



# Analysing India's Export Strengths: An RCA-Based Assessment of Top Merchandise Exporting States (FY2018–FY2025)

P. PREETHI<sup>1</sup>, and S. A. JYOTHI RANI<sup>2</sup>

<sup>1</sup>Researcher, Department of Statistics, Osmania University, Hyderabad, India

<sup>2</sup>Professor, Department of Statistics, Osmania University, Hyderabad, India

Emails: 1. preethipatil24@gmail.com 2. jyothi.rani@osmania.ac.in

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**Abstract:** India's export landscape is shaped by distinct regional strengths, each contributing uniquely to the country's trade portfolio. This study employs the Revealed Comparative Advantage (RCA) framework to analyse the export competitiveness of the top 10 merchandise-exporting states from FY2018 to FY2025. Using data from the Niryat Portal, the research calculates RCA indices across a wide range of commodity groups, identifying established and emerging export-strength sectors. The findings highlight West Bengal and Andhra Pradesh as the most diversified sectors with RCA >1, while states like Telangana and Odisha exhibit focused specialisation in high-performing industries such as pharmaceuticals and minerals, respectively. The study not only maps regional export patterns but also sheds light on structural vulnerabilities and potential for export diversification. The insights serve as a foundation for strategic trade policy formulation, emphasising the need for state-specific interventions to bolster India's global trade position.

**Key words:** Revealed Comparative Advantage (RCA), Merchandise Exports, Indian States, Export Competitiveness

**JEL Classification:** A10, A19, O20, O24



## Introduction

India's role in global trade has witnessed significant evolution over the last decade, driven by both traditional exports and the gradual emergence of high-value sectors. Understanding the comparative strengths of India's regions is crucial for designing targeted export strategies and industrial policies. The Revealed Comparative Advantage (RCA) framework, as introduced by Balassa (1965), serves as a powerful tool to assess a region's competitiveness in various commodities relative to others. While several studies have applied RCA at the national level, limited attention has been paid to interstate comparative performance within India.

This study aims to bridge that gap by analysing the RCA of India's top 10 merchandise-exporting states between FY2018 and FY2025. The objectives are to evaluate the overall trend of India's merchandise exports, rank states by export performance, compute state-wise RCA across major commodities, and identify both strongholds and emerging sectors. By doing so, the study not only sheds light on each state's export dynamics but also provides actionable insights for regional development and export diversification. With merchandise trade becoming increasingly pivotal in economic planning, such state-level analyses are instrumental in crafting nuanced and data-driven trade policies.

## Literature Review

The concept of comparative advantage has been central to international trade theory, with Ricardo's classical model laying the foundation for the notion that countries should specialise in goods they can produce more efficiently. Balassa (1965) extended this idea by proposing the **Revealed Comparative Advantage (RCA)** index, which uses export data to empirically assess comparative advantage. Since then, RCA has become a widely accepted tool in empirical trade analysis due to its simplicity and robustness.

Numerous studies have utilised RCA to evaluate national-level export competitiveness. Vollrath (1991) refined Balassa's measure by proposing alternatives such as the Revealed Symmetric Comparative Advantage (RSCA) to address some of its limitations, particularly in comparing negative and positive values. Hinloopen and van Marrewijk (2001) applied the RCA index across countries and commodities to investigate specialisation patterns and suggested that RCA is a reliable indicator of sectoral competitiveness.

In the Indian context, several researchers have examined the country's export dynamics using RCA. Batra and Khan (2005) analysed India's trade with SAARC countries and found that India's export basket has gradually shifted from primary commodities to manufacturing and value-added products. Similarly, Veeramani (2009) highlighted India's increasing comparative advantage in skill- and capital-intensive sectors such as pharmaceuticals, software, and engineering products. However, these analyses have predominantly remained at the national level.

State-level export performance in India has been studied in a more limited fashion. Reports by institutions like the **Export-Import Bank of India (2021)** and the **NITI Aayog** have acknowledged the importance of decentralising export promotion strategies, noting that states differ significantly in their industrial structure, policy support, and infrastructure quality. A few academic studies (e.g., Mukherjee & Ghosh, 2017) have analysed the export performance of Indian states, but these have largely focused on descriptive trade volumes rather than comparative advantage.



This study contributes to the existing literature by applying the RCA framework at the **state level**, an approach that is relatively underexplored in Indian trade analysis. By identifying commodity-wise RCA for India's top 10 merchandise-exporting states, this research bridges the gap between national-level competitiveness analysis and regional policy planning. It also adds value by highlighting emerging sectors nearing the RCA threshold, offering a forward-looking perspective on potential growth areas.

## Objectives of the Study

The primary objective of this study is to assess the export competitiveness of Indian states using the Revealed Comparative Advantage (RCA) framework. Specifically, the study aims to:

- Examine the overall trend of India's merchandise exports during the period FY2018 to FY2025, identifying key fluctuations and growth patterns.
- Identify the top 10 Indian states based on their average merchandise export performance over the FY2018–FY2025 period.
- Compute commodity-wise RCA values for the top 10 exporting states to assess their relative export strengths within India's overall trade structure.
- Identify emerging sectors with near-threshold RCA values ( $0.8 \leq RCA \leq 1$ ) that have the potential to develop into competitive export segments in the near future.
- Conduct a comparative interstate analysis to evaluate diversification, sectoral dominance, and vulnerability to export concentration across the top exporting states.

## Research Methodology

This study employs the Revealed Comparative Advantage (RCA) index to conduct a comparative analysis of the top 10 merchandise-exporting states in India. The RCA index, originally proposed by Balassa (1965), is a widely used metric to assess a region's relative export performance in specific commodity categories.

Traditionally, the RCA index is calculated as a country's share of global exports of a particular commodity divided by its share in total global exports. In this study, the RCA index is adapted to the sub-national level and is defined as follows:

$$RCA_{ij} = \frac{X_{ij}/X_i}{X_{cj}/X_c}$$

Where:

- $X_{ij}$ : Exports of commodity  $j$  by state  $i$
- $X_i$ : Total exports by state  $i$
- $X_{cj}$ : Total exports of commodity  $j$  by India
- $X_c$ : Total merchandise exports of India

An RCA value greater than 1 implies that state  $i$  has a comparative advantage in commodity  $j$  relative to other Indian states. The study uses export data from the Niryat Portal, Government of India, covering the fiscal years FY2018 to FY2025. **For FY2025, data is included up to February due to the unavailability of March data at the time of writing.** The analysis identifies both strong and emerging sectors across states, based on average RCA values over the selected period.



## Results and Discussions

### India's Merchandise Exports Trend (FY2018 to FY2025)

India's merchandise exports exhibited a Compound Annual Growth Rate (CAGR) of 3.86% over the period FY2018 to FY2025 (up to February). Starting at USD 303,526 million in FY2018, exports rose steadily until FY2020, followed by a significant dip in FY2021—likely a result of the global economic disruptions caused by the COVID-19 pandemic. A strong recovery was observed in subsequent years, with exports peaking at USD 447,460 million in FY2023. By February FY2025, exports had reached USD 395,629 million, indicating a projected year-end figure slightly below the FY2023 peak. Despite short-term volatility, India's merchandise export performance shows a resilient and upward trend.

**Fig.1. India's Merchandise Exports Trend (FY2018 to FY2025)**

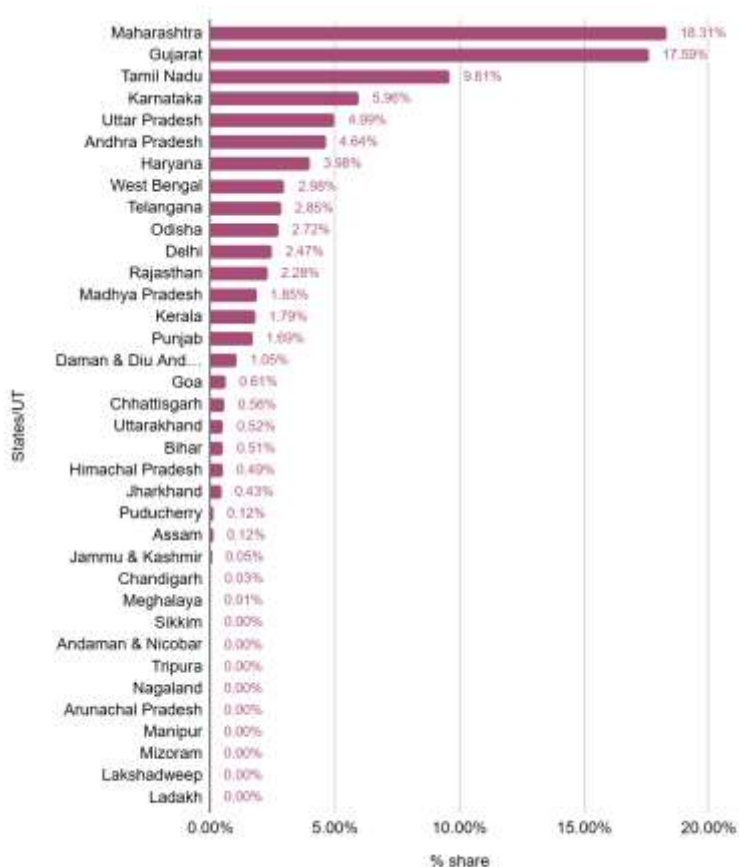


### Few States, Major Stakes: State-wise Share in India's Merchandise Exports (FY2018–FY2025)

An analysis of the average export between FY2018 to FY2025 contribution by states reveals a highly concentrated distribution of export activity. Maharashtra leads with an average share of 18.31% in total exports, followed closely by Gujarat at 17.59%. Tamil Nadu ranks third with a 9.61% share, reflecting its strong industrial base. Karnataka (5.96%), Uttar Pradesh (4.99%), and Andhra Pradesh (4.64%) are also key contributors. States like Haryana, West Bengal, Telangana, and Odisha contribute between 2.5% and 4% each. In contrast, several smaller states and union territories, including Meghalaya, Sikkim, and many northeastern states, showed minimal or no contribution to merchandise exports during the study period. These findings underscore the regional disparity in India's export ecosystem, driven largely by differences in industrial infrastructure and sectoral specialisation.



**Fig. 2. State's Share of Total India's Merchandise Exports between (FY2018–FY2025)**



### Commodity Wise Revealed Comparative Advantage Of Top 10 Indian States

The Revealed Comparative Advantage (RCA) was calculated for the top 10 Indian states, which collectively contribute 73.62% to India's total merchandise exports. This group of states, therefore, represents the dominant share of the nation's export performance. The analysis includes Maharashtra, Gujarat, Tamil Nadu, Karnataka, Uttar Pradesh, Andhra Pradesh, Haryana, West Bengal, Telangana, and Odisha. The RCA values were computed for each state across multiple commodity groups, and the findings for each state are discussed in detail.

#### Maharashtra

The Revealed Comparative Advantage (RCA) analysis for Maharashtra during the period FY2018 to FY2025 underscores the state's strong and increasingly diversified export profile. The number of commodity sectors with an RCA greater than 1 rose from 6 in FY2018 to 12 in FY2025, reflecting a notable enhancement in Maharashtra's competitive position across a wider range of merchandise exports. The state demonstrates a pronounced comparative advantage in key sectors such as Gems and Jewellery (average RCA: 3.10), Fruits and Vegetables (2.20), Cereal Preparations and Miscellaneous Processed Items (1.61), and Engineering Goods (1.16), all of which consistently recorded RCA values above 1 throughout the study period. Furthermore, sectors like Drugs and Pharmaceuticals and Meat, Dairy, and Poultry Products also exhibited stable average RCA values above 1, highlighting the state's strengths in both industrial and agro-processing domains.

In addition, certain segments such as Man-Made Yarn/Fabs./Madeups Etc., Plastic and Linoleum, Handicrafts Excluding Hand-Made Carpet, and Organic and Inorganic Chemicals have shown improved RCA values in recent years, suggesting emerging potential for future growth. Overall, the trend reveals that Maharashtra is not only maintaining its dominance in traditional export sectors but is also progressively expanding its export base—an encouraging sign for long-term trade resilience and strategic export development.



**Table 1: Commodity-Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Maharashtra**

| Commodity group                                      | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | AVERAGE RCA |
|------------------------------------------------------|------|------|------|------|------|------|------|------|-------------|
| Carpet                                               | 0.10 | 0.07 | 0.11 | 0.11 | 0.08 | 0.08 | 0.09 | 0.09 | 0.09        |
| Cashew                                               | 0.01 | 0.01 | 0.02 | 0.04 | 0.04 | 0.03 | 0.06 | 0.09 | 0.04        |
| Ceramic Products And Glassware                       | 0.29 | 0.34 | 0.32 | 0.28 | 0.33 | 0.34 | 0.32 | 0.37 | 0.32        |
| Cereal Preparations And Miscellaneous Processed Item | 1.47 | 1.55 | 1.63 | 1.57 | 1.52 | 1.57 | 1.71 | 1.87 | 1.61        |
| Coffee                                               | 0.06 | 0.08 | 0.07 | 0.11 | 0.09 | 0.10 | 0.11 | 0.17 | 0.10        |
| Cotton Yarn/Fabs./Madeups, Handloom Products Etc.    | 0.58 | 0.65 | 0.73 | 0.75 | 0.73 | 0.81 | 0.83 | 0.83 | 0.74        |
| Drugs And Pharmaceuticals                            | 1.02 | 0.94 | 0.98 | 0.93 | 1.04 | 1.07 | 1.12 | 1.12 | 1.03        |
| Electronic Goods                                     | 0.85 | 0.80 | 0.71 | 0.74 | 0.77 | 0.70 | 0.69 | 0.63 | 0.74        |
| Engineering Goods                                    | 1.05 | 1.09 | 1.09 | 1.00 | 1.14 | 1.30 | 1.37 | 1.28 | 1.16        |
| Fruits And Vegetables                                | 1.80 | 1.87 | 1.89 | 1.91 | 2.34 | 2.55 | 2.70 | 2.54 | 2.20        |
| Gems And Jewellery                                   | 2.87 | 3.12 | 3.05 | 3.58 | 2.98 | 3.10 | 3.05 | 3.06 | 3.10        |
| Handicrafts Excl. Handmade Carpet                    | 1.08 | 0.77 | 0.82 | 0.81 | 0.85 | 0.86 | 1.68 | 1.02 | 0.99        |
| Iron Ore                                             | 0.03 | 0.05 | 0.06 | 0.06 | 0.06 | 0.13 | 0.18 | 0.09 | 0.08        |
| Jute Mfg. Including Floor Covering                   | 0.03 | 0.02 | 0.03 | 0.02 | 0.01 | 0.02 | 0.04 | 0.03 | 0.02        |
| Leather And Leather Manufactures                     | 0.15 | 0.14 | 0.14 | 0.16 | 0.13 | 0.15 | 0.15 | 0.13 | 0.14        |
| Man-Made Yarn/Fabs./Madeups Etc.                     | 0.92 | 0.87 | 0.88 | 0.89 | 0.93 | 1.16 | 1.22 | 1.16 | 1.00        |
| Marine Products                                      | 0.42 | 0.44 | 0.43 | 0.38 | 0.45 | 0.51 | 0.52 | 0.53 | 0.46        |
| Meat, Dairy And Poultry Products                     | 0.94 | 0.88 | 1.14 | 1.03 | 1.32 | 1.43 | 1.34 | 1.45 | 1.19        |
| Mica, Coal And Other Or Minerals Including Processed | 0.04 | 0.05 | 0.07 | 0.05 | 0.06 | 0.08 | 0.07 | 0.07 | 0.06        |
| Oil Meals                                            | 0.84 | 0.57 | 0.36 | 0.61 | 0.72 | 0.90 | 0.79 | 1.09 | 0.73        |
| Oil Seeds                                            | 0.72 | 0.81 | 0.62 | 0.48 | 0.38 | 0.33 | 0.29 | 0.34 | 0.50        |
| Organic and Inorganic Chemicals                      | 0.85 | 0.83 | 0.88 | 0.90 | 0.96 | 1.08 | 1.14 | 1.17 | 0.98        |
| Other Cereals                                        | 0.90 | 0.77 | 0.63 | 0.47 | 0.55 | 0.66 | 0.66 | 1.09 | 0.72        |





|                                 |      |      |      |      |      |       |       |       |      |
|---------------------------------|------|------|------|------|------|-------|-------|-------|------|
| Others                          | 0.69 | 0.83 | 0.85 | 0.91 | 1.15 | 1.25  | 0.85  | 0.80  | 0.92 |
| Petroleum Products              | 0.15 | 0.13 | 0.18 | 0.16 | 0.14 | 0.10  | 0.11  | 0.13  | 0.14 |
| Plastic And Linoleum            | 0.84 | 0.75 | 0.84 | 0.86 | 0.97 | 1.08  | 1.16  | 1.15  | 0.96 |
| Ready-made garments of textiles | 0.40 | 0.42 | 0.42 | 0.47 | 0.52 | 0.44  | 0.50  | 0.50  | 0.46 |
| Rice                            | 0.21 | 0.25 | 0.27 | 0.39 | 0.38 | 0.47  | 0.48  | 0.47  | 0.36 |
| Spices                          | 0.68 | 0.52 | 0.55 | 0.61 | 0.63 | 0.68  | 0.67  | 0.83  | 0.65 |
| Tea                             | 0.10 | 0.09 | 0.12 | 0.18 | 0.17 | 0.21  | 0.26  | 0.26  | 0.17 |
| Tobacco                         | 0.38 | 0.37 | 0.38 | 0.37 | 0.40 | 0.28  | 0.24  | 0.27  | 0.34 |
| No. of Sectors with RCA > 1     | 6.00 | 4.00 | 5.00 | 4.00 | 7.00 | 10.00 | 10.00 | 12.00 | 6.00 |

## Gujarat

The RCA analysis for Gujarat highlights a strong and sustained comparative advantage across a broad range of commodity groups over the period FY2018 to FY2025. The number of sectors with an average RCA greater than 1 remained consistently at 8, underscoring Gujarat's robust export competitiveness. Key sectors such as Ceramic Products and Glassware (2.59), Oil Seeds (average RCA: 2.44), Petroleum Products (2.44), and Organic and Inorganic Chemicals (1.83) emerged as core strengths, consistently maintaining RCA values above the threshold of 1 throughout the study period. These results reaffirm Gujarat's position as a leading hub for industrial and resource-based exports.

In addition, other sectors such as Plastic and Linoleum, Others (miscellaneous exports), Cotton Yarn/Fabs./Madeups, Handloom Products Etc. (1.10), and Man-Made Yarn/Fabs./Madeups Etc. (1.06) also recorded average RCA values above 1, reflecting a diversified and resilient export structure.

However, Gujarat displayed a fluctuating comparative advantage in sectors like Tobacco (0.87), Drugs and Pharmaceuticals (0.82), and Oil Meals (0.82), with RCA values hovering near the competitiveness threshold. Moreover, Inorganic Chemicals showed higher RCA values in recent years, indicating growth potential in the near future. These patterns reinforce Gujarat's status as one of India's top exporting states, supported by a solid base in both traditional and high-value-added sectors.

**Table 2: Commodity-Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Gujarat**

| Commodity group                                      | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | AVERAGE RCA |
|------------------------------------------------------|------|------|------|------|------|------|------|------|-------------|
| Carpet                                               | 0.18 | 0.20 | 0.23 | 0.22 | 0.16 | 0.08 | 0.06 | 0.05 | 0.15        |
| Cashew                                               | 0.01 | 0.01 | 0.02 | 0.06 | 0.01 | 0.01 | 0.01 | 0.02 | 0.02        |
| Ceramic Products And Glassware                       | 2.52 | 2.67 | 3.08 | 3.23 | 2.20 | 2.11 | 2.35 | 2.60 | 2.59        |
| Cereal Preparations And Miscellaneous Processed Item | 0.59 | 0.67 | 0.72 | 0.75 | 0.57 | 0.50 | 0.54 | 0.62 | 0.62        |
| Coffee                                               | 0.01 | 0.02 | 0.03 | 0.03 | 0.00 | 0.00 | 0.00 | 0.00 | 0.01        |



|                                                   |      |       |       |      |      |      |      |      |      |
|---------------------------------------------------|------|-------|-------|------|------|------|------|------|------|
| Cotton Yarn/Fabs./Madeups, Handloom Products Etc. | 1.20 | 1.31  | 1.32  | 1.28 | 0.91 | 0.77 | 0.93 | 1.07 | 1.10 |
| Drugs And Pharmaceutica                           | 0.85 | 0.95  | 0.99  | 0.99 | 0.73 | 0.63 | 0.64 | 0.78 | 0.82 |
| Electronic Goods                                  | 0.25 | 0.23  | 0.21  | 0.26 | 0.19 | 0.30 | 0.31 | 0.18 | 0.24 |
| Engineering Goods                                 | 0.54 | 0.54  | 0.55  | 0.57 | 0.40 | 0.39 | 0.44 | 0.53 | 0.49 |
| Fruits And Vegetables                             | 0.49 | 0.58  | 0.76  | 0.75 | 0.54 | 0.60 | 0.68 | 0.83 | 0.65 |
| Gems And Jewellery                                | 0.39 | 0.22  | 0.38  | 0.75 | 1.23 | 1.11 | 1.01 | 1.04 | 0.77 |
| Handicrafts Excl. Ha                              |      |       |       |      |      |      |      |      |      |
| Made Carpet                                       | 0.64 | 0.81  | 0.64  | 0.70 | 0.51 | 0.44 | 0.46 | 0.74 | 0.62 |
| Iron Ore                                          | 0.04 | 0.28  | 0.08  | 0.03 | 0.03 | 0.02 | 0.02 | 0.00 | 0.06 |
| Jute Mfg. Including Fl                            |      |       |       |      |      |      |      |      |      |
| Covering                                          | 0.01 | 0.02  | 0.02  | 0.01 | 0.01 | 0.01 | 0.01 | 0.02 | 0.01 |
| Leather And Leat                                  |      |       |       |      |      |      |      |      |      |
| Manufacturers                                     | 0.01 | 0.02  | 0.01  | 0.00 | 0.01 | 0.01 | 0.01 | 0.01 | 0.01 |
| Man-Made Yarn/Fabs./Madeups Etc.                  | 1.10 | 1.27  | 1.24  | 1.26 | 0.87 | 0.82 | 0.88 | 1.04 | 1.06 |
| Marine Products                                   | 0.52 | 0.59  | 0.57  | 0.50 | 0.31 | 0.30 | 0.36 | 0.39 | 0.44 |
| Meat, Dairy And Poul                              |      |       |       |      |      |      |      |      |      |
| Products                                          | 0.04 | 0.13  | 0.07  | 0.11 | 0.15 | 0.06 | 0.05 | 0.06 | 0.08 |
| Mica, Coal And Other Or                           |      |       |       |      |      |      |      |      |      |
| Minerals, Including Proce                         | 0.53 | 0.59  | 0.58  | 0.46 | 0.52 | 0.61 | 0.55 | 0.64 | 0.56 |
| Oil Meals                                         | 0.67 | 1.14  | 1.33  | 0.97 | 0.52 | 0.75 | 0.73 | 0.48 | 0.82 |
| Oil Seeds                                         | 2.16 | 2.48  | 2.99  | 2.87 | 2.06 | 2.01 | 2.24 | 2.67 | 2.44 |
| Organic and Inorga                                |      |       |       |      |      |      |      |      |      |
| Chemicals                                         | 1.90 | 2.18  | 2.21  | 2.06 | 1.57 | 1.47 | 1.58 | 1.69 | 1.83 |
| Other Cereals                                     | 0.34 | 0.24  | 0.42  | 0.17 | 0.08 | 0.09 | 0.18 | 0.42 | 0.24 |
| Others                                            | 1.49 | 1.55  | 1.55  | 1.48 | 0.95 | 0.80 | 0.93 | 1.12 | 1.23 |
| Petroleum Products                                | 3.05 | 2.21  | 2.15  | 2.24 | 2.61 | 2.32 | 2.38 | 2.58 | 2.44 |
| Plastic And Linoleum                              | 1.84 | 2.09  | 2.01  | 2.04 | 1.37 | 1.18 | 1.23 | 1.43 | 1.65 |
| Ready-made garments of                            |      |       |       |      |      |      |      |      |      |
| textiles                                          | 0.11 | 0.14  | 0.12  | 0.11 | 0.08 | 0.07 | 0.09 | 0.10 | 0.10 |
| Rice                                              | 0.29 | 0.70  | 0.52  | 0.54 | 0.51 | 0.48 | 0.46 | 0.50 | 0.50 |
| Spices                                            | 0.69 | 0.96  | 0.82  | 0.84 | 0.58 | 0.61 | 0.73 | 0.89 | 0.76 |
| Tea                                               | 0.08 | 0.11  | 0.16  | 0.16 | 0.12 | 0.11 | 0.14 | 0.15 | 0.13 |
| Tobacco                                           | 0.88 | 1.26  | 1.16  | 1.16 | 0.74 | 0.61 | 0.57 | 0.57 | 0.87 |
| No. of Sectors with RCA                           | 8.00 | 10.00 | 10.00 | 9.00 | 6.00 | 6.00 | 6.00 | 9.00 | 8.00 |





## Tamil Nadu

Tamil Nadu has demonstrated consistent export diversification, maintaining an average of 8 sectors with RCA values greater than 1 throughout the period. This reflects broad-based export competitiveness, indicating that the state is not overly reliant on a limited set of commodities—a factor that enhances resilience against sector-specific global disruptions. The state shows high RCA values in labor-intensive and high-value manufacturing sectors such as Leather Products (4.10), Ready-made Garments (3.29), and Electronic Goods (2.16).

Additionally, commodities like Cashew (1.97), Cotton Yarn/Fabrics/Handlooms (1.94), Cotton Yarn/Fabs./Madeups, Handloom Products Etc. (1.94), and Tea (1.88) also recorded consistently strong RCA values, reaffirming Tamil Nadu's traditional strengths in agro-processing and textiles. Several other sectors, including Handicrafts Excluding Hand-Made Carpet (0.97), Fruits and Vegetables (0.96), and Marine Products (0.8), are positioned close to the RCA threshold of 1. These represent promising opportunities for future competitiveness, where targeted interventions—such as quality enhancement, branding, and certification—could help convert near-threshold sectors into areas of clear comparative advantage.

**Table 3: Commodity-Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Tamil Nadu**

| Commodity group                                         | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | AVERAG<br>RCA |
|---------------------------------------------------------|------|------|------|------|------|------|------|------|---------------|
| Carpet                                                  | 0.14 | 0.13 | 0.12 | 0.06 | 0.11 | 0.10 | 0.14 | 0.14 | 0.12          |
| Cashew                                                  | 1.70 | 1.90 | 1.70 | 1.68 | 2.55 | 2.42 | 2.00 | 1.81 | 1.97          |
| Ceramic Products A<br>Glassware                         | 0.55 | 0.72 | 0.57 | 0.54 | 0.60 | 0.55 | 0.51 | 0.47 | 0.56          |
| Cereal Preparations A<br>Miscellaneous Proces<br>Item   | 0.59 | 0.63 | 0.64 | 0.65 | 0.66 | 0.51 | 0.44 | 0.39 | 0.57          |
| Coffee                                                  | 0.68 | 0.75 | 0.77 | 0.74 | 0.77 | 0.71 | 0.55 | 0.43 | 0.67          |
| Cotton<br>Yarn/Fabs./Madeups,<br>Handloom Products Etc. | 1.87 | 1.94 | 1.92 | 2.06 | 2.21 | 2.27 | 1.77 | 1.51 | 1.94          |
| Drugs And Pharmaceutic                                  | 0.29 | 0.27 | 0.27 | 0.27 | 0.29 | 0.30 | 0.28 | 0.25 | 0.28          |
| Electronic Goods                                        | 1.89 | 1.86 | 1.51 | 1.67 | 1.43 | 2.51 | 3.30 | 3.15 | 2.16          |
| Engineering Goods                                       | 1.70 | 1.71 | 1.76 | 1.61 | 1.62 | 1.78 | 1.55 | 1.31 | 1.63          |
| Fruits And Vegetables                                   | 0.98 | 0.93 | 0.91 | 1.02 | 1.14 | 1.04 | 0.89 | 0.75 | 0.96          |
| Gems And Jewellery                                      | 0.19 | 0.12 | 0.12 | 0.14 | 0.22 | 0.24 | 0.27 | 0.53 | 0.23          |
| Handicrafts Ex<br>Handmade Carpet                       | 1.18 | 1.22 | 1.24 | 1.16 | 1.13 | 0.83 | 0.50 | 0.48 | 0.97          |
| Iron Ore                                                | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.02 | 0.00          |
| Jute Mfg. Including Fl<br>Covering                      | 0.06 | 0.08 | 0.10 | 0.13 | 0.10 | 0.15 | 0.17 | 0.11 | 0.11          |
| Leather And Leat<br>Manufacturers                       | 3.97 | 4.23 | 4.09 | 4.05 | 4.63 | 4.74 | 3.89 | 3.17 | 4.10          |



|                                                      |      |       |      |       |       |      |      |      |      |
|------------------------------------------------------|------|-------|------|-------|-------|------|------|------|------|
| Man-Made Yarn/Fabs./Madeups Etc.                     | 0.64 | 0.66  | 0.59 | 0.68  | 0.74  | 0.63 | 0.61 | 0.55 | 0.64 |
| Marine Products                                      | 0.88 | 0.94  | 0.91 | 0.85  | 0.86  | 0.79 | 0.66 | 0.52 | 0.80 |
| Meat, Dairy And Poultry Products                     | 0.28 | 0.27  | 0.22 | 0.21  | 0.20  | 0.31 | 0.36 | 0.23 | 0.26 |
| Mica, Coal And Other Or Minerals Including Processed | 1.47 | 1.54  | 1.81 | 1.22  | 1.20  | 1.10 | 1.10 | 0.73 | 1.27 |
| Oil Meals                                            | 0.02 | 0.01  | 0.02 | 0.01  | 0.02  | 0.01 | 0.02 | 0.02 | 0.01 |
| Oil Seeds                                            | 0.68 | 0.63  | 0.72 | 0.85  | 0.81  | 0.81 | 0.57 | 0.24 | 0.66 |
| Organic and Inorganic Chemicals                      | 0.38 | 0.37  | 0.35 | 0.40  | 0.38  | 0.37 | 0.35 | 0.33 | 0.37 |
| Other Cereals                                        | 0.27 | 0.32  | 0.18 | 0.68  | 0.80  | 0.43 | 0.56 | 0.13 | 0.42 |
| Others                                               | 0.82 | 0.71  | 0.70 | 0.78  | 0.64  | 0.52 | 0.55 | 0.53 | 0.66 |
| Petroleum Products                                   | 0.10 | 0.14  | 0.15 | 0.14  | 0.14  | 0.11 | 0.15 | 0.18 | 0.14 |
| Plastic And Linoleum                                 | 0.43 | 0.40  | 0.45 | 0.45  | 0.51  | 0.51 | 0.48 | 0.37 | 0.45 |
| Ready-made garments of textiles                      | 2.77 | 3.18  | 3.11 | 3.60  | 3.94  | 3.60 | 3.24 | 2.92 | 3.29 |
| Rice                                                 | 0.15 | 0.11  | 0.10 | 0.14  | 0.16  | 0.15 | 0.11 | 0.11 | 0.13 |
| Spices                                               | 0.81 | 0.68  | 0.58 | 0.80  | 0.90  | 0.65 | 0.56 | 0.53 | 0.69 |
| Tea                                                  | 1.60 | 1.96  | 1.90 | 2.11  | 2.26  | 1.77 | 1.97 | 1.48 | 1.88 |
| Tobacco                                              | 0.28 | 1.17  | 0.66 | 0.37  | 0.20  | 0.59 | 0.44 | 0.41 | 0.52 |
| No. of Sectors with RCA > 1                          | 9.00 | 10.00 | 9.00 | 10.00 | 10.00 | 9.00 | 8.00 | 7.00 | 8.00 |

## Karnataka

Karnataka has demonstrated consistent export diversification, maintaining an average of 8 sectors with RCA values greater than 1 throughout the study period. The state's export competitiveness is particularly concentrated in sectors such as Coffee (10.97), Electronic Goods (3.58), Cashew (3.3), Ready-made Garments of All Textiles (2.12), Iron Ore (2.02), and Petroleum Products (1.04). These high-performing sectors underscore Karnataka's strong position in both agro-based and industrial exports.

Furthermore, Karnataka has sustained RCA values above 1 in agri-based commodities such as Fruits and Vegetables (1.49) and Other Cereals (1.19), reflecting the state's robust agronomic base and agro-processing capabilities. These sectors also offer potential for inclusive growth by supporting rural livelihoods and smallholder farmers.

Several other sectors show RCA values near the threshold of 1, including Mica, Coal and Other Ores (1.00), Handicrafts Excluding Hand-Made Carpet (0.92), Cereal Preparations and Miscellaneous Processed Items (0.83), Marine Products (0.81), and Drugs and Pharmaceuticals (0.8). These figures suggest opportunities for Karnataka to further diversify its export portfolio and enhance competitiveness in these sectors. Strategic policy support, infrastructure development, and active collaboration with the private sector could help strengthen Karnataka's position in both existing and emerging export domains.



**Table 4: Commodity-Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Karnataka**

| Commodity group                                            | FY18  | FY19  | FY20  | FY21  | FY22  | FY23  | FY24  | FY25  | AVERAG<br>RCA |
|------------------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|---------------|
| Carpet                                                     | 0.01  | 0.05  | 0.05  | 0.05  | 0.01  | 0.01  | 0.01  | 0.01  | 0.02          |
| Cashew                                                     | 3.43  | 3.53  | 3.75  | 4.14  | 3.13  | 3.06  | 2.81  | 2.55  | 3.30          |
| Ceramic Products And<br>Glassware                          | 0.12  | 0.13  | 0.09  | 0.07  | 0.06  | 0.07  | 0.07  | 0.07  | 0.09          |
| Cereal Preparations And<br>Miscellaneous Processed<br>Item | 0.75  | 0.95  | 0.87  | 1.18  | 0.89  | 0.77  | 0.70  | 0.53  | 0.83          |
| Coffee                                                     | 11.32 | 12.15 | 11.29 | 12.00 | 10.29 | 10.26 | 10.39 | 10.09 | 10.97         |
| Cotton<br>Yarn/Fabs./Madeups,<br>Handloom Products Etc.    | 0.49  | 0.46  | 0.51  | 0.49  | 0.47  | 0.50  | 0.49  | 0.41  | 0.48          |
| Drugs And Pharmaceutical                                   | 0.73  | 0.80  | 0.82  | 0.89  | 0.78  | 0.76  | 0.87  | 0.77  | 0.80          |
| Electronic Goods                                           | 4.43  | 4.07  | 3.56  | 3.94  | 3.98  | 3.08  | 2.59  | 2.95  | 3.58          |
| Engineering Goods                                          | 1.06  | 1.08  | 1.19  | 1.27  | 1.07  | 0.86  | 1.01  | 0.89  | 1.05          |
| Fruits And Vegetables                                      | 1.44  | 1.65  | 1.57  | 1.86  | 1.46  | 1.29  | 1.38  | 1.33  | 1.49          |
| Gems And Jewellery                                         | 0.64  | 0.04  | 0.03  | 0.02  | 0.02  | 0.04  | 0.05  | 0.05  | 0.11          |
| Handicrafts Excl. Hand<br>Made Carpet                      | 0.68  | 0.93  | 0.92  | 1.15  | 0.97  | 1.01  | 0.88  | 0.79  | 0.92          |
| Iron Ore                                                   | 1.67  | 2.66  | 1.63  | 1.11  | 2.22  | 2.96  | 2.73  | 1.16  | 2.02          |
| Jute Mfg. Including Floor<br>Covering                      | 0.01  | 0.01  | 0.02  | 0.02  | 0.01  | 0.01  | 0.02  | 0.01  | 0.01          |
| Leather And Leather<br>Manufactures                        | 0.31  | 0.32  | 0.30  | 0.26  | 0.21  | 0.20  | 0.24  | 0.24  | 0.26          |
| Man-Made<br>Yarn/Fabs./Madeups Etc.                        | 0.52  | 0.60  | 0.60  | 0.75  | 0.62  | 0.67  | 0.71  | 0.70  | 0.65          |
| Marine Products                                            | 0.66  | 0.76  | 0.56  | 0.71  | 0.62  | 1.17  | 1.23  | 0.80  | 0.81          |
| Meat, Dairy And Poultry<br>Products                        | 0.08  | 0.06  | 0.08  | 0.08  | 0.11  | 0.12  | 0.11  | 0.10  | 0.09          |
| Mica, Coal And Other Or<br>Minerals Including Processed    | 1.33  | 1.38  | 1.22  | 1.04  | 0.87  | 0.81  | 0.74  | 0.61  | 1.00          |
| Oil Meals                                                  | 0.09  | 0.03  | 0.02  | 0.02  | 0.02  | 0.01  | 0.02  | 0.01  | 0.03          |
| Oil Seeds                                                  | 0.38  | 0.37  | 0.45  | 0.53  | 0.91  | 0.62  | 0.53  | 0.29  | 0.51          |
| Organic and Inorganic<br>Chemicals                         | 1.33  | 0.79  | 0.81  | 0.79  | 1.07  | 0.53  | 0.65  | 0.64  | 0.83          |
| Other Cereals                                              | 0.69  | 0.85  | 1.12  | 1.91  | 1.44  | 1.70  | 0.87  | 0.91  | 1.19          |
| Others                                                     | 0.46  | 0.53  | 0.64  | 0.60  | 0.81  | 1.55  | 1.56  | 1.23  | 0.92          |



|                                 |       |      |       |       |       |       |      |      |      |
|---------------------------------|-------|------|-------|-------|-------|-------|------|------|------|
| Petroleum Products              | 1.00  | 1.46 | 1.16  | 0.74  | 1.06  | 1.10  | 0.82 | 0.96 | 1.04 |
| Plastic And Linoleum            | 0.45  | 0.51 | 0.53  | 0.60  | 0.60  | 0.49  | 0.53 | 0.50 | 0.53 |
| Ready-made garments of textiles | 2.05  | 2.34 | 2.31  | 2.13  | 1.84  | 2.18  | 2.23 | 1.89 | 2.12 |
| Rice                            | 0.05  | 0.05 | 0.04  | 0.13  | 0.28  | 0.22  | 0.16 | 0.13 | 0.13 |
| Spices                          | 0.48  | 0.78 | 0.50  | 0.72  | 0.73  | 0.51  | 0.52 | 0.56 | 0.60 |
| Tea                             | 0.03  | 0.10 | 0.02  | 0.07  | 0.04  | 0.03  | 0.05 | 0.03 | 0.04 |
| Tobacco                         | 1.30  | 0.55 | 0.58  | 0.61  | 0.77  | 0.79  | 0.43 | 0.33 | 0.67 |
| No. of Sectors with RCA         | 11.00 | 9.00 | 10.00 | 11.00 | 10.00 | 11.00 | 9.00 | 7.00 | 9.00 |

## Uttar Pradesh

The Revealed Comparative Advantage (RCA) analysis for Uttar Pradesh from FY2018 to FY2025 reveals a consistent trend of export competitiveness across select commodity groups. Meat, Dairy and Poultry Products recorded the highest average RCA value (10.25), followed by Carpets (8.38), Leather and Leather Manufactures (5.38), Electronic Goods (3.75), and Handicrafts Excluding Hand-Made Carpets (3.23), indicating strong and sustained comparative advantage in these areas. Additionally, sectors such as Ready-made Garments of All Textiles (2.54) and Spices (2.19) also posted average RCA values above 2, reflecting robust export orientation and specialization.

The data also show a gradual rise in the number of sectors with  $RCA > 1$ , increasing from 9 in FY2018 to 11 in FY2025, suggesting a broadening of the state's export-competitive base. Emerging sectors like Jute Manufacturing Including Floor Covering (0.85), Plastic and Linoleum (0.85), and Engineering Goods (0.83) consistently remained close to the RCA threshold of 1, indicating potential for strategic policy interventions to boost competitiveness. Overall, the RCA analysis underscores Uttar Pradesh's sustained strength in traditional exports, while also highlighting a gradual diversification into new competitive sectors, reflecting the state's evolving trade landscape.

**Table 5: Commodity-Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Uttar Pradesh**

| Commodity group                                         | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | AVERAG<br>RCA |
|---------------------------------------------------------|------|------|------|------|------|------|------|------|---------------|
| Carpet                                                  | 9.16 | 8.57 | 7.29 | 6.85 | 7.67 | 9.35 | 9.39 | 8.75 | 8.38          |
| Cashew                                                  | 0.00 | 0.00 | 0.01 | 0.01 | 0.01 | 0.01 | 0.02 | 0.06 | 0.02          |
| Ceramic Products A<br>Glassware                         | 2.16 | 1.87 | 1.61 | 1.38 | 1.70 | 1.23 | 1.08 | 1.17 | 1.52          |
| Cereal Preparations A<br>Miscellaneous Process<br>Item  | 0.93 | 0.93 | 0.97 | 0.97 | 1.17 | 1.15 | 1.15 | 1.05 | 1.04          |
| Coffee                                                  | 0.00 | 0.04 | 0.04 | 0.03 | 0.04 | 0.00 | 0.07 | 0.01 | 0.03          |
| Cotton<br>Yarn/Fabs./Madeups,<br>Handloom Products Etc. | 0.64 | 0.62 | 0.58 | 0.51 | 0.51 | 0.69 | 0.62 | 0.64 | 0.60          |



|                          |       |       |      |      |       |       |       |       |       |
|--------------------------|-------|-------|------|------|-------|-------|-------|-------|-------|
| Drugs And Pharmaceutica  | 0.19  | 0.17  | 0.14 | 0.16 | 0.17  | 0.17  | 0.18  | 0.17  | 0.17  |
| Electronic Goods         | 1.62  | 3.72  | 4.98 | 4.56 | 4.83  | 4.29  | 3.25  | 2.75  | 3.75  |
| Engineering Goods        | 0.90  | 0.85  | 0.79 | 0.81 | 0.87  | 0.90  | 0.80  | 0.74  | 0.83  |
| Fruits And Vegetables    | 0.04  | 0.36  | 0.50 | 0.44 | 0.56  | 0.64  | 0.58  | 0.41  | 0.44  |
| Gems And Jewellery       | 0.39  | 0.25  | 0.20 | 0.13 | 0.13  | 0.15  | 0.51  | 0.32  | 0.26  |
| Handicrafts Excl. Ha     |       |       |      |      |       |       |       |       |       |
| Made Carpet              | 2.78  | 3.12  | 3.06 | 3.16 | 3.79  | 3.51  | 3.30  | 3.13  | 3.23  |
| Iron Ore                 | 0.00  | 0.00  | 0.00 | 0.03 | 0.00  | 0.00  | 0.00  | 0.00  | 0.01  |
| Jute Mfg. Including Fl   |       |       |      |      |       |       |       |       |       |
| Covering                 | 0.54  | 0.81  | 0.67 | 0.82 | 0.93  | 0.84  | 1.16  | 1.05  | 0.85  |
| Leather And Leat         |       |       |      |      |       |       |       |       |       |
| Manufactures             | 5.85  | 5.18  | 4.72 | 5.11 | 5.40  | 5.31  | 5.90  | 5.55  | 5.38  |
| Man-Made                 |       |       |      |      |       |       |       |       |       |
| Yarn/Fabs./Madeups Etc.  | 0.28  | 0.31  | 0.27 | 0.35 | 0.37  | 0.41  | 0.42  | 0.41  | 0.35  |
| Marine Products          | 0.00  | 0.00  | 0.00 | 0.01 | 0.01  | 0.00  | 0.00  | 0.01  | 0.00  |
| Meat, Dairy And Poul     |       |       |      |      |       |       |       |       |       |
| Products                 | 11.26 | 10.85 | 9.55 | 9.55 | 10.02 | 10.08 | 10.95 | 9.76  | 10.25 |
| Mica, Coal And Other Or  |       |       |      |      |       |       |       |       |       |
| Minerals Including Proce | 0.15  | 0.30  | 0.37 | 0.36 | 0.43  | 0.57  | 0.82  | 0.76  | 0.47  |
| Oil Meals                | 0.79  | 0.11  | 0.35 | 0.15 | 0.22  | 0.23  | 0.20  | 0.30  | 0.29  |
| Oil Seeds                | 0.38  | 0.42  | 0.26 | 0.26 | 0.25  | 0.18  | 0.33  | 0.32  | 0.30  |
| Organic and Inorga       |       |       |      |      |       |       |       |       |       |
| Chemicals                | 0.40  | 0.37  | 0.34 | 0.34 | 0.33  | 0.37  | 0.33  | 0.37  | 0.36  |
| Other Cereals            | 0.03  | 0.21  | 0.49 | 0.18 | 0.22  | 0.20  | 0.45  | 0.98  | 0.34  |
| Others                   | 1.12  | 1.17  | 1.29 | 1.40 | 1.57  | 1.56  | 1.38  | 1.22  | 1.34  |
| Petroleum Products       | 0.00  | 0.13  | 0.14 | 0.15 | 0.11  | 0.08  | 0.08  | 0.10  | 0.10  |
| Plastic And Linoleum     | 0.96  | 0.92  | 0.68 | 0.72 | 0.72  | 0.84  | 0.97  | 0.95  | 0.85  |
| Ready-made garments of   |       |       |      |      |       |       |       |       |       |
| textiles                 | 2.38  | 2.47  | 2.26 | 2.10 | 2.50  | 2.89  | 2.99  | 2.72  | 2.54  |
| Rice                     | 0.79  | 0.96  | 0.96 | 0.91 | 0.76  | 0.62  | 0.48  | 0.55  | 0.75  |
| Spices                   | 2.32  | 2.88  | 2.77 | 2.23 | 2.27  | 1.84  | 1.62  | 1.60  | 2.19  |
| Tea                      | 0.29  | 0.34  | 0.30 | 0.33 | 0.50  | 0.45  | 0.46  | 0.45  | 0.39  |
| Tobacco                  | 0.70  | 0.66  | 0.85 | 0.97 | 0.74  | 0.55  | 0.41  | 0.29  | 0.65  |
| No. of Sectors with RCA  | 9.00  | 9.00  | 9.00 | 9.00 | 10.00 | 10.00 | 11.00 | 11.00 | 10.00 |

## Andhra Pradesh

The RCA analysis for Andhra Pradesh from FY2018 to FY2025 highlights a strong comparative advantage in several key sectors, most notably Tobacco (11.8) and Marine Products (8.6). These two sectors consistently outperformed others throughout the period, indicating a stable and significant export specialization. Other



sectors such as Coffee (3.72), Spices (3.52), Mica, Coal and Other Minerals (3.50), and Cashew (2.51) also exhibited sustained competitiveness, with RCA values well above 2, underscoring the state's strength in agro-based and mineral exports. Furthermore, Drugs and Pharmaceuticals (1.74), Organic and Inorganic Chemicals (1.46), and Engineering Goods (1.04) maintained moderate RCA levels above 1, reflecting a balanced export portfolio that spans both primary and industrial goods.

The number of sectors with an RCA greater than 1 rose from 10 in FY2018 to 12 in FY2023 and FY2024, before settling at 11 in FY2025, indicating a gradual expansion in export competitiveness over the years. Sectors such as Fruits and Vegetables (0.91) hovered near the RCA threshold of 1, signaling marginal competitiveness. Targeted policy support could help strengthen export performance in such underperforming and emerging sectors.

**Table 6: Commodity-Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Andhra Pradesh**

| Commodity group                                         | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | AVERAG<br>RCA |
|---------------------------------------------------------|------|------|------|------|------|------|------|------|---------------|
| Carpet                                                  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00          |
| Cashew                                                  | 2.69 | 3.37 | 2.98 | 1.83 | 2.44 | 2.26 | 2.57 | 1.93 | 2.51          |
| Ceramic Products A<br>Glassware                         | 0.29 | 0.30 | 0.26 | 0.19 | 0.26 | 0.27 | 0.17 | 0.16 | 0.24          |
| Cereal Preparations A<br>Miscellaneous Process<br>Item  | 0.33 | 0.24 | 0.14 | 0.19 | 0.28 | 0.37 | 0.37 | 0.27 | 0.27          |
| Coffee                                                  | 3.65 | 3.78 | 4.08 | 2.92 | 3.47 | 4.23 | 4.25 | 3.40 | 3.72          |
| Cotton<br>Yarn/Fabs./Madeups,<br>Handloom Products Etc. | 0.89 | 0.98 | 0.47 | 0.42 | 0.65 | 0.36 | 0.43 | 0.35 | 0.57          |
| Drugs And Pharmaceutic                                  | 1.90 | 1.99 | 1.97 | 1.75 | 1.24 | 1.62 | 1.75 | 1.72 | 1.74          |
| Electronic Goods                                        | 0.46 | 0.52 | 0.53 | 0.44 | 0.52 | 0.37 | 0.37 | 0.22 | 0.43          |
| Engineering Goods                                       | 0.74 | 1.13 | 1.07 | 1.18 | 1.18 | 1.20 | 0.99 | 0.80 | 1.04          |
| Fruits And Vegetables                                   | 1.11 | 1.03 | 0.95 | 0.66 | 1.04 | 1.02 | 0.75 | 0.69 | 0.91          |
| Gems And Jewellery                                      | 0.79 | 0.06 | 0.06 | 0.38 | 0.01 | 0.11 | 0.04 | 0.05 | 0.19          |
| Handicrafts Excl. Ha<br>Made Carpet                     | 0.14 | 0.12 | 0.09 | 0.11 | 0.12 | 0.15 | 0.11 | 0.18 | 0.13          |
| Iron Ore                                                | 0.36 | 0.41 | 0.36 | 0.12 | 0.01 | 0.04 | 0.17 | 0.06 | 0.19          |
| Jute Mfg. Including Fl<br>Covering                      | 0.45 | 0.44 | 0.31 | 0.18 | 0.23 | 0.13 | 0.13 | 0.02 | 0.24          |
| Leather And Leat<br>Manufactures                        | 0.51 | 0.55 | 0.63 | 0.51 | 0.74 | 0.37 | 0.53 | 0.79 | 0.58          |
| Man-Made<br>Yarn/Fabs./Madeups Etc.                     | 0.03 | 0.02 | 0.03 | 0.05 | 0.07 | 0.06 | 0.09 | 0.14 | 0.06          |
| Marine Products                                         | 8.45 | 8.55 | 8.68 | 7.34 | 9.30 | 8.50 | 8.89 | 9.12 | 8.60          |





|                                                  |       |       |       |       |       |       |       |       |       |
|--------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Meat, Dairy And Poul Products                    | 0.40  | 0.54  | 0.45  | 0.24  | 0.20  | 0.44  | 0.56  | 0.58  | 0.43  |
| Mica, Coal And Other Or Minerals Including Proce | 3.20  | 3.14  | 3.12  | 2.33  | 3.35  | 4.04  | 4.69  | 4.17  | 3.50  |
| Oil Meals                                        | 0.04  | 0.02  | 0.06  | 0.01  | 0.02  | 0.02  | 0.02  | 0.01  | 0.03  |
| Oil Seeds                                        | 1.15  | 0.67  | 0.64  | 0.66  | 0.82  | 0.41  | 0.42  | 0.34  | 0.64  |
| Organic and Inorga Chemicals                     | 1.24  | 1.26  | 1.27  | 1.26  | 1.74  | 1.86  | 1.51  | 1.54  | 1.46  |
| Other Cereals                                    | 0.29  | 0.85  | 0.23  | 0.68  | 1.82  | 1.97  | 4.60  | 0.27  | 1.34  |
| Others                                           | 0.67  | 0.86  | 0.53  | 0.37  | 0.76  | 0.81  | 1.16  | 0.99  | 0.77  |
| Petroleum Products                               | 0.14  | 0.15  | 0.35  | 0.14  | 0.11  | 0.13  | 0.24  | 0.39  | 0.21  |
| Plastic And Linoleum                             | 0.19  | 0.14  | 0.21  | 0.20  | 0.10  | 0.13  | 0.15  | 0.25  | 0.17  |
| Ready-made garments of textiles                  | 0.13  | 0.18  | 0.29  | 0.25  | 0.30  | 0.31  | 0.31  | 0.34  | 0.26  |
| Rice                                             | 1.64  | 1.73  | 0.89  | 1.52  | 2.27  | 2.21  | 1.85  | 2.22  | 1.79  |
| Spices                                           | 3.06  | 3.76  | 4.63  | 2.74  | 3.14  | 3.88  | 4.08  | 2.86  | 3.52  |
| Tea                                              | 0.24  | 0.26  | 0.23  | 0.21  | 0.34  | 0.33  | 0.33  | 0.34  | 0.29  |
| Tobacco                                          | 12.32 | 10.23 | 10.12 | 8.74  | 11.64 | 12.70 | 14.28 | 14.36 | 11.80 |
| No. of Sectors with RCA                          | 11.00 | 11.00 | 9.00  | 10.00 | 12.00 | 12.00 | 11.00 | 9.00  | 11.00 |

## Haryana

The RCA analysis for Haryana from FY2018 to FY2025 indicates consistent export competitiveness across a select set of sectors, with 9 sectors maintaining an RCA greater than 1 throughout the period. Carpet stands out as the most prominent sector, posting the highest average RCA value of 9.10 and peaking at 10.92 in FY23, reflecting a strong and sustained comparative advantage. Rice also emerged as a major strength, with a high and stable average RCA of 7.33, reinforcing Haryana's position as a key agri-exporting state. Other notably competitive sectors include Handicrafts excluding Hand-Made Carpet (3.58) and Ready-Made Garments (3.07), both showing consistently strong RCA values over the years.

In addition, sectors such as Jute Manufacturing (2.28), Cotton Yarn/Fabs./Madeups, Handloom Products Etc. (1.6), Engineering Goods (1.51), Leather and Leather Manufactures (1.3), and Cereal Preparations and Miscellaneous Processed Items (1.26) consistently maintained RCA values above 1, indicating reliable export strengths. These findings suggest that while Haryana has a solid foundation in a few high-performing sectors, there is scope for diversification and targeted policy support to enhance competitiveness in underperforming areas and broaden the state's export base.



**Table 7: Commodity-Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Haryana**

| Commodity group                                         | FY18 | FY19 | FY20 | FY21  | FY22  | FY23 | FY24 | FY25 | AVERAG<br>RCA |
|---------------------------------------------------------|------|------|------|-------|-------|------|------|------|---------------|
| Carpet                                                  | 7.39 | 8.04 | 9.04 | 10.38 | 10.92 | 9.72 | 8.89 | 8.46 | 9.10          |
| Cashew                                                  | 0.00 | 0.00 | 0.01 | 0.00  | 0.00  | 0.02 | 0.01 | 0.00 | 0.00          |
| Ceramic Products A<br>Glassware                         | 0.61 | 0.54 | 0.59 | 0.50  | 0.66  | 0.64 | 0.53 | 0.46 | 0.57          |
| Cereal Preparations A<br>Miscellaneous Process<br>Item  | 1.02 | 1.09 | 1.30 | 1.04  | 1.33  | 1.24 | 1.46 | 1.57 | 1.26          |
| Coffee                                                  | 0.02 | 0.04 | 0.02 | 0.05  | 0.02  | 0.11 | 0.03 | 0.09 | 0.05          |
| Cotton<br>Yarn/Fabs./Madeups,<br>Handloom Products Etc. | 1.28 | 1.37 | 1.56 | 1.63  | 1.68  | 1.97 | 1.66 | 1.65 | 1.60          |
| Drugs And Pharmaceutic                                  | 0.41 | 0.43 | 0.39 | 0.34  | 0.37  | 0.37 | 0.32 | 0.30 | 0.37          |
| Electronic Goods                                        | 1.13 | 0.97 | 0.73 | 0.75  | 0.72  | 0.63 | 0.59 | 0.54 | 0.76          |
| Engineering Goods                                       | 1.65 | 1.60 | 1.36 | 1.31  | 1.49  | 1.63 | 1.53 | 1.47 | 1.51          |
| Fruits And Vegetables                                   | 0.26 | 0.20 | 0.25 | 0.31  | 0.35  | 0.50 | 0.47 | 0.38 | 0.34          |
| Gems And Jewellery                                      | 0.00 | 0.06 | 0.07 | 0.05  | 0.02  | 0.02 | 0.45 | 0.18 | 0.11          |
| Handicrafts Excl. Ha<br>Made Carpet                     | 2.57 | 3.16 | 3.55 | 3.86  | 4.37  | 4.17 | 3.45 | 3.48 | 3.58          |
| Iron Ore                                                | 0.00 | 0.00 | 0.00 | 0.00  | 0.00  | 0.00 | 0.00 | 0.00 | 0.00          |
| Jute Mfg. Including Fl<br>Covering                      | 0.84 | 1.37 | 2.10 | 2.96  | 3.21  | 2.45 | 2.68 | 2.66 | 2.28          |
| Leather And Leat<br>Manufactures                        | 1.07 | 1.18 | 1.35 | 1.26  | 1.44  | 1.36 | 1.36 | 1.39 | 1.30          |
| Man-Made<br>Yarn/Fabs./Madeups Etc.                     | 0.39 | 0.41 | 0.45 | 0.45  | 0.50  | 0.64 | 0.70 | 0.74 | 0.54          |
| Marine Products                                         | 0.00 | 0.00 | 0.00 | 0.00  | 0.00  | 0.00 | 0.00 | 0.00 | 0.00          |
| Meat, Dairy And Poul<br>Products                        | 0.17 | 0.21 | 0.29 | 0.43  | 0.89  | 1.06 | 1.12 | 1.12 | 0.66          |
| Mica, Coal And Other Or<br>Minerals Including Proce     | 0.13 | 0.13 | 0.13 | 0.19  | 0.12  | 0.15 | 0.13 | 0.14 | 0.14          |
| Oil Meals                                               | 0.01 | 0.03 | 0.01 | 0.01  | 0.01  | 0.01 | 0.02 | 0.02 | 0.01          |
| Oil Seeds                                               | 0.15 | 0.24 | 0.18 | 0.12  | 0.03  | 0.02 | 0.01 | 0.03 | 0.10          |
| Organic and Inorga<br>Chemicals                         | 0.18 | 0.18 | 0.22 | 0.20  | 0.26  | 0.26 | 0.23 | 0.22 | 0.22          |
| Other Cereals                                           | 0.10 | 0.08 | 0.09 | 0.03  | 0.00  | 0.01 | 0.01 | 0.04 | 0.05          |
| Others                                                  | 0.82 | 0.90 | 0.91 | 0.85  | 0.90  | 0.94 | 1.02 | 0.94 | 0.91          |



|                                 |      |      |      |      |      |       |       |       |      |
|---------------------------------|------|------|------|------|------|-------|-------|-------|------|
| Petroleum Products              | 0.01 | 0.01 | 0.02 | 0.02 | 0.01 | 0.04  | 0.01  | 0.01  | 0.02 |
| Plastic And Linoleum            | 0.53 | 0.62 | 0.58 | 0.54 | 0.66 | 0.63  | 0.64  | 0.64  | 0.60 |
| Ready-made garments of textiles | 2.56 | 2.81 | 3.07 | 2.80 | 3.37 | 3.59  | 3.27  | 3.11  | 3.07 |
| Rice                            | 6.97 | 7.42 | 9.91 | 6.82 | 6.20 | 7.17  | 7.85  | 6.26  | 7.33 |
| Spices                          | 0.12 | 0.10 | 0.12 | 0.14 | 0.16 | 0.17  | 0.16  | 0.20  | 0.15 |
| Tea                             | 0.03 | 0.03 | 0.02 | 0.05 | 0.04 | 0.04  | 0.02  | 0.06  | 0.04 |
| Tobacco                         | 0.02 | 0.24 | 0.07 | 0.05 | 0.04 | 0.02  | 0.07  | 0.13  | 0.08 |
| No. of Sectors with RCA         | 9.00 | 9.00 | 9.00 | 9.00 | 9.00 | 10.00 | 11.00 | 10.00 | 9.00 |

## West Bengal

The RCA analysis for West Bengal from FY2018 to FY2025 highlights a strong and diversified export profile, with 14 to 15 sectors consistently recording an RCA greater than 1—signifying sustained comparative advantage across a broad spectrum of products. Jute Manufacturing stood out as the most dominant sector, with an exceptionally high average RCA of 23.88, underscoring the state's global competitiveness in traditional jute-based exports. Tea, a signature product of West Bengal, followed with a consistently high average RCA of 8.01 across all years, along with Leather and Leather Manufactures (5.23), Other Cereals (3.83), Oil Meals (3.22), Marine Products (2.73), and Iron Ore (2.22), all demonstrating strong and stable export competitiveness.

The analysis also identified continued competitiveness in sectors such as Rice (1.83), Cereal Preparations and Miscellaneous Processed Items (1.58), and Fruits and Vegetables (1.58), each consistently maintaining RCA values above 1, reflecting the state's strength in agro-based exports. Overall, the findings indicate that West Bengal possesses a well-diversified and resilient export base, led by traditional sectors like jute and tea, while also showing promise in industrial and agro-processed segments. Among peer states, West Bengal maintains the highest average number of competitive sectors (15), highlighting its broad-based export advantage.

**Table 8: Commodity Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for West Bengal**

| Commodity group                                      | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | AVERAG<br>RCA |
|------------------------------------------------------|------|------|------|------|------|------|------|------|---------------|
| Carpet                                               | 0.28 | 0.05 | 0.13 | 0.01 | 0.02 | 0.02 | 0.04 | 0.04 | 0.07          |
| Cashew                                               | 0.06 | 0.02 | 0.29 | 0.02 | 0.01 | 0.03 | 0.24 | 0.36 | 0.13          |
| Ceramic Products And Glassware                       | 0.67 | 0.49 | 0.39 | 0.26 | 0.33 | 0.49 | 0.50 | 0.37 | 0.44          |
| Cereal Preparations And Miscellaneous Processed Item | 0.64 | 0.62 | 0.68 | 0.72 | 1.44 | 3.22 | 3.45 | 1.85 | 1.58          |
| Coffee                                               | 0.01 | 0.05 | 0.02 | 0.02 | 0.12 | 0.20 | 0.15 | 0.12 | 0.09          |
| Cotton Yarn/Fabs./Madeups, Handloom Products Etc.    | 0.33 | 0.36 | 0.47 | 0.35 | 0.32 | 0.57 | 0.56 | 0.57 | 0.44          |
| Drugs And Pharmaceutical                             | 0.09 | 0.11 | 0.12 | 0.11 | 0.10 | 0.09 | 0.09 | 0.09 | 0.10          |



|                                                      |       |       |       |       |       |       |       |       |       |
|------------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Electronic Goods                                     | 0.76  | 0.76  | 0.62  | 0.47  | 0.91  | 0.51  | 0.60  | 0.33  | 0.62  |
| Engineering Goods                                    | 1.05  | 1.26  | 1.23  | 1.17  | 1.15  | 1.14  | 1.07  | 1.04  | 1.14  |
| Fruits And Vegetables                                | 1.50  | 2.59  | 2.17  | 2.17  | 0.99  | 0.90  | 1.11  | 1.19  | 1.58  |
| Gems And Jewellery                                   | 0.67  | 0.65  | 0.53  | 0.48  | 0.89  | 1.26  | 1.70  | 2.03  | 1.03  |
| Handicrafts Excl. Handmade Carpet                    | 0.50  | 0.69  | 0.73  | 0.31  | 0.35  | 0.59  | 0.52  | 0.40  | 0.51  |
| Iron Ore                                             | 2.59  | 3.26  | 2.45  | 2.26  | 3.72  | 1.81  | 1.59  | 0.07  | 2.22  |
| Jute Mfg. Including Floor Covering                   | 25.29 | 24.20 | 23.60 | 21.87 | 21.12 | 25.83 | 25.33 | 23.78 | 23.88 |
| Leather And Leather Manufactures                     | 4.86  | 4.96  | 5.00  | 5.31  | 4.74  | 5.35  | 6.08  | 5.56  | 5.23  |
| Man-Made Yarn/Fabs./Madeups Etc.                     | 1.11  | 0.91  | 1.18  | 0.88  | 0.80  | 1.11  | 0.97  | 0.73  | 0.96  |
| Marine Products                                      | 2.69  | 2.86  | 2.94  | 2.76  | 2.58  | 2.89  | 2.60  | 2.54  | 2.73  |
| Meat, Dairy And Poultry Products                     | 0.15  | 0.18  | 0.23  | 0.22  | 0.19  | 0.23  | 0.23  | 0.20  | 0.20  |
| Mica, Coal And Other Or Minerals Including Processed | 0.69  | 0.61  | 1.17  | 1.17  | 1.91  | 1.87  | 1.24  | 1.07  | 1.21  |
| Oil Meals                                            | 3.59  | 2.25  | 3.16  | 3.17  | 4.04  | 3.44  | 1.76  | 1.04  | 2.80  |
| Oil Seeds                                            | 0.39  | 0.64  | 0.50  | 0.40  | 0.43  | 0.40  | 0.37  | 0.69  | 0.48  |
| Organic and Inorganic Chemicals                      | 0.72  | 0.66  | 0.75  | 0.55  | 0.56  | 0.74  | 0.74  | 0.83  | 0.69  |
| Other Cereals                                        | 0.69  | 1.52  | 2.07  | 6.44  | 6.65  | 8.69  | 2.81  | 1.81  | 3.83  |
| Others                                               | 1.02  | 1.01  | 1.05  | 1.35  | 1.74  | 1.56  | 2.08  | 2.04  | 1.48  |
| Petroleum Products                                   | 0.62  | 0.48  | 0.57  | 0.46  | 0.21  | 0.25  | 0.25  | 0.33  | 0.40  |
| Plastic And Linoleum                                 | 2.27  | 2.46  | 2.19  | 1.58  | 1.49  | 1.64  | 1.65  | 1.27  | 1.82  |
| Ready-made garments of textiles                      | 0.58  | 0.55  | 0.59  | 0.60  | 0.59  | 0.77  | 0.83  | 0.73  | 0.65  |
| Rice                                                 | 2.31  | 1.38  | 1.08  | 2.11  | 2.40  | 1.75  | 1.55  | 2.05  | 1.83  |
| Spices                                               | 0.35  | 0.58  | 1.16  | 1.15  | 0.19  | 0.27  | 0.32  | 0.25  | 0.53  |
| Tea                                                  | 8.60  | 8.56  | 6.88  | 5.57  | 7.52  | 10.04 | 9.01  | 9.04  | 8.15  |
| Tobacco                                              | 0.48  | 0.39  | 0.55  | 0.39  | 0.63  | 0.69  | 0.47  | 0.24  | 0.48  |
| No. of Sectors with RCA > 1                          | 12.00 | 12.00 | 15.00 | 14.00 | 13.00 | 15.00 | 15.00 | 14.00 | 15.00 |

## Telangana

The Revealed Comparative Advantage (RCA) analysis for Telangana from FY2018 to FY2025 indicates a modest yet strategically focused export profile, with an average of 6 sectors recording RCA values greater than 1 during the period. Drugs and Pharmaceuticals emerged as the most dominant sector, with an impressive average RCA of 6.08, highlighting Telangana's global leadership and specialization in pharmaceutical exports.



Other Cereals (2.90), Organic and Inorganic Chemicals (2.87), Cereal Preparations and Miscellaneous Processed Items (2.63), and Mica and Other Ores (2.56) also consistently posted RCA values above 2, emphasizing the state's strengths in industrial and mineral-based commodities. Spices further displayed solid and growing competitiveness, with an average RCA of 2.42, supported by steady performance since FY18.

Despite strong performance in select areas, many other commodities registered RCA values well below 1, pointing to limited export competitiveness. Meat, Dairy and Poultry Products showed near-threshold competitiveness with an average RCA of 0.95, while Tobacco experienced a notable decline in RCA in recent years. Overall, the data suggest that Telangana's export strengths are concentrated in a few high-value sectors rather than being widely distributed. This focused comparative advantage positions the state as a specialized hub for pharmaceuticals and chemicals, with potential for growth through targeted value chain development in these industries.

**Table 9: Commodity Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Telangana**

| Commodity group                                      | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | AVERAGE RCA |
|------------------------------------------------------|------|------|------|------|------|------|------|------|-------------|
| Carpet                                               | 0.01 | 0.00 | 0.00 | 0.01 | 0.09 | 0.08 | 0.00 | 0.00 | 0.02        |
| Cashew                                               | 0.00 | 0.00 | 0.01 | 0.00 | 0.00 | 0.00 | 0.01 | 0.01 | 0.01        |
| Ceramic Products And Glassware                       | 0.36 | 0.30 | 0.25 | 0.21 | 0.24 | 0.37 | 0.20 | 0.17 | 0.26        |
| Cereal Preparations And Miscellaneous Processed Item | 3.48 | 3.50 | 3.04 | 2.23 | 2.52 | 2.62 | 2.12 | 1.52 | 2.63        |
| Coffee                                               | 0.63 | 0.71 | 0.73 | 0.94 | 0.62 | 0.54 | 0.61 | 0.52 | 0.66        |
| Cotton Yarn/Fabs./Madeups, Handloom Products Etc.    | 0.12 | 0.13 | 0.10 | 0.10 | 0.19 | 0.15 | 0.17 | 0.10 | 0.13        |
| Drugs And Pharmaceuticals                            | 6.41 | 6.60 | 6.11 | 5.04 | 6.91 | 7.38 | 5.90 | 4.31 | 6.08        |
| Electronic Goods                                     | 1.21 | 0.88 | 0.72 | 0.76 | 0.90 | 0.78 | 0.65 | 0.39 | 0.79        |
| Engineering Goods                                    | 0.53 | 0.58 | 0.56 | 0.51 | 0.58 | 0.67 | 0.99 | 1.57 | 0.75        |
| Fruits And Vegetables                                | 0.85 | 0.82 | 0.76 | 0.44 | 0.51 | 0.47 | 0.44 | 0.41 | 0.59        |
| Gems And Jewellery                                   | 0.21 | 0.16 | 0.15 | 0.11 | 0.22 | 0.21 | 0.24 | 0.20 | 0.19        |
| Handicrafts Excl. Handmade Carpet                    | 0.05 | 0.04 | 0.05 | 0.07 | 0.04 | 0.05 | 0.02 | 0.03 | 0.04        |
| Iron Ore                                             | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.11 | 0.00 | 0.00 | 0.01        |
| Jute Mfg. Including Floor Covering                   | 0.00 | 0.00 | 0.01 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00        |
| Leather And Leather Manufactures                     | 0.02 | 0.02 | 0.02 | 0.01 | 0.04 | 0.02 | 0.02 | 0.01 | 0.02        |
| Man-Made Yarn/Fabs./Madeups Etc.                     | 0.16 | 0.16 | 0.12 | 0.08 | 0.14 | 0.17 | 0.16 | 0.12 | 0.14        |



|                                                  |      |      |      |      |      |      |      |      |      |
|--------------------------------------------------|------|------|------|------|------|------|------|------|------|
| Marine Products                                  | 0.08 | 0.07 | 0.06 | 0.03 | 0.03 | 0.04 | 0.07 | 0.03 | 0.05 |
| Meat, Dairy And Poul Products                    | 1.67 | 1.68 | 1.25 | 0.70 | 0.40 | 0.55 | 0.71 | 0.64 | 0.95 |
| Mica, Coal And Other Or Minerals Including Proce | 3.61 | 3.36 | 3.00 | 2.40 | 2.31 | 2.50 | 2.10 | 1.20 | 2.56 |
| Oil Meals                                        | 0.00 | 0.00 | 0.00 | 0.00 | 0.01 | 0.00 | 0.00 | 0.00 | 0.00 |
| Oil Seeds                                        | 0.01 | 0.07 | 0.09 | 0.04 | 0.75 | 0.93 | 0.87 | 0.25 | 0.38 |
| Organic and Inorga Chemicals                     | 3.73 | 3.32 | 3.36 | 3.11 | 2.57 | 2.70 | 2.35 | 1.86 | 2.87 |
| Other Cereals                                    | 4.65 | 4.80 | 4.98 | 1.20 | 1.28 | 1.08 | 2.62 | 2.58 | 2.90 |
| Others                                           | 1.01 | 0.83 | 0.70 | 0.65 | 1.04 | 0.65 | 0.62 | 0.52 | 0.75 |
| Petroleum Products                               | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Plastic And Linoleum                             | 0.37 | 0.39 | 0.39 | 0.34 | 0.51 | 0.66 | 0.57 | 0.43 | 0.46 |
| Ready-made garments of textiles                  | 0.06 | 0.06 | 0.07 | 0.05 | 0.07 | 0.07 | 0.06 | 0.05 | 0.06 |
| Rice                                             | 0.71 | 0.73 | 0.63 | 0.48 | 0.64 | 0.57 | 0.56 | 0.50 | 0.61 |
| Spices                                           | 2.01 | 1.47 | 1.47 | 1.66 | 3.66 | 4.22 | 3.07 | 1.76 | 2.42 |
| Tea                                              | 0.06 | 0.09 | 0.11 | 0.09 | 0.14 | 0.08 | 0.08 | 0.08 | 0.09 |
| Tobacco                                          | 0.44 | 0.62 | 1.36 | 1.12 | 1.08 | 0.96 | 0.82 | 0.38 | 0.85 |
| No. of Sectors with RCA                          | 9.00 | 7.00 | 8.00 | 7.00 | 8.00 | 6.00 | 6.00 | 7.00 | 6.00 |

## Odisha

The Revealed Comparative Advantage (RCA) analysis for Odisha from FY2018 to FY2025 underscores a highly concentrated export strength, with only 4 to 5 sectors consistently recording RCA values greater than 1. Iron Ore stands out as the most dominant sector, boasting an exceptionally high and sustained average RCA of 23.91. This reflects Odisha's global competitiveness and leadership in mineral-based exports. Notably, Iron Ore also achieved the highest RCA across all fiscal years, peaking at 36.56 in FY25, signalling rising international demand and the state's strong export positioning in this commodity.

Beyond Iron Ore, Odisha displays moderate to strong competitiveness in a select few sectors. Mica and Other Ores maintain an average RCA of 5.31, while Marine Products (2.61) and Engineering Goods (2.38) also demonstrate sustained comparative advantage. However, other sectors—including traditionally significant areas like Textiles, Agricultural Commodities, and Leather—register RCA values well below 1, highlighting the state's limited export competitiveness outside its mineral base. The analysis suggests that Odisha's export profile is heavily reliant on mineral resources, which, while leveraging the state's natural wealth, also exposes it to global commodity price volatility. This reinforces the importance of pursuing greater export diversification for long-term resilience.

**Table 10: Commodity Wise Revealed Comparative Advantage (RCA) analysis from FY2018 to FY2025 for Odisha**



| Commodity group                                         | FY18  | FY19  | FY20  | FY21  | FY22  | FY23  | FY24  | FY25  | AVERAG<br>RCA |
|---------------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|---------------|
| Carpet                                                  | 0.01  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Cashew                                                  | 0.10  | 0.13  | 0.10  | 0.03  | 0.02  | 0.00  | 0.03  | 0.03  | 0.06          |
| Ceramic Products A<br>Glassware                         | 1.01  | 1.20  | 1.01  | 0.59  | 0.49  | 0.61  | 0.35  | 0.41  | 0.71          |
| Cereal Preparations A<br>Miscellaneous Proces<br>Item   | 0.00  | 0.00  | 0.02  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Coffee                                                  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Cotton<br>Yarn/Fabs./Madeups,<br>Handloom Products Etc. | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Drugs And Pharmaceutic                                  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Electronic Goods                                        | 0.01  | 0.00  | 0.04  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.01          |
| Engineering Goods                                       | 2.52  | 2.35  | 2.16  | 1.93  | 2.57  | 2.91  | 2.39  | 2.22  | 2.38          |
| Fruits And Vegetables                                   | 0.02  | 0.02  | 0.02  | 0.01  | 0.02  | 0.01  | 0.02  | 0.03  | 0.02          |
| Gems And Jewellery                                      | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Handicrafts Excl. Ha<br>Made Carpet                     | 0.01  | 0.01  | 0.01  | 0.01  | 0.01  | 0.00  | 0.00  | 0.01  | 0.01          |
| Iron Ore                                                | 18.86 | 27.49 | 29.26 | 18.37 | 13.98 | 22.93 | 23.79 | 36.56 | 23.91         |
| Jute Mfg. Including Fl<br>Covering                      | 0.00  | 0.00  | 0.02  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Leather And Leat<br>Manufactures                        | 0.00  | 0.00  | 0.02  | 0.00  | 0.00  | 0.01  | 0.00  | 0.01  | 0.00          |
| Man-Made<br>Yarn/Fabs./Madeups Etc.                     | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Marine Products                                         | 2.59  | 3.12  | 3.00  | 2.01  | 1.91  | 2.72  | 2.32  | 3.21  | 2.61          |
| Meat, Dairy And Poul<br>Products                        | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Mica, Coal And Other Or<br>Minerals Including Proce     | 5.46  | 8.14  | 5.14  | 2.53  | 3.61  | 5.13  | 4.46  | 8.04  | 5.31          |
| Oil Meals                                               | 0.00  | 0.00  | 0.00  | 0.00  | 0.02  | 0.02  | 0.00  | 0.00  | 0.01          |
| Oil Seeds                                               | 0.01  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.00          |
| Organic and Inorga<br>Chemicals                         | 0.08  | 0.10  | 0.12  | 0.07  | 0.05  | 0.07  | 0.09  | 0.10  | 0.08          |
| Other Cereals                                           | 0.00  | 0.02  | 0.02  | 0.81  | 0.77  | 0.55  | 0.56  | 0.05  | 0.35          |
| Others                                                  | 0.20  | 0.24  | 0.21  | 0.13  | 0.17  | 0.15  | 0.15  | 0.20  | 0.18          |
| Petroleum Products                                      | 0.82  | 0.66  | 0.36  | 0.90  | 0.64  | 0.36  | 0.41  | 0.40  | 0.57          |





|                                 |      |      |      |      |      |      |      |      |      |
|---------------------------------|------|------|------|------|------|------|------|------|------|
| Plastic And Linoleum            | 0.01 | 0.00 | 0.02 | 0.06 | 0.02 | 0.02 | 0.02 | 0.06 | 0.03 |
| Ready-made garments of textiles | 0.00 | 0.03 | 0.06 | 0.04 | 0.05 | 0.09 | 0.09 | 0.09 | 0.05 |
| Rice                            | 0.00 | 0.01 | 0.01 | 0.01 | 0.06 | 0.11 | 0.08 | 0.18 | 0.06 |
| Spices                          | 0.00 | 0.00 | 0.01 | 0.00 | 0.01 | 0.01 | 0.02 | 0.02 | 0.01 |
| Tea                             | 0.00 | 0.00 | 0.01 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Tobacco                         | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| No. of Sectors with RCA         | 5.00 | 5.00 | 5.00 | 4.00 | 4.00 | 4.00 | 4.00 | 4.00 | 4.00 |

## Conclusion

The comparative RCA analysis across ten Indian states reveals notable differences in sectoral competitiveness and export composition. West Bengal stands out with the highest level of diversification, featuring 15 sectors with strong comparative advantage. It exhibits exceptional strength in jute manufacturing (RCA 23.88), along with high performance in tea, leather, and agro-industrial exports. Gujarat and Maharashtra demonstrate competitiveness in petrochemicals, gems and jewellery, and processed foods, supported by robust infrastructure and well-developed industrial ecosystems.

Andhra Pradesh and Uttar Pradesh also display considerable export diversification, with 10 and 11 sectors showing strong comparative advantage, primarily concentrated in agro-based and marine products. Karnataka and Tamil Nadu present a balanced export profile, combining leading agricultural commodities such as coffee and cashew with advanced manufacturing and technology-oriented sectors like electronics, engineering goods, and garments. While moderately diversified, Telangana exhibits clear specialisation in pharmaceuticals (RCA 6.08) and Organic and Inorganic Chemicals (2.87), aligning closely with its focused industrial development strategy.

Haryana's comparative advantage lies in Carpet (9.1), Rice (7.33), and Handicrafts Excl. Hand-Made Carpet (3.58), with a relatively diversified but specialised export structure. Odisha, in contrast, has a highly concentrated export profile dominated by iron ore (RCA 23.91) and mineral-based products, making it more vulnerable to global commodity price shocks.

This RCA-based insight highlights the varied economic capabilities and vulnerabilities of states. States with high diversification and agro-industrial mix tend to be more resilient, while those dependent on a narrow set of resource-based exports may face greater volatility. A nuanced approach to export policy, focusing on value addition, diversification, and sector-specific support, is essential to maximise comparative advantages and ensure long-term competitiveness.

## Key Comparative Insights



| States         | RCA>1 | Diversification | Top 3 Sectors                                                                                                                                                                         | Top 3 Emerging Sectors ( Average RCA 0.8–1)                                                                                                                                                                                    |
|----------------|-------|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maharashtra    | 6     | Moderate        | <ul style="list-style-type: none"> <li>Gems and Jewellery (3.10)</li> <li>Fruits and Vegetables (2.20)</li> <li>Cereal Preparations And Miscellaneous Processed Item (1.6)</li> </ul> | <ul style="list-style-type: none"> <li>Man-Made Yarn/Fabs./Madeups Etc.(1.00)</li> <li>Handicrafts Excl. Hand Made Carp (0.99)</li> <li>Organic and Inorganic Chemicals (0.98)</li> </ul>                                      |
| Gujarat        | 8     | Moderate        | <ul style="list-style-type: none"> <li>Ceramic Products And Glassware (2.59)</li> <li>Oil Seeds (2.44)</li> <li>Petroleum Products (2.44)</li> </ul>                                  | <ul style="list-style-type: none"> <li>Tobacco (0.87)</li> <li>Oil Meals (0.83)</li> <li>Drugs And Pharmaceuticals (0.83)</li> </ul>                                                                                           |
| Tamil Nadu     | 8     | Moderate        | <ul style="list-style-type: none"> <li>Leather And Leather Manufactures (4.1)</li> <li>Ready-made garments of textiles (3.29)</li> <li>Electronic Goods (2.16)</li> </ul>             | <ul style="list-style-type: none"> <li>Handicrafts Excl. Hand Made Carp (0.97)</li> <li>Fruits And Vegetables (0.96)</li> <li>Marine Products (0.8)</li> </ul>                                                                 |
| Karnataka      | 9     | Moderate        | <ul style="list-style-type: none"> <li>Coffee (10.97)</li> <li>Electronic Goods (3.58)</li> <li>Cashew (3.3)</li> </ul>                                                               | <ul style="list-style-type: none"> <li>Mica, Coal And Other Or Minerals Including Process (1)</li> <li>Handicrafts Excl. Hand Made Carp (0.92)</li> <li>Cereal Preparations And Miscellaneous Processed Item (0.83)</li> </ul> |
| Uttar Pradesh  | 10    | High            | <ul style="list-style-type: none"> <li>Meat, Dairy And Poultry Products (10.25)</li> <li>Carpets (8.38)</li> <li>Leather And Leather Manufactures (5.38)</li> </ul>                   | <ul style="list-style-type: none"> <li>Jute Mfg. Including Floor Covering (0.85)</li> <li>Plastic And Linoleum (0.85)</li> <li>Engineering Goods (0.83)</li> </ul>                                                             |
| Andhra Pradesh | 11    | High            | <ul style="list-style-type: none"> <li>Tobacco (11.8)</li> <li>Marine Products (8.6)</li> <li>Coffee (3.72)</li> </ul>                                                                | <ul style="list-style-type: none"> <li>Fruits And Vegetables (0.91)</li> </ul>                                                                                                                                                 |
| Haryana        | 9     | Moderate        | <ul style="list-style-type: none"> <li>Carpets (9.1)</li> <li>Rice (7.33)</li> <li>Handicrafts Excl. Hand Made Carpets (3.58)</li> </ul>                                              | <ul style="list-style-type: none"> <li>Others (0.91)</li> </ul>                                                                                                                                                                |
| West Bengal    | 15    | High            | <ul style="list-style-type: none"> <li>Jute Mfg. Including Floor Covering (23.88)</li> <li>Tea (8.15)</li> <li>Leather And Leather Manufactures (5.38)</li> </ul>                     | <ul style="list-style-type: none"> <li>Man-Made Yarn/Fabs./Madeups Etc. (0.96)</li> </ul>                                                                                                                                      |



|           |   |          |                                                                                                                                                                          |                                                                                                                       |
|-----------|---|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
|           |   |          | Manufactures (5.23)                                                                                                                                                      |                                                                                                                       |
| Telangana | 6 | Moderate | <ul style="list-style-type: none"> <li>• Drugs And Pharmaceuticals (6.08)</li> <li>• Other Cereals (2.9)</li> <li>• Organic and Inorganic Chemicals (2.87)</li> </ul>    | <ul style="list-style-type: none"> <li>• Meat, Dairy And Poultry Products (0.95)</li> <li>• Tobacco (0.85)</li> </ul> |
| Odisha    | 4 | Low      | <ul style="list-style-type: none"> <li>• Iron Ore (23.91)</li> <li>• Mica, Coal And Other Minerals Including Process (5.31)</li> <li>• Marine Products (2.61)</li> </ul> |                                                                                                                       |

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