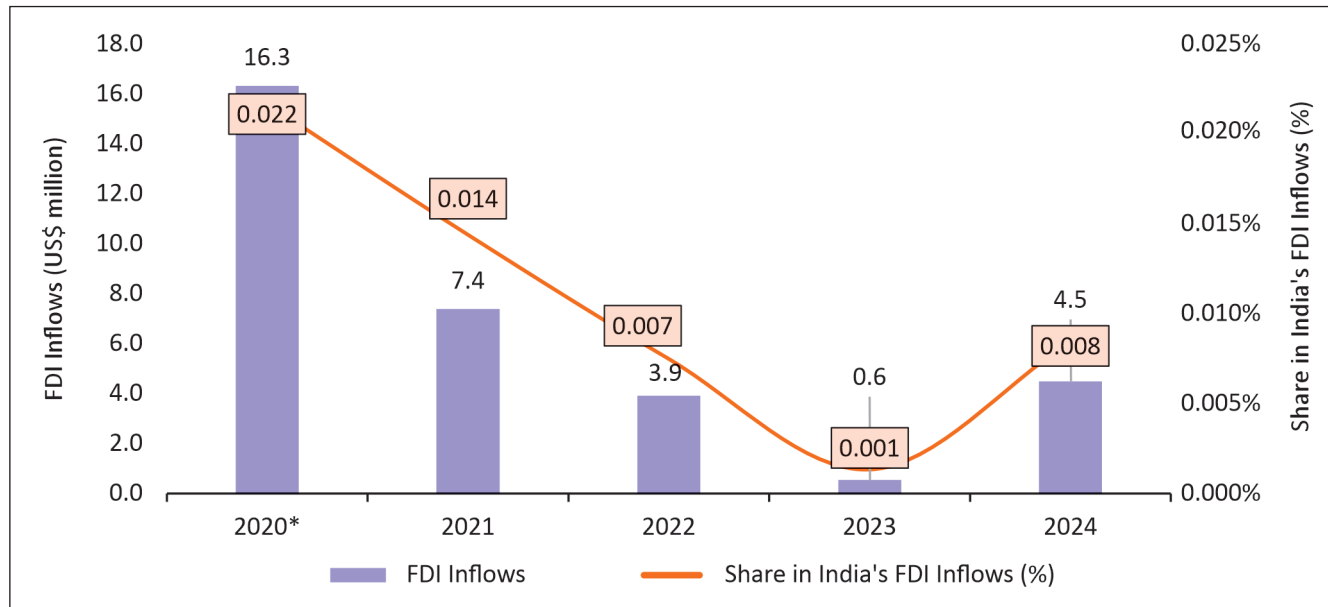
⁷ Observer Research Foundation (ORF)

⁸ North East: India's Beacon of Inclusive Growth, PIB (June 2025)

⁹ Data for FDI inflows for 2020 includes data starting from October 2019.

to the other parts of the country. The FDI inflows, by value, the NER constitute a very small proportion of the total FDI inflows in India. In 2024, the region received a meagre 0.0008% of the total FDI inflows in the country. The proportion has also declined between 2019-20 to 2024, from 0.02% to 0.0008%, respectively (Figure 2.8).

Figure 2.8: FDI inflows in North-Eastern Region

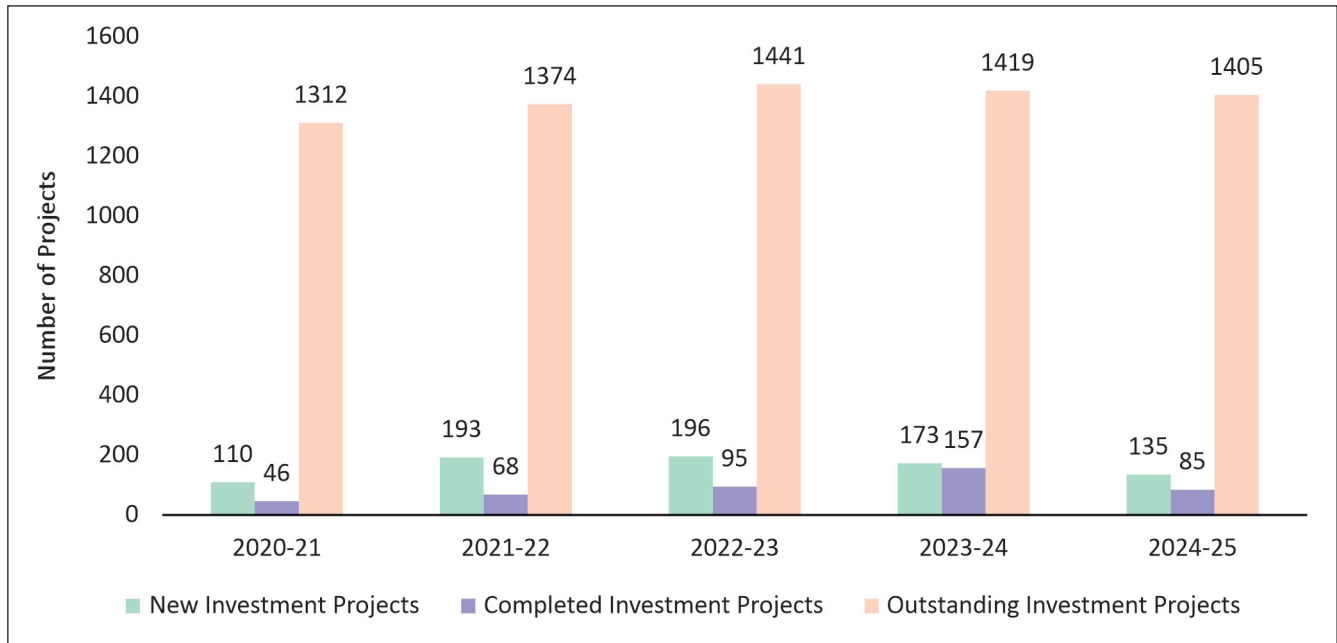


*Data for the year starts from October 2019

Source: Department for Promotion of Industry and Internal Trade (DPIIT), Exim Bank Research

Figure 2.9 represents the categorisation of investment projects in the NER between 2020-21 to 2024-25, classified into new, completed, and outstanding. The trend in the data indicates that while the count of new projects announced peaked to 196 in 2022-23, it registered a gradual decline to 135 in 2024-25. The investments under the completed projects category showed a continuous increase till 2023-24, peaking at 157, after which the number declined to 85 in the succeeding year in 2024-25. In contrast, investments in the outstanding projects category remained consistently high during the same period, fluctuating slightly between 1312 in 2020-21 to 1405 in 2024-25. This trend of persistent backlog indicates that despite the initiation of new projects and an increase in completion of projects in the recent years, the overall volume of outstanding projects in the NER continues to dominate, possibly highlighting a structural challenge in project execution and closure.

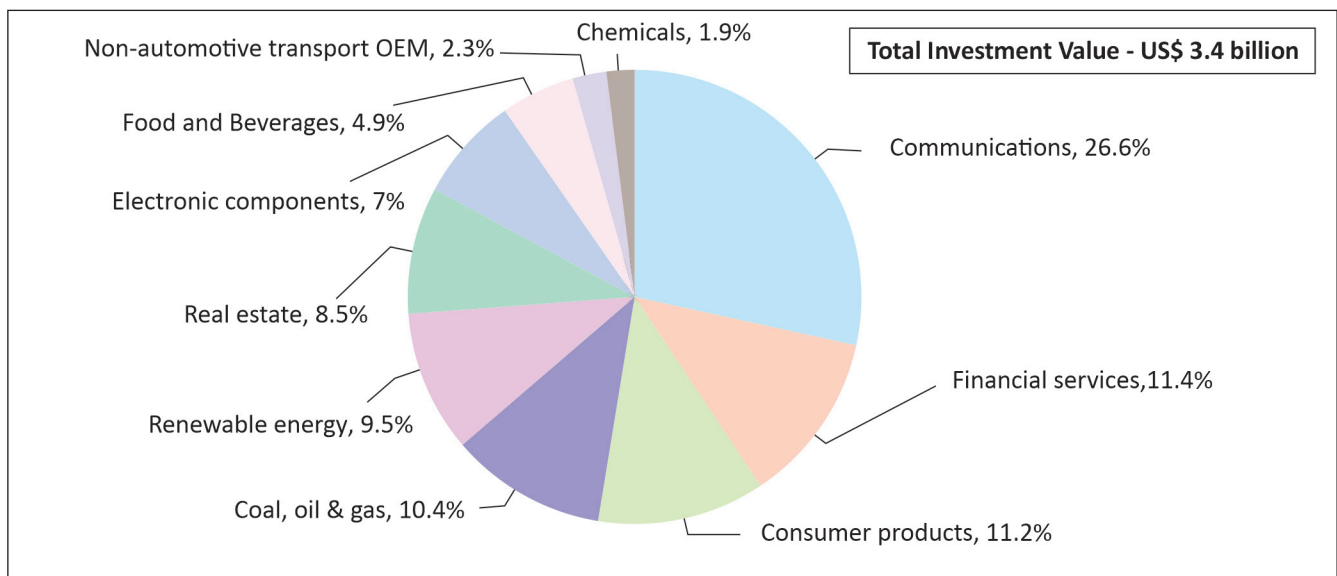
Figure 2.9: Investment Trends in North-Eastern Region



Source: CMIE States of India; Exim Bank Research

During January 2003 to January 2026, the top FDI receiving sectors in the NER have been communications (26.6%), financial services (11.4%), consumer products (11.2%), coal, oil and gas (10.4%), and renewable energy (9.5%) (Figure 2.10). The Digital Northeast Vision 2022, which was launched in 2018 as an integral part of the Digital India Programme, has led to significant opportunities for investments in the communication sector. Over the years multiple initiatives have been undertaken across the region to strengthen digital infrastructure, bolster electronics manufacturing, expand IT and ITes services, enhance digital payment systems, and for the promotion of startup growth towards infrastructural and comprehensive growth of the region.

Figure 2.10: Top Sectors for Foreign Capital Investment in North-Eastern Region (2003-2026)



Source: fDi Markets; Exim Bank Research

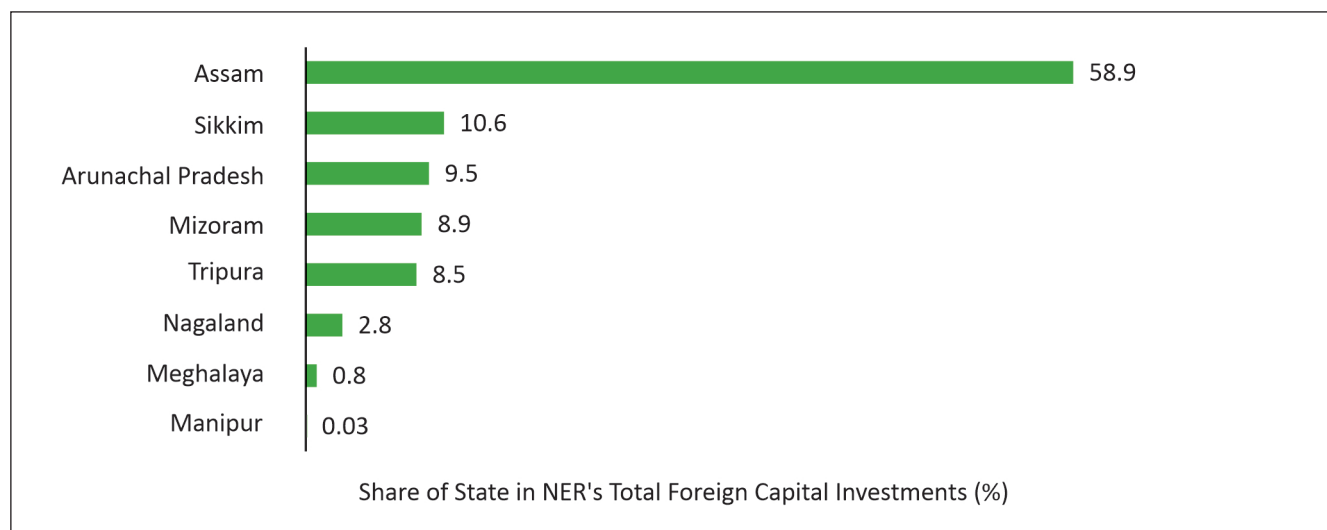
The region with its abundant natural resources and ample opportunities for potential of oil and gas and hydrocarbons remains an attractive destination for FDI in the concerned sector. Government of India has envisaged to double the exploration acreage in the region from existing 30,000 sq km (square kilometres) to 60,000 sq km. It also envisions to double the oil and gas production in the region from 9 million metric tonnes of oil equivalent (MMTOE) to 18 MMTOE. Additionally, the vision also includes setting up of a dedicated service provider hub in the region to support the oil and gas industry and implementation of North East Gas Grid (NEGG) to provide access to natural gas.

The region possesses vast untapped renewable energy resources. The Ministry of New and Renewable Energy (MNRE), GOI has exclusively earmarked 10% of its budget under the annual schemes for the region to promote the development of clean energy in the region. According to the Ministry of Power, the region has a 129 GW (gigawatt) potential from large hydro projects and greater than 18 GW from pumped storage plants. In the renewable energy sector, the region has a total of 115 Memorandum of Understanding (MoU) equivalent to a total of ₹38,856 crore, signed between the state governments and the private sector. Government of India has also highlighted that the region is expected to play a key role in ensuring India's grid stability in the near future under the initiative of "One Nation, One Grid". Taking leverage of its geographical positioning, the region has the capability of becoming the future energy export hub of India, as its proximity to the neighbouring countries makes it ideal for cross-border electricity trade. Such developments paired with capital subsidies has played a crucial role in attracting potential investments in the NER in the sector.

The distribution of the FDI inflows have been highly uneven among the states of the NER. During January 2003 to January 2026, Assam has been the top recipient of the FDI inflows in the region, with investments amounting to US\$ 1984.5 million, approximately 58.9% of the total FDI inflows in the NER. This could be owing to factors like the state's robust connectivity with developed infrastructural facilities, and lucrative developmental potential in major sectors like agriculture, semiconductors, renewables, industry and commerce, and tourism. Such large-scale developmental projects not only position the state as an emerging technology hub but also enhances its attractiveness to FDI inflows. Moreover, the State Government of Assam, to facilitate and augment FDI inflows, has also constituted a dedicated cell, the Industrial Investment Secretariat Cell (IISC), and a high-level committee to accord fast-track clearances for investment proposals.

After Assam, Sikkim has been the highest recipient of FDI inflows in the region with an investment amounting to US\$ 357.3 million and 10.6% of the total FDI inflows of the region. Measures taken by the Government of Sikkim such as the Viksit Sikkim in 2022, and a declaration for tourism promotion played a pivotal role in increasing the investment in the state. The NER states of Nagaland, Meghalaya, and Manipur have received a very low proportion of FDI inflows accounting for approximately 2.8%, 0.8%, and 0.03% of the total FDI inflows, respectively. Limited infrastructure development, geographical constraints (hilly terrain), low industrialisation, and perceived security challenges are the primary reasons for low recipients of the FDI inflows in the concerned states.

Figure 2.11: State-wise Share in Foreign Capital Investment in North-Eastern Region (2003-2026)



Source: *fDi Markets, Exim Bank Research*

The analysis of trade and investment patterns in the NER reveals a paradox of high strategic potential coexisting with structurally constrained outcomes. While the region's geographic proximity to the neighbouring economies is noteworthy, its export basket remains narrow, state-wise participation highly concentrated, and FDI inflows disproportionately low relative to the national trends. The dominance of few commodities such as tea and petroleum products, the larger share of contributions in exports from Assam, and the persistence of logistical dependence on distant ports together reflects limited depth of the region's industrialisation. Thus, further developments of the region as a trade and investment hub might depend not only on its geographical and resource endowments, but also on the extent to which policy and infrastructure converge to unlock its competitive strengths.



Export Trends of Agriculture and Allied Products

The agriculture and allied sector of the NER is a vibrant sector and is a significant contributor to the region's economy. Out of the 21 agro-ecological zones of the country, 4 zones are covered exclusively by the region. Under the initiatives of North-Eastern Regional Agricultural Marketing Corporation (NERAMAC), 13 agriculture and allied products from the region have received a Geographical Indication (GI) tag. Approximately 70.0% of the region's population depends on agriculture and its allied sector as a primary source of their livelihood, making agriculture a pivotal part of the regional economy. The abundant availability of fertile lands across the region has enabled cultivation of a diverse array of crops such as rice, tea, spices, fruits, rubber, jute, and vegetables making the region a significant source of agricultural produce. However, in 2024-25 the total export value of agriculture and allied products from the region accounted for only 0.4% of the total exports of the same from India.

Export Trends of Agriculture and Allied Products in North-Eastern Region¹⁰

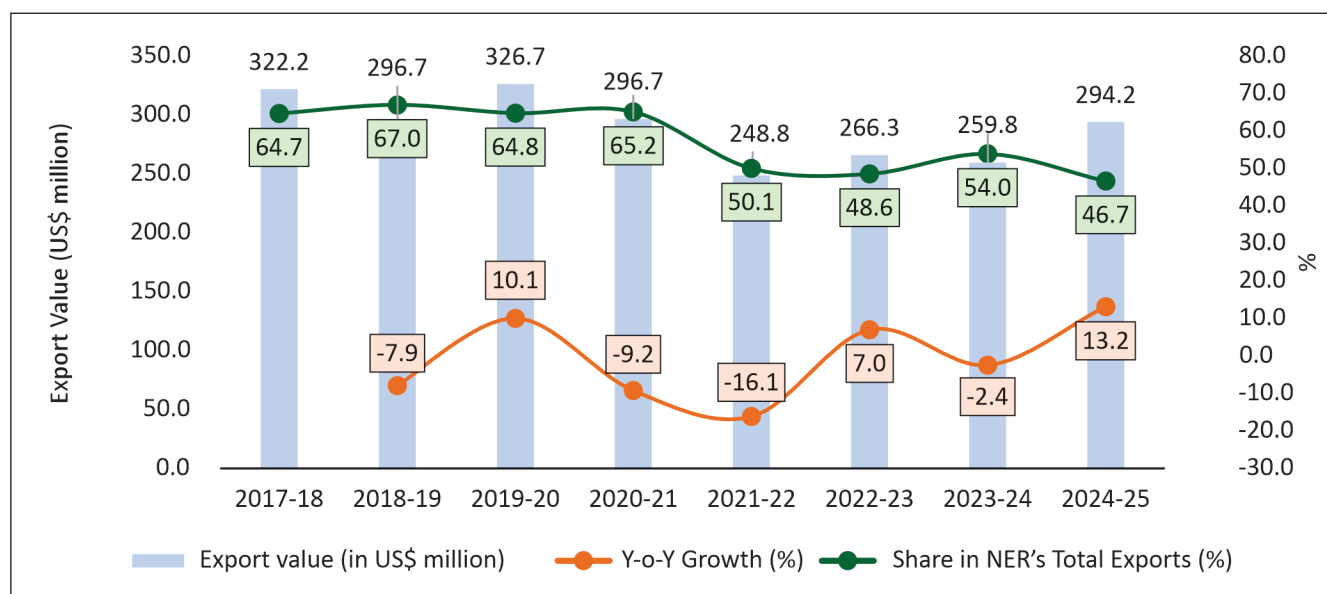
Over the years, export values have shown fluctuations declining from US\$ 322.2 million in 2017-18 to US\$ 294.2 million in 2024-25, registering a decline of (-) 8.7% (**Figure 3.1**). Exports dipped to its lowest in the year 2021-22 at US\$ 248.8 million, witnessing a decline in the percentage share in total export value to 50.1% as compared to 65.2% in the previous year. The share of agriculture and allied products in the total exports of the region has steadily decreased over the years from 64.7% in 2017-18 to 46.7% in 2024-25, reflecting a reduced contribution to the region's overall exports. Owing to the decline in relative share, growth rates have also been highly volatile, with sharp contractions observed in 2020-21 (-9.2%) and 2021-22 (-16.1%). However, the growth rates recoiled in the succeeding years as it increased to 13.2% in 2024-25.

Despite fluctuating export performance, the region continues to depend on traditional agricultural practices, agro-biodiversity and indigenous knowledge systems for livelihood and economic growth. At the same time, the region does not have extensive cultivable land; only about 16.0% of the area of the region is under cultivation, and the total cropped area, including area under multiple cropping, often stays limited to 22.0%.¹¹

¹⁰ The list of products included in the agriculture and allied sector include alcoholic beverages, ayush and herbal, cashew, cereal preparations, cocoa products, coffee, cotton fabric, cotton raw inclusive of waste, cotton yarn, dairy products, floriculture products, fresh fruits, fresh vegetables, fruits or vegetable seeds, jute yarn, jute raw, marine products, natural silk yarn, natural rubber, niger seeds, oil meals, other textile yarns, other cereals, other jute manufacturing, other oil seeds, other rubber products, processed fruits and juices, processed meats, processed vegetables, pulses, rice (basmati), rice (other than basmati), sesame seeds, silk waste, silk raw, spices, sugar, tea, tobacco manufactured, tobacco unmanufactured, vegetable oils, woollen yarn, and products derived from agricultural raw materials.

¹¹ Agricultural Backwardness Analysis of North-East India, International Journal of Current Research

Figure 3.1: Export Trends of Agriculture and Allied Products from North-Eastern Region (2017-18 to 2024-25)



Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

Top Agriculture and Allied Products Exported from North-Eastern Region

Table 3.2 highlights the top ten agriculture and allied principal commodities exported from the region in 2024-25. The table shows a clear dominance of tea exported from the region accounting for 90.6% of the total value of exports of agriculture and allied products from the region. Other commodities contributed nominally to the total agricultural exports such as by other cereals (1.8%), sesame seeds (1.3%), rice other than basmati (1.2%), spices (1.1%), and cereal preparations (0.9%). Overall, NER is observed to have a highly concentrated export profile, which relies heavily on tea, with limited diversification across other products. In terms of India's total exports of these commodities, the region contributes significantly to the total tea exports from the country, accounting for 28.8% of the total exports. The region's share in other cereals (1.9%), sesame seeds (0.8%), rice (0.1%), spices (0.1%), cereal preparations (0.3%), and manufactured tobacco (0.4%), among other remains relatively smaller, highlighting its narrower export base.

Table 3.1: Principal Commodity-wise Top Agriculture and Allied Export Products from North-Eastern Region (2024-25)

Commodity	Export Value (in US\$ million)	Share in Total Agriculture and Allied Products (%)	Share in India's Exports of the Commodity (%)
Tea	266.4	90.6	28.8
Other cereals	5.3	1.8	1.9
Sesame seeds	3.8	1.3	0.8
Rice (other than basmati)	3.6	1.2	0.1
Spices	3.3	1.1	0.1
Cereal Preparations	2.6	0.9	0.3
Tobacco manufactured	1.8	0.6	0.4

Commodity	Export Value (in US\$ million)	Share in Total Agriculture and Allied Products (%)	Share in India's Exports of the Commodity (%)
Dairy products	1.1	0.4	0.2
Ayush and herbal products	1.1	0.4	0.2
Marine Products	1.1	0.4	0.01

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

The concentration of products or sectors in exports of the region can be analysed through the Hirschman Herfindahl Index (HHI), which is a measure to calculate market concentration of a sector in the export basket. HHI index is the sum of the squared shares of each commodity in total exports. A perfectly diversified export portfolio will have an index closer to zero, whereas an export portfolio with the value concentrated around a few products only will have a value closer to 1 (least diversified).

According to World Integrated Trade Solutions (WITS), the formula for HHI can be given by:

$$HHI_{jt} = \sum \left(\frac{x_{it}}{X_{yt}} \right)^2$$

The equation describes HHI_{jt} i.e. HHI for the agriculture and allied products in a particular year, where x_{it} represents the export value of a particular commodity in a year, and X_{yt} represents the total export of agriculture and allied products from the region in the same year. **Table 3.2** illustrates the HHI values for the top agriculture and allied commodities from 2017-18 to 2024-25. Although the index values are higher throughout the given period, indicating heavy export concentration around few products, the value has declined over the years. The index value has declined from 0.903 in 2017-18 to 0.821 in 2024-25. This downward trend in the index values indicates that while the export from the region remains highly concentrated, there has been a gradual move towards diversification in the past few years.

Table 3.2: HHI Values (2017-18 to 2024-25)

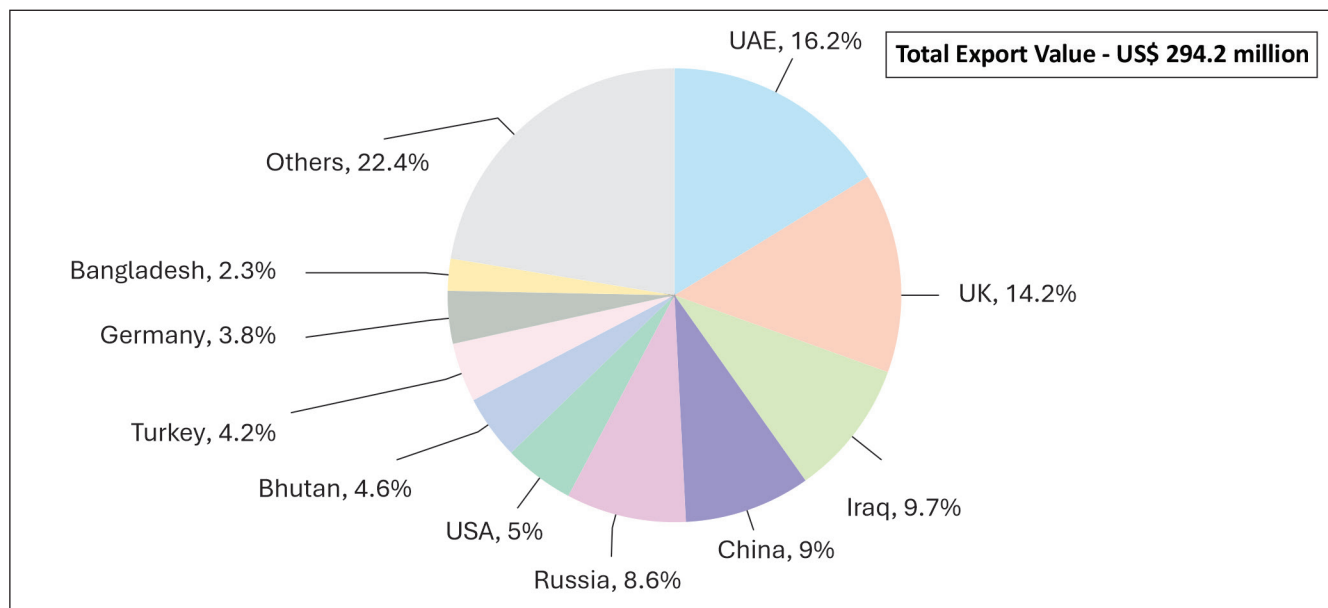
Year	HHI Value
2017-18	0.903
2018-19	0.921
2019-20	0.915
2020-21	0.900
2021-22	0.834
2022-23	0.852
2023-24	0.861
2024-25	0.821

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS); Exim Bank Research

Top Exporting Destination of Agriculture and Allied Products from North-Eastern Region

Figure 3.2 shows that in 2024-25, the UAE emerged as the largest export destination for agri and allied products from the region, accounting for 16.2% of the total exports, followed by the UK (14.2%), Iraq (9.7%), China (9%), and Russia (8.6%). Taken together, these top five export destinations accounted for 57.7% share of the region's total agricultural exports.

Figure 3.2: Top Export Destinations for Agriculture and Allied Products from North-Eastern Region (2024-25)



Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

State-wise Top Agriculture and Allied Products Exported from North-Eastern Region

Table 3.3 lists the state-wise top five agricultural and allied products exported in 2024-25, reflecting significant variations in export composition across the states. Assam's exports are largely dominated by tea (91.5%), while Arunachal Pradesh shows relatively greater diversification, with tea (38.7%) and fresh fruits (26.5%) forming major shares of the total exports of agricultural and allied products from the state. The agri-exports from Manipur are driven by spices, as it accounts for the largest share of 44%, while in Meghalaya, rice (40.2%) and Ayush and herbal products (36.1%) dominated the agri-export basket. The figure also reflects extreme product concentration in Mizoram (spices, 92.8%) and Nagaland (cotton fabrics, 97.1%). Sikkim's exports are primarily driven by cereal preparations (84.4%), and Tripura recorded spices (42.2%) as its leading export commodity.

Table 3.3: State-wise Top Agricultural and Allied Products Exported from North-Eastern Region (2024-25)

State	Principal Commodity (Agriculture and Allied)	Share in Total Exports of Agriculture and Allied Product from State (%)
Arunachal Pradesh	Tea	38.7
	Fresh fruits	26.5
	Other rubber products except footwear	15.8
	Alcoholic beverages	14.8
Assam	Tea	91.5
	Other cereals	1.8
	Sesame seeds	1.3
	Rice (other than basmati)	1.1
	Spices	0.9
Manipur	Spices	44.0
	Vegetable oils	13.7
	Cotton fabrics	12.1
	Ayush and herbal products	11.7
	Other rubber products except footwear	10.6
Meghalaya	Rice (other than basmati)	40.2
	Ayush and herbal products	36.1
	Spices	12.7
	Marine products	3.9
	Alcoholic beverages	3.4
Mizoram	Spices	92.8
	Fresh fruits	6.8
	Floriculture products	0.3
	Cotton fabrics	0.1
Nagaland	Cotton fabrics	97.1
	Spices	2.0
	Rice (other than basmati)	0.9
Sikkim	Cereal preparations	84.4
	Spices	3.8
	Tea	3.3
	Fresh Vegetables	2.8
	Other rubber products except footwear	1.5

State	Principal Commodity (Agriculture and Allied)	Share in Total Exports of Agriculture and Allied Product from State (%)
Tripura	Spices	42.4
	Other cereals	14.4
	Pulses	12.2
	Cashew	8.6
	Tea	8.1

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

Challenges Faced by North-Eastern Region in Exports of Agriculture and Allied Sector Products

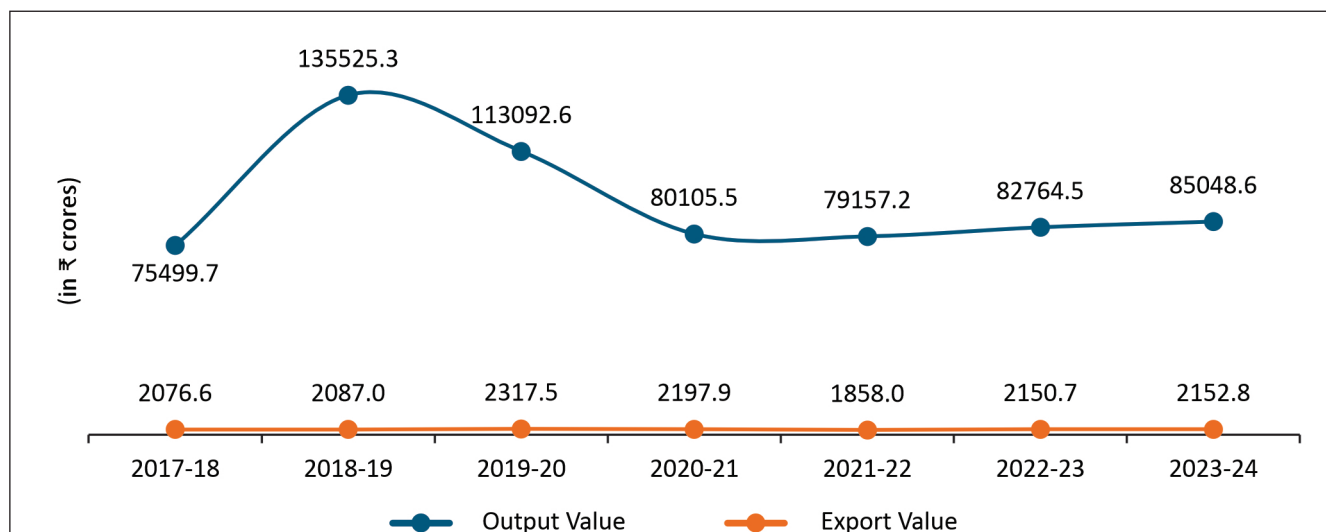
The analysis indicates that although the region has a defined export basket and identifiable destination markets, the overall share of agricultural output remains low. Hence, in the succeeding section, the relationship between agricultural production and exports, and the structural and institutional factors that might be constraining the region's export performance, have been analysed.

Figure 3.3 depicts the output and export value of agriculture and allied products between 2017-18 to 2023-24. Although the production value for the agriculture and allied activities has fluctuated during this period, it has subsequently increased from ₹ 75,500 crores in 2017-18 to ₹ 85,049 crores in 2023-24. In contrast, export performance in terms of value has remained largely stagnant increasing marginally from ₹ 2076.6 crores in 2017-18 to ₹ 2152.8 crores in 2023-24. The CAGR further reinforces this divergence, as values of agriculture output registered a CAGR of 2% during the period, and export values grew at a much slower CAGR of 0.5%.

The correlation between the two series, agriculture output and export value stands at 0.28. While the positive correlation coefficient indicates that the output and export have moved in the same direction to some extent, the magnitude of the coefficient is weak, suggesting that an increase in production is not strongly transmitted into export expansion in the NER agriculture sector. The low elasticity of export values with respect to output increase indicates that only a limited portion of the growth accounts for export performance. This implies that factors other than production capacity are also influencing export outcomes.

The Export Intensity Ratio (EIR), which measures the proportion of a country or region's output in a particular sector or commodity that is exported, has also been stagnant during the same period for NER's agriculture and allied sector, with the value remaining within the range of 0.2-0.3 over the period. The rigidity of the ratio further indicates that incremental production in the sector is being absorbed within the domestic market rather than being directed towards international markets.

Figure 3.3: Output and Export Trends of Agriculture and Allied Sector Products of North-Eastern Region (2017-18 to 2023-24)



Note: The output value for agriculture and allied products is taken from MoSPI, (at 2011-12 prices) and the export value is sourced from DGCI, so there might exist some discrepancies in the products considered as a part of agriculture and allied sector

Source: Directorate General of Commercial Intelligence and Statistics (DGCI); Ministry of Statistics and Programme Implementation (MoSPI), Government of India; Exim Bank Research

The above analysis indicates that in 2024-25, only 2.5% of the total agricultural output from NER has been exported from the region, marking a marginal decline from 2.7% in 2017-18. One of the primary reasons behind this trend is the persistence of infrastructural bottlenecks. The region continues to face a shortage of adequate cold storage, testing laboratories, grading and certification centres, and processing units. The issue is further exacerbated by rugged terrain, difficult topography, and restricted accessibility. Limited transportation networks, including the absence of multimodal connectivity, constrain the development of an efficient supply chain.

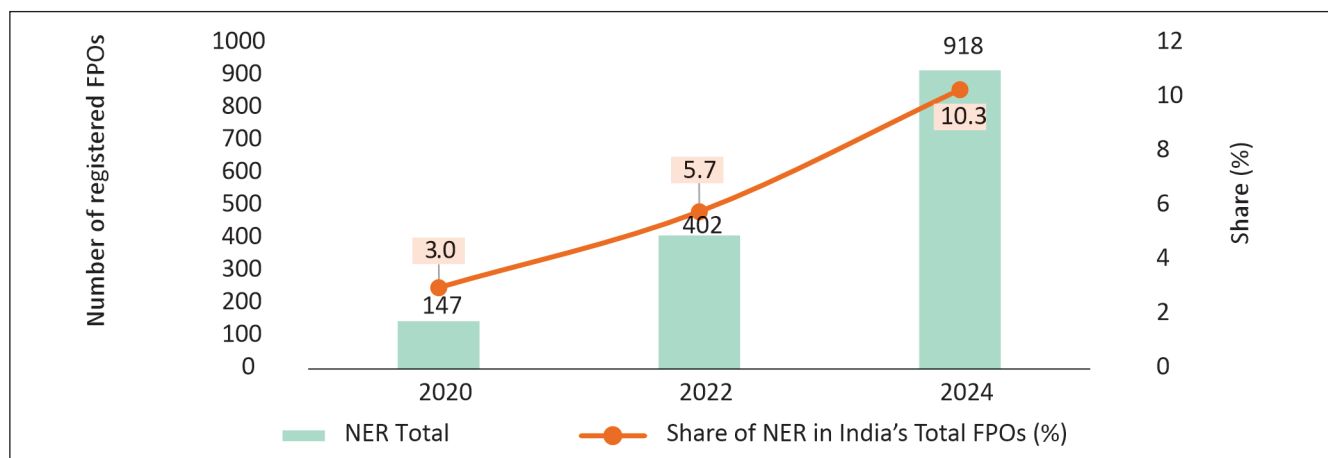
Figure 3.4 represents the number of registered Farmers’ Producer Organizations (FPO). According to the Ministry of Agriculture, Cooperation and Farmers’ Welfare, the number of registered FPOs in the region has increased between 2020 and 2024, from 147 in 2020 to 918 in 2024. In proportional terms, the region’s share in total registered FPOs in the country increased from 3% to 10.3% during the same period. However, it may be noted that not all the registered FPOs are yet functional.

Figure 3.5 shows the existing cold storage capacity in the NER, measured in kilo tonnes (KT). The analysis of cold storage capacity in the region further highlights the infrastructural constraints pertaining to the sector. Between 2017 to 2022 (as per the latest data available), cold storage capacity in the region increased from 232.3 KT in 2017 to 291.8 KT in 2022, recording a growth of 25%. While this growth appears substantial in isolation, its relative contribution at the national level remains negligible. The region accounted for only 0.7% of the total national cold storage capacity in 2017, which marginally increased to 0.8% in 2022. Thus, despite incremental improvements, the region continues to be structurally underequipped.

The limited cold storage capacity in the region imposes structural constraints on the exports of agricultural goods, especially for the perishable commodities like fruits, vegetables, spices, floriculture, fisheries, and dairy products. Cold storage plays a crucial role in export facilitation by reducing post-harvest losses,

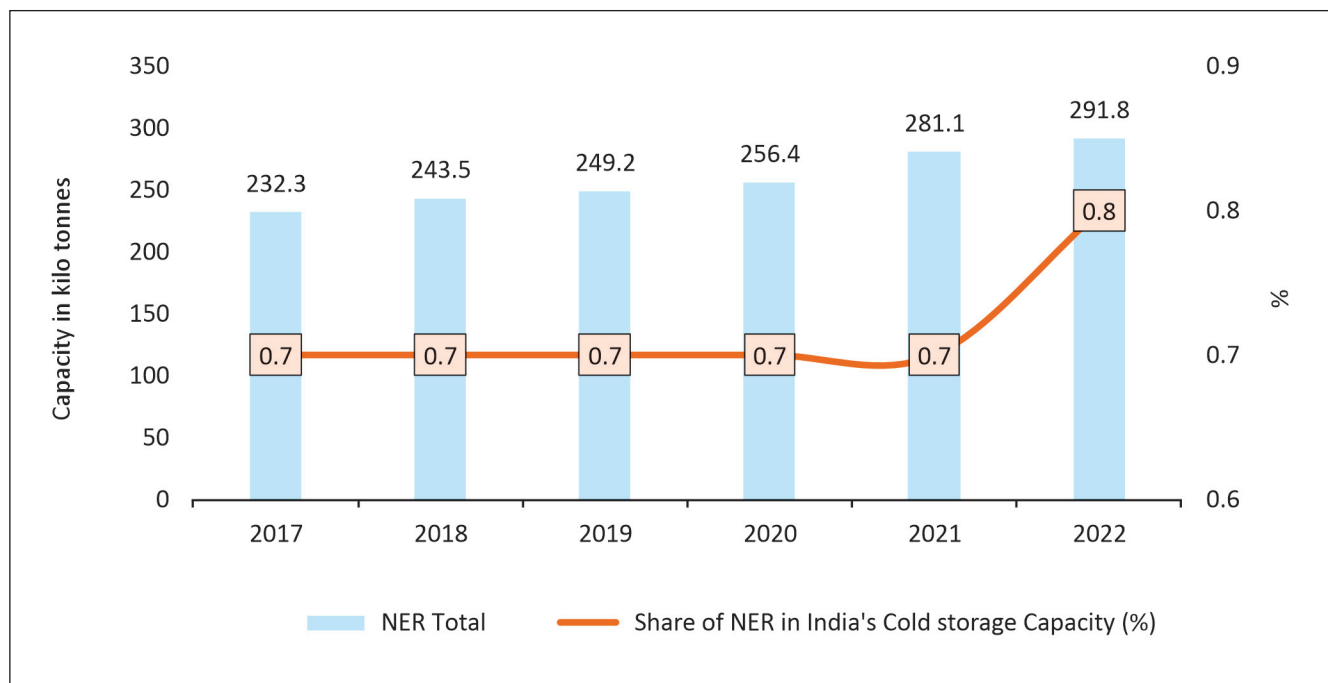
maintaining quality standards, enabling longer transport distances, and ensuring that the product reaches the international market in optimal conditions. In its absence, producers are often compelled to engage in distress sales within local markets, thereby limiting export-oriented commercialisation. Moreover, most of the existing cold storage infrastructure is concentrated in major towns and is operated by institutions like State Warehousing Corporations, Marketing Boards and Apex Cooperative Federations. Such facilities are often geographically distant from production clusters and financially inaccessible to small producers, hence, limiting their utilisation.

Figure 3.4: Number of Registered FPOs in North-Eastern Region (2020-2024)



Source: Farmer Producer Organisations (FPOs), Press Information Bureau (PIB), Exim Bank Research

Figure 3.5: Cold Storage Capacity of North-Eastern Region (2017-2022)



Source: State-wise Cold Storage Capacity, Reserve Bank of India (RBI), Exim Bank Research

Besides infrastructure, the agrarian structure of the region also influences export performance. The region is predominantly characterised by small and marginal producers, with land holdings often below 1-2 hectares.

Agricultural practices are largely subsistence-based and rainfed, with production focused on rice, maize, and other indigenous crops primarily meant for household consumption. Consequently, the marketable surplus available for commercial or export channels remains limited.

Thus, the low export ratio of the region is not only a reflection of inadequate agriculture production, but also a result of infrastructural and institutional constraints that limits the conversion of outputs into exportable surplus.

Measures to Promote Exports of Agriculture and Allied Products from North-Eastern Region

The Government of India has undertaken several proactive measures to encourage exports of agricultural and allied products from the region such as organising capacity building programmes on export awareness across the region, initiating field visits of importers to have symmetrical information about the sustainable cultivation practices undertaken by the producers and export promotion of GI-tagged products. Agriculture and Processed Food Products Export Development Authority (APEDA), Ministry of Commerce and Industry, GOI, in association with the agriculture university in Assam has been undertaking multiple training programmes on pre-harvest and post-harvest management and other research activities for the promotion of exports from the region. It also aims to undertake capacity building programmes for exporters, FPOs, Farmer Producer Companies (FPCs) and the officials of the state government across the region for skill development, training in food processing, and value addition on horticulture products.

Organic and Natural Farming – A Rising Opportunity

The North–Eastern Region of India has tremendous potential in organic and natural farming. Organic farming is a system of agricultural production based on the use of natural processes and resources, without the use of chemical pesticides and fertilisers. The region has also the largest number of organic producers with small holdings largely practicing traditional low input agriculture which is often claimed as organic by default. Despite inherent nutrient deficits and supplementing these to harness higher land, water and crop productivity, low use of synthetic fertilisers at less than 12.0 kilograms per hectare (kg/ha) and chemicals are common in the North-Eastern hill ecosystems.

Table 3.4 shows state-wise consumption of fertilisers in the region. In 2022-23, the total fertiliser consumption was recorded at 180.9 kg/ha, constituting 30.1% of the total consumption of India. The value declined to 161.4 kg/ha in 2023-24, marking a decrease in the percentage to 26.4% of the total fertiliser consumption of the country. Sikkim has been identified as a 100% organic state, having completely phased out chemical fertilisers and pesticides in agricultural production in both the years. The state has continued this trend since 2016. Among the fertiliser consuming states of the region, Nagaland has been identified as the lowest consumer of fertilisers, with only 0.8 kg/ha consumption in 2023-24. It was followed by Arunachal Pradesh (1.2 kg/ha), and Meghalaya (7 kg/ha). In contrast, Assam has been the highest fertiliser consuming state, with 66.6 kg/ha usage of fertilisers in 2023-24.

Table 3.4: State-wise Consumption of Synthetic Fertilisers per Unit of Gross Cropped Area (in kg/ha) for North-Eastern Region

State		2022-23	2023-24
Arunachal Pradesh	N	1.1	1.1
	P ₂ O ₅	–	0.1
	K ₂ O	–	–
	Total	1.1	1.2
Assam	N	44.1	46.6
	P ₂ O ₅	12.2	13.2
	K ₂ O	7.1	6.8
	Total	63.4	66.6
Manipur	N	39.9	30.8
	P ₂ O ₅	10.8	4.5
	K ₂ O	6	2.4
	Total	56.7	37.7
Meghalaya	N	–	5.8
	P ₂ O ₅	–	1.2
	K ₂ O	–	–
	Total	–	7
Mizoram	N	23.6	28.2
	P ₂ O ₅	2.9	0.2
	K ₂ O	0.2	0.1
	Total	26.7	28.5
Nagaland	N	0.5	0.8
	P ₂ O ₅	–	0.02
	K ₂ O	–	–
	Total	0.5	0.8
Sikkim	N	–	–
	P ₂ O ₅	–	–
	K ₂ O	–	–
	Total	–	–
Tripura	N	19.8	14.8
	P ₂ O ₅	9.4	8.7
	K ₂ O	3.3	3.1
	Total	32.5	26.6
NE Region	Grand Total	180.9	161.4
All India	Grand Total	600.3	610.6

Note: N - Nitrogen, P₂O₅ - Diammonium Phosphate, K₂O - Potassium Oxide Consumption of plant nutrients (synthetic fertiliser) per hectare has been worked out on the basis of gross cropped area available for the year 2022-23. The all India data for fertiliser consumption is derived by the adding the consumption numbers for all the regions of the country.

Source: Fertiliser Association of India, Exim Bank Research

For the systematic promotion of organic farming, Government of India has initiated several programmes, including Paramparagat Krishi Vikas Yojana (PKVY), National Programme for Organic Production (NPOP), National Project on Organic Farming (NPOF), and National Mission on Natural farming (NMNF), across India. Specifically for the North-Eastern Region, the Government has implemented the Mission Organic Value Chain Development for Northeastern Region (MOVCDNER) scheme, a sub-mission under National Mission for Sustainable Agriculture (NMSA). The scheme aims to develop certified organic production in a value chain mode to link growers with consumers and to support the development of entire value chain starting from inputs, seeds, certification, to the creation of facilities for collection, aggregation, processing, marketing and brand building initiative.

Box Item 1: Sikkim - World's First 100% Organic State

Sikkim was officially declared as India's first organic state in 2016. In 2018, Sikkim was awarded the UN FAO's Future Policy Gold Award, often referred to as the 'Oscar for Best Policies' in sustainable agriculture. This recognition placed Sikkim on the world map as a leader in organic farming. The seeds of the organic revolution of Sikkim were planted back in 2003, when the state government implemented a future plan for the state's entire agricultural landscape to be chemical-free. The ideas were to promote organic farming to not only protect the environment but also improve people's health and create sustainable livelihoods for farmers.

Sikkim launched its organic mission in 2010. It was not just a policy initiative, but also a comprehensive transformation in the process of how food was cultivated, certified, and marketed. The Government of Sikkim completely phased out the use of synthetic fertilisers and pesticides by 2010, while farmers received training, guidance, and subsidies to support their transition to organic methods. To ensure quality, all the farmlands of the state underwent organic certification under both national and international standards. By 2015, the entire 75,000 hectares of farmland of Sikkim had been converted to certified organic. This shift not only safeguarded the environment but also enhanced farmers' livelihoods by enabling higher prices and access to export markets for organic products, thereby driving economic growth and well-being in the state.

Source: Exim Bank Research



Analysing Trade Potential of North-Eastern Region

With its strategic location and abundant resources, the NER holds significant untapped potential for exports. Despite sharing a large portion of its border with the neighbouring countries, and serving as an important gateway for trade, the region's exports in 2024-25 stood only at US\$ 626.6 million. Exports from the NER, despite showing fluctuations, have increased over the last eight years, from US\$ 497.7 in 2017-18 to US\$ 629.6 in 2024-25. Exports from the region accounted for 0.14% of India's total exports in 2024-25. The existing gap between geographical advantage and actual trade performance highlights the importance of identifying the products, where the region has a Revealed Comparative Advantage (RCA).

Analysing the key products where the region has a comparative advantage and complementing it with the import demand of global trade for these products is necessary for strengthening the trade outflows from the region. Quantification of comparative advantage will help in identification of products where exports from the region have been performing well, and also for those where success has been limited, although opportunities are significant.

Prior to identifying export competitive products from NER, the Study also analyses the Export Preparedness Index (EPI) of the region, highlighting structural and institutional hurdles that might impact trade flows from the region. EPI provides a structured framework to assess how well the States in the region are prepared to drive and enhance their exports.

Export Preparedness Index (EPI) 2024 by NITI Aayog

EPI provides an evidence-based framework to evaluate the strength, resilience, and inclusiveness of subnational export ecosystems. The Index identifies key structural challenges, growth levels, and policy opportunities for enhancing export competitiveness at the State and district levels. The index is based on four broad pillars, namely, export infrastructure, business ecosystem, policy and governance, and export performance. Based on EPI score 2024, Nagaland emerged as the top-performing North-Eastern state, with the highest overall score of 46.4 and an overall rank of 18th. According to the report, Nagaland occupied 3rd position, among the small, North-Eastern states, and union territories, driven by its strong business ecosystem, and policy and governance scores (**Table 4.1**).

Tripura and Assam also performed relatively well, securing an overall rank of 22 and 24, respectively. Tripura scored highest in policy and governance, while Assam scored the highest in export performance. Besides, both the states obtained a balanced score among the remaining pillars. Meghalaya indicated strength in

policy and governance, but the state lagged in infrastructure, while Arunachal Pradesh, Manipur, and Mizoram remained at the lower end of the rankings, reflecting weaker institutional and infrastructural support. In contrast, although Sikkim was placed 4th in the overall rank among all NER states, it scored the highest in export infrastructure, indicating an underutilized logistics network.

Table 4.1: North-Eastern Region’s States’ Pillar-wise Performance in EPI 2024

State	Pillars of EPI 2024				Overall Score	Rank
	Export Infrastructure	Business Ecosystem	Policy and Governance	Export Performance		
Arunachal Pradesh	6.5	13.5	3.0	8.8	31.5	32
Assam	8.2	12.3	10.0	12.4	42.5	24
Manipur	5.8	12.3	3.0	7.2	28.3	35
Meghalaya	5.6	11.9	10.7	9.2	37.5	27
Mizoram	5.7	15.8	3.4	5.5	30.2	34
Nagaland	7.9	17.3	12.6	8.6	46.4	18
Sikkim	8.8	13.2	3.0	8.7	33.8	31
Tripura	7.3	12.0	13.2	10.4	42.8	22

Note: Heat map represents position of each state in the respective pillar of EPI 2024 i.e. higher the score value, greener is the cell. This is opposite with regards to the rank secured by each state i.e. better the rank, greener the cell.

Source: NITI Aayog Export Preparedness Index 2024, Exim Bank Research

Export Competitiveness of North-Eastern Region

For analysing the export competitiveness, the concept of RCA is used. RCA Indices are used to identify categories of exports in which an economy has a comparative advantage by way of comparison of the country’s trade scenario with the world scenario. The basic assumption underlying the concept of revealed comparative advantage is that trade profile reflects the inter-country differences in terms of relative costs as well as non-price aspects. As per Balassa’s (1965) measure, index for country i, commodity j is:

$$RCA_{iju} = (x_{iju}/X_{iu}) / (x_{wju}/X_{wu})$$

Where,

X_{ji} : exports of commodity j from country i

X_i : total exports from country i

X_{jw} : total exports of commodity j from world

X_w : total exports from world

The RCA index ranges from zero to infinity, with 1 as the break-even point. That is, an RCA value of less than 1 means that the country does not have comparative advantage in the product, while a value above 1 indicates that the country has a comparative advantage in the product.

The normalised revealed comparative advantage (NRCA) index has been demonstrated to be capable of revealing the extent of comparative advantage more precisely and consistently than alternative RCA indices

in the literature. NRCA can be defined in the following manner:

$$NRCA_{iju} = (RCA_{iju-1} / RCA_{iju+1})$$

The export competitiveness of the NER, as reflected in the NRCA, has been mapped with the global demand for the products. Based on this mapping, four categories of products have been identified -

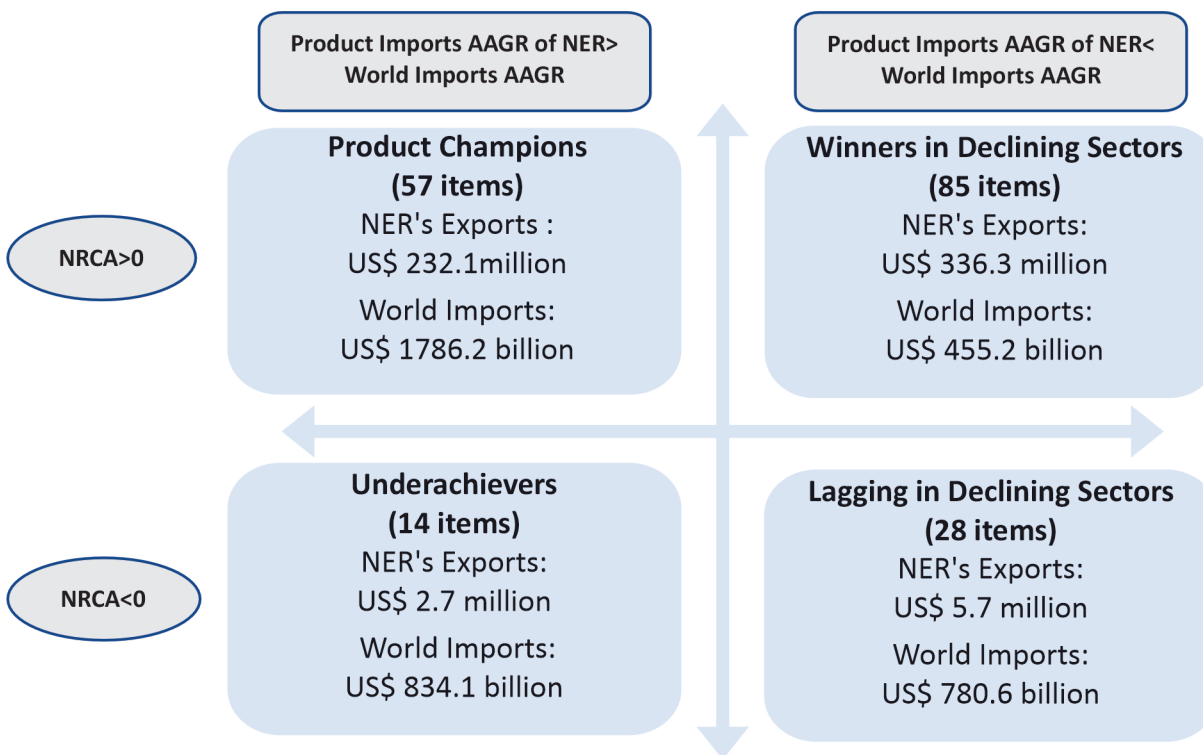
- **Product Champions – Competitive Exports (NRCA > 0); Growing Import Demand (Product Import AAGR > 0):** These products have the maximum potential, as the world demand for these products during 2019 to 2024 has shown robust growth, and the region has a comparative advantage in exports of these products.
- **Underachievers – Exports Not Competitive (NRCA < 0); Growing Import Demand (Product Import AAGR > 0):** The region does not have a comparative advantage in these products, but the import demand for these products has shown positive growth over the period under consideration. The region can strive towards increasing competitiveness in the same.
- **Lagging in Declining Sectors – Exports Not Competitive (NRCA < 0); Weak Import Demand (Product Import AAGR < 0):** The region does not have a comparative advantage in these products, and the sector has registered negative global import growth during the period under consideration.
- **Winners in Declining Sectors – Competitive Exports (NRCA > 0); Weak Import Demand (Product Import AAGR < 0):** The region has a comparative advantage in these products, but the world import demand for these products has been negative.

In the short to medium term, the region can focus on leveraging the opportunities arising in the ‘product champions’ segment, considering that the region already possesses reliable capabilities in the same. In the medium to long term, the region needs to encourage capacity development in the ‘underachievers’ segment. Such a product analysis based on the comparative advantage and import demand of NER’s export products aims to direct policy formulation towards enhancing the region’s export performance by focusing on the identified products.

Product Identification

For the purpose of analysing the export competitiveness of the region, at the 6-digit HS Code level, exports from the region with a minimum export value of US\$ 0.10 million and above have been taken into account for the year 2024. Accordingly, 184 items have been studied with a total value of US\$ 576.8 million that accounted for a share of 97.9% of the region’s total exports in 2024. To calculate the world AAGR of imports, a time period of 6 years, that is, 2019 to 2024 has been covered. Following the above outlined methodology, these products have been classified as below:

Chart 4.1: Product Identification for Exports from North-Eastern Region to World (2024)



Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Out of the total 184 commodities considered at the 6-digit HS Code level, 57 items with exports worth US\$ 232.1 million fall under the category of 'product champions.' These products constituted a share of 39.4% of NER's total exports in 2024 with 'Other petroleum oils and oils obtained from bituminous minerals' (HS 271019) being the largest exported item in the category.

Table 4.2 shows the top product champions of the region as per the highest export values, aggregated at the broader 2-digit HS Code level (Chapter) to help identify the recurring product chapters under this classification. Accordingly, it was observed that in 2024, exports of mineral fuels, oil, waxes and bituminous (HS 27) from the region was the chapter with the highest export value falling under product champions, worth US\$ 149.6 million. The chapter also emerged as the region's most recurring product chapter. It was followed by pharmaceutical products, with an export value equal to US\$ 35.8 million, and the number of export items falling under the chapter aggregation being equal to 2. However, exports of iron and steel (HS 72) from the region, despite having a comparatively smaller export value, included 7 products being exported under the same product category.

Table 4.2: Chapter-wise Categorisation of North-Eastern Region’s Major Product Champions

HS Code	Product Chapter	Export Value (US\$ million)	Number of Identified Products at 6-Digit HS Level
27	Minerals fuels, oils, waxes, and bituminous	149.6	9
30	Pharmaceutical products	35.8	2
12	Oil seeds, miscellaneous grains, medicinal plants, and straw	7.5	2
10	Cereals	7.1	2
33	Oils and resinoids, perfumery, cosmetic or toilet preparations	6.4	3
25	Salt, sulphur, earth and stone, lime, and cement	5.1	3
72	Iron and steel	3.0	7
87	Vehicles other than railway or tramway	2.5	1
19	Preparations of cereals, flour, starch, or milk	2.4	3
09	Coffee, tea, mate, and spices	2.0	2

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

Table 4.3 lists NER’s top ‘underachievers’ as per the highest export value, aggregated at the 2-digit HS Code level. Out of the total 184 commodities considered at the 6-digit HS Code level, 14 items worth US\$ 2.7 million fall under the category of 'underachievers'. These products constitute a share of 0.5% of the total exports from the region in 2024. In 2024 ‘electrical machinery and equipment’ (HS 85) was both the region’s most recurring product chapter in the underachievers category as well as the one with the highest export value. Given that although the import demand for these products is on the rise in the world, but the region is yet to garner export competitiveness in the same, the latter must provide a conducive policy environment and efficient resource allocation to increase its share in the overall export basket of the world.

Table 4.3: Chapter-wise Categorisation of North-Eastern Region’s Major Underachievers

HS Code	Product Chapter	Export Value (US\$ million)	Number of Identified Products at 6-Digit HS Level
85	Electrical machinery and equipment	0.51	3
34	Soaps, waxes, scouring products, candles, modelling pastes, dental waxes	0.46	1
27	Mineral fuels, oils, waxes and bituminous	0.41	2
17	Sugar and sugar confectionary	0.39	2
73	Articles of iron and steel	0.26	1
70	Glass and glassware	0.20	1
21	Miscellaneous edible preparations	0.15	1
72	Iron and steel	0.15	1
87	Vehicles other than railway or tramway	0.11	1
84	Machinery and mechanical appliances	0.11	1

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

In a nutshell, the analysis of NER's trade facilitation environment, potential trade opportunities, and the subsequent mapping of NER's export competitive products to global import demands might enable the optimal utilisation of the strategic advantage in trade that the region offers.

For NER, in particular, identifying its competitive exports in accordance with global import demand will henceforth, assist in tailoring of commodity-specific policy measures, thereby expanding NER's market access and strengthening its integration into global value chains.



Trade Infrastructure and Cross-Border Connectivity

India's North-Eastern Region is central to its Act East Policy, serving as a gateway to both the neighbouring South Asian countries as well as Southeast Asia. States in the region share international borders with five countries namely, Bangladesh, Bhutan, China, Nepal and Myanmar, and are linked to the rest of India only through the Siliguri Corridor, a 22 km highly congested, narrow strip of land. The proximity of the region to India's bordering countries and its general resource abundance necessitates the establishment of a robust trade connectivity ecosystem that can aid the NER in leveraging its unique geographic location and tap into the vast economic opportunities that come along with it.

South Asia is known to be among the world's least integrated regions, with intraregional trade accounting for barely 5.0% of its total trade.¹² High trade and transport costs remain major bottlenecks to deeper regional integration. With NER being geographically positioned uniquely among multiple South Asian countries, strengthening trade connectivity and border infrastructure remains vital for the overall economic upliftment of the region. The region's challenging terrain, characterised by the Eastern Himalayas and vast river systems, makes it even more important to fill in the existing infrastructure gap.

Against this backdrop, NER's cross-border trade flows through land ports and major international trade connectivity initiatives, especially with its neighbouring countries, are analysed.

Land Customs Stations (LCS)

LCSs are the building blocks of India's trade connectivity, serving as land ports to clear goods exported and imported across international borders either by land or inland waterways. Currently, India has a total of 122 LCSs strategically located along India's international borders with 7 countries viz. Afghanistan, Pakistan, China, Myanmar, Bhutan, Bangladesh and Nepal, covering land border crossing points, railway stations and river banks/ports.¹³ Of these, 44 are notified to be located in NER. **Table 5.1** lists NER's state-wise LCS for each bordering country, showing only those which are considered to be functional, excluding those designated as 'border haat' purposes. Accordingly, NER has the highest number of functional, as well as total number of LCSs with Bangladesh, exceeding those bordering other neighbouring states by a large margin. Among these, Meghalaya had the highest number of functional LCS with Bangladesh at 8. Overall, however, it is Assam

¹² A visit to India's busiest integrated border crossing shows need for regional cooperation and connectivity, World Bank Blogs (February 2022)

¹³ Bridging Borders & Connecting Nations, India's Land Customs Stations, Central Board of Indirect Taxes & Customs (CBIC)

which has the highest number of LCSs in all of NER at 9 - 6 at the Bangladesh border and 3 at the Bhutan border. Some of Assam's LCSs include Golakganj, Mankachar, Dhubri Steamerghat, Gelephu and Darranga.

Table 5.1: North-Eastern Region's State-wise Land Customs Stations on Different Borders

State	Arunachal Pradesh	Assam	Manipur	Meghalaya	Mizoram	Nagaland	Sikkim	Tripura	Total LCS per Neighbouring Country
Bangladesh	-	6	-	8	0	-	-	7	21
Bhutan	0	3	-	-	-	-	0	-	3
Myanmar	0	-	1	-	1	-	-	-	2
China	-	-	-	-	-	-	1	-	1
Total LCS in each NER State	0	9	1	8	1	-	1	7	27

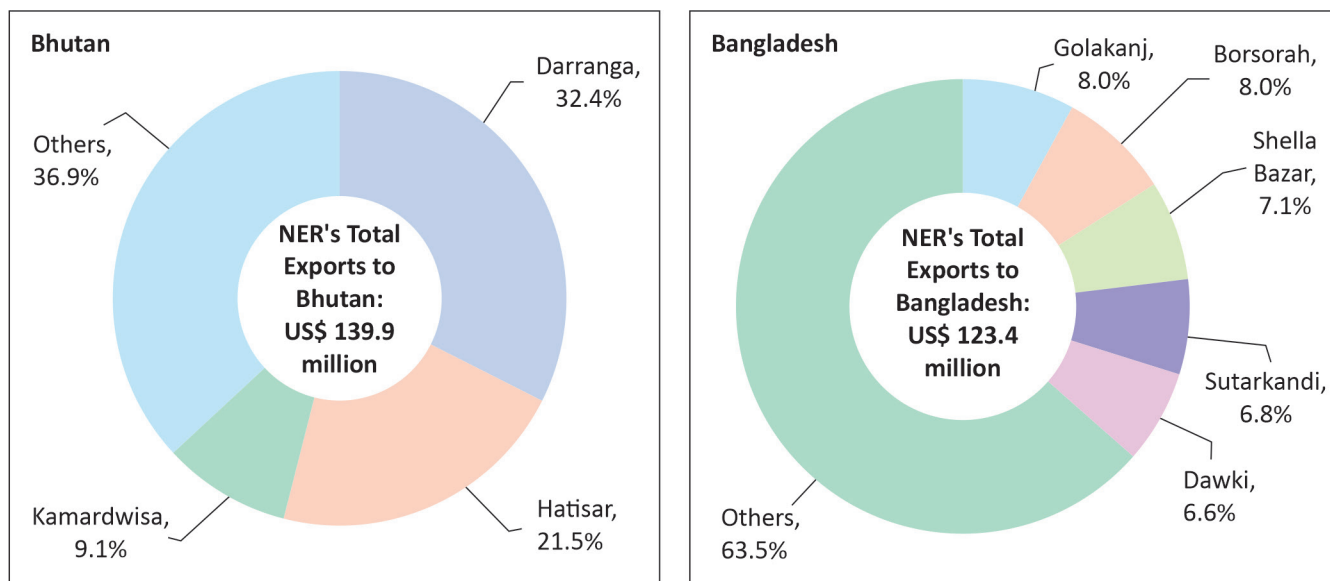
Note: Includes functional LCSs only.

Source: NEC Yearbook 2025, North Eastern Council, Exim Bank Research

Land ports are crucial channels to accelerate trade relations with India's bordering countries like Bhutan and Bangladesh which were also the top destinations for exports originating in NER in 2024-25.

For NER's exports headed to Bhutan in 2024-25, a major share of 63.1% of the region's exports to the country was routed through LCSs in NER, primarily those in Assam (**Figure 5.1**). In the case of Bangladesh, LCSs in NER accounted for a share of 42.4% of the region's total exports there. Notably, majority of the region's exports were routed through land ports in West Bengal at a share of 56.5%.

Figure 5.1: Share of NER's Major Land Custom Stations in India's Border Trade in 2024-25



Source: Directorate General of Commercial Intelligence and Statistics (DGCI&S), Exim Bank Research

Integrated Check Posts (ICPs)

To optimise border trade connectivity and logistics, India has been establishing ICPs which are consolidated facilities that enable the smooth movement of both cargo and passengers. Serving as a one-stop for all trade and associated activities, ICPs provide services like customs processing, immigration clearance, border security, warehouses, quarantine facilities and parking areas, among others.

NER currently houses 5 operational ICPs, namely Agartala and Srimantapur in Tripura, Moreh in Manipur, Sutarkandi in Assam, and Dawki in Meghalaya. All of these ICPs are located at the India-Bangladesh border, except for Moreh, which lies along India's border with Myanmar. In 2024, ICP Sabroom (Tripura) and Darranga (Assam) were also inaugurated.

In 2024-25, exports were recorded in all of NER's ICPs except for Moreh. Goods worth US\$ 17.7 million were exported via the other 4 ICPs, primarily to Bangladesh. Sutarkandi in Assam accounted for the highest share at 47.2% of this total export exiting through ICP facilities, with salt and sulphur being the largest export product (**Table 5.2**). In the same year, Dawki followed close behind, contributing to an export share of 46.4%.

Table 5.2: North-Eastern Region's ICP-wise Exports in 2024-25

ICP	Export Value (US\$ million)	Share of Top Export Products in ICP's Total Exports (%)
Sutarkandi (Assam)	8.3	Salt, sulphur, earths and stone, plastering materials, lime, and cement (63.2%); cereals (15.9%); articles made from stone, plaster, cement, asbestos (15.8%)
Dawki (Meghalaya)	8.2	Salt, sulphur, earths and stone, plastering materials, lime, and cement (35.2%); paper and paperboard, articles of paper pulp, of paper (25.0%); organic chemicals (15.0%)
Srimantapur (Tripura)	1.0	Coffee, tea, mate and spices (69.6%); edible vegetables and certain roots and tubers (17.9%); cereals (6.8%)
Agartala (Tripura)	0.1	Edible fruit and nuts (77.7%); coffee, tea, mate and spices (22.3%)

Source: Directorate General of Commercial Intelligence and Statistics (DGCI&S), Exim Bank Research

ICPs in NER, however, continue to face several operational and structural bottlenecks that deter its potential as enablers of cross-border trade with neighbouring countries (**Figure 5.2**).

Figure 5.2: Challenges at North-Eastern Region's ICPs



Source: A visit to India's busiest integrated border crossing shows need for regional cooperation and connectivity, World Bank (February 2022), Exim Bank Research

Border Haat

The establishment of 'border haats' is another channel in the NER that is used to facilitate cross-border trade with neighbouring countries. These refer to marketplaces along the India-Bangladesh border, designated for the economic transaction of goods on a tax-free basis. Herein, locally produced goods are sold by sellers and buyers who are both from areas within a 5 km radius of the facility. The purchasing limit for the buyer is set at a cap of US\$ 200 per visit, to be paid in their respective local currency. Commodities sold here include inter alia food items, garments, agriculture and household implements, cosmetics, all produced within the said border district. Although the *haats* contribute a negligible amount to the total India-Bangladesh trade, they have had a positive welfare impact on the communities involved.

At present, there are 7 border haats in NER, 5 in Meghalaya, and 2 in Tripura (**Table 5.3**).

Table 5.3: Border Haats in North-Eastern Region

State	Indian Side	Bangladeshi Side
Meghalaya	Kalaichar	Baliamari
	Balat	Lauwaghar (Dalora)
	Bholaganj	Bholaganj
	Nalikata	Saydabad
	Ryngku	Bagan Bari
Tripura	Srinagar	Chhagalnaiya
	Kamalasagar	Tarapur

Source: NEC Yearbook 2025, North Eastern Council

The presence of informal trade was observed to have been predominant in locations permitted and/or proposed for the establishment of border haats owing to factors like demand-supply mismatch in select products, commodity price differentials across borders, absence of connectivity to urban centres and other non-tariff barriers (NTBs).¹⁴ In this regard, border haats have been a key tool in formalising trade along the border. These facilities create employment generation opportunities, and foster people-to-people contact that help to maintain traditional cross-border cultural ties. Border haats have had a positive impact, particularly, on women labour participation, providing female workers with an income source.

However, the COVID-19 pandemic-induced closure of these haats had a detrimental impact on the livelihoods of the local communities.

International Connectivity Projects

Given the geographical placement of NER, strengthening its regional connectivity with neighbouring countries and Southeast Asia remains key to India advancing its Act East Policy, and transforming the region's states into trade and connectivity hubs. Siliguri Corridor, the strategic artery that links NER to the rest of India, is also expected to undergo a connectivity boost to further expand its role in the region's overall connectivity.

¹⁴ India-Bangladesh Border Haats, Facilitating new dimensions in cross-border trade, CUTS International (September 2021)

An underground rail line spanning approximately 36 km has been proposed to connect Dumdangi to Bagdogra, thereby ensuring uninterrupted connectivity along this corridor while minimizing road traffic congestion.¹⁵

Further, select major international connectivity projects are listed in **Table 5.4**. These projects are crucial to fostering trade ties, enhancing people to people movement and strengthening India's strategic influence in the region.

Table 5.4: North-Eastern Region's Key International Trade Connectivity Projects/Agreements

Project	Partner Countries with India	Description
Asian Highway (AH) Network	32 countries across Asia	<ul style="list-style-type: none"> • The creation of such an international network of interconnected highways was first initiated in 1959 to establish a platform for the coordinated development of highways to a minimum standard to promote cross-border trade and tourism. • As a regional transport cooperation initiative, the AH network comprises about 141000 km of standardised roads, passing through 32 member countries. • In India, the Asian Highway (AH) 1 and AH 2 pass through the NER states following the National Highway stretch from the India-Myanmar border at Moreh in Manipur via up to India-Bangladesh border in Meghalaya.
Kaladan Multi-Modal Project (KMTTP)	<ul style="list-style-type: none"> • Myanmar 	<ul style="list-style-type: none"> • The KMTTP, announced in April 2008, provides an alternative route from the India's eastern coast to the landlocked NER states via Myanmar using waterway routes, bypassing the narrow Siliguri Corridor and thus reducing transportation costs by 50% between Kolkata and Aizwal. • As a multi-modal corridor, KMTTP first connects Kolkata to Myanmar's Sittwe Port which is connected to Paletwa by a waterway component of 158 km on the Kaladan river, following which a road component of 109 km then further connects Paletwa to Zorinpui on India-Myanmar border in Mizoram. • At present, although construction of the port and inland water transport components has been completed, the road component of the project is yet to be finalised citing security reasons in Myanmar.

¹⁵ Indian Railways plans new underground rail line near Siliguri to strengthen Northeast connectivity, The Economic Times (February 2026)

Project	Partner Countries with India	Description
India-Myanmar-Thailand Trilateral Highway (IMT-TH)	<ul style="list-style-type: none"> • Myanmar • Thailand 	<ul style="list-style-type: none"> • Envisioned in 2002, this road network spanning 1360 km aims to connect Moreh in Manipur to Mae Sot in Thailand through Myanmar. • India is undertaking the funding and construction of two sections in this highway project namely, the Kalewa-Yagyi road section (120.7 km) and the building of 69 bridges along the Tamu-Kyigone-Kalewa (TKK) road section. • A trilateral Motor Vehicles Agreement to facilitate the movement of cargo and passenger vehicular traffic is also under inter-governmental negotiations between the three nations. • Although the majority of the highway's construction has been completed, progress on the remaining portion is delayed due to security concerns in Myanmar. • Upon completion, the trilateral highway is expected to foster greater regional connectivity by contributing to other initiatives as well like the Asian Highway Network and the BIMSTEC Transport Master Plan.
Bangladesh, Bhutan, India and Nepal (BBIN) Motor Vehicle Agreement (MVA)	<ul style="list-style-type: none"> • Bangladesh • Nepal • Bhutan (Observer) 	<ul style="list-style-type: none"> • The BBIN MVA was signed in June 2015 along the lines of the SAARC MVA, as a part of the larger corridor vision, to facilitate trade and connectivity between India through NER with the neighbouring countries. • This landmark framework agreement is expected to facilitate the smooth cross-border flow of passenger, personal and cargo vehicular traffic between the BBIN countries thereby reducing border traffic congestion. • In 2022, although India, Bangladesh and Nepal finalised a Memorandum of Understanding (MoU) regarding the BBIN MVA, Bhutan, however, chose to opt out owing to concerns related to the environment and infrastructure but remains willing to join in the future.
Protocol on Inland Water Transit and Trade (PIWTT)	<ul style="list-style-type: none"> • Bangladesh 	<ul style="list-style-type: none"> • In place since 1972, and last renewed in 2020, under this Protocol, inland vessels of one country can transit through designated waterway routes of the other country. By providing alternate routes to more conventional land routes like the Siliguri Corridor, this use of waterways is expected to reduce logistic costs. • In 2020, the number of Indo-Bangladesh Protocol (IBP) routes under this Protocol were increased from 8 to 10 along with the addition of new locations to the existing routes. The number of Ports of Call were also increased to 11 and extended Ports of Call in each country increased to 2.

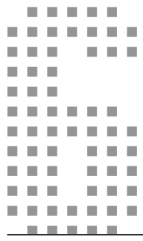
Project	Partner Countries with India	Description
Agartala-Akhaura Railway Link	<ul style="list-style-type: none"> Bangladesh 	<ul style="list-style-type: none"> Inaugurated in November 2023, the rail link spans about 12 km, costing a total of ₹ 972.5 crore, connecting Agartala in Tripura to Akhaura in Bangladesh and thereby, to the latter's broader rail network. This connectivity with Bangladesh benefits both passenger and freight, and fulfils two objectives namely, bypassing the Siliguri Corridor to strengthen NER's connectivity to Kolkata via Bangladesh; and bilateral trade with Bangladesh by providing access to the Port of Chattogram. Once fully operational, the project is expected to reduce travel time between Agartala and Kolkata via Dhaka to 10 hours from the current 31 hours.
Hili-Mahendraganj Transnational Economic Corridor	<ul style="list-style-type: none"> Bangladesh 	<ul style="list-style-type: none"> Proposes to link Hili in West Bengal and Mahendraganj in Meghalaya' Garo Hills via Bangladesh. The project aims to enhance both road and rail connectivity of NER to rest of India, bypassing the congested Siliguri Corridor. This proposed 100 km corridor is expected to cut travel time and costs by 25-60% from Kolkata to the various growth centres of NER such as Tura, Baghmara, Dalu, and Dawki, thereby facilitating greater trade and economic activities Notably, the Indian Railways has also sanctioned a Final Location Survey for a transnational railway project between Hili and Mahendraganj through Bangladesh.
Bhutan-Bodoland-Bay of Bengal (B3) Corridor	<ul style="list-style-type: none"> Bhutan 	<ul style="list-style-type: none"> This proposed corridor aims to strengthen Bhutan's connectivity to the Bay of Bengal through Assam and Meghalaya. Assam's Bodoland and Meghalaya's Phulbari are expected to serve as crucial logistical hubs for the B3 Corridor. The initiative includes the proposed 69 km Kokrajhar – Gelephu line, connecting Assam with Bhutan's Gelephu. This railway line has been declared a Special Railway Project, enabling fast-tracked clearances and land acquisition. Given Phulbari's location on the banks of the Brahmaputra River, the corridor will have access to water cargo, thereby creating a multi-modal ecosystem that integrates road, rail, and riverine transport.

Source: Exim Bank Research

Conclusion

Developing a strong foundation of cross-border connectivity is therefore essential to capitalising on NER's export potential. The aforementioned trade infrastructure and connectivity components, both those operational

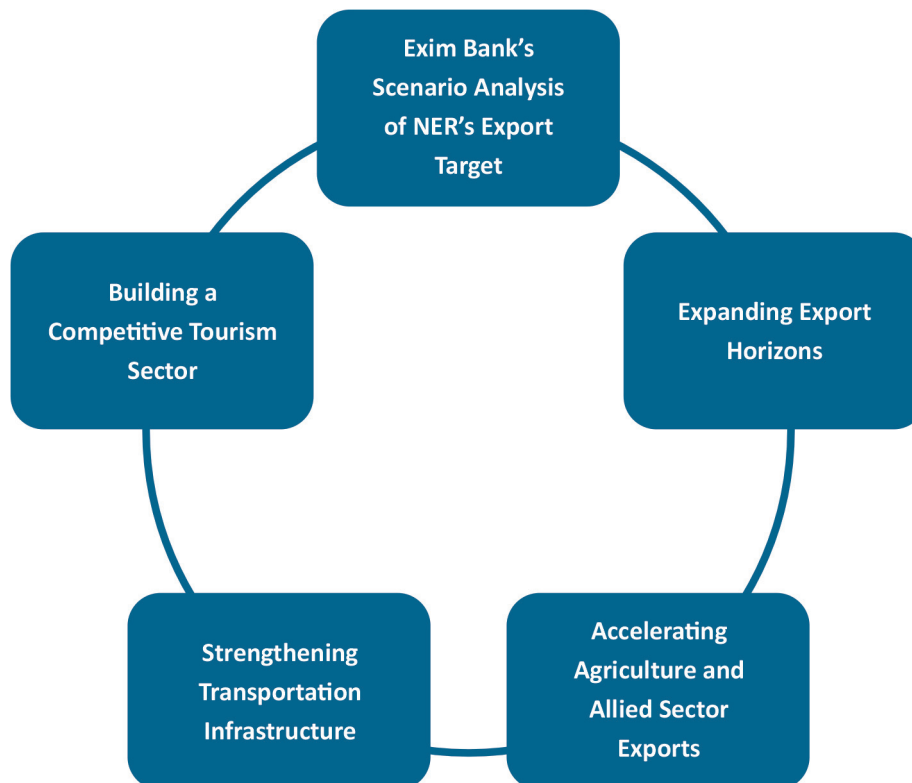
and proposed, offer immense scope to transform the economic environment in the Northeast. The region's landlocked nature and over reliance on the narrow Siliguri Corridor makes routes through Bangladesh offer shorter, cost-effective access to both, global markets and the rest of India. Strengthening connectivity with Myanmar will enable smoother access to ASEAN markets, enabling export growth, investment inflows, and integration into regional value chains, making connectivity a key driver of NER's economic transformation.



Recommendations and Way Forward

The North-Eastern Region remains a marginal player in India's export landscape despite its rich natural resource endowment and strategic geographic location. Among other factors, structural bottlenecks, ranging from inadequate infrastructure and fragmented value chains to limited market access and institutional gaps, have long constrained the region's trade potential. In this regard, a defined export strategy is critical to address existing challenges as well as provide a roadmap to realise the region's export potential and direct it towards a higher economic growth trajectory.

Figure 6.1: Recommendations to Tap into North-Eastern Region's Export Potential



1. Exim Bank’s Scenario Analysis of NER’s Export Target

NER is yet to optimally leverage its export potential as a resource-abundant region, serving as a gateway to Southeast Asia due to its strategic geographic location. The region’s contribution to India’s total merchandise exports has stagnated within the narrow range of 0.1% to 0.2%. With India aiming to achieve a merchandise export target of US\$ 1 trillion by 2030, states across the country must focus on augmenting export growth to support meeting this target. At present, state-wise contribution to India’s exports remains concentrated largely in select few states, further highlighting the growing need to accelerate exports from NER, in accordance with well-defined targets. The export target setting, hence, for India’s North-Eastern Region is an important parameter in the subsequent formulation of its export strategy.

As per the different growth rates considered, Exim Bank’s scenario analysis sets NER’s export target within the range of US\$ 929.2 million to US\$ 1500.0 million by 2029-30, from the present export recorded at US\$ 629.6 million in 2024-25 (**Table 6.1**).

The scenarios analysed to come to this target for NER, are as follows –

Scenario 1: In 2024-25, NER’s exports stood at US\$ 629.6 million, making up a mere share of 0.1% in India’s total exports for the year. From 2020-21 to 2024-25, NER’s exports grew by a CAGR of 6.7%. In a business as usual scenario, assuming exports continue to grow at a CAGR of 6.7%, NER’s exports will reach about US\$ 929.2 million by 2029-30.

Scenario 2: India has set a merchandise export target of US\$ 1 trillion by 2030, for which the country’s exports must grow at a CAGR of 18.0%. If NER’s exports grow at this rate, it will touch US\$ 1695.6 million by 2029-30, almost tripling from its current value of US\$ 629.6 million.

Scenario 3: In a scenario where NER aims to double its exports to reach US\$ 1500.0 million by 2029-30, it must grow at a CAGR of 15.6%. This may lead to a rise in the region’s export share in India’s total exports given that the latter increases at a higher rate.

Table 6.1: Merchandise Export Target for North-Eastern Region (2029-30)

Scenario	Current Exports: 2024-25	Export Target: 2029-30	CAGR
At par with NER's growth rate in last 5 years	US\$ 629.6 million	US\$ 929.2 million	6.7%
At par with India's growth rate to achieve US\$ 1 trillion export target		US\$ 1695.6 million	18.0%
NER's exports double by 2029-30		US\$ 1500.0 million	15.6%

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

2. Expanding Export Horizons

To increase exports from NER, it is essential to map the export competitive products from the region to global import demand, thereby directing policy support and resources to these identified products.

In line with the Revealed Comparative Advantage (RCA) analysis conducted in Chapter 4, to identify NER’s export potential products, it has been observed that 57 commodities could be classified as ‘product champions.’

These products are not only export competitive but also have witnessed robust global import demand during 2019 to 2024, thereby highlighting NER's continued focus towards exporting these items.

It may be observed that the top 10 amongst the 57 identified product champions, alone, accounted for a share of almost 33.4% of NER's total exports in 2023 (**Table 6.2**). In the sector-wise aggregation of NER's product champions, it was observed that other petroleum oils and oils obtained from bituminous minerals was the highest-value export product from the region. At the same time, it is worth noting that items exported from NER like coke and semi-coke of coal or lignite, quartz, and other seeds and fruits used primarily in pharmacy have a smaller but notable share of 0.3%, 0.2%, and 0.1%, respectively, in world exports in 2024. Giving greater thrust to these export-oriented segments may yield significant benefits to the region.

Table 6.2: Top 'Product Champions' of North-Eastern Region

HS Code	Product Description	NER's Export of Items to the World in 2024 (US\$ million)	Share in NER's Total Exports in 2024 (%)	NER's Share in World Exports in 2024 (%)
271019	Other petroleum oils and oils obtained from bituminous mineral	82.3	14.0	0.02
300490	Other medicine put up for retail sale	35.6	6.0	0.01
270400	Coke and semi/coke of coal/lignite/peat w/n agglomerated	28.1	4.8	0.28
270119	Other coal	18.1	3.1	0.03
271012	Light oils and preparations:	9.3	1.6	0.00
100590	Other maize (corn)	6.2	1.1	0.01
271320	Petroleum bitumen	6.0	1.0	0.04
121190	Other seeds and fruits primarily used in pharmacy	4.5	0.8	0.10
330590	Other: hair oil	3.8	0.6	0.03
250610	Quartz	3.2	0.5	0.19

Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Market Diversification

As per the RCA, select products from NER's export basket have been classified as 'winners in declining sectors.' These commodities, despite showing export competitiveness have seen weak global import demand thereby resulting in inefficient resource usage. However, in order to optimally leverage the export potential of these products, market diversification strategies may be followed, thus shifting away from existing export destinations with weak demand to new markets showing robust import demand for the same.

Table 6.3 maps NER's top 10 commodities in the 'winners in declining sectors' product category to top global importers of the product as well as those that show growth rates above the global AAGR of the item. These major importing countries with growing demand offer alternate export markets for NER's commodities which would lead to efficient use of their export potential.

For instance, NER’s top export destinations for limestone flux (HS Code 252100) is not in accordance with the top global importers. The region’s export of this commodity is wholly concentrated in Bangladesh, which receives 100% of the total exports of this commodity, and needs to be diversified. To better realise the product’s export potential, new markets like Netherlands and Taiwan may be targeted that have shown growing demand.

Table 6.3: Export Market Diversification for ‘Winners in Declining Sector’ Category of Products

HS Code	Product description	Export Value (in US\$ millions)	Share in NER's Total Exports in 2024 (%)	Major Export Destinations of NER in 2024	Major Global Importers in 2024	Top Global Importers with Positive and Higher AAGR than World (2019-24)
090240	Other black tea (fermented) and other partly fermented tea	236.3	40.1	UAE (17.9%) UK (17.7%) Russia (11.3%) China (7.9%) Iraq (7.8%)	Russia (8.9%) UK (7.3%) Egypt (7.1%) UAE (5.1%) USA (5.1%)	Egypt (1.5%) UAE (5.8%) USA (1.4%)
090230	Black tea(fermented) and partly fermented tea	17.7	3.0	Iraq (33.9%) USA (19.3%) UAE 17.2%) Russia (6.3%) Albania (5.3%)	USA (8.6%) Iraq (8.6%) Saudi Arabia (5.8%) Australia (4.4%) Netherlands (4.1%)	UAE (5.3%) Iraq (13.0%) Netherlands (7.7%)
841199	Parts of other gas turbines	11.1	1.9	China (86.7%) Singapore (12.0%) Italy (1.1%) Bhutan (0.2%)	USA (13.7%) Singapore (7.2%) Germany (7.1%) Italy (5.8%) Mexico (5.5%)	USA (8.5%) Germany (10.9%) Italy (9.8%) Mexico (8.3%)
252100	Limestone flux, and limestone	8.5	1.4	Bangladesh (100%)	Netherlands (7.4%)* Taiwan (7.3%) Korea (3.5%) Germany (3%) Japan (2.5%)	Netherlands (40.3%) Taiwan (11.4%)

HS Code	Product description	Export Value (in US\$ millions)	Share in NER's Total Exports in 2024 (%)	Major Export Destinations of NER in 2024	Major Global Importers in 2024	Top Global Importers with Positive and Higher AAGR than World (2019-24)
440290	Wood charcoal, whether or not agglomerated	8.4	1.4	Bhutan (100%)	China (8.2%) Saudi Arabia (7.5%) Korea (7%) USA (6.9%) Japan (6.1%)	China (8.7%) Saudi Arabia (12.3%) Korea (1.1%) USA (12.6%)
300420	Other, containing antibiotics	7.3	1.2	France (53.2%) Iraq (12.4%) Nepal (10.7%) Vietnam (9.9%) Yemen (5.7%)	USA (18.8%) China (9.8%) Switzerland (6.7%) Belgium (5.8%) Germany (3.3%)	USA (2.1%) China (0.7%) Belgium (1.9%) Germany (3.9%)
251690	Other monumental or building stone	5.2	0.9	Bangladesh (99.3%) Bhutan (0.7%)	Bangladesh (26.5%) Netherlands (10.3%) Saudi Arabia (10.2%) China (8.5%) France (6.9%)	Netherlands (5.1%) Saudi Arabia (184.4%) China (17.2%)
330499	Other beauty/make up preparations	4.2	0.7	Iraq (42.5%) Bangladesh (31.2%) Malaysia (10.0%) UAE (6.8%) Kenya (1.8%)	China (20.2%) USA (9.2%) Hong Kong (6.2%) UK (3.9%) Germany (3.8%)	USA (11.6%) UK (8.3%) Germany (5.2%)
330290	Other: mixtures of aromatic chemicals and essential oils	2.9	0.5	UAE (53.1%) Egypt (37.4%) Bangladesh (6.9%) Nepal (2.5%)	France (15.9%) UAE (7%) Spain (4.4%) Italy (4.3%) Germany (3.9%)	France (7.4%) UAE (25.7%) Spain (7.9%) Italy (10.1%)

HS Code	Product description	Export Value (in US\$ millions)	Share in NER's Total Exports in 2024 (%)	Major Export Destinations of NER in 2024	Major Global Importers in 2024	Top Global Importers with Positive and Higher AAGR than World (2019-24)
300450	Other medicaments containing vitamins	2.7	0.5	South Africa (48.4%) Nepal (38.2%) Iraq (10.4%) Sierra Leone (0.9%) Kenya (0.6%)	China (8.3%) USA (5.7%) Russia (5.2%) Germany (4.7%) Belgium (4.5%)	China (10.9%) USA (5.9%) Germany (12.9%) Belgium (45.5%)

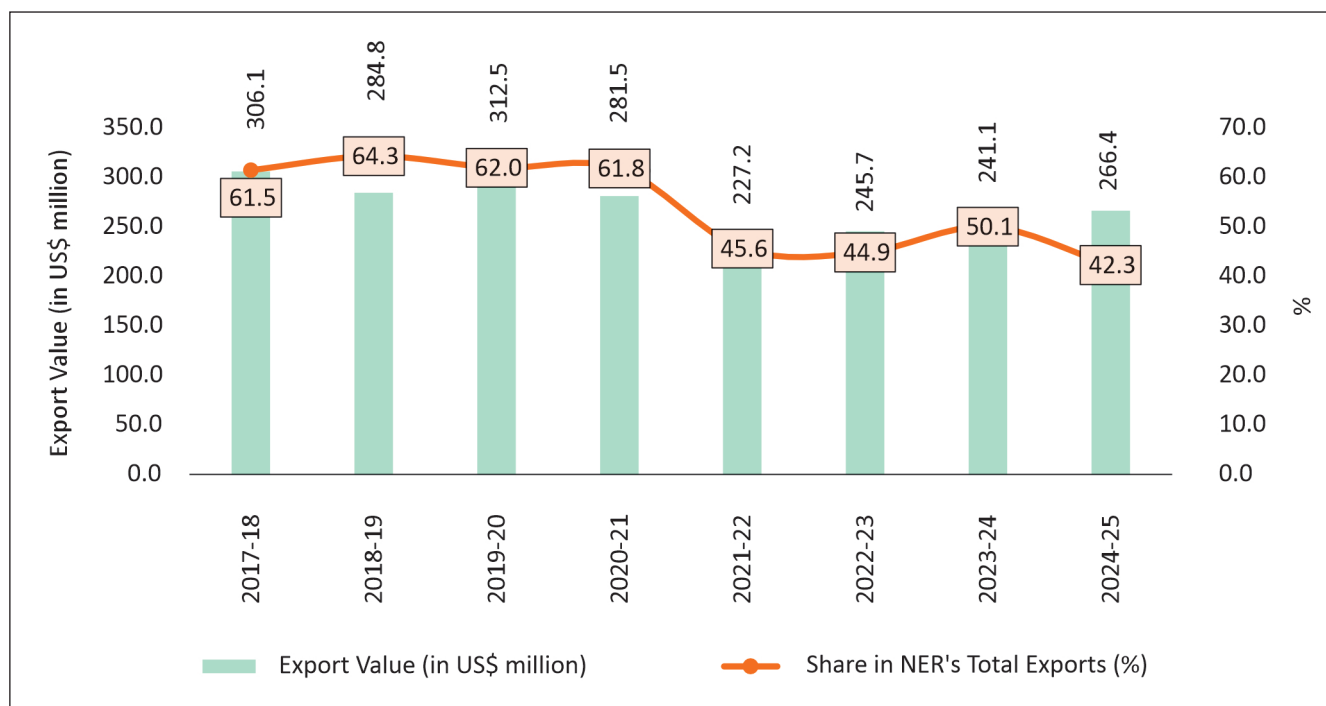
*For HS Code 252100, India being the top importer has been excluded from the list

Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

Product Diversification

NER has immense and largely untapped potential for the export of agriculture and allied products. Moreover, among the existing export of agri-commodities, a significant share of NER's export value is concentrated in tea exports itself. For instance, in 2024-25, the share of tea exports alone constituted 42.3% of the total exports from the region (at Principal Commodity level) (Figure 6.2).

Figure 6.2: Export Trends of Tea from the North-Eastern Region



Source: Directorate General of Commercial Intelligence and Statistics (DGCIS), Exim Bank Research

The export profile of NER reflects a significant degree of market concentration, particularly in the case of tea exports from the region. In 2024-25, nearly 17.6% of the region's total tea exports were directed to the UAE. Besides, the region exported 15.7% of its total tea exports to the UK, followed by 10.7% to Iraq, and 9.4% to Russia. While this reflects strong trade linkages, it also exposes the region's exports to potential vulnerabilities. Heavy reliance on a single market can pose a risk in the event of adverse developments, such as the ongoing geopolitical conflict in West Asia, which might disrupt trade flows and demand conditions. The region can explore expanding its tea exports to other parts of the European region, where there exists a considerable import demand for tea.

In this context, adoption of a more diversified export strategy, both in terms of product and market diversification, can be beneficial for the region. Rather than concentrating its exports around tea, the NER can diversify its product market for key export destinations. For instance, in 2024, the UAE imported 2.4% of its cosmetics and toiletries (HS Code- 330499) from India, and NER has already an established presence for the export of this product. In 2024-25, cosmetics and toiletries accounted for 20.3% of the region's total exports for the same commodity to the UAE. This indicates an opportunity to further diversify and strengthen exports in other high-potential sectors by aligning with the import demand of the destination country.

Creation of North East Export Promotion Council (NEEPC)

The lack of a dedicated, region-specific Export Promotion Council (EPC) creates institutional gaps and trade information asymmetry which can hinder export growth from NER. At present, exporters from the region rely on various product-specific national EPCs or Commodity Boards like the Export Promotion Council for Handicrafts (EPCH) and the Tea Board of India, or regional bodies like the North Eastern Regional Agricultural Marketing Corporation (NERAMAC) to navigate operational requirements and for marketing purposes. In this regard, the creation of a North East Export Promotion Council (NEEPC) can be explored to streamline region-specific export promotion efforts, tailored to the economic landscape of NER. Establishment of such a nodal agency for NER can improve information transparency for all involved stakeholders including producers, exporters, artisans, to name a few, and assist the region to accelerate exports.

The proposed EPC can focus on core operational areas like enabling increased NER participation in domestic and international trade fairs, facilitating buyer-seller meets, organising export-specific capacity building and skill development programmes, providing assistance in adhering to international quality standards, and maintaining an exporter database. In 2024, the North Eastern Council (NEC) in collaboration with North Eastern Development Finance Corporation Limited (NEDFi) launched a digital initiative called North Eastern Region Agri-Commodity E-Connect (NE-RACE) to provide market linkage for agricultural and horticultural products from NER. This initiative can act as a future template to be expanded to NER's other product categories as well. By serving as a one stop shop for all trade information, the proposed EPC can also serve as a bridge between NER's exporters, state governments and the private sector. Further on, the EPC can also act as nodal agency for coordination with the various export facilitation agencies and or house help desks of various national trade bodies, insurance companies, and banks that can provide assistance to expand NER's exporter horizon, both in terms of products and markets.

3. Accelerating Agriculture and Allied Sector Exports

Exim Bank's Analysis for NER's Agri and Allied Sector Export Target

The agriculture and allied sectors continue to be the backbone of NER's economy, acting as the primary source of livelihood for its vast rural population and a significant contributor to the economy's gross value addition. Despite the region's vast natural endowments and agro-climatic zones that support abundant agricultural production, its contribution to India's agri and allied sector exports remains negligible. Over the last 5 years, from 2020-21 to 2024-25, NER's exports from this sector have contracted by a CAGR of (-) 0.2%. This reiterates the need to provide a structured policy direction to revive the region's agri and allied sector exports, optimally utilising its resource abundance for the economic benefit of the local communities. With this objective, scenario-wise targets for NER's agri and allied sector exports have been calculated. Here too, India's aim to achieve US\$ 1 trillion of merchandise exports by 2030 has been considered.

Therefore, as per Exim Bank's scenario analysis, NER's agricultural and allied sector exports target has been set within the range of US\$ 600.0 million to US\$ 671.5 million by 2029-30.

Scenario 1: In 2024-25, exports from the agriculture and allied sector took up a share of about 16.0% in India's total merchandise exports. Assuming this share is maintained against India's overall merchandise export target of US\$ 1 trillion, India's exports from agri and allied sector must grow at a CAGR of 14.7% by 2029-30 to meet its proportionate target. Therefore, in a scenario where NER's agriculture and allied sector exports also grow at this rate to contribute to India's targets, it will reach US\$ 671.5 million by 2029-30 (**Table 6.4**).

Scenario 2: In a scenario where NER aims to approximately double exports from this sector to reach US\$ 600.0 million by 2029-30, it must grow at a CAGR of 12.6%, from the present value of US\$ 294.1 million.

For NER to meet the aforementioned targets, however, several infrastructural and operational growth constraints need to be addressed such as the absence of an optimal number of cold storage facilities, testing laboratories, weak commodity branding and market intelligence, to name a few.

Table 6.4: Agriculture and Allied Sector Export Target for North-Eastern Region (2029-30)

Scenario	Current Exports: 2024-25	Export Target: 2029-30	CAGR
At par with India's growth rate to achieve US\$ 1 trillion export target	US\$ 294.1 million	US\$ 671.5 million	14.7%
NER's exports double by 2029-30		US\$ 600.0 million	12.6%

Source: Directorate General of Commercial Intelligence and Statistics (DGCIIS), Exim Bank Research

Expanding Agro-Processing Clusters

India's North-Eastern Region with its diverse agro-climatic zones produces a wide variety of agricultural produce. The availability of such agricultural production surplus offers the region to process these raw materials into higher value products for further export. Besides benefits realised from scaling up exports of processed agri-products, the food processing industry can also give an impetus to other ancillary sectors in the NER like packaging and transportation. In this regard, NER's unique agri strengths can be utilised to create product specific agro-processing clusters that will support the export of processed food from the

region. Product specific processing clusters will also help create transparent value chains, providing tailor-made infrastructure and linkages to markets with high import demand for the products.

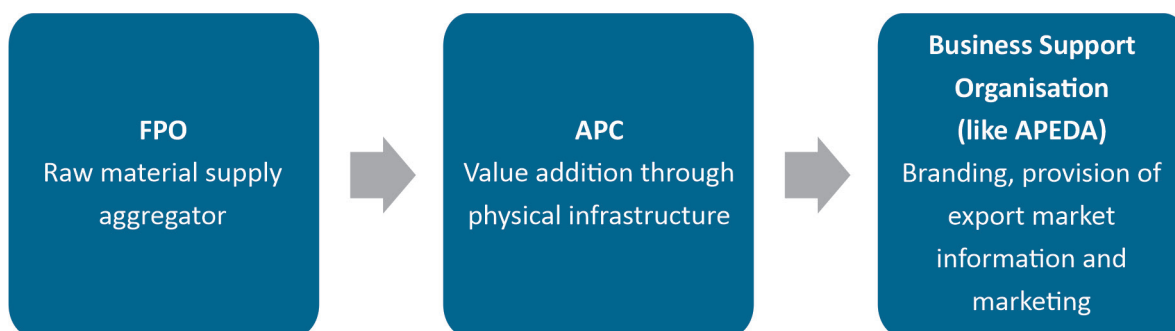
At present, NER receives a higher grant-in-aid at 50% of project cost to set up Agro Processing Clusters (APC) as a component scheme of the Pradhan Mantri Kisan Sampada Yojana (PMKSY) implemented by the Ministry of Food Processing Industries (MoFPI), GOI. However, these infrastructure clusters are not product specific. Given the small and fragmented nature of NER's farm holdings, the product specific food processing clusters may be developed in coordination with FPOs for the respective agricultural product. Agro processing clusters and FPOs can complement each other in functionality, such as the cluster providing the required common facilities including processing units, warehouses and cold storage units, and the FPOs acting as the supply aggregator for the units. Such an integration will close structural gaps faced by each entity while also ensuring finished product exports from the region are not concentrated to specific states but are processed with value addition in states of their origin.

Presently, NER lags behind other states in the formation of FPOs, totalling 77, as compared to export-oriented states like Maharashtra that have a total of 105.¹⁶ Creation of more product specific FPOs will accelerate the onward development of product-based value chains by linking them to processing clusters thereby creating an export-ready ecosystem.

To boost processed food exports, it is also necessary to establish quality testing infrastructure within these clusters and otherwise, to ensure adherence to the product specific non-tariff barriers related to Sanitary and Phytosanitary Measure (SPS), certifications, packaging and labelling requirements, and Technical Barriers to Trade (TBT) pertaining to the identified export markets. For instance, if by leveraging NER's geographic proximity to Southeast Asia, a processed agri commodity is to be exported to ASEAN, the ASEAN General Standard for the Labelling of Prepackaged Food, which is a part of the ASEAN Common Food Control Requirements (ACFCR), has to be adhered to. Within ASEAN too, countries like Indonesia and Malaysia may also require Halal sourcing certification for certain processed food imports. Therefore, such a product defined FPO-anchored processing cluster will allow easier access to product specific export market information from trade promotion bodies and aid backward and forward market linkages.

To accelerate processed food exports from NER and optimally benefit from such an agro-processing cluster and FPO set up, these may be established in close proximity to the ongoing cross-border connectivity projects or ICPs to further lower transportation costs and strengthen linkages to potential markets.

Figure 6.3: Entity-wise Role in Product Value Chain in North-Eastern Region



Source: Exim Bank Research

¹⁶ Small Farmers' Agri-Business Consortium, Ministry of Agriculture, Cooperation and Farmers' Welfare, Government of India

Bolstering Agricultural Exports to ASEAN

The commercial viability of NER's agricultural sector along with the region's geographical proximity to ASEAN, makes NER ideally placed to advance India's Act East Policy through its diverse agricultural produce. To support this objective, the region's major sector-specific exports are mapped against ASEAN's major imports to analyse the extent of convergence.

Accordingly, among the mapped top 10 agricultural products, six of NER's global agricultural export products overlapped with ASEAN's top global agricultural imports in 2025. Of these complementary products, miscellaneous edible preparations (HS 21) were the most traded product, accounting for 2.1% of NER's total global agricultural exports and 6.7% of ASEAN's total global agricultural imports. The product has seen rising import demand in the ASEAN market, growing at a CAGR of nearly 4% from 2021 to 2025. This complementarity presents an opportunity for NER to allocate the necessary resources to increase its export share and meet demand in Southeast Asia.

Within this segment, preparations for sauces and prepared sauces (HS 210390) are among ASEAN's most imported goods. NER's diverse range of chillies, including GI-tagged varieties such as Bhoot Jolokia, Dalle chilli, and Mizo chilli, can be leveraged to develop a strong value chain by producing value-added products such as chilli pastes, oils, sauces, and purees for ASEAN markets.

This is followed by edible fruit and nuts (HS 08), which accounts for 1.6% of NER's global agricultural exports and 7.5% of ASEAN's global agricultural imports, and has grown at a CAGR of 3% over the past five years until 2025. The region holds substantial untapped potential for fruit exports, supported by marketable surplus and GI-tagged varieties. ASEAN's status as a net importer of citrus fruit (HS 0805) presents a clear opportunity. In this regard, NER can focus on expanding exports of oranges, including GI-tagged Arunachal Orange, Tamenglong Orange, and Khasi Mandarin.

Table 6.5: Mapping Complementarity between North-Eastern Region's Global Agricultural Exports and ASEAN's Global Agricultural Imports (2025)

HS Code	Product Description	NER's Global Exports (US\$ mn)	Share in NER's Total Global Agri Exports (%)	HS Code	Product Description	ASEAN's Global Imports (US\$ mn)	Share in ASEAN's Global Agri Imports (%)	CAGR (2021-2025)
TOTAL	All Products	312.0	100.0%	TOTAL	All Products	153172.5	100.0%	3.5%
09	Coffee, tea, maté and spices	273.9	87.8%	10	Cereals	17514.3	11.4%	0.7%
12	Oil seeds and oleaginous fruits	9.1	2.9%	23	Residues and waste from the food industries	13818.4	9.0%	-2.7%
21	Miscellaneous edible preparations	6.4	2.1%	08	Edible fruit and nuts	11485.7	7.5%	3.0%

08	Edible fruit and nuts	5.1	1.6%	15	Animal, vegetable or microbial fats and oils	11316.1	7.4%	1.3%
10	Cereals	4.9	1.6%	03	Fish and crustaceans, molluscs	10575.8	6.9%	5.3%
23	Residues and waste from the food industries	4.3	1.4%	21	Miscellaneous edible preparations	10293.7	6.7%	3.9%
19	Preparations of cereals, flour, starch or milk	2.2	0.7%	02	Meat and edible meat offal	9722.4	6.3%	8.4%
24	Tobacco and substitutes	2.0	0.6%	18	Cocoa and cocoa preparations	9427.2	6.2%	22.6%
04	Dairy produce	1.5	0.5%	04	Dairy produce	8045.5	5.3%	3.5%
03	Fish and crustaceans, molluscs	1.1	0.4%	22	Beverages, spirits and vinegar	7353.0	4.8%	4.3%

Note: Green denotes products that overlap between NER's top global agricultural exports and ASEAN's top global agricultural imports at 2-digit HS Code level. Data included for products from HS 01 to HS 24.

Source: Directorate General of Commercial Intelligence and Statistics (DGCI), ITC Trade Map, Exim Bank Research

To strengthen agricultural exports to ASEAN, government trade bodies such as APEDA may consider establishing ASEAN-dedicated trade desks across the region. These desks can facilitate access to bloc-specific trade information and support exporters through market intelligence dissemination covering tariff concessions, Rules of Origin requirements, and certification processes under the India-ASEAN FTA.

Non-adherence to regulatory requirements such as quality certifications, packaging norms, and Halal certification can impede exports. Accordingly, these desks can provide compliance assistance related to non-tariff measures (NTMs), including sanitary and phytosanitary (SPS) regulations and technical barriers to trade (TBT). Additional functions may include facilitating NER-ASEAN buyer-seller meets and providing advisory support on logistics and connectivity.

The Act East Policy Affairs Department established by the Assam Government can serve as a model for other NER states to strengthen institutional engagement with ASEAN and enhance agricultural trade linkages.

With the ASEAN-India Trade in Goods Agreement (AITIGA) currently under review,¹⁷ India may address regulatory bottlenecks by harmonising quality standards with international benchmarks, simplifying certification processes, and implementing Mutual Recognition Agreements (MRAs) to ease compliance with NTMs.

¹⁷ India hosts 10th Meeting of AITIGA Joint Committee to review ASEAN-India Trade in Goods Agreement, PIB (August 2025)

Box Item 2: Exim Bank Exposure in North-Eastern Region

Exim Bank has extended its support to promote agri-exports from the NER. Under its Grassroots Initiatives for Development (GRID) programme, the Bank provides assistance to the FPOs, Co-operative societies, and to clusters which are engaged in exports of agarwood products in Tripura. Moreover, it has also provided assistance for packaging facilities. Through a combination of soft interventions such as capacity building, training, and design development, alongside hard interventions including infrastructure improvement, equipment support, and technology upgradation, the programme seeks to reinforce local value chains, enhance productivity, and build export readiness across the NER.

Over the last three years, multiple GRID programmes have been sanctioned across seven districts of five North-Eastern States, signalling the Bank's commitment to embedding the programme within the One District One Product-Districts as Export Hubs (ODOP-DEH) initiative and addressing the region's unique developmental needs. Across these states, GRID interventions aim to strengthen high value agriculture, floriculture, and handicrafts, benefitting more than 3,700 farmers and artisans; many of them are women who play a central role in cultivation, postharvest operations, and traditional craft based livelihoods. The Bank has extended the following support in different states of the region:

Nagaland - GRID engagement in Peren and Dimapur is poised to strengthen both the Naga Chillies value chain and the bamboo craft ecosystem, enabling producer groups and artisan communities to shift towards more organised, efficient, and market aligned practices. These actions are intended to stimulate the formalisation of cultivation based and craft based livelihoods and create broader opportunities for income diversification in rural communities. The Bank has provided training to 200 farmers and 10 FPO staff, assisted in providing electricity connection, machinery and equipment, and construction of cold storage units.

Meghalaya - Support to the Lakadong Turmeric value chain is designed to strengthen the district's ability to process, package, and position a globally recognised high curcumin variety, helping growers achieve improved quality consistency, enhance value addition, and integrate more smoothly with organised supply chains.

Mizoram - GRID's support for the Anthurium floriculture segment is directed at improving the production ecosystem through enhancements in cultivation environments, packaging systems, and logistics supported in part by renewable energy linked improvements. These measures aim to help growers, particularly women, adopt more sustainable practices while achieving the quality standards required for premium domestic and export markets.

Sikkim - In Sikkim, interventions in the Large Cardamom value chain are intended to strengthen earlystage processing and collective systems at a time when cultivation continues to revive. By sharpening curing and postharvest capacities, the programme aims to support farmers in remote hill regions to maintain product quality and improve longterm market access.

Tripura - GRID aims to create sectorwide developmental traction in Tripura by strengthening both the agarwood ecosystem in North Tripura and the bamboo craft sector in West Tripura. Through improvements in processing environments, functional infrastructure, and structured skill development, these interventions

are designed to help producer groups and artisans improve product quality and connect more effectively with organised markets for both high value natural resource based products and traditional crafts.

Together, these efforts aim to reinforce the horticulture, floriculture, agriculture, and handicrafts landscape across the NER. By broadening access to improved skills, better production systems, and stronger market pathways, Bank's GRID Programme seeks to equip grassroots producers, including cultivators, growers, craftsmen, and artisans to achieve higher productivity, enhanced value realisation, and deeper participation in domestic and global value chains.

4. Strengthening Transportation Infrastructure

One of the primary challenges faced by the NER in its path of economic development is the lack of adequate infrastructure. For a long time, the region remained relatively isolated from the mainland due to its geographical location, hilly terrain, and limited economic development. This restricted trade, slowed economic progress, and constrained access to essential services, making the region dependent and vulnerable to disruptions.

At present, road connectivity continues to be the dominant mode of transport between NER and the rest of India. Although the railway sector has seen increased investment, several parts of the region are still not fully connected either with one another or with the mainland. According to the Ministry of Civil Aviation, Govt. of India¹⁸ there are only 16 operational airports in the region. Limited air connectivity continues to constrain tourism, trade, and logistics, leading to a heavy dependence on slower and often challenging surface transport.

Poor road conditions and climate-sensitive infrastructure frequently result in delays, product deterioration, and economic losses. Higher transportation costs further increase the prices of the goods. In addition, the region lacks sufficient warehousing and cold storage facilities, which restricts the export potential of the region, particularly for agricultural and other perishable commodities. Construction of reefers container services is also required for transportation of agri and allied products that require temperature control, moreover these reefer services must be strategically placed so that it connects the Inland Container Depots (ICD) to the transit ports, from where the goods are getting exported. Absence of seamless connectivity to ports also hampers the export potential in the region.

Expanding Railway Networks

Over the past decade, railway expansion in the NER has accelerated, which is expected to reshape the regional connectivity, and can lead to opening of new trade corridors and economic opportunities across the border. There is a need to further expedite national highway projects, integrated logistic hubs, and multimodal infrastructure to ensure seamless movement of goods. Projects such as Bairabi Sairang Railway Line, providing railway connectivity from Aizawl to the rest of India's railway network enables swift, and cost-effective movements of goods from the region, enabling the indigenous products of Mizoram to reach new markets. Development of other similar projects like Jiribham-Imphal railway line, connecting Manipur to the mainland, and the ongoing Rangpo new railway line project, connecting West- Bengal to Sikkim, might also prove beneficial to transform the trade and economic environment in the region.

¹⁸ Press Information Bureau, March 2023

The development of dedicated freight transportation is also imperative. In 2026, the inauguration of Assam’s first private rail freight corridor is expected to ease cargo movements between NER and mainland India, lowering transportation cost and improving supply chain reliability. Expanding such private sector participation, initiatives involving Public-Private Partnership (PPP), can further support infrastructure development, especially in remote areas.

Expanding Inland Water Port Networks

In 2024-25, 36.0% of the NER’s exports were directed through the Kolkata Port. According to the estimates of Inland Waterways Authority of India, NER has approximately 1800 km of river routes that can be used by streamers and large country boats. The region has 19 operational National Waterways (NWs), dominated by NW-2 (Brahmaputra) and NW-16 (Barak). The Brahmaputra River hosts several small ports, like Sadiya, Dibrugarh, and Dhubri, which are supported by numerous ferryghats that facilitate passenger and cargo movement, while the Barak River also has established ports and ferry services. In addition, select tributaries of the Brahmaputra and rivers across Tripura, Nagaland, and Mizoram are being explored for navigation potential. Harnessing and upgrading this inland waterway network can significantly reduce logistics costs and open new trade opportunities for the region.

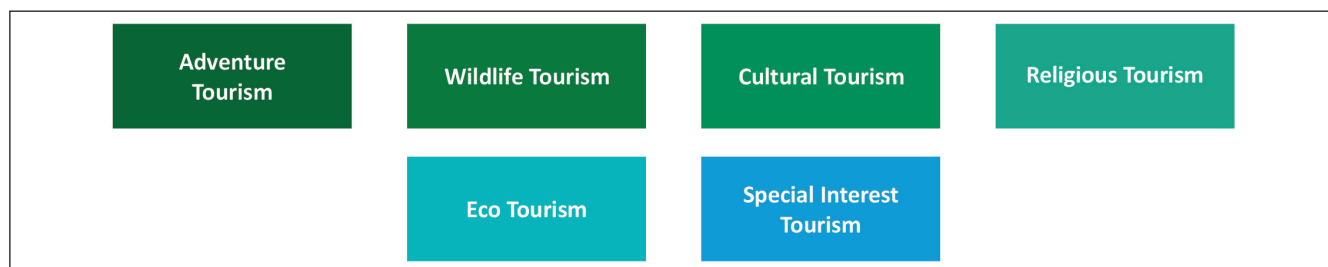
The limited development of inland water transport infrastructure and terminals in the region hinders net exports by significantly increasing logistics costs and transit times. Strengthening inland waterways and expanding transboundary river connectivity can provide an efficient channel for trade, regional integration, and sustainable development, linking the NER to mainland India as well as Southeast Asia.

Given the region’s challenging terrain and complex borders, leveraging its extensive river systems offers a cost-effective and environmentally sustainable alternative for transport. However, this requires sustained investment in modern infrastructure, including digital navigation systems, real-time monitoring, and climate-resilient technologies capable of handling floods, erosion, and sediment shifts. Strengthening cooperation among riparian states is also essential to ensure coordinated and efficient river management.

5. Building a Competitive Tourism Sector

NER is renowned for its breathtaking natural beauty, diverse culture, and rich history. Each state has its own unique identity, reflected in the region’s food, festivals, music, and culture, making it an ideal destination for cultural tourism. NER is also home to iconic landmarks such as the Kamakhya Temple in Assam, one of India’s oldest and most revered shrines, and the living root bridges of Meghalaya, which showcase the ingenuity of local communities. With its cultural richness and distinctive attractions, the region offers visitors a wide variety of tourism experiences.

Figure 6.4: Tourism Opportunities in the North-Eastern Region



Source: Ministry of Development of North-Eastern Region

However, the tourism potential of the NER remains largely untapped. In 2024, NER was the least visited region of India both in terms of Domestic Tourists Visit (DTV) and Foreign Tourist Visit (FTV).¹⁹ In the said year, FTV in NER stood at 0.24 million and DTV stood at 12.8 million, constituting a share of 0.4% and 1.2%, respectively in India's total share, these figures represent modest growth yet pale in comparison to mainstream destinations.

Tourism development in the NER faces several challenges, including poor transportation facilities, limited alternative routes for accessing different states and tourist destinations, weak marketing efforts, and the existing territorial boundary issues both among the states and with neighbouring countries. Another significant hurdle is the multiple permit system required at different levels for entry into the region. In order to simplify the permit process measures such as digitisation of the permit system and implementing single window clearance might prove beneficial to enhance tourism in the sector.

Overcoming Infrastructural Gap

The region's rugged terrain, heavy monsoon rainfall, and historically underdeveloped infrastructure create significant accessibility constraints that hinder tourism growth. Many remote areas remain difficult to access, and transportation networks continue to require substantial investment to ensure reliable, year-round connectivity. These challenges not only affect tourist inflow but also increase travel costs and time, reducing the overall attractiveness of the region. Strengthening multimodal connectivity, including road, rail, and air networks, can be beneficial to unlock the tourism potential of the region.

Community Tourism

Community tourism could be a good attraction for the NER amongst foreigners. For NER region, which is identified for its rich tribal community base, community-based tourism is a way for communities to reclaim agency and ownership in how tourism unfolds in their space and what impact it has on them and the environment. In Nagaland, Meghalaya, and Sikkim, community-based tourism happens alongside the grand festivals and tours. For instance, in Nagaland, the Hornbill Festival brings together various tribes of the state to showcase and preserve their heritage and culture. Community-based eco-tourism for the Mawphlang Sacred Groves in Meghalaya, offers a successful model that can serve as a roadmap for developing similar initiatives across the region.

Diverting the community-based tourism from overcrowded to lesser explored places in the region might encourage the same. Introduction of a regional community-based tourism scheme, which focuses on sustainable community mobilisation planning by increasing the participation ratio of different communities, can also be considered. Other potential measures to improve the prospects for community-based tourism in the region include resource mapping through documenting cultural and natural assets, local capacity building, business skill development training, infrastructural developments, and digital promotions.

¹⁹ India Tourism Data Compendium 2025, Ministry of Tourism

Annexure

Top 10 'Product Champions' of North-Eastern Region

HS code	Product Description	NER's Export of Items in 2024 (US\$ million)	Share in NER's Total Exports in 2024 (%)
271019	Other petroleum oils and oils obtained from bituminous mineral	82.3	14.0
300490	Other medicine put up for retail sale	35.6	6.0
270400	Coke and semi/coke of coal/lignite/peat whether or not agglomerated	28.1	4.8
270119	Other coal	18.1	3.1
271012	Light oils and preparations	9.3	1.6
100590	Other maize (corn)	6.2	1.1
271320	Petroleum bitumen	6.0	1.0
121190	Other: seeds	4.5	0.8
330590	Other: hair oil	3.8	0.6
250610	Quartz	3.2	0.5

Top 10 'Underachievers' of North-Eastern Region

HS code	Product Description	NER's Export of Items in 2024 (US\$ million)	Share in NER's Total Exports in 2024 (%)
340250	Preparations put up for retail sale	0.46	0.08
270112	Bituminous coal whether or not pulverised but not agglomerated	0.30	0.05
730890	Other structures and parts of structures	0.26	0.04
851713	Smartphones	0.24	0.04
701090	Other articles for conveyance or packing of goods	0.24	0.03
170490	Other sugar confectionary not containing cocoa	0.19	0.03
170199	Sugar refined not containing flavouring or colouring matter	0.19	0.03

HS code	Product Description	NER's Export of Items in 2024 (US\$ million)	Share in NER's Total Exports in 2024 (%)
853710	Bords etc for a voltage<=1000 volts	0.16	0.03
210111	Extracts essences and concentrates of coffee	0.15	0.03
721070	Products painted, varnished or coated with plastics	0.15	0.02

Top 10 'Winners in Declining Sectors' of North-Eastern Region

HS code	Product Description	NER's Export of Items in 2024 (US\$ million)	Share in NER's Total Exports in 2024 (%)
090240	Other black tea (fermented) and other partly fermented tea	236.3	40.1
090230	Black tea(fermented) and partly fermented tea	17.7	3.0
841199	Parts of other gas turbines	11.1	1.9
252100	Limestone flux; limestone and other calcareous stone	8.5	1.55
440290	Other	8.4	1.4
300420	Other, containing antibiotics	7.3	1.2
251690	Other monumental or building stone	5.2	0.9
330499	Other beauty or make up preparations	4.2	0.7
330290	Other: mixtures of aromatic chemicals and essential oils	2.9	0.5
300450	Other medicaments containing vitamins	2.7	0.5

Top 10 'Lagging in Declining Sectors' of North-Eastern Region

HS code	Product Description	NER's Export of Items in 2024 (US\$ million)	Share in NER's Total Exports in 2024 (%)
870899	Other parts and accessories" for motor vehicles of headings 8701–8705"	0.6	0.11
840991	Parts suitable for use solely or principally with spark-ignition internal combustion	0.5	0.09
401110	New pneumatic rubber tyres for motor cars (including station wagons and racing cars)	0.4	0.07
392690	Other articles of plastics	0.4	0.07
300432	Medicaments containing corticosteroid hormones	0.3	0.05
851220	Other lighting or visual signalling equipment	0.2	0.05
870830	Brakes and servo-brakes; parts thereof	0.2	0.04
610910	T-shirts etc of cotton	0.2	0.04
961900	Sanitary towels (pads) and tampons, napkins	0.2	0.03
848210	Ball bearings	0.2	0.03

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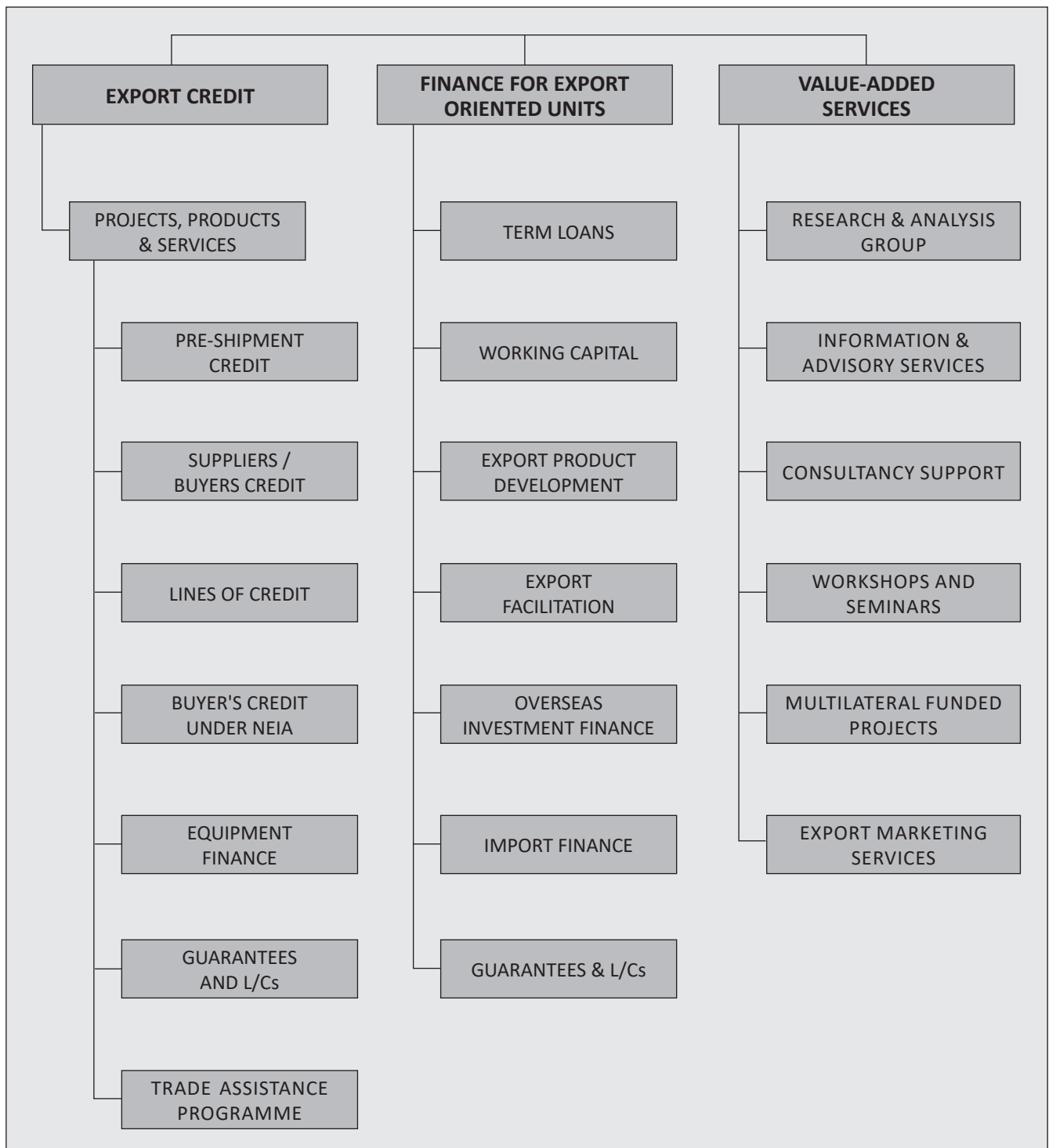
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