Today's WorldView

The end of the Trump-Modi bromance

Trump's tariffs against India threatens to end Washington's decades-long, bipartisan consensus to forge stronger U.S.-India ties

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Column by Joshua Yang

When Indian Prime Minister Narendra Modi met President Donald Trump in the Oval Office in February, the Indian premier was in an exuberant mood at the prospect of a second Trump term.

Trump was a man with whom Modi had formed a personal bond — or even better, a friendship. Did the two not share fond memories, Modi reminisced, of appearing together at the "Howdy Modi" rally in Texas in 2019, and of hosting another joint mega-event in Modi's home state of Gujarat in 2020? In the coming years, would the two not advance the U.S.-India relationship with "the same warmth, the same trust, the same excitement"?

Apparently not.

On July 30, months into deadlocked negotiations for a U.S.-India trade deal, Trump posted on Truth Social that he would be slapping 25 percent tariffs on Indian imports. Not eight hours later, Trump added insult to injury by announcing a trade deal with Pakistan, India's perennial rival, at a lower tariff rate of 19 percent.

The tension escalated from there. Trump called India's economy "dead" and warned last Monday that tariffs on India would be "substantially" raised. On Wednesday, the number was revealed: 50 percent, which would be one of the highest tariff rates imposed by the United States anywhere in the world.

What accounts for this abrupt reversal? If Trump's Truth Social posts are to be taken at face value, the tariffs punish India's relationship with Russia: India imports significant amounts of Russian oil, and Indian manufacturers have shipped parts and weapons to Russia for use in the war in Ukraine.

But Trump is apparently content to allow some nations to profit off Russia, as Indian officials have repeatedly argued. China, which buys more crude oil and oil products from Russia than India, was given an extension to negotiate a trade deal a day before Trump imposed the first round of punitive tariffs on India. Russia itself, for that matter, enjoys a luxurious 10 percent tariff rate.

The India-Russia relationship has also historically played to U.S. interests, as my colleagues reported last week. In the early days of the war, European nations placed sanctions on the purchase of Russian oil. The only problem? Europe was still heavily dependent on Russian energy. With the tacit encouragement of the U.S., India bought Russian crude oil at cheap prices, processed it and exported it to European nations, thus helping Europe avoid directly violating its own financial sanctions against Russia.

Having India buy Russian oil "satisfied multiple players in this game," Ashley Tellis, a senior fellow at the Carnegie Endowment for International Peace, told me. But "all that now is ancient history, because we've changed our policy. What India did without penalty before has now become a source of consternation to this administration."

Beyond India-Russia relations, personal rancor is a possible factor in play. Trump took offense with New Delhi's behavior in the aftermath of the India-Pakistan conflict in May, when India refused to acknowledge Trump's role in mediating a ceasefire. Trump, gunning for the Nobel Peace Prize, has cited ending the India-Pakistan conflict as one of the reasons he deserves the award.

"The way that entire India-Pakistan crisis ended left him with a rather sour taste, because he thought the Indians should have been grateful for his intervention," Tellis said. "Instead, they ended up simply carping about his role. I think from that time onward, he just started to look at India in a somewhat different way."

Trump's annoyance appears to have opened the door to anti-India sentiment from multiple quarters in the White House. For economic right-wingers such as Peter Navarro, Trump's senior counselor for trade and manufacturing, long-held gripes about India's protectionist economy and high trade barriers are finally seeing the light of day. And for the anti-immigration right — people including Stephen Miller, Trump's deputy chief of staff — India is in the crosshairs as the largest beneficiary of the H-1B visa program, which offers skilled foreign workers a pathway to U.S. permanent residency.

Domestically, the Modi government is caught between a rock and a hard place. New Delhi's best hope out of punishing U.S. tariffs is to negotiate a trade deal, but to do so, Modi faces a difficult political balancing act back home. One of Washington's main demands is to open the Indian market to U.S. agricultural crops and dairy products. But unfortunately for Modi, the country's agriculture and dairy industries are the third rail of Indian politics: Any attempt to loosen the trade barriers protecting these two sectors is a surefire way to lose the next election.

Farmers, who account for around 45 percent of India's labor force, are a critical constituency for Modi's Bharatiya Janata Party (BJP). As Maya Prakash noted in a recent Washington Post opinion piece, one of the few stinging defeats in Modi's 11-year premiership came in 2020, when his government passed legislation that would have potentially reduced farmers' earnings, leading agricultural workers to mount widespread protests across northern India. After 16 months of highway shutdowns and routs for the BJP in state-level elections, the government was forced to repeal the bills.

Importing U.S. dairy — which may come from cows fed with animal-derived products such as tallow — is also a no-go for India, where an 80 percent Hindu population opposes animal-fed dairy on cultural grounds.

Though the domestic Indian opposition is no fan of Trump — opposition leader Rahul Gandhi called the tariffs "economic blackmail" on Wednesday — they know to pounce if Modi budges on agriculture or dairy. The "government needs to stand up straight and demonstrate some spine against this coercion and bullying," Manish Tewari, a member of the opposition Congress party, told Indian media Thursday.

In the meantime, Modi will have to do his best to navigate tariff turbulence. During a rally on Aug. 2, Modi obliquely referred to the U.S. tariffs without mentioning Trump by name, exhorting his citizens to buy Indian-made goods "made with the sweat of the people of India" while unveiling a new slogan, "Vocal for Local."

But talk, especially defiant talk, is cheap in Indian politics. In 2020, after Chinese and Indian soldiers clashed in a deadly border dispute, Modi announced an initiative to boycott Chinese imports and build an "Atmanirbhar Bharat" — a self-reliant India. Even so, Indian imports from China surged from $65 billion in 2020 to $113 billion in 2024.

In a similar vein, Modi may well have to eventually cave on the issue of Russian oil — less because Trump is profoundly concerned with India funding Russia and more to signal that New Delhi is willing to bend the knee. "My suspicion is that they will stop buying Russian oil progressively," Tellis said. "But they will be very cagey about announcing that publicly, because if they do, then it will look like an unconditional surrender to Trump."

India will survive the tariffs, but they could slow the country's GDP growth by a full percentage point, according to Indian media reports. Close U.S.-India relations, painstakingly forged over many decades, may not fare as well.

When India gained independence in 1947, its first prime minister, Jawaharlal Nehru, championed the "nonaligned" movement, rejecting entry into the orbit of either the U.S. or the Soviet Union. Nearly eight decades later, India remains true to its nonalignment ethos in certain respects: It is both part of the Quad, an informal grouping with the U.S., Japan and Australia to counter China in the Indo-Pacific, and BRICS, a geopolitical bloc that includes China.

Since 2008, however, when the U.S. and India signed a landmark deal to cooperate on civil nuclear energy, successive administrations in the White House have pried India away from its traditional posture — which always seemed closer to Moscow than Washington — and toward the U.S. in the hopes that India could act as a bulwark against China. So important was cooperating against China that the U.S. was willing to separate economic and strategic relations with India: Policymakers in Washington prevented unresolved disagreements over protectionism or intellectual property from getting in the way of advancing defense sales and intelligence sharing.

Meanwhile, the Modi government reciprocated by embracing the American right, going so far as to have Ram Madhav, the national general secretary of the BJP, speak at a forum affiliated with the U.S.-based Conservative Political Action Conference.

But Trump has so far evinced little concern for great-power strategic competition with China, at least where India is concerned. That has freed the U.S. president to demand that India choose between its defense interests and its protectionist idiosyncrasies. Trump's India strategy "is really incomprehensible," Tellis said. "This may turn out to be another one of those very costly whims of the president that the country will ultimately end up paying for."

The possibility of returning to a prelapsarian Trump-Modi bromance is now fast fading. India has instead dug its heels into its relationships with Russia and China: Modi sent his national security adviser to Moscow on Wednesday and said he would visit China in early September for the first time in seven years. "I may have to pay a very heavy price personally" for refusing to cave to Trump, Modi said at a public event Friday. "But I am prepared for it."

[Asia](#) | The white stuff

Cow’s milk, as well as Russian oil, fuels the US-India trade war

There is another liquid the two sides cannot agree on

How dairy you Photograph: Getty Images

Aug 11th 2025|Delhi|

Donald Trump has [beef with India](#) for buying oil from Russia. But the American president’s tariffs totalling 50% on many Indian exports—set to come into force later this month—are not just about geopolitics. Agriculture and dairy have been the most contentious issues in India’s talks with America, which broke down this month. And it is over farming that India’s equally combative prime minister, Narendra Modi, has chosen to fight back. “India will never compromise on the well being of its farmers, dairy and fishermen,” he thundered in Delhi on August 7th, a day after Mr Trump’s announcement.

For Hindu-nationalist politicians like Mr Modi, the dairy industry has particular importance (the cow is sacred in Hinduism). But it is also a source of national pride, seen as a poverty-alleviating triumph of enlightened policymaking, technological advance and international co-operation. India is a milk superpower. For nearly three decades it has been the world’s biggest producer and is now the source of about a quarter of the global total. Yet, from the point of view of India’s trading partners, notably America, the industry seems to sum up all that is wrong with India. It is inefficient, subsidised, polluting (all that methane) and heavily protected by high tariff barriers and a perplexing lattice of arcane non-tariff ones.

Can these views be reconciled? The answer matters a lot to India’s trade diplomacy. It is not just America that complains about access to the Indian market. It is a sticking-point in negotiations with the EU, too, and was one of the thorniest issues in the negotiations leading to a free-trade agreement with Britain signed last month. It may also have been the main reason why India pulled out of a big regional trade deal in 2019. (As *The Economist* noted at the time, Indians’ nightmare was that New Zealand would provide her milk, while China ate her lunch.)

Indian dairy still basks in the glow of a “white revolution” launched in 1970. At the time Indians already had more cattle than any other country, but they consumed an average of about 100 millilitres of milk a day, far below recommended nutritional standards. Some of that had to be imported. By the turn of the century India had virtually doubled the availability of milk per person. Dairy practices were modernised and the cross-breeding of cattle had boosted yields. A network of tens of thousands of co-operatives was established, improving distribution and logistics, financed by the sale of skimmed milk powder and butter donated by the European Economic Community, the EU’s forebear.

Yields have continued to improve this century, but the structure of the industry remains unchanged. “White Revolution 2.0”, launched by the government last year, aims not to reform but expand it, with co-operatives increasing milk procurement by 50% over five years. Production will still depend on tens of millions of smallholders—families with a cow that grazes on their plot, produces dung and urine to be used as fertiliser, and provides milk for the family, sometimes with a surplus to sell.

Mooing and booing

Himanshu (who goes by one name), a professor of economics at Jawaharlal Nehru University in Delhi, points out that Mr Modi and Mr Trump are both very “pro-farmer”. But their farmers, including dairy farmers, could hardly be more different. India has about 200m cattle, of which the United States Department of Agriculture estimates 62m are dairy cows. Yet the average “herd” consists of fewer than four, and the average landholding has just one hectare. A number widely used is that 80m families have one or more cows or buffaloes. America has just 24,000 dairy farms, with an average herd size of about 390.

Co-operatives guarantee Indian farmers a buyer for their milk, and pay them bonuses when prices rise. A handful have become big organisations—notably Amul, from Gujarat, home state of Mr Modi and his powerful cabinet minister, Amit Shah. So vaunted is the success of the agricultural co-operative system that in July Mr Shah unveiled plans to extend it to other businesses such as tourism and green energy.

Proud as Indians are of their cows and their dairy farmers, they have to admit that both are, by international standards, woefully unproductive. The average American cow produces about seven times as much milk as her Indian competitor. India protects its dairy farmers with import tariffs comparable to those Mr Trump is now imposing on Indian exporters: 40% on most butter and cheese and 60% on powdered milk. Without these protections, says Shashi Kumar, boss of Akshayakalpa, a privately owned organic-dairy business in southern India that works with 2,200 small farmers, “smallholder farms will collapse”.

It is not just tariffs that Mr Trump’s negotiators object to. India excludes imports of all genetically modified crops except cotton, and in dairy there is a ban on what has become known as “non-veg milk”—with a requirement that imported dairy products be certified to come from cows that have not been fed animal products such as bone meal. The ban is often decried as a non-tariff barrier dressed up in politically correct Hindu-nationalist clothes. Vijay Sardana, a lawyer and agri-economist, points out it was in fact introduced in 2003, when he drafted the law in response to the BSE (mad-cow disease) scare in Europe.

Still, the perception that the Indian government will use any available tactic to protect its farmers is probably justified. Harish Damodaran, the agriculture editor of the *Indian Express*, a newspaper, points out that twice in four years India’s farmers have fended off attempts at reform. In 2021 their prolonged, angry protests in Delhi forced Mr Modi to repeal three laws introducing sensible deregulatory reforms. Mr Trump’s effort to impose change through diplomacy may prove equally fruitless. ■

US-India tariff timeline: From ‘tariff king’ to ‘dead economy’ — how it all fell apart

How Did the ‘Howdy Modi’ Hugfest Lead to a Full-Blown Trade War? Read below

Mint, 7 Aug 2025

In September 2019, US President Donald Trump and Indian Prime Minister Narendra Modi stood side-by-side in front of a roaring crowd of over 50,000 in Houston, Texas. The “Howdy Modi” event was billed as a celebration of US-India friendship, and the two leaders did not disappoint.

“I'm so thrilled to be here in Texas with one of America's greatest, most devoted and most loyal friends,” Trump declared. Modi returned the warmth, calling Trump a “true friend in the White House”.

Fast-forward to August 2025 — that bonhomie has collapsed. A full-blown trade war is now underway, with India facing a staggering 50 per cent tariff on its exports to the US. What happened in between tells a story of shifting priorities, escalating trade disputes and a friendship that couldn’t survive realpolitik.

February 2018: The Harley-Davidson Flashpoint

The cracks began to show long before the Houston event. In early 2018, Donald Trump publicly slammed India’s high import tariffs on Harley-Davidson motorcycles, labelling them “unfair”. India, he noted, was charging up to 100 per cent tariffs on imported bikes, while the US taxed Indian motorcycles at zero.

March 2018: Steel and Aluminium Tariffs Imposed

By March, India was hit with 25 per cent tariffs on steel and 10 per cent on aluminium as part of Trump’s broader “America First” trade agenda. It was a shot across the bow — one that would set the tone for future economic skirmishes.

March 2019: India Loses GSP Benefits

Just months before “Howdy Modi”, Trump announced the end of India’s Generalised System of Preferences (GSP) status, a trade concession that had allowed duty-free exports of over $5 billion worth of Indian goods.

October 2019: From Friend to ‘Tariff King’

Barely weeks after sharing the stage in Houston, Trump labelled India the “Tariff King”, accusing the country of some of the world’s highest duties. The phrase would go on to define Trump’s view of Indian trade policy for years to come.

Despite these jabs, public displays of friendship continued between the two leaders — but behind closed doors, tensions were mounting.

Also Read | US tariffs: India's state-owned oil refiners pull back from buying Russian oil

February 2025: A Glimmer of Hope

Following Modi’s high-profile visit to Washington in early 2025, optimism briefly returned. Both sides floated the idea of a comprehensive trade deal, with hopes of doubling bilateral trade to $500 billion by 2030. Negotiators from both nations began five rounds of intensive talks between March and July.

Indian officials were so confident that they briefed the media that tariffs could be capped at just 15 per cent.

30 July 2025: Trump Breaks the Deal

In a dramatic reversal, Trump scrapped the expected trade pact and instead imposed an additional 25 per cent tariff on Indian goods.

His social media post that day read: “India’s tariffs are far too high, among the highest in the world, and they have the most strenuous and obnoxious non-monetary trade barriers of any country.”

31 July 2025: The ‘Dead Economy’ Comment

The following day, Trump’s rhetoric turned sharply hostile.

“I don’t care what India does with Russia,” he wrote online. “They can take their dead economies down together for all I care.”

The comment stung, especially as India remains one of the world’s fastest-growing major economies, with GDP growth above 6 per cent even amid global downturns.

Same Day: A Hug for Pakistan, a Snub to India

As if to twist the knife, Donald Trump simultaneously announced a trade deal with Pakistan, praising its cooperation and even suggesting that Islamabad might someday sell oil to India.

This came on the heels of the terrorist attack in Pahalgam, further souring sentiment in New Delhi.

6 August 2025: 50 per cent Tariff Locked In

On 6 August, Trump signed an executive order slapping a further 25 per cent tariff on Indian imports, bringing the total to 50 per cent. India now finds itself among the most heavily tariffed US trading partners in history, surpassing even China during its peak trade war with the US.

The Fallout: Indian Exporters Rattled

From textiles and gems to pharmaceuticals and auto parts, Indian exporters are now staring at a sharply reduced margin — or outright exclusion — from the lucrative American market.

Trade analysts have dubbed it the worst crisis in US-India economic relations in over two decades. What began as a squabble over motorcycles has now escalated into a full-scale economic confrontation.

What’s Next for US-India Ties?

The fallout raises a critical question: Can the strategic relationship between the world's largest democracies survive such intense economic strain? Or will trade tensions erode decades of partnership?

As the dust settles on Donald Trump’s tariff barrage, the answer may determine not just the future of Indian exports — but the broader balance of power across the Indo-Pacific.

Also Read | Trump's India tariffs explained: Here are 8 key things to know

Also Read | Trump’s tariffs on India and US–Russia trade: A double standard?