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CONTRIBUTION OF AGRICULTURE TO JAMMU AND KASHMIR'S ECONOMY: A TREND ANALYSIS OF SECTORAL SHARE AND GROWTH (2000–2025)

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ABSTRACT. This paper examines the changing contribution of agriculture to the economy of Jammu and Kashmir (J&K) over the first quarter of the twenty-first century, using published secondary data from the J&K Economic Survey, the National Statistical Office (NSO), the Reserve Bank of India's *Handbook of Statistics on the Indian Economy*, and departmental sources. A descriptive trend analysis of sectoral shares and growth rates reveals a clear structural transformation: the primary sector's share of Gross Value Added (GVA) has fallen from roughly 28 % in the late 2000s to about 20 % by 2023–24, even as the tertiary sector has come to account for over three-fifths of the economy. Crucially, this relative decline has occurred alongside rising nominal value added in agriculture: a simple growth-gap decomposition shows that the sector's share is eroding not because farm output is falling but because it grows about one percentage point per year more slowly than the aggregate economy. We complement the aggregate picture with three sector-specific findings. First, the primary sector's decline in J&K is shaped by farmland conversion as well as by ordinary reallocation, distinguishing it from the textbook transition. Second, the region's comparative advantage lies in high-value horticulture—apple, walnut, and saffron—which alone contributes on the order of 8 %–9 % of Gross State Domestic Product and sustains roughly 7.5 lakh families. Third, a striking output–livelihood gap persists: agriculture generates about a fifth of measured output but supports close to 70 % of the population, implying low value added per worker relative to services. We interpret these findings through structural-transformation theory, benchmark J&K against the all-India profile, and discuss implications for policy interventions such as the Holistic Agriculture Development Programme. The analysis is deliberately data-light and fully reproducible from freely accessible official sources.

Keywords: agriculture; structural transformation; Gross Value Added; sectoral share; horticulture; Jammu and Kashmir; regional economy; trend analysis.

JEL classification: O13; Q10; R11; O47; O53.

Introduction

The relationship between agriculture and the broader economy lies at the heart of development economics. In the classical accounts of structural transformation associated with Fisher, Clark, Kuznets, and later Chenery and Syrquin, economic growth is accompanied by a systematic reallocation of output and employment away from agriculture and towards industry and services. In the dual-economy model of Lewis, labour moves from a low-productivity traditional sector to a higher-productivity modern one; in the empirical regularities documented by Kuznets and by Chenery and Syrquin, the share of agriculture in national or regional income falls steadily as per-capita income rises. This happens not because farming collapses but because the non-agricultural sectors expand more rapidly and because the demand for food is income-inelastic relative to the demand for manufactures and services (Engel's law). Reading the trajectory of a regional economy through the movement of its sectoral shares is therefore one of the most economical ways to characterize where that economy stands in its developmental arc.

Jammu and Kashmir offers a particularly instructive case. The region is popularly and administratively described as an agrarian economy: agriculture and allied activities support, directly

or indirectly, close to 70 % of the population and remain central to rural livelihoods, food security, and the cultural fabric of the Valley and the Jammu plains alike. Yet the statistical contribution of agriculture to regional income has been receding for well over a decade, and the tertiary sector—trade, tourism, transport, public administration, and allied services—has become the dominant contributor to Gross Value Added (GVA). This apparent tension between agriculture's demographic weight and its shrinking share of measured output is the central puzzle this paper addresses. It is not merely an accounting curiosity: the gap between where people work and where value is generated is, at bottom, a statement about relative productivity and rural incomes, and hence about welfare.

Our aim is empirical and deliberately transparent. We ask four questions. First, how has the share of agriculture (and of the primary sector more broadly) in J&K's GVA evolved over the period 2000–2025? Second, has the sector's absolute value added grown, stagnated, or declined over the years for which comparable official data exist, and can the movement of the share be decomposed into an own-growth component and a relative (structural) component? Third, what is the internal composition of the sector—in particular, how large is the high-value horticultural core that gives J&K its comparative advantage? Fourth, how does the region's agrarian profile compare with the all-India picture? We answer these using only published secondary data, so that every figure in the paper can be traced to a freely accessible official source.

Two features of the J&K case require care and are woven through the analysis. The first is the reorganization of 31 October 2019, when the erstwhile State of Jammu and Kashmir was reconstituted as two Union Territories, J&K and Ladakh. Official value-

added series from 2019–20 onwards pertain to the UT of J&K only, introducing a structural break that must be acknowledged before any pre- and post-2019 figures are compared. The second is the well-documented conversion of fertile agricultural land to non-farm uses, which distinguishes J&K’s experience from the clean “textbook” transition and links the sectoral-share story to questions of land-use policy and food self-sufficiency. The contribution of this paper is not the discovery of new data but the assembly of scattered official figures into a coherent, interpretable trend narrative for a regional economy that is often discussed impressionistically. Where earlier regional studies tend to focus on a single crop or a single survey year, we combine the aggregate share trend, a growth-gap decomposition, the horticultural composition, and an output–employment comparison into one account, and we benchmark each element against the national picture. The remainder of the paper is organized as follows. Section 2 describes the data sources and the descriptive methodology, including the growth-gap decomposition. Section 3 sets out the current sectoral structure of the J&K economy. Section 4 presents the core trend analysis of agriculture’s share and growth, and Section 5 decomposes the share change. Section 6 examines the horticultural core. Section 7 analyzes the output–livelihood gap and places J&K in national context. Section 8 interprets the findings and connects them to policy, and Section 9 concludes.

1. DATA AND METHODOLOGY

1.1. **Sources.** The analysis draws exclusively on published secondary data:

- the **J&K Economic Survey** (various years, most recently 2023–24 and 2025–26), which reports sectoral shares of GVA, headline GSDP aggregates, growth rates, and programme-level information;
- the **Reserve Bank of India**, *Handbook of Statistics on the Indian Economy* (2023–24), which reproduces NSO estimates of Net State Value Added (NSVA) by economic activity at current prices, base 2011–12;
- the **National Statistical Office (NSO)** and the *Agricultural Statistics at a Glance* series of the Government of India, for national benchmarks; and
- departmental and official sources—the J&K Department of Horticulture and NITI Aayog—for the sub-sectoral horticultural figures used in Section 6.

All figures used below are official estimates. Where a single year is cited for a share, it corresponds to the reference year of the relevant Economic Survey; where a range is cited, the endpoints are the earliest and latest comparable official observations.

1.2. **Definitions.** Following NSO conventions, the *primary sector* comprises agriculture (crops and livestock), forestry and logging, fishing and aquaculture, and mining and quarrying; the *secondary sector* comprises manufacturing, construction, and utilities; and the *tertiary sector* comprises services. “Agriculture and allied activities” denotes the primary sector net of mining, which in J&K is negligible (mining NSVA is under 1 % of the sector). Sectoral shares are computed as the ratio of a sector’s value added to total GVA, expressed as a percentage.

1.3. Growth measures and the share decomposition. We summarize growth using the compound annual growth rate

$$V_{t1} / V_0$$

$$\frac{1}{t_1 - t_0} \ln \frac{V_{t1}}{V_0} \quad (2.1)$$

where V_t is nominal value added in year t . To understand why a sector's share moves, let

$s_a(t) = V_a(t)/V(t)$ denote agriculture's share of total GVA $V(t)$. Differentiating the ratio,

$$\frac{\dot{s}_a s_a \dot{V}_a}{V_a} = \frac{\dot{V}_a}{V} - \frac{\dot{V}}{V} = g_a - g_V \quad (2.2)$$

so that the sector's share rises, is constant, or falls precisely as its own growth rate g_a exceeds, equals, or falls short of the growth rate g_V of the aggregate economy. Equation (2.2) is the analytical backbone of the paper: it makes explicit that a falling share is entirely consistent with a growing sector, provided the rest of the economy grows faster. In discrete form, the change in the share over a window $[t_0, t_1]$ can be written as

$$s_a(t_1) - s_a(t_0) = s_a(t_0) \left[\frac{(1 + g_a)^T}{(1 + g_V)^T} - 1 \right] \quad T = t_1 - t_0, \quad (2.3)$$

relative-growth (structural) effect

which isolates the wedge between sectoral and aggregate growth as the sole driver of the share change. We use (2.1)–(2.3) descriptively; no econometric model is estimated and no primary data are collected. The goal is an honest, reproducible trend account.

1.4. Caveats. Three limitations should be kept in view. (i) *Structural break.* Because series from 2019–20 onwards cover the UT of J&K only (excluding Ladakh), levels are not strictly comparable across the 2019 boundary; we therefore emphasize *shares* and *within-period* growth rather than raw level comparisons that straddle the break. (ii) *Base-year and splicing.* Com-parable official series use the 2011–12 base; statements about the late-2000s share rely on the Economic Survey's own long-horizon characterization rather than on a spliced point estimate, and are treated as indicative rather than exact. (iii) *Nominal versus real.* The year-to-year value-added figures below are at current prices; part of their increase reflects price change rather than real output, a point we flag when interpreting them. The decomposition (2.3) is applied to nominal magnitudes and is likewise read as indicative of direction and rough magnitude, not as an exact accounting.

2. THE STRUCTURE OF J&K'S ECONOMY

Before tracing agriculture's trajectory it is useful to fix the contemporary structure of the economy. As of 2023–24, the tertiary sector dominates J&K's Gross Value Added, the primary sector accounts for about a fifth, and the secondary sector for slightly less (Figure 1,

Table 1). This is the profile of a services-oriented economy in which agriculture, though demographically central, is no longer the largest contributor to measured output.

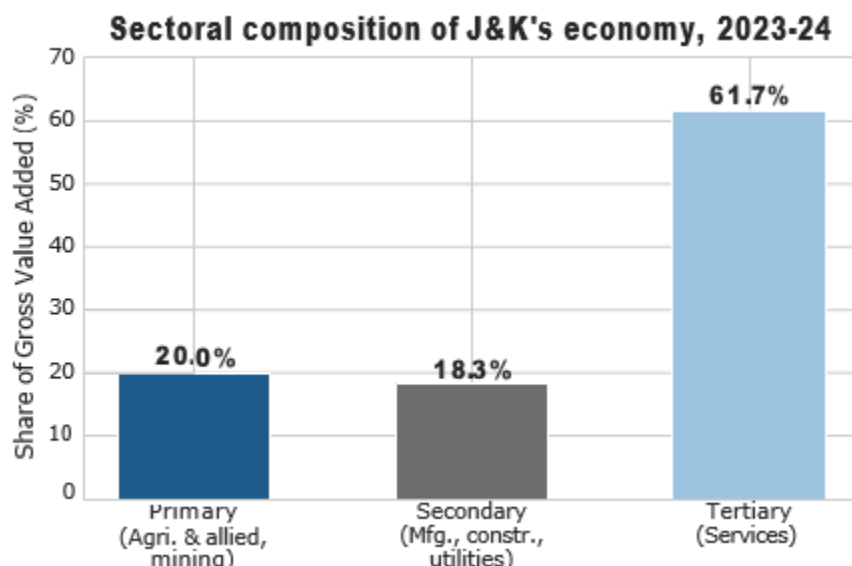


FIGURE 1. Sectoral composition of J&K's Gross Value Added, 2023–24. The tertiary sector accounts for over three-fifths of GVA; the primary sector for about one-fifth. Source: J&K Economic Survey 2023–24.

TABLE 1. Sectoral shares of Gross Value Added, J&K (percent).

Sector	2023–24	2025–26 (est.)
Primary (agriculture, allied, mining)	20.0	20.45
Secondary (manufacturing, construction, utilities)	18.3	18.52
Tertiary (services)	61.7	61.02
Total	100.0	100.0

Source: J&K Economic Survey 2023–24 and 2025–26. Shares of GVA at current prices; rows may not sum to exactly 100 owing to rounding.

Several headline macro indicators fix the scale of the economy within which these shares operate (Table 2). The nominal Gross State Domestic Product (GSDP) of J&K reached ap-proximately Rs. 2.62 lakh crore in 2024–25 and is estimated near Rs. 2.86 lakh crore in 2025–26; the economy contributes about 0.8 % of India's GDP, roughly in line with its population share. Real GSDP is estimated to grow at about 5.8 % in 2025–26, and per-capita income stands near Rs. 1,68,000. These aggregates confirm a steadily expanding economy—the backdrop against which agriculture's *relative* decline must be read.

TABLE 2. Selected macroeconomic indicators, J&K.

Indicator	Value
Nominal GSDP, 2024–25	≈ Rs. 2.62 lakh crore
Nominal GSDP, 2025–26 (est.)	≈ Rs. 2.86 lakh crore
Nominal GSDP growth, 2025–26	≈ 8.9%
Real GSDP growth, 2025–26	≈ 5.8%
GSDP CAGR, 2018–19 to 2024–25	≈ 8.6%
Share in India's GDP	≈ 0.8%
Per-capita income, 2025–26 (est.)	≈ Rs.
1,68,000 Population dependent on agriculture (direct/indirect)	≈ 70%

Source: J&K Economic Survey (2023–24, 2025–26); IBEF state profile. Figures rounded.

3. TREND ANALYSIS: SHARE AND GROWTH OF AGRICULTURE

3.1. The receding share. The single most important trend is the long-run decline in the primary sector's share of GVA. According to the J&K Economic Survey, the primary sector accounted for close to 28 % of Gross Value Added in the late 2000s but had fallen to about 20 % by 2023–24—a decline of roughly eight percentage points in around fifteen years (Figure 2). The most recent survey places the share at 20.45 % for 2025–26, essentially flat against 2023–24, suggesting the steep phase of the decline may be levelling off at around one-fifth of the economy.

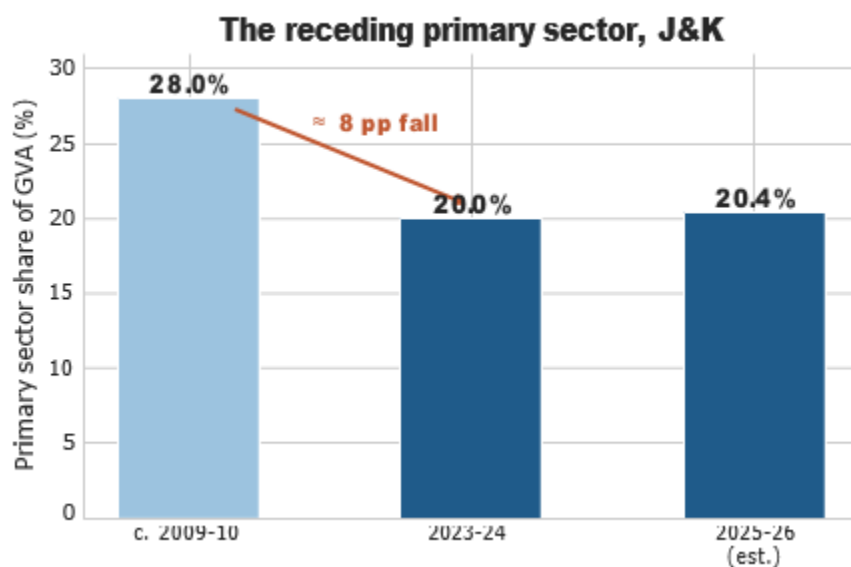


FIGURE 2. The long-run fall in the primary sector's share of GVA, from about 28

% in the late 2000s to roughly 20 % in the 2020s. Endpoints are official Eco-nomic Survey anchor values; the intermediate path is characterized qualitatively by the surveys rather than plotted point-by-point. Source: J&K Economic Sur-vey.

This mirror-images the rise of services. The tertiary sector now supplies over 61 % of GVA, powered by trade, tourism and hospitality, transport, public administration, education, and health. In share terms, the J&K economy has completed much of the transition from a primary-dominated to a services-dominated structure, while the secondary sector has remained compar-atively thin at under a fifth—an industrialization “gap” relative to the classical sequence, in which services have grown at the expense of agriculture without a commensurate expansion of manufacturing.

3.2. Absolute value added is rising. A falling share is not the same as a shrinking sector, and it is essential to separate the two. The NSO estimates of Net State Value Added from “Agriculture, Forestry and Fishing,” reproduced in the RBI *Handbook*, show that the sector’s nominal value added in J&K rose over 2018–19 to 2022–23, from about Rs. 22,900 crore to about Rs. 30,800 crore at current prices (Table 3, Figure 3). Applying the compound-growth definition (2.1) to these endpoints gives a nominal CAGR of

$$g_a = \frac{30818}{2289}^{1/4} - 1 \approx 7.7\% \text{ per}$$

over a window that includes the pandemic. The series also records the expected COVID-19 disturbance: value added dipped slightly in 2020–21 before rebounding strongly in 2021–22.

TABLE 3. Net State Value Added from Agriculture, Forestry & Fishing, J&K (current prices, base 2011–12, Rs. crore).

Year	NSVA (Rs. crore)
2018–19	22,896
2019–20	23,951
2020–21	23,565
2021–22	28,424
2022–23	30,818

Source: RBI, *Handbook of Statistics on the Indian Economy* 2023–24 (NSO estimates). From 2019–20 the series covers the UT of J&K only. Figures at current prices; part of the increase reflects price change.

4. DECOMPOSING THE SHARE CHANGE

Placing the two findings side by side resolves the puzzle of the introduction, and the growth-gap identity (2.2) makes the resolution precise. Agriculture’s nominal value added grew at

about $g_a \approx 7.7\%$ per annum over 2018–19 to 2022–23, while aggregate nominal GSDP grew at about $g_v \approx 8.6\%$ per annum over 2018–19 to 2024–25. Since $g_a < g_v$, equation (2.2) implies a falling share, at an approximate proportional rate

$$\dot{s}_a s_a = g_a - g_v \approx 7.7\% - 8.6\% = -0.9\% \text{ per annum.}$$

With a base share of $s_a \approx 0.20$, this corresponds to an erosion of roughly $0.20 \times 0.9\% \approx 0.18$ percentage points of GVA per year from the differential-growth channel alone—modest year on year, but cumulatively responsible for the multi-point decline documented in Figure 2 once compounded over a decade and a half and combined with the land-conversion pressures discussed below. The decomposition (2.3) attributes the entire share movement to this relative-growth (structural) effect: there is no own-contraction term, because the sector did not contract. This is the formal statement of a benign reading of the trend—agriculture being outpaced rather than hollowed out—subject to the important qualification, taken up in Section 8, that part of the observed decline reflects erosion of the productive land base rather than pure productivity-led

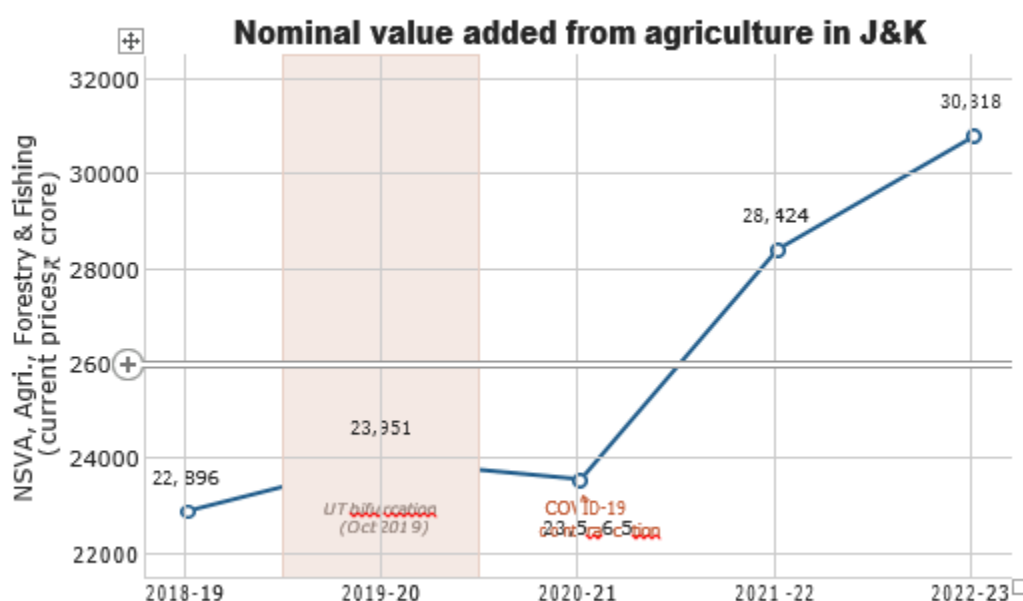


FIGURE 3. Nominal value added from agriculture, forestry and fishing in J&K rose over 2018–19 to 2022–23, with a mild COVID-19 contraction in 2020–21. The shaded band marks the 2019 UT reorganization, after which the series excludes Ladakh. Source: RBI *Handbook of Statistics on the Indian Economy* 2023–24.

reallocation. Two accounting caveats attach to the numbers: the two growth rates are measured over slightly different windows (2022–23 versus 2024–25 endpoints) and both are nominal, so the calculation is indicative of direction and rough magnitude rather than an exact decomposition.

5. THE HORTICULTURAL CORE

Aggregate shares can obscure as much as they reveal, and in the J&K case the most important thing they obscure is the internal composition of the primary sector. The region's comparative advantage lies not in cereals—in which it is, in fact, food-deficit—but in high-value horticulture. J&K is the dominant Indian producer of temperate fruit: it accounts for roughly 77 % of national apple production and about 90 % of national walnut production, and it is the country's only significant producer of saffron. Within the sector, apple alone occupies about half the horticultural area and yields the majority of output, with annual apple production of the order of two million tonnes in recent years (Table 4).

Three features of this horticultural core matter for the paper's argument. First, its economic weight is disproportionate to its physical footprint: horticulture is estimated to contribute on the order of 8 %–9 % of GSDP by itself—that is, close to half of the entire primary sector's 20 % share—while sustaining roughly 7.5 lakh families, or some 35 lakh people. Second, the *value-addition gradient is steep*: per-hectare returns from apple (Rs. 3–5 lakh), walnut (Rs. 1.5–2.5 lakh), and especially saffron (Rs. 5–15 lakh) dwarf those from cereal cultivation (Rs. 40,000–60,000). This gradient is the economic logic behind the region's ongoing shift from traditional cereal farming toward orchards, and behind the state's high-density apple-plantation programme launched in the mid-2010s and later diversified to cherry, walnut, and other crops. Third, the core is *not without stress*: a 2026 NITI Aayog roadmap flags stagnant productivity, high post-harvest losses (of the order of Rs. 1,500 crore), and rising import competition, and sets out a phased strategy to 2047 for productivity, value addition, and exports.

TABLE 4. Selected indicators of the horticultural sector, J&K.

Indicator	Value
Contribution to GSDP (approx.)	8 %–9 %
Families dependent (direct/indirect)	≈ 7.5 lakh (≈ 35 lakh persons)
Share of India's apple production	≈ 77%
Share of India's walnut production	≈ 90%
Apple production, recent years	≈ 2.0–2.1 million tonnes
Area under fruit (mid-2010s)	≈ 3.5 lakh hectares
Per-hectare returns: cereals	≈ Rs. 40,000–60,000
Per-hectare returns: apple	≈ Rs. 3–5 lakh
Per-hectare returns: walnut	≈ Rs. 1.5–2.5 lakh
Per-hectare returns: saffron	≈ Rs. 5–15 lakh

Sources: J&K Department of Horticulture; NITI Aayog horticulture roadmap

(2026); CEIC/NSO production series; regional studies. Figures approximate and, for per-hectare returns, indicative ranges.

The implication for the trend analysis is that the primary sector's arithmetic decline in share coexists with a high-value sub-sector whose scope for arresting that decline is considerable. If the erosion of agriculture's economic weight is to be slowed, the horticultural core—through productivity gains, cold-chain and processing infrastructure, and value addition—is where the leverage lies. A study of the aggregate share alone would miss this entirely.

6. THE OUTPUT–LIVELIHOOD GAP AND NATIONAL CONTEXT

6.1. Output versus livelihood. The most socially consequential feature of the trend is the wedge between agriculture's share of *output* and its share of *livelihoods*. The sector generates about 20 % of GVA but supports, directly or indirectly, close to 70 % of the population (Figure 4). Even allowing for the looseness of “dependence” as a concept—it blends principal cultivators, allied workers, and the wider rural economy—the gap is large and persistent, and it has a clear economic meaning: value added per person attached to agriculture is well below value added per person in services. A workforce concentrated in a sector that produces a fifth of output, while a smaller workforce in services produces three-fifths, is the signature of a productivity and income gap between farm and non-farm work. This is the distributional counterpart of the aggregate transformation: structural change has moved *output* toward services faster than it has moved *people*, leaving a large population attached to the lower-productivity sector.

6.2. J&K in national context. Benchmarking against the all-India picture sharpens the interpretation (Figure 5). At the national level, agriculture and allied sectors contributed about 18.4 % of GVA in 2022–23, with a long-run trend around 18 %; roughly 55 % of the national workforce was engaged in agriculture as of the 2011 Census (with more recent labour-force surveys placing the share somewhat lower). J&K's primary-sector share of about 20 % thus sits slightly *above* the national agricultural share, and its livelihood dependence is markedly higher, confirming that—despite the services-led headline structure—J&K remains *more* agrarian than India as a whole in both output and, especially, employment terms. The region has followed the national direction of travel (a falling agricultural share, a rising services share) but retains a heavier agricultural footprint, particularly on the livelihood side, which is precisely what makes the output–livelihood gap a first-order policy concern locally.

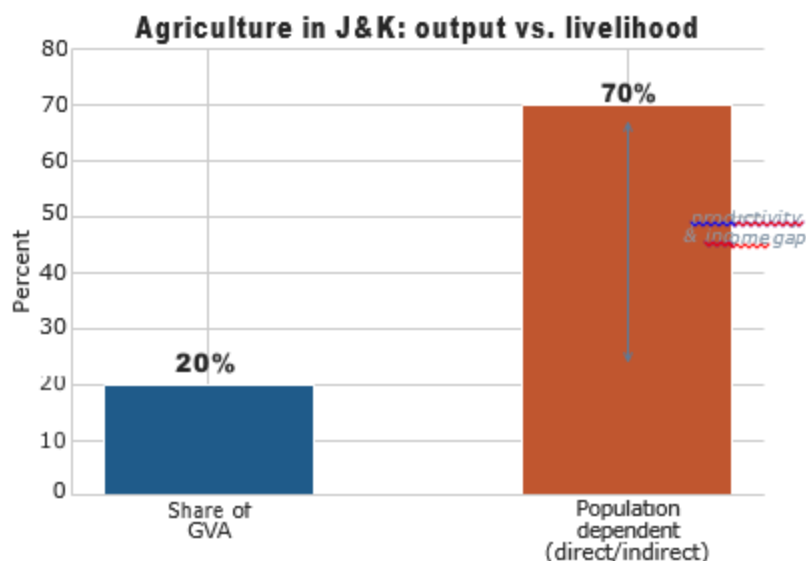


FIGURE 4. The output–livelihood gap in J&K: agriculture generates about a fifth of Gross Value Added but supports close to 70 % of the population, directly or indirectly. The gap is a measure of the relative-productivity deficit of farm work. Source: J&K Economic Survey.

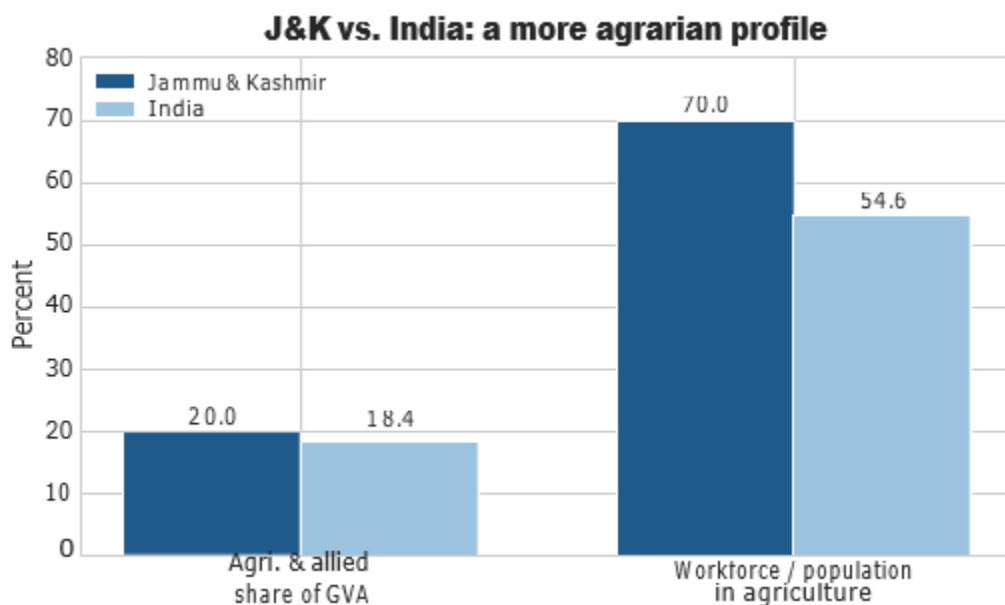


FIGURE 5. J&K compared with India. The agriculture and allied share of GVA is slightly higher in J&K than nationally, while dependence on agriculture for livelihoods is substantially higher, marking J&K as the more agrarian economy. Sources: J&K Economic Survey; Department of Agriculture & Farmers Welfare / NSO; Census of India 2011.

7. DISCUSSION

7.1. A transformation complicated by land-use change. Much of what we observe is the ordinary arithmetic of development formalized in equation (2.2): as incomes rise and the service economy deepens, agriculture's share falls even when farm output grows. But the J&K transition carries a distinctive and less benign element. Successive Economic Surveys and regional commentary attribute part of the primary sector's decline to the conversion of fertile agricultural land to non-farm uses—housing, commercial development, and infrastructure—rather than to voluntary, productivity-led reallocation alone. Where a falling agricultural share is driven by rapid non-farm productivity growth, it is a sign of health; where it is driven partly by the erosion of the productive land base itself, it carries risks for local food production and raises dependence on food brought in from outside the region, with attendant effects on prices. The growth-gap decomposition of Section 5 can flag the aggregate wedge but cannot, by itself, separate these two channels; doing so is the key interpretive question behind the headline trend and a natural target for future, more granular work.

7.2. The thin secondary sector. A second feature worth emphasizing is the modest weight of the secondary sector, which has hovered below a fifth of GVA. In the canonical transformation sequence, labour and output move from agriculture through industry before services come to dominate. J&K appears to have partially skipped the industrial stage, with services expanding directly at agriculture's expense. This has direct implications for the output–livelihood gap of Section 7: absent a large manufacturing base, the off-farm absorption of agricultural labour depends heavily on services and construction, whose capacity to provide stable, higher-productivity employment in the region is itself constrained. A thin industrial middle is thus part of why so many people remain attached to farming even as farming's output share falls.

7.3. Horticulture as the lever. The horticultural core analyzed in Section 6 is the most promising route to narrowing both the share decline and the livelihood gap. Because its value added per hectare is an order of magnitude above that of cereals, shifting land and effort toward orchards and high-value crops raises the sector's contribution to GVA and lifts farm incomes, addressing the productivity deficit at its source. The policy challenge identified by the NITI Aayog roadmap—stagnant productivity, post-harvest losses, weak processing and cold-chain infrastructure—is precisely a challenge of moving from volume to value. Progress here would show up in the data as a narrowing of the growth gap $g_a - g_v$ in equation (2.2), and ultimately as a stabilization of agriculture's share, of which the flat 2023–24 to 2025–26 reading may be an early sign.

7.4. Policy response. The policy architecture has begun to respond to exactly this diagnosis. The Holistic Agriculture Development Programme (HADP), a flagship intervention with an outlay of about Rs. 5,013 crore across roughly two dozen projects, is explicitly designed to raise productivity, diversify towards high-value crops, and add value—and is projected by the government to lift GSDP substantially and to generate lakhs of jobs over its horizon. Complementary measures—crop insurance extended to all districts, expanded institutional credit through Kisan Credit Cards, market integration via the electronic National Agriculture Market, and Geographical Indication tags for signature produce such as Kashmir saffron—share the common logic of lifting value added per

farmer rather than merely defending the sector's share. Whether these succeed in stabilizing agriculture's economic weight is the empirical question the coming years will answer.

7.5. Limitations and future work. This study is descriptive by design and inherits the limitations set out in Section 2: a structural break at 2019, reliance on current-price value-added figures for the annual series, and the use of the Economic Survey's qualitative long-horizon characterization for the pre-2011–12 share. The growth-gap decomposition is applied to nominal magnitudes over slightly mismatched windows and is therefore indicative rather than exact. Natural extensions include deflating the value-added series to separate real growth from price effects; a full shift-share decomposition using consistent real series and a finer time grid; disaggregation of the primary sector into crops, horticulture, livestock, forestry, and fisheries with their own growth rates; and pairing the output-share trend with a formal employment-share series from the Periodic Labour Force Survey to quantify the farm/non-farm productivity gap directly rather than through the dependence proxy used here.

8. CONCLUSION

Over the first quarter of the twenty-first century, agriculture's place in Jammu and Kashmir's economy has been reshaped by the familiar forces of structural transformation, sharpened by region-specific pressures on the agricultural land base. The primary sector's share of Gross Value Added has fallen from roughly 28 % in the late 2000s to about 20 % in the mid-2020s, while the tertiary sector has risen to more than three-fifths of the economy. Yet this relative decline has coincided with rising nominal value added in agriculture: the growth-gap identity shows that the sector's share is eroding only because it grows about a percentage point per year more slowly than the aggregate economy, not because it is contracting. Beneath the aggregate, a high-value horticultural core—apple, walnut, and saffron—contributes on the order of 8 %–9 % of GSDP and sustains some 7.5 lakh families, and it is here that the greatest scope lies for arresting the decline through value addition. The most consequential finding is distributional: agriculture generates about a fifth of output but supports close to 70 % of the population, a gap that marks J&K as more agrarian than India as a whole and that locates the region's central economic challenge in the productivity and income deficit of farm work. The recent stabilization of agriculture's share, together with a policy turn towards productivity and value addition, offers a cautious indication that the sector's economic weight may be finding a floor. Tracking whether that floor holds, and whether the decline of recent years reflects healthy reallocation or the erosion of a productive base, is the task that this descriptive account leaves to future, more granular work.

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