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PERFORMANCE OF SUGAR INDUSTRY IN INDIA WITH SPECIAL REFERENCE TO HARYANA STATE

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ABSTRACT

Sugar industry is the biggest agricultural based industry in India after textile industry. The agricultural sector occupied 43% of India's total geographical area and is contributing about 16% of India GDP. Hence, the sugar industry and sugarcane cultivation in India plays an important role towards development of rural population. Through this paper, an attempt has been made to examine the status of sugar industry in India with special reference to state Haryana.

KEYWORDS

sugar industry, sugarcane cultivation, Haryana.

INTRODUCTION

ugar industry occupies an important place among agriculture based industries. Sugar industry is the second largest industry after cotton textile industry among agriculture based industries in India. This industry provides not only employment to a substantial number of persons but also holds the potentialities of developing other industries related to by-products.

India is the largest consumer of sugar and the second largest producer of sugar. Sugar industry is the second largest agro based industry in India after textiles. Sugar and sugarcane are essential commodities under the Essential Commodities Act, 1955.

Sugar is one of the oldest commodities in the world and traces its origin in 4th century AD in India and China. In those days sugar was manufactured only from sugarcane. But both countries lost their initiatives to the European, American and Oceanic Countries, as the eighteenth century witnessed the development of new technology to manufacture sugar from sugar beet. However, India is presently a dominant player in the global sugar industry along with Brazil in terms of production. India has been known as the original home of sugarcane and sugar. India is the largest producer and consumer of sugar in the world, with Maharashtra contributing over one third of country's sugar output. Indians knew the art of making sugar since the fourth century. Kautilya also mentioned about sugarcane cultivation and sugar production in his Arthashastra during third century B.C. It clears that sugar industry is not new for India. However, the advent of modern sugar industry in India dates back to mid 1930's when a few vacuum pan units were established in the subtropical belts of Uttar Pradesh and Bihar, until the mid 50s, the sugar industry was almost wholly confined to the states of Uttar Pradesh and Bihar. After late fifties or early sixties the industry dispersed into southern India, Western India and other parts of Northern India. The sufficient and well distributed monsoon rains, rapid population growth and substantial increase in sugar production capacity have combined to make India the largest consumer and second largest producer of sugar in the world.

Indian sugar industry is highly fragmented with organized and unorganized players. The unorganized players mainly produce Gur and Khandsari, the less refined forms of sugar. The government had a controlling grip over the industry, which has slowly yet steadily given way to liberalization. Dual pricing system is adopted in the Indian sugar industry, which includes sugar prices in public distribution system and the free sale sugar price. As the industry is a fragmented one, even leading players do not control more than 4 percent market in India. However, the situation is changing and players of late are striving to increase their market share either by acquiring smaller mills or by going for green field capacity additions. Another notable trend is the shift from Gur and Khandsari to sugar in the rural areas. This should further increase the per capita consumption of sugar in India besides the Indian urban market is slowly moving towards branded sugar.

REVIEW OF LITERATURE

Ghuman and Monga conducted a study entitled 'Financial performance, physical performance & Management of Nine Cooperative sugar Mills in Punjab'. The study analyzed financial statement of the mills and it was found that possible factor responsible for losses were non availability of sugarcane around the mills, low price of molasses, low sugar recovery, heavy interest charges and excessive inventories. The finding of the study was too much interference of the state government in the functioning of these mills, lack of material, management technique and non availability of improved varieties of sugarcane, it was suggested in the study mills must be increased.

Jagadeswaran in his article analyzed the export's problems of sugar industry with remedies. An important reason for the lower sugar export has been the uneconomic cost structure in the sugar industry, due to the higher cost of production. Indian sugar could not compete in the world market. Indian sugar exports in most of years have been possible only at a loss. While sugar exports were limited, the entire losses were met by the sugar industry. He suggested the policy has to be production oriented. Government should adopt a rational and long term cane price policy and fix an enumerative cane price for the farmers to ensure sufficient cane supplies to the sugar factories. Incidentally the Govt. should also fix remunerative levy sugar price from time to time.

Ramchandram in his article told about the total contribution of the co-operative sugar mills. He observed sugar co-operatives have created a suitable environment for economic development in the region and enabled the farmers not only to receive a higher price for their sugarcane thereby improving standard of living, but also to contribute more to the development of sugar industry in India. The co-operative sugar industries alone responsible for transforming India from a deficit sugar producing country to a surplus sugar producing country.

N. Chandrasekaran (1999) in his study 'Financial Performance of Indian Sugar Industry' concluded that industry's financial performance is found moderate to poor during the study period i.e. 1990-91 to 1995-96 except in 1993-94. Financial structure of the industry is unfavorable due to high gearing. Further, both business risk and financial risk are also higher, serving the debt becomes difficult. The researcher suggested that firms must focus on enhancing earnings steadily by controlling and reducing the cost of production. He further suggested that share of external as well as internal equity should also be increased in the financial structure of mills.

OBJECTIVES OF THE STUDY

The main objectives of the present study are as follows:

- To examine the status of sugar industry in India.
- To analyse the status of sugar industry in Haryana.

SUGAR INDUSTRY IN INDIA

There are 509 sugar mills in India in which 14 mills are located in Haryana. The Indian sugar industry is a key factor of rural development supporting India's economic growth. The importance of sugar industry in India can be judged from the fact that about 45 million sugarcane cultivators depend on sugarcane and sugar industry for their livelihood. Thus it supports a large number of farmers and their families. The list of sugar mills in India is given in the following table:

TABLE 1: NO. OF SUGAR FACTORIES IN OPERATION IN INDIA

Year	No. of Factories in Operation
2008-09	488
2009-10	490
2010-11	507
2011-12	529
2012-13	526
2013-14	509

Source: List of Sugar Factories in Operation in India 2013-14.

Above table shows that in India these number of factories in operation were 488 in 2008-09 and in 2013-14 the number of sugar factories in India were 509 approximately. Hence this table shows the increasing trend during this time period. The sugar industry and sugarcane cultivation in India plays an important role towards socio-economic development in the rural population. Thus, this table also shows the economic development through the increased number of sugar factories in India.

The agricultural sector occupied 43% of India's geographical area and is contributing about 16% of India's GDP. Following table is prepared to show the sugarcane production (million tons) in India during the period 2008-09.

TABLE 2: SUGARCANE PRODUCTION IN INDIA

Year	Sugarcane Production (million tons)
2004-05	237.09
2005-06	281.17
2006-07	255.52
2007-08	348.19
2008-09	285.03
2009-10	292.30
2010-11	342.38
2011-12	361.04
2012-13	341.20
2013-14	350.02

Source: RBI, Handbook of Statistics on the Indian Economy, 2013-14

Above table shows that the sugarcane production in 2004-05 is 237.09 million tons and in 2013-14 it is 350.02 million tons. During this period, there is almost increasing trend in sugarcane production expect mainly two years. Thus, sugarcane production has great importance in agricultural development of India. In India about 45% geographical area is under agricultural sector. Following table shows the area under sugarcane cultivation in India.

TABLE 3: AREA UNDER SUGARCANE CULTIVATION IN INDIA

Year	Cane acreage (million hectares)
2004-05	3.66
2005-06	4.20
2006-07	5.15
2007-08	5.06
2008-09	4.42
2009-10	4.18
2010-11	4.88
2011-12	5.04
2012-13	5.06
2013-14	5.01

Source: RBI, Handbook of Statistics on the Indian Economy, 2013-14

Above table shows the India's sugarcane cultivation area during the time period of 10 years i.e. 2004-05 to 2013-14. During this time period, India's sugarcane area under cultivation is increased continuously expect two years. Hence, this table shows the sound performance of sugar industry in India which is a sign of economic development of India.

The major sugarcane crop growing States are:

1. Uttar Pradesh
2. Bihar
3. Haryana
4. Gujarat
5. Maharashtra
6. Karnataka
7. Andhra Pradesh
8. Tamil Nadu
9. Uttarakhand
10. Punjab

TABLE 4: TOP TEN SUGARCANE PRODUCING STATES IN INDIA

Rank	STATE	PRODUCTION (THOUSAND TONNES)
1	Uttar Pradesh	135161.6
2	Maharashtra	76554.8
3	Karnataka	35910.0
4	Tamilnadu	31760.0
5	Andhra Pradesh	15360.0
6	Bihar	13476.6
7	Gujrat	12550.0
8	Haryana	7446.0
9	Uattrakhand	6432.0
10	Punjab	6311.7

Source: RBI, Handbook of Statistics on the Indian Economy, 2013-14

The production of sugarcane is spread across the country. In above States, they are classified into three groups according to its production capacity. The high sugar producing States are Maharashtra and Uttar Pradesh. The second category was the medium sugar producing States. They are Gujarat, Andhra Pradesh, Bihar, Tamil Nadu, and Karnataka. The remaining States are low sugar producing States. They were Punjab, Uattrakhand and Haryana.

SUGAR INDUSTRY IN HARYANA

There are 509 sugar mills in India in which 14 mills are located in Haryana, 3 mills are in private sector and 11 mills are in cooperative sector. The list of sugar mills in Haryana is given in the following table:

TABLE 5: SUGAR MILLS IN HARYANA

District	Sector	Capacity (TCD)
Yamuna Nagar	Private	13000
Panipat	Co-operative	1800
Karnal	Co-operative	1250
Rohtak	Co-operative	1750
Meham	Co-operative	2500
Sonipat	Co-operative	1250
Jind	Co-operative	1250
Palwal	Co-operative	1250
Shahabad	Co-operative	3500
Kaithal	Co-operative	2500
Naraingarh	Private	2500
Gohana	Co-operative	2500
Sirsa	Co-operative	1750
Picadly	Private	1750

Source: List of Sugar Mills in India, 2007-08

Haryana occupies an important place in the sugarcane map of northern India. In terms of area under sugarcane it has third position, Uttar Pradesh and Maharashtra having first and second position.

SUGARCANE CULTIVATION IN HARYANA

TABLE 6: DISTRICT WISE AREA UNDER SUGARCANE CULTIVATION DURING 2014-15

S. No.	Districts	Area (00 hectares)
1	Hisar	11
2	Fatehabad	2
3	Sirsa	1
4	Bhiwani	22
5	Rohtak	81
6	Jajjar	27
7	Sonepat	71
8	Mawet	2
9	Fridabad	5
10	Palwal	20
11	Panipat	64
12	Karnal	111
13	Kurukshetra	107
14	Kaithal	34
15	Ambala	102
16	Panchkula	5
17	Yamunanagar	265
18	Jind	35
19	Mahendragarh	0
20	Rewari	0
21	Gudgaon	0

Source: Block-wise area under Principal crop Kharif for the year 2014-15

This table shows the block wise area under sugarcane cultivation in Haryana which is high in district Yamunanagar such as 26,500 hectares. The area under sugarcane cultivation in the district Karnal, Panipat and Kurukshetra is also greater than other district of Haryana. In Gudgaon, there is nothing area under sugarcane cultivation because of the industries development in this city. Mahendragarh and Rewari district also not preferred to sugarcane cultivation.

TABLE 7: SUGAR PRODUCTION IN HARYANA

Year	Sugar Production (M. Tons)
1966-67	59586
1970-71	83459
1975-76	106961
1980-81	200497
1985-86	138782
1990-91	668290
1995-96	403891
2000-01	465060
2005-06	2773446
2010-11	517336
2012-13	418872
2013-14	238952

Source: Statistical Abstract of Haryana 2013-14

Above table show that the sugar production from 1966-67 to 2013 is increased continuously throughout this time period. It means that the farmers in Haryana are giving preference to sugarcane cultivation than other crops. It leads to improve the performance of sugar industry in Haryana. Hence, sugar industry plays an important role in progress of any country or state.

CONCLUSION AND POLICY IMPLICATIONS

The number of sugar industry in India with respect to year 2008 to 2014 is given in Table-1. There are 488 in 2008 and in 2013-14 about 509 factories are in operation. It is to be noted that increasing number of factories show the development of sugar industry in India. Sugarcane production in India is given in Table-2 and the area under sugarcane cultivation in India is given in Table-3. These tables show that as long as the area under sugarcane cultivation is increased, the production is also increased. Table-4 highlights the top 10 sugarcane producing states in India. It is clear from the table that Uttar Pradesh and Maharashtra take place in high sugar producing states and Gujarat, Andhra Pradesh, Bihar and Tamil Nadu are take place in medium sugar producing states. Haryana, Punjab and Uttrakhand are the low sugarcane producing states in India.

In India, 509 mills are in operation, in which 14 are located in Haryana, 3 mills are in private sector and 11 mills are in cooperative sector. Yamuna Nagar, Naraingarh and Picadily are the sugar mills located in private sector. Total daily cane crushing capacity of 14 Haryana Sugar mills is more than 38 thousands tones but they are in position to crush about 63 lakh tonnes more than this limit of sugarcane annually during average crushing season of six month. It is interesting to note that in India the SSM is the biggest sugar mill in Asia and in Haryana. The TCD of Yamuna Nagar is 13000 tons which is more than of other sugar mills in Haryana. The cooperative sugar mill Gohana and Panipat installed capacities of 2500 and 1800 ton daily crushing cane respectively could produce 9200 and 8593 ton sugar. It is prove that no sincere efforts have been made by these two mills. District wise area under sugarcane cultivation in Haryana is given in Table-6. It is clear from the table that maximum area of sugarcane is in Yamuna Nagar district. Sugar production in Haryana is given in Table-7. This table highlight the sugar production from 1966-67 to 2013-14. The sugar production is 59586 M. tons and 238952 M. tons respectively in these two years. Thus, it is clear from the table that the sugar production is increasing continuously during this time period.

Sugar industry is the biggest industry in India after textile industry. It provides employment, improve BOP through export, meeting the domestic requirement etc. The performance of sugar industry is not only to be maintained, there is wide scope of further improvement in the raw material i.e. the growth of sugar cane cultivation and improving the working condition of sugar mills. Scientific research should be done for the improvement of sugar industry. Proper sugar cane marketing is to be done. Better quality of sugar should be packed properly for export. The sick units of the sugar mill should be revived by modernization. Credit facilities should be provided by banks to this industry. The most important thing is that the government should fix the sugarcane price by considering the benefits both of the cane cultivators and manufacturer of sugar.

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