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AN OVERVIEW OF POST – PANDEMIC AGRICULTURAL DEVELOPMENT IN TAMIL NADU.

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ABSTRACT
Tamil Nadu's agricultural sector has demonstrated remarkable resilience in the post-pandemic period, maintaining positive growth even as India's GDP contracted in 2020-21. The state leads in the production of banana, coconut, and cloves, while ranking among the top producers of sugarcane, groundnut, and oilseeds. Despite contributing only 6% to the Gross State Value Added (GSVA), agriculture remains vital, employing 41.1% of the rural workforce, with 93.5% of farmers being small and marginal (average landholding: 0.7 hectares). The present study examines post-pandemic agricultural development in Tamil Nadu, analyzing trends in productivity, cropping patterns, allied activities, and policy interventions. Key findings reveal that Tamil Nadu outperforms national averages in rice (3,235 kg/ha), oilseeds (2,287 kg/ha), and sugarcane (1,05,000 kg/ha). However, challenges such as water scarcity, climate variability, and fragmented landholdings persist. Irrigation infrastructure relies heavily on wells (65%), while reservoir data shows fluctuating water availability, with Mettur Dam contributing 47% of releases.
Policy support, including record crop loans (₹15,542 crore in 2023-24), MSP incentives, and subsidized farm machinery (₹188 crore), has bolstered farmer incomes. Diversification into horticulture (235 lakh MT production), livestock (₹1.35 lakh crore GSVA), and fisheries (₹6,854 crore exports) highlights the sector's evolving dynamics. Additionally, organic farming has expanded, with 34,000 hectares under cultivation in 2023-24. Despite these strengths, climate risks—such as extreme weather events—threaten stability. The study underscores the need for enhanced irrigation, crop diversification, and climate-smart practices to ensure long-term agricultural sustainability in Tamil Nadu.
Keywords: *Agricultural development, Cropping Pattern, Horticultural Development, Credit Facilities.*

INTRODUCTION :
Tamil Nadu's economy and growth patterns resemble those of other large, industrialized states, as well as the overall economic trends of India. However, Tamil Nadu stood out as one of the few states to record positive GSDP growth when India's GDP contracted by -5.78% in 2020-21 due to the pandemic. Tamil Nadu leads India in the production of banana, coconut, and clove and is also a major producer of sugarcane, cotton, turmeric, maize, groundnut, and oilseeds. It is the country's fourth-largest producer of rice, following West Bengal, Uttar Pradesh, and Punjab. Tamil Nadu's primary sector, which includes agricultural crops, livestock, forestry and logging, fishing and aquaculture, and mining and quarrying, grew at an average rate of 4.78% from 2012-13 to 2023-24. This growth rate is relatively low compared to its average growth of 6.05% from 2005-06 to 2011-12. Within the primary sector, the growth of agriculture (crops) and fishing has declined, while livestock, forestry, and mining have shown stronger growth. (Economic survey of Tamil Nadu 2024-2025).
Agriculture in Tamil Nadu is highly dependent on monsoons and is the largest consumer of water in the state, utilizing 75% of its water resources. Although the state receives an average annual rainfall of 965.6 mm, actual rainfall varies each year, leading to droughts in some years and floods in others. Tamil Nadu's surface water potential is 24,864 MCM, while its usable groundwater recharge capacity is 22,423 MCM. However, the per capita water availability in the state is just 900 cubic meters, much lower than the national average of 2,200 cubic meters. In 2023-24, Tamil Nadu's Agriculture GSVA

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(Gross State Value Added) at current prices was around ₹1.5 lakh crore. Agriculture contributes 6% to the state's total GSVA, making it the fifth-largest sub-sector after manufacturing, real estate, construction, and trade & repair services. Agriculture and related activities employ 41.1% of the rural workforce. In 2021-22, the state had 92.3 lakh farmers cultivating 64.6 lakh hectares of land. Notably, 93.5% of these farmers (86.3 lakh) are small and marginal, collectively farming 62.7% of the total cultivated area, with an average landholding size of only 0.7 hectares.

Despite challenges related to water availability, Tamil Nadu's agricultural sector has shown impressive results. In 2022-23, the state ranked first in India in the productivity of oilseeds, groundnut, and sugarcane; second in maize; and third in paddy. Technological innovations, expanded irrigation infrastructure, and better market access have significantly boosted crop yields. Kumarasamy et al. (2020) conducted a sectoral analysis of Tamil Nadu's economy during the pandemic, revealing that while the primary sector (agriculture and allied activities) remained stable, the secondary sector (manufacturing and construction) faced severe contractions due to supply chain disruptions. The tertiary sector, however, saw growth in communication and IT-enabled services, contributing positively to the Gross State Value Added (GSVA). Their study emphasized that agriculture was less affected compared to other sectors, but allied activities like poultry and fisheries experienced significant declines due to reduced demand and logistical challenges.

OBJECTIVE OF THE STUDY :

The primary objective of this study is to analyze the post-pandemic agricultural development in Tamil Nadu, focusing on Agricultural growth trends, Cropping patterns, Allied activities, challenges, and policy impacts

METHODOLOGY OF THE STUDY :

The present study focus on Tamil Nadu's agricultural sector employs a mixed-methods research approach, combining quantitative data analysis with qualitative policy evaluation, utilizing secondary data from authoritative government sources such as the Economic Survey of Tamil Nadu 2024-2025, the Directorate of Economics and Statistics, the Water Resources Department (WRD), Reserve Bank of India reports, Agricultural Statistics at a Glance (2024), and Policy Notes from the Agriculture Department. The study analyzes data from 2019-20 to 2023-24 to capture pre-pandemic trends, pandemic impacts (2020-22), and post-pandemic recovery (2022-24), employing a robust analytical framework that includes comparative analysis (benchmarking against national averages), trend analysis (five-year patterns in productivity, land use, and resource allocation), sectoral analysis (evaluating crops, livestock, and fisheries), and policy evaluation (assessing government interventions). Key metrics examined encompass productivity indicators (yield per hectare), land use patterns (net sown area, fallow lands), water resource utilization (reservoir data, irrigation coverage), financial flows (credit disbursement, subsidies), and climate vulnerability indicators.

LAND USE PATTERN IN TAMIL NADU:

Tamil Nadu has a total geographical area of 130.3 lakh hectares. Out of this, the net sown area, representing land actively cultivated, stands at 47.6 lakh hectares, making up just 36.5% of the state's total geographical area.

Chart 1: Land Use Pattern in Tamil Nadu, 2023-24

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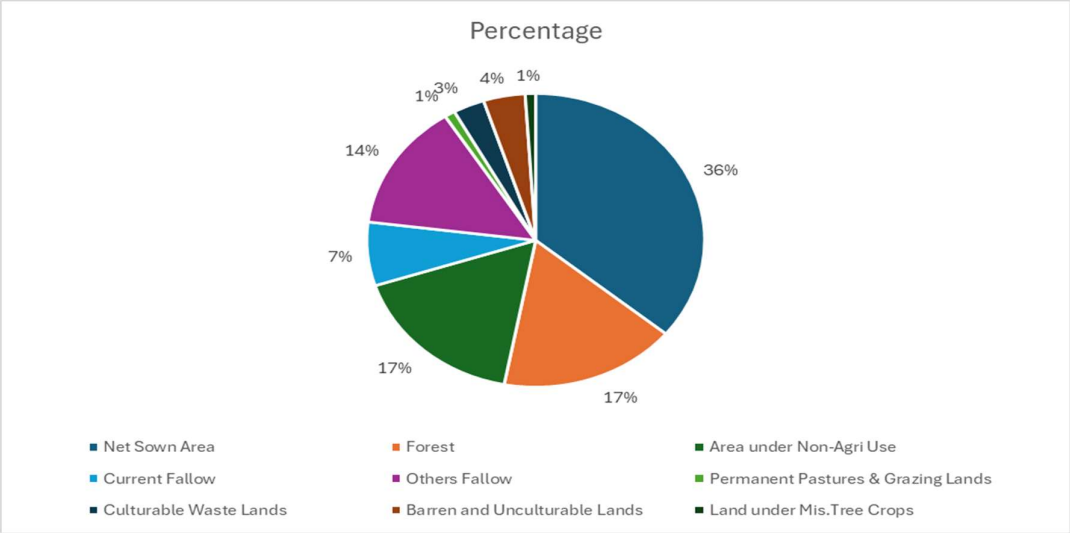

Source: Directorate of Economics and Statistics, GoTN.

Chart 1. shows Tamil Nadu's land use pattern highlights a strong reliance on agriculture, with 36% of the total land classified as Net Sown Area, indicating a significant portion dedicated to active crop cultivation. Forests cover 17% of the land, contributing to ecological balance and biodiversity conservation. An equal share (17%) is allocated for Non-Agricultural Uses, including urban settlements, industries, and infrastructure, reflecting the state's growing urbanization and economic diversification.

A notable 21% of land remains fallow, with 7% as Current Fallow (temporarily uncultivated) and 14% as Other Fallow (left idle for longer periods), suggesting challenges such as water scarcity, soil degradation, or shifting cultivation practices. Permanent Pastures & Grazing Lands account for only 1%, indicating limited reliance on livestock-based farming. Meanwhile, Culturable Waste Lands (3%) represent underutilized areas with potential for future agricultural expansion. Barren and Unculturable Lands (4%) consist of rocky or arid terrains unsuitable for farming. Additionally, Land under Miscellaneous Tree Crops (1%) includes orchards and agroforestry systems, though their share remains marginal.

IRRIGATION FACILITIES IN TAMIL NADU :

The state's irrigation infrastructure includes 2,241 canals, 41,123 tanks, 4,15,842 tube and bore wells, and 14,51,894 open wells. Around 60% of the net sown area is irrigated. Of the total irrigated land, 20.91% is supplied by canals, 13.90% by tanks, and the remaining 65.19% depends on wells, including both bore wells and open wells.

WATER AVAILABILITY IN TAMIL NADU:

Except in 2019-20, Tamil Nadu has consistently received above-average annual rainfall. Yet climate change remains a serious threat, disrupting agricultural production and yields in vulnerable years. A striking example: 67 days of extreme weather in just the first three quarters of 2024 impacting thousands of hectares of cultivated land.

Table 1: Water Released from Major Reservoirs in TMC.

Reservoir (Depth in feet)	2019-20	2020-21	2021-22	2022-23	2023-24
Mettur (120)	205.1	195.7	327.3	710.7	111.3
Bhavanisagar (105)	68.9	54.9	73.7	84.7	57.3
Amaravathy (90)	9.8	17.3	19.3	23.1	12.2
Periyar (152)	22.0	23.9	36.7	27.5	18.5
Vaigai (71)	16.9	16.9	32.2	30.4	22.6

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Papanasam (143)	20.7	90.8	34.0	23.5	23.6
Manimuthar (118)	6.5	8.2	6.6	4.4	2.8
Pechiparai (48)	18.8	13.9	9.4	4.7	12.6
Perunchani (77)	11.7	7.8	11.3	7.5	6.7
Krishnagiri (52)	7.0	6.1	13.9	44.8	1.3
Sathanur (119)	2.2	4.5	30.0	56.8	12.9
Poondi (35)	7.5	10.3	37.3	16.9	16.6
Sholayar (160)	36.6	20.1	22.7	25.5	14.7
Parambikulam (72)	22.9	29.0	17.8	40.7	Nil
Aliyar (120)	11.5	12.0	15.4	13.9	Nil
Thirumoorthy (60)	16.3	19.7	22.1	17.8	9.9

Source: WRD, GoTN. * TMC=1 thousand million cubic feet.

Table 1: presents data on water released from major reservoirs in Tamil Nadu. Over the years, Mettur, Bhavanisagar, Vaigai, and Papanasam have collectively accounted for 58% to 76% of the total water discharge from the state's 16 major reservoirs. Between 2019-20 and 2023-24, the average annual water release from these reservoirs stood at 616 TMC, with Mettur alone contributing 47.4% of the total. However, in 2023-24, the water released from key reservoirs, including Mettur, Bhavanisagar, Amaravathy, Vaigai, Krishnagiri, and Sathanur, was considerably lower compared to the previous two or three years.

FERTILIZER AND POWER CONSUMPTION IN TAMIL NADU

The expansion of commercial agriculture and the rise in productivity of key crops in Tamil Nadu have been largely driven by the extensive use of chemical fertilizers and groundwater, supported by the energization of pump sets and the provision of free power for irrigation. The state's consumption of fertilizers (NPK) increased from 9,65,016 metric tonnes in 2019-20 to 10,68,934 metric tonnes in 2023-24(Table 1), though it saw a slight decline from the peak in 2022-23 due to a reduction in the gross cropped area—particularly for paddy, pulses, and cotton—and a shift towards organic farming.

Likewise, agricultural power consumption rose from 13,811 million units in 2019-20 to 15,430 million units in 2021-22, then temporarily dropped to 13,926 million units in 2022-23 before reaching 17,957 million units in 2023-24. To continue supporting the sector, the state government has allocated ₹7,216 crore for the subsidy on three-phase free power in 2024-25.

CROPPING PATTERN IN TAMIL NADU :

Food grains, including paddy, maize, jowar, bajra, ragi, and millets make up around 62% of the gross cropped area, while non-food crops such as oilseeds, sugarcane, and cotton account for the remaining 38%. Pulses alone represent 11.72% of the total cropped area.

Rice, being the staple food of the population, has consistently dominated the cropping pattern over the years. Paddy's share in the total cropped area rose from 32.1% in 2019-20 to 34.4% in 2023-24. The state government's paddy procurement incentives, which is in the addition to Minimum Support Price (MSP) set by the Union government, have further boosted the cultivation of paddy.

With paddy retaining its dominant position, area under pulses and millets has witnessed a significant decline. The area under jowar cultivation has decreased from 4.5 lakh hectares in 2019-20 to 3.54 lakh hectares in 2023-24, while area under pulses have reduced from 8.24 lakh hectares to 7.17 lakh hectares over the same period. A notable exception to this trend is area under maize (corn), which has increased by 1.21 lakh hectares between 2019-20 and 2023-24.

PRODUCTION AND PRODUCTIVITY OF MAJOR CROPS:

After 2019-20, the pandemic disrupted labor availability, supply chains, and input distribution, causing paddy production to drop to 68.81 lakh tonnes. However, paddy production has since recovered, reaching 70.48 lakh tonnes in 2023-24. Similarly, maize production, which had increased from 24.76 lakh tonnes in 2019-20 to 28.36 lakh tonnes by 2023-24. At the same period. According to the

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Agricultural Statistics at a Glance (2024), Tamil Nadu ranked first in the productivity of oilseeds, groundnut, and sugarcane, second in maize productivity, and third in paddy productivity. Compared to 2023-24, the productivity of cotton, groundnut, and millet improved in 2024-25. However, the productivity of paddy, maize, pulses, oilseeds, and sugarcane slightly declined due to deficient rainfall during the southwest monsoon, the effects of Cyclone and heavy rainfall in the southern districts in December 2023.

In 2023-24, Tamil Nadu's rice productivity was around 3,235 kg/ha, above the national average of 2,882 kg/ha. Tamil Nadu's oilseeds productivity was 2,287 kg/ha, which exceeded the national average of 1,314 kg/ha. Tamil Nadu's sugarcane productivity was 1,05,000 kg/ha, which was higher than the national average of 78,953kg/ha.

Table 2: Productivity (Yield) of Selective Crops in Tamil Nadu (Kg. /Ha.)

Productivity (Yield)	2019-2020	2020-21	2021-22	2022-23	2023-24	All India
Rice	3760	3379	3566	3500	3235	2791
Maize	7424	6408	7066	7007	6239	3298
Pulses	735	588	622	836	538	636
Groundnut	2980	2502	2812	2598	2694	1905
Oil Seeds	2626	2244	2505	2288	2287	1587.8
cotton	418	369	347	313	330	439

Source: Directorate of Economics and Statistics, GoTN

Chart 2: Tamil Nadu demonstrates higher agricultural productivity compared to the national average across most major crops, though recent years show fluctuating yields. Rice, the staple crop, consistently outperforms the All-India average (2,791 kg/ha), peaking at 3,760 kg/ha in 2019-20 before declining to 3,235 kg/ha in 2023-24, possibly due to climate variability or water stress. Maize yields are notably robust, doubling the national average (3,298 kg/ha), with 2020-21 and 2023-24 showing dips that may reflect weather disruptions. Pulses exhibit volatility, plunging to 538 kg/ha in 2023-24 (below the national average of 636 kg/ha), signaling susceptibility to adverse conditions. Groundnut and oil seeds maintain strong productivity but have trended downward since 2019-20, mirroring broader challenges in oilseed cultivation. Conversely, cotton yields lag behind India's average (439 kg/ha), with a steady decline from 418 kg/ha (2019-20) to 330 kg/ha (2023-24), highlighting potential issues in pest management or soil health. These trends underscore Tamil Nadu's agricultural resilience while revealing vulnerabilities to climate and market pressures, necessitating targeted interventions to stabilize yields.

FINANCE SUPPORT TO FARMERS: CREDIT, MARKET SUPPORT, AND CROP INSURANCE IN TAMIL NADU :

In Tamil Nadu, 4,454 Primary Agricultural Co-operative Credit Societies (PACCS), along with 151 branches, provide credit services for both agricultural and nonagricultural activities to 12,525 village panchayats. In 2023-24, crop loan disbursements reached a record ₹15,000 crore for the first time in the history of the Tamil Nadu Co-operative Department, totaling ₹15,542.84 crore distributed to 18,36,345 farmers. Additionally, the increase in new farmers led to a rise in loan distribution. In the Cauvery Delta districts, the number of farmers receiving crop loans grew by 14% in 2023-24, with ₹3,744.59 crore disbursed to 5,00,380 farmers, compared to ₹3,288.98 crore provided to 4,88,866 farmers in 2022-23.

Table 3: Credit to Tamil Nadu Agriculture by Commercial Banks

Years	Credit to Tamil Nadu Agriculture by Commercial Banks (₹ in crores)
2019-20	182990
2020-21	223007

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2021-22	252472
2022-23	288990
2023-24	357805

Sources: Handbook of Statistics on Indian States, RBI

As shown in Table 3, credit disbursed to Tamil Nadu farmers by scheduled commercial banks has steadily increased, rising from ₹1,82,990 crore in 2019-20 to ₹3,57,805 crore in 2023-24. In the same year, Tamil Nadu ranked first in agricultural credit disbursed by commercial banks, surpassing Andhra Pradesh (₹2.64 lakh crore), Uttar Pradesh (₹2.1 lakh crore), and Karnataka (₹1.84 lakh crore).

According to the Agricultural Statistics at a Glance (2024), the total institutional credit extended to Tamil Nadu's agricultural sector—through commercial banks, co-operative banks, and regional rural banks—reached ₹4.39 lakh crore. Of this amount, ₹2.42 lakh crore was allocated for crop loans, while ₹1.97 lakh crore was provided as term loans to support long term agricultural investments.

MARKET SUPPORT :

Market Support and Price Incentives: As an add on to minimum support price, the Tamil Nadu Government provides an additional incentive of ₹105 per quintal for paddy and ₹215 per tonne for sugarcane. As of June 2024, a total of 29.91 lakh metric tonnes of paddy had been procured from 3.72 lakh farmers, with ₹6,442.8 crore distributed as support.

To support agricultural trade and storage, the government has set up 284 regulated markets across Tamil Nadu, which include 525 storage go-downs, 395 transaction sheds, 421 drying yards, 863 traders' shops, and 275 cold storage units with a combined capacity of 40,365 metric tonnes. The National Agriculture Market (eNAM) has been implemented in 213 of these regulated markets to facilitate digital trading. In addition, 193 Uzhavar Sandhais (farmers' markets) are operational across the state, offering farmers direct market access.

Crop Insurance: Crop insurance provides financial protection to farmers during crop losses during unexpected natural disasters. By covering 49% of the insurance premium paid to insurance companies, the state government helps to safeguard farmers' livelihoods while encouraging the adoption of modern agricultural practices and technologies. Table 4, provides details on crop insurance under PMFBY. In 2020-21, the scheme saw the highest enrollment of farmers, driven by the impact of the pandemic, with a record compensation payout of ₹2,685 crore. However, the number of enrolled farmers and the total insured area have varied over the years, influenced by factors such as changing climatic risks and better targeting.

Table 4: Crop Insurance Coverage

Years	Crop Insurance Coverage (Area Insured (Lakh Acre)	Crop Insurance Coverage (Farmers Enrolled (Lakh)
2019-20	35.33	15.45
2020-21	44.99	20.09
2021-22	41.1	19.39
2022-23	38.9	17.37
2023-24	34.62	14.76

Source: Department of Agriculture and Farmers welfare

AGRICULTURE MECHANIZATION

The government is dedicated to supporting small and marginal farmers by providing subsidized agricultural machinery. This initiative includes essential equipment such as tractors, power tillers, rotavators, paddy transplanters, multi-crop threshers, and smaller tools li**ke** drum seeders and sprayers. Additionally, advanced machinery, such as drones, and value-added equipment like onion de-toppers, coconut dehuskers, oil extractors, and pulverizers, are being distributed. To further support disadvantaged farmers, the state government provides an additional 20% subsidy for SC and ST

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farmers. In 2023-24, agricultural machinery including 5,654 power tillers, 2,437 tractors, and 2,428 rotavator were provided to 28,230 farmers, with a total subsidy of around ₹188 crore. For 2024-25, the subsidy allocation was substantially increased to ₹242 crore. 3.23 To address the challenge of shrinking land holdings and encourage the use of smaller machinery, the government distributed around 4,332 power tillers with a total subsidy of Rs.21 crore under the Kalaignarin All Village Integrated Development To address the challenge of shrinking land holdings and encourage the use of smaller machinery, the government distributed around 4,332 power tillers with a total subsidy of Rs.21 crore under the Kalaignarin All Village Integrated Development Programme in 2024-25. This initiative aims to boost agricultural productivity while providing vital support to farmers, especially those from disadvantaged backgrounds. Additionally, the e-Vaadagai mobile app, developed by the Agricultural Engineering Department, allows farmers to book agricultural machinery and implements online, make digital payments, and eliminate the need for physical visits to Agri-Engineering Department (AED) offices.

ORGANIC FARMING:

Organic and natural farming focus on producing chemical-free, pesticide-free food grains while improving soil health and reducing environmental pollution. In Tamil Nadu, the adoption of organic farming has been steadily increasing, signaling a shift towards more sustainable agricultural practices. The number of farmers registered with the Tamil Nadu Organic Certification Department (TNOCD) has nearly doubled, rising from 5,255 in 2019-20 to 11,820 in 2023-24. Likewise, the area dedicated to organic farming has grown significantly, from 9,639 hectares to 34,000 hectares (Table 5). Notably, TNOCD is ranked first in the country for the highest number of registered organic farmers, underscoring the state's leadership in promoting organic agriculture.

Table 5: Organic Farming in Tamil Nadu

Years	Area (Hectare)	Farmers
2019-20	35.33	15.45
2020-21	44.99	20.09
2021-22	41.1	19.39
2022-23	38.9	17.37
2023-24	34.62	14.76

Source: Department of Agriculture and Farmers welfare, GoTN

HORTICULTURE DEVELOPMENT IN TAMIL NADU

Table 6: Area, Production and Yield of Horticulture Crops in 2023-24

Horticulture Crop	Area (lakh ha)	Production (lakh MT)	Productivity (MT/ha)
Fruit	3.34	75.29	22.52
Vegetable	3.63	92.36	25.46
Plantation	7.59	56.28	7.41
Spices & Condiments	1.11	3.3	2.97
Medicinal and Aromatic	0.16	1.68	10.52
Flower	0.47	6.31	13.55
Total	16.3	235.22	82.43

Source: Policy Note-Agriculture 2024-25.

The 2023-24 horticulture data for Tamil Nadu reveals significant sectoral variations, with vegetables demonstrating the highest production (92.36 lakh MT) and productivity (25.46 MT/ha) despite occupying only 22.3% of the total horticulture area (3.63 lakh ha), while plantation crops dominate the cultivated area (7.59 lakh ha, 46.6% of total) but show relatively lower productivity (7.41 MT/ha). Fruits exhibit remarkable yield efficiency (22.52 MT/ha) from just 3.34 lakh ha, contributing

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substantially to total output, whereas spices display the lowest productivity (2.97 MT/ha) despite moderate cultivation area (1.11 lakh ha), suggesting potential for technological interventions. The flower sector stands out for its exceptional productivity (13.55 MT/ha) from minimal area (0.47 lakh ha), indicating strong commercial potential, while medicinal plants show promising yields (10.52 MT/ha) in their niche segment, collectively contributing to Tamil Nadu's robust horticulture performance with total production reaching 235.22 lakh MT across 16.3 lakh hectares, reflecting the sector's vital role in the state's agricultural economy.

ALLIED ACTIVITIES

Tamil Nadu possesses abundant livestock and poultry resources, serving as a crucial source of livelihood for small and marginal farmers as well as landless laborers. In 2023-24, the Gross State Value Added (GSVA) from the livestock sector at nominal prices stood at ₹1.35 lakh crore, contributing 5.41% to the state's total GSVA. This sector has significantly enhanced the per capita availability of milk, eggs, and meat, reinforcing its importance in the state's agricultural economy.

Table 7: Production of Meat, Egg and Milk in Tamil Nadu

Years	Meat (1000 tonnes	Egg (Crores)	Milk (1000 tonnes)
2019-20	663	2002	8759
2020-21	670	2012	9790
2021-22	686	2083	10107
2022-23	704	2156	10316
2023-24	768	2233	1080

Source: Handbook of Statistics on Indian States, RBI

Table 7, highlights the trends in meat, egg, and milk production in Tamil Nadu. Between 2019-20 and 2022-23, meat production rose from 6.63 lakh tonnes to 7.04 lakh tonnes, egg production increased from 2,022 crore to 2,156 crore, and milk production expanded from 87.59 lakh tonnes to 103.17 lakh tonnes. Tamil Nadu produces the second highest number of eggs, following Andhra Pradesh, and ranks sixth in meat production. Additionally, the state stands 11th in the country in terms of milk production.

PRODUCTION AND EXPORT OF FISH IN TAMIL NADU

Tamil Nadu has a vast coastline spanning 1,076 kilometers and possesses 3.86 lakh hectares of effective inland water resources, including reservoirs, major and minor irrigation tanks, short seasonal tanks, ponds, rivers, backwaters, and other water bodies. Additionally, the state has 56,000 hectares of brackish water area dedicated to fisheries. Tamil Nadu's inland fishing community comprises approximately 2.36 lakh people, while 4536.46 hectares are designated for coastal aquaculture, primarily focusing on shrimp farming. This sector also provides livelihoods to 10.48 lakh marine fishers, underscoring its economic and social significance.

In 2023-24, the Gross State Value Added (GSVA) from fishing and aquaculture reached ₹24,000 crore at current prices, contributing 0.95% to Tamil Nadu's total GSVA. Fish production in the state saw a steady rise, increasing from 7.574 lakh tonnes in 2019-20 to 8.84 lakh tonnes in 2023-24 (Table 8). Marine products account for nearly 75% of this production, with slight annual fluctuations. In 2023-24, Tamil Nadu exported 1.34 lakh tonnes of fish products, generating ₹6,854 crore in foreign exchange earnings.

Table 8: Production and Export of Fish in Tamil Nadu

Years	Marine	Inland	Export
2019-20	583031	174428	134918
2020-21	547615	174824	110023
2021-22	595177	211548	114810
2022-23	596687	231963	123157

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2023-24	637442	246576	134317

Source: Directorate of Fisheries, GoTN.

MAJOR SUMMARY HIGHLIGHTS:

Productivity & Growth: Tamil Nadu outperforms national averages in rice (3,235 kg/ha vs. 2,882 kg/ha), oilseeds (2,287 kg/ha vs. 1,314 kg/ha), and sugarcane (1,05,000 kg/ha vs. 78,953 kg/ha). However, yields for pulses and cotton lag, reflecting climate and soil challenges.

Water & Irrigation: With 60% of net sown area irrigated, wells (65%) dominate over canals (21%) and tanks (14%). Reservoir data (2019-24) shows volatile water availability, with Mettur Dam contributing 47% of releases.

Policy Support: Record crop loans (₹15,542 crore in 2023-24), MSP incentives (+₹105/quintal for paddy), and subsidized machinery (₹188 crore) bolster farmer incomes.

Climate Risks: Extreme weather (67 days in 2024) and declining rainfall resilience threaten stability, despite Tamil Nadu's 965.6 mm average annual rainfall.

Diversification: Horticulture (235 lakh MT production) and allied sectors (livestock: ₹1.35 lakh crore GSVA; fisheries: ₹6,854 crore exports) are growing, alongside organic farming (34,000 ha in 2023-24).

CONCLUSION:

Tamil Nadu, India's second-largest economy, has demonstrated resilience in its agricultural sector despite challenges like climate variability, water scarcity, and post-pandemic disruptions. The state leads in the production of banana, coconut, and cloves, while ranking among the top producers of sugarcane, groundnut, and oilseeds. Although agriculture contributes only 6% to the GSVA, it employs 41.1% of the rural workforce, with 93.5% of farmers being small/marginal (avg. landholding: 0.7 ha). In Tamil Nadu, agriculture contributes a significant, though decreasing, portion to the Gross State Domestic Product (GSDP). While the primary sector (including agriculture) contributed 11.61% to GSVA in 2022-23, it dropped to 11.18% in 2023-24. Agriculture contributes ₹1.5 lakh crore (6% of GSVA) and ranks as the fifth largest sector in Tamil Nadu.

Tamil Nadu's agriculture thrives on productivity and policy support but faces systemic risks from climate change, fragmented landholdings, and water stress. Strengthening irrigation infrastructure, promoting crop diversification (especially millets/pulses), and scaling up climate-smart practices, integrated farming system and mixed farming are critical for long-term sustainability. The sector's success remains pivotal for rural livelihoods and the state's broader economic resilience.

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