



INTERNATIONAL JOURNAL OF RESEARCH IN COMMERCE AND MANAGEMENT

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PROBLEMS OF FRUIT PROCESSING INDUSTRY IN ANDHRA PRADESH - A CASE STUDY OF SELECT UNITS IN CHITTOOR DISTRICT

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ABSTRACT

This article made an attempt to review the status of fruit processing industry and the problems encountered by the industry in Chittoor District of Andhra Pradesh. Based on the observations of the problems, appropriate suggestions are also offered to tone up the performance of the fruit processing industry in Andhra Pradesh in general and Chittoor District in particular. The Chittoor Fruit Processing Cluster (CFPC) is the largest cluster of its kind in India. Lack of mutual trust, intense inter-firm competition and a roller-coaster performance marked the growth of the cluster before the interventions in 1998. The other problems afflicting it were unscientific raw material handling practices, primitive processing technologies, unremunerative product-mix, poor product quality and high environmental pollution. The interventions by APITCO, as the Cluster Development Agent (CDA), with the active participation of the firms and their commitment to "swim or sink together" attitude; along with proactive support from National Horticulture Board (NHB), Agricultural and Processed Food Products Export Development Authority (APEDA), Ministry of Food Processing Industry (MFPI), Government of India and Government of Andhra Pradesh (GoAP). Increased exports, domestic sales and employment; led to introduction of HACCP protocols; and setting up of aseptic packaging facilities and effluent treatment plants. An Agri-Export Zone (AEZ) covering the entire district.

KEY WORDS

Fruit Processing Industry, APITCO, Cluster Development Agent (CDA), National Horticulture Board (NHB), Agricultural and Processed Food Products Export Development Authority (APEDA), Ministry of Food Processing Industry (MFPI) and Agri-Export Zone(AEZ).

INTRODUCTION

The fruit processing industry owes its origin to the discovery of the fact that foods specialized by heat and sealed hermetically would retain their quality for months and even for years. Systematic food preservation by drying, smoking, salting and other household methods is as old as human civilization itself. But the art of processing is of comparatively recent origin. A French man Nicholas Appert (1750-1841) was the first to carry on commercial processing and also the first to write a systematic treatise on the subject (1810). During his early experiments Appert enclosed food in glass jars, cooked them with great care, submerged them in water which has gradually raised to the boiling point and billed them "for more or less time, according to the nature of food" a method still used successfully in household processing for fruits and vegetables. Later he experimented with tin and with wrought iron cans¹. India grows a variety of temperate to tropical fruits and vegetables. Processing plays an important role in the conservation and effective utilization of fruits and vegetables. The processing also helps in generating rural employment, besides, processed fruits and vegetables are a source of earning foreign exchange. India has favorable climate conditions and vast potential for growing fruits and vegetables. However, slightly over one percent in the units are covered under the Fruits Production Order (FPO). This is because of a number of problems faced by the industry such as high cost of production, high cost of processing, high cost of packing and transportation. The new industrial policy has however placed the processed fruits and vegetables in the list of high priority areas and various incentives have been provided in this sector².

INDIAN SCENARIO

India is the second largest producer of fruits and vegetables in the world, accounting for about 16% of global vegetable production and 10% of world fruit production. India is a front runner in many fruits and vegetables with share in world production as follows³:

- 41% of mango
- 23% of banana
- 24 % of cashew nut
- 10% of onion
- 30% of cauliflower
- 36% of green peas

The trends in India's fruits and vegetables production are presented in table 1

TABLE 1: PRODUCTION OF FRUIT AND VEGETABLES IN INDIA

Year	Fruits			vegetables		
	Area (Million Ha)	Production (Million Tonnes)	Growth Rate	Area (Million Ha)	Production (Million Tonnes)	Growth Rate
2002-03	4.8	49.2	-	5.9	84.8	-
2003-04	5.1	49.8	1.22	6.7	101.4	19.57
2004-05	5.3	52.8	6.02	7.1	108.2	6.71
2005-06	5.3	55.4	4.92	7.2	111.4	2.96
2006-07	5.6	59.6	7.58	7.5	115.0	3.23
2007-08	5.8	63.5	6.54	7.8	125.9	9.48

(Source: National Horticultural Board, data base 2007-08)

The production of fruit in India, as detailed in table 1 shows an average production of 55.05 Million tonnes over a period of 6 years starting from 2002-03 to 2007-08. It was 49.2 Million tonnes in 4.8 Million Ha in the year 2002-03. A slight increase in the area of the land showed almost the same in 2003-04. In 2004-05 there was some increase in production in 5.3 Million Ha, in 2005 and 2006 the production increased considerably in the same extent of land of 5.3 Million Ha. The production remarkably increased in 2006-07 to 59.6 Million tonnes in almost the same extent of area of 5.6 Million Ha. In 2007-08 only 1 Million Ha of area increased but the production was increased by about 14 Million tonnes.

FIGURE: 1

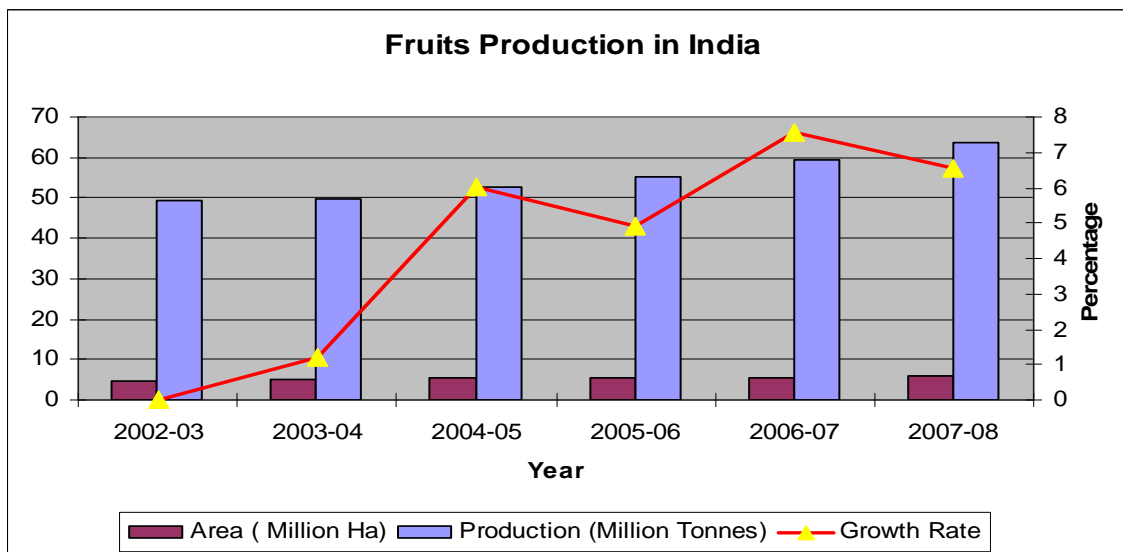
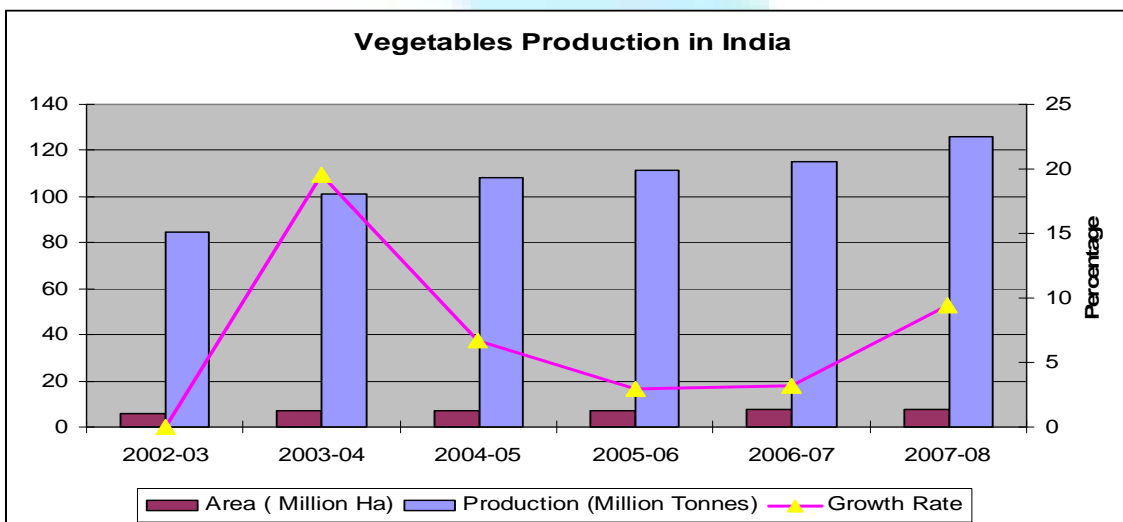


FIGURE: 2



Agro processing in general and food processing in particular has started gaining momentum. The government is aiming to hike the processing of the perishable to 20 per cent from the current 6 per cent, increasing value addition from the current 7 per cent to a whopping 70 per cent and improving the country's share in the global market to 3 per cent. By 2010 the various policy initiatives would have been embarked upon in this direction⁴.

To exploit the niche market available at domestic as well as the global level, further improvements like attracting more investment, development of infrastructural facilities, up gradation of technology available with the Indian manufacturers by taking assistance through foreign collaborations, in case of design know-how back-up etc are required. Other measures may involve improving the hygienic conditions of slaughterhouses, following the sanitary and phyto-sanitary standards and other practices like labeling, grading, etc., product innovation (for instance, tapping other meat sources like rabbit) to expand the scope of market, co-ordination of production-procurement-processing activities to lessen the impact of irregular supply of raw materials arising out of seasonable nature, etc.

If convenience is the symbol of modernization, then development of the fruit processing industry is one of the avenues leading towards it. India would benefit by exhibiting the competitive edge it enjoys in this direction-given its resource endowments⁵. This needs to be supported by adequate investments and strong regulatory frame work on quality standards to enable the domestic industry to meet the challenges posed in the global market.

FRUIT PROCESSING INDUSTRY IN ANDHRA PRADESH

Andhra Pradesh is a key state that contributes significantly to the food and food processing sector in India. The state ranks first in the country in area and production of mango, oil palm, chillies and turmeric, second in citrus and coriander, third in cashew, fourth in flowers and fifth in grapes, banana, ginger and guava based on area and production. It accounts for a sizeable share of country's aggregate production of rice. It also contributes 25-30 per cent to the total sea food exports of the country. The food processing industry contributes 19.36 per cent to total industrial production in the state. It ranks second in the production of value-added products and beverages with a 10 per cent contribution to the exports of the country. The state is also well endowed with human resources with the right skill sets. It is estimated that the agro based industry in the state employs 65 per cent of its total population. Andhra Pradesh is a major fruit and vegetable producing States of India. A variety of tropical and sub-tropical fruits and vegetables are grown in the state⁶. The state occupies a distinct place in the national scenario in respect of some fruits and vegetables as indicated in table 2.

TABLE 2: SHARE OF ANDHRA PRADESH IN PRODUCTION OF MAJOR FRUITS

Sl. No	Fruits	% of share in India's production	National rank
1	Mango	28	1
2	Papaya	39	1
3	Sapota	15	4
4	Citrus	42	4
5	Banana	10	5

(Source: AP horticultural Board, data base 2007-08)

There are 157 fruit and vegetable processing units in the state mainly in the small and medium sector. Fruit processing activity is largely concentrated in Chittoor district. There are 53 processing units with an aggregate installed capacity to produce about 2 lakh tonnes of mango and other fruit pulps. Contract manufacturing for leading exporters and food retail majors is most common. Own account production is low. 90% of the production by these units is exported in the form of canned pulp or aseptic concentrate. The state of Andhra Pradesh ranks Second in the Country in Fruit Production and the Mango Production alone is 31,64,172 M.T.s and the Production of Mango Pulp is about One Lakh Fifty thousand Tons mostly produced in Chittoor District only. Chittoor district is basically an agricultural district with added potentialities and having good agriculture, horticultural, dairy and mineral resources. Mango is the major horticultural crop of chittoor district with an average of 1,19,539 acres crop and providing 3,58,617 M. Tonnes per annum. There are 53 fruit processing industries in small and medium scale sector. 90% of the Mango Pulp produced in the District is being exported mainly to the Gulf countries like Kuwait, Saudi, Dubai and also to the European Countries.

FRUIT PROCESSING IN CHITTOOR DISTRICT

Chittoor is the Southern most district of Andhra Pradesh, forming part of the Rayalaseema region of the State. Chittoor is bordered by the states of Tamilnadu and Karnataka. The district abounds in the production of mangoes and tomatoes. Besides processing a good horticulture base, the district has easy access to the leading horticulture belts of Tamilnadu, Karnataka and Andhra Pradesh. In tune with the inherent advantages, the district has the largest number of fruit processing units. Fruit processing units in the district are termed as "Fruit Processing Cluster". "A cluster is a group of enterprises, operating in the same industry, concentrated in a geographical area, possessing similar characteristics and facing common growth constraints".

MANGO PROCESSING INDUSTRY IN CHITTOOR DISTRICT:

- 53 processing units are established in the district
- 7 units are with Aseptic processing
- 46 units are with canning system
- 4.02 lakh MTs of Mango production
- 1.90 lakh MTs of raw mangoes are processed.
- 1.26 lakh Mrs of mango pulp were produced.
- 90% of totapuri fruit, 50% of Alphonso fruit is utilized for pulp processing and remaining is being used for table purpose

The fruit processing units in Chittoor district process largely mango. Other fruits processed though in small quantities, are guava, papaya, and grapes as also tomato. In addition to catering to the domestic markets, these units contribute substantially to mango pulp and RTS (Ready-To-Serve) fruit juice exports from India. These units developed into a cluster over the last two and a half decades, spontaneously have also contributed to the emergence of a large network of support providers in the form of raw material suppliers, transport providers, suppliers of packing material, machinery and equipment servicing firms, merchant exporters and skilled labour etc. The development of Chittoor fruit processing industry assumes significance considering the inherent strengths and weakness of the units.

The strengths relate to the presence of a dependable raw material base, good export potential for tropical and sub-tropical fruits pulps and juices, expanding urban markets within the country for natural fruits juices, easy accessibility to better technologies, major domestic markets for end products and a sea port for exports.

The weaknesses relate to highly seasonal operations of the units, narrow product mix, inadequate effort to enhance product range and explore domestic markets, lack of cost optimization effort, limited inter-firm interaction, absence of critical common facilities, varying product quality, excessive dependence on merchant exporters, lack of alternative market effort, no waste utilization, objectionable practices of waste disposal.

STATUS OF FRUIT PROCESSING INDUSTRY IN CHITTOOR DISTRICT

The Chittoor Fruit Processing cluster is the largest of its kind in the country. 53 processing units are presently operating in the district. Nearly 83 % of the units are located within a radius of about 35 kms from chittoor town, the district headquarters. Out of 53 units, 49 units are small and medium scale units and 4 are large scale units, categorized based on investment range and 40 units in Chittoor Region, 10 units in Tirupati Region and 3 units in Madanapalli Region.

PROFILE OF FRUIT PROCESSING UNITS IN TIRUPATI REGION**TABLE 3: FRUIT PROCESSING INDUSTRIES – TIRUPATI REGION**

Name of the Unit	Status	Investment in Rs. Crores	Production Capacity in MT P.A	Raw materials (Mango) Requirement in MT P.A
Parrot Processed Foods (Karveti Nagar)	Existing	0.6	2000	4000
Sai Krishna Food Products(P) Ltd.,APIE, Renigunta	Existing	0.26	1000	2000
Varsha Food Products (Renigunata)	Existing	0.8	1000	2000
Galla Foods, Rangam pet (Pakala)	Existing	19.95	6000	12000
Vaikuntaraya Fruit roducts, Puttur	Existing	0.67	200	400
Navabharathi Processed Foods, Damalcheruvu Road (Pakala)	Existing	0.2	1050	2100
Venus Food Products, Pakala	Existing	0.15	750	1500
Capricon Food Products India Ltd., Sathayavedu	Existing	1.52	4000	8000
CFL Agro(P) Ltd, Chandragiri	Under Pipe line	2.25	1500	3000
Sri Sai Fruit Products, Manipireddypalli(V)	Existing	0.53	1500	3000

(Source- District Industrial Centre, Chittoor.)

The Andhra Pradesh state is unique in its kind to announce a separate policy for the FPI. The State has declared various packages, incentives and concessions for the growth of fruit processing sector in the State. Efforts are being made to develop food processing sector by investing crores of funds. Hence, the efficiency with which the FPI units mobilise and utilise the scarce financial resources determines the development of FPI. In this context, the financial performance and

problems of fruit processing units assume a paramount importance to the government as well as to the FPI itself. Therefore, the present study concentrates on various issues and performances of select fruit processing units in Tirupathi Region of Chittoor District⁸.

The Tirupathi region is second largest Mango growing region in Chittoor District of A.P. and the market is very prone to fluctuations both in prices and in production. The Fruit Processing is also facing a lot of fluctuations in the production. Although number of studies have been conducted, quite a large number of seminars and conferences being organized, volumes of information was published on marketing of mango production, yet due to wide fluctuations in production and price, most of the studies failed to provide time tested market solutions. The education, levels of development and enterprising abilities of mandi owners cum traders had shaken the market efficiency operations. Some issues are region specific and area specific. Mango being a tropical crop it is grown in limited agro climate zone/region. On the other, natural conditions, market accessibility, infrastructural and location variations show marked advantages or disadvantages because of perishable nature of the mango produce. In this context, location specific or district level studies focus the problem more effectively than the state or country wide studies. Tirupathi Region is the second largest mango producing center in Chittoor District of A.P. Incidentally, there is no comprehensive study on Fruit Processing Industry in the Tirupathi Region of Chittoor District. Hence, ATMA and Chittoor District Fruit Processors' Federation have proposed to study and identify problems and solutions of Fruit Processing Industry in Tirupathi Region. Hence, an attempt is made to study the Problems and Prospects of Fruit Processing Industry in Tirupathi region⁹.

THE METHODOLOGY OF THE STUDY

Apart from the analysis hither to make on the status and progress of fruit processing industry, the study purports to analyse the problems encountered by the fruit processing units in chittoor district. This is a micro level study confined to Tirupathi region of Chittoor district. The study covers 7 small and medium processing units because the size and conditions under which they operate varies from the unit to unit. The data is collected through canvassing questionnaires to the entrepreneurs of fruit processing units. This study is limited only to the problems of fruit processing industry in Tirupathi Region.

OBJECTIVE OF THE STUDY

The main objectives of the present study is to identify the problems encountered by the Fruit Processing Units, to assess future prospects and to offer some feasible suggestions for toning up of the performance of Processing Units in the district.

SOURCE OF THE DATA

The present study is mainly based on both primary as well as secondary data. The Primary data collected from the sample units by way of field study. Schedules specially designed for the purpose were filled in through personnel interviews and information given by the respondents was also recorded, analysed and drawn inferences. Secondary data for the study have been collected from the annual reports of National Horticultural Board, AP Horticultural Department and District Industrial Centre. The other data have also been gathered from various annual reports, journals, and periodicals.

The present study has been conducted for a period of six years commencing from 2004-05 to 2009-10.

PROBLEMS OF FRUIT PROCESSING INDUSTRY

TABLE 4: PROBLEMS OF FRUIT PROCESSING INDUSTRY

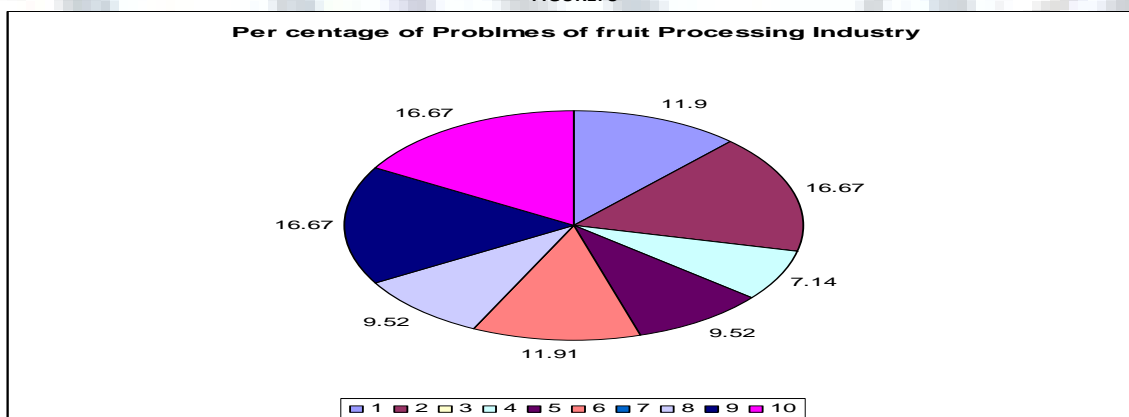
Sl.No	Problems	No. of Respondents	Percentage
1	Machinery	5	11.90
2	Bank Loan and Interest	7	16.67
3	Asceptic Packing Unit under Common Facility	3	7.14
4	Agricultural Market Cess (AMC)	4	9.52
5	Electricity	5	11.91
6	Supply of Coal	4	9.52
7	Disposal of Mango Waste Products	7	16.67
8	Raw material	7	16.67

Source: Field Study

Note: Figures in parentheses indicate percentages to totals

From the above table 4 it is evident that majority of the fruit processing industry in Tirupathi region of Chittoor district suffer fro want of sufficient and easy and concessional bank loans. Another major problem faced by most of the industries is the problem of disposal of mango waste products. They are worried about sufficient place for dumping waste products. A similar problem is regarding raw material such as mangos, sugar, chemicals and tin plates. Since there is no direct marketing for buying mangoes middle men sell them at exorbitant rates to the units. Electricity is another serious problem for fruit processors. Fruit processing is seasonal and consumer more electricity so they have to change to category III B which is higher expensive. Fast technological developments make it necessary for the fruit processors to change their machinery frequently for latest manufacturing they have to spend huge amounts very often. Agricultural Market Cess (AMC) in Andhra Pradesh is another problem for the growth of fruit processing industry. In view of complicate procedure for the supply of coal the processors have to go for private coal supply which is beyond their reach. The government of Andhra Pradesh is neglecting Asceptic Packing Unit under common facility which highly essential for the fruit processors.

FIGURE: 3



The following are the major problems of fruit processing units in Tirupathi Region of Chittoor District.

1. MACHINERY

Machinery is 11.90 percent of the total problem. Usually it takes 3 to 6 months to get machinery after the placement of order to Metal Box India Ltd., Madras or Raylons Metal Works, Mumbai. In recent years the cost of machinery is increasing rapidly. Further rapid technological changes are making the machinery obsolete in short intervals. Consequently, the units have to place orders for new machines in frequent intervals. If the units can not replace the old by new ones, it is difficult to survive in the competitive market. The units have to pay high interest charges on medium term loans borrowed to purchase new machinery, which puts heavy financial burden on the units.

2. BANK LOAN AND INTEREST

Being a Seasonal Industry, the Industry works for 60 days only in a year and the rest of the year, it is kept idle. Fruit Processors' effort to run the Industry throughout the year with other fruits is not successful due to lack of market facilities and involvement of huge capital and the interest burden on the Industry is heavy. For Working Capital each Bank is charging 12% to 15% as Rate of Interest which amounts to lakhs of rupees and which is more than the profit margin earned some times. Many Units have become sick due to lack of Working Capital and support from Financial Institutions. The heavy burdens of Interest accumulated month after month have become a big liability. It is very sad to note that 10 Units were already sold in distress. At present there are nearly 15 Units which are on the brink of becoming sick and on the verge of collapse condition. The Fruit Processing Industry is facing several financial crises in the District, as the District is prone to chronic drought year after year. It amount to 16.67 per cent of the total problems.

3. ASEPTIC PACKING UNIT UNDER COMMON FACILITY

This is of course a low percentage about 7.14 per cent in the total problems of the industry. Aseptic packing unit under Common facility – Funds released by APEDA (Central Government) was withdrawn as the Project was not grounded-by the Government of Andhra Pradesh. APEDA sanctioned a One Time Grant of Rs. 439 Lakh (75% of the project cost) towards setting up the facility and accordingly MOU has been entered by APSTC with APEDA on 19-03-2004, out of which, an amount of Rs.175 Lakh (40% of the total grant) has been released by the APEDA as mobilization advance.

As the scheme was not implemented by State Trading Corporation and the guarantee given for the amount of Rs 175 Lakh not renewed or utilized, APEDA has withdrawn the said amount. This is absolutely huge loss to the Fruit Processing Industry and also A.P. State. The aseptic packing Unit under Common facility is very much needed for Small Scale Industries.

4. AGRICULTURAL MARKET CESS (AMC)

The processors have the problem of AMC to the extent of 9.5 per cent. In Andhra Pradesh 1% AMC is levied on the cost of fruits purchased for processing. In Tamilnadu the AMC is totally exempted on Fruit and Vegetables. In Karnataka the AMC is not leaving Processed Fruits and Vegetable Products. It may be noted that in India only 3% of the total fruit and vegetables are processed, where as in other countries like Brazil, Mexico and European countries 70 to 80% of the fruit and vegetables are being processed which is helping the development of the farmers in those countries in a big way.

The Government of Andhra Pradesh to encourage Food Processing Industry in the State announced Special incentives as per the guidelines and G.O issued under the Food Processing Policy of Andhra Pradesh on 14-11-2003. 'All Food Processing Industries shall be exempted from payment of Market Cess on Procurement of Raw Materials like Mangos for the Industry. But the policy is not implemented so far by the Marketing Department.

5. ELECTRICITY

Most of the Fruit Processing Industries have below 75 HP connecting Load and come under category III A. Due to modernization of improvement quality, strict sanitation and hygiene and compulsory providing Effluent Treatment Plant, the power requirement is more and some items go beyond 75 HP III A Category, therefore the Electricity Authorities are demanding Fruit Processing Industrialists to join III B Category. As per the terms and conditions of category III B the entrepreneur has to pay Rs 2,000/- per HP as Security and development charges and install his own Transformer costing Rs. One Lakh and also metering cost of Rs 1,40,000. The Fruit Processing Units work only for seasonal three months. So, they are unable to bear the huge amounts under this category. As the industry is already facing financial crisis and crippling problems due to lack of funds, additional expenditure due to change of power category to III B will definitely affect the industry badly up to 11.91 per cent in the total problems of faced by industry.

6. SUPPLY OF COAL

Each Processing Unit requires 180 M.T.s of Coal for the Mango Season Processing. In the previous years the District Industries Centre (DIC) was recommending Processing Units requirement of Coal to the Singareni Collieries Co. Ltd., A.P. But during the year 2006-2007 the Sanction or Recommendation is entrusted to three departments viz. District Industries Centre, Commercial Tax Department and Ned Cap and as a result of this no Unit could get coal permit. Due to this involvement of three departments the concept totally failed and the canners have suffered heavy financial loss on Purchase of Private coal at higher rates from other States 9.52 per cent of this problem is not negligible.

7. DISPOSAL OF MANGO WASTE PRODUCTS

Of the total problems of industry this occupies a sizable percentage of 16.67 per cent. During process of fruits 50% of the quantity comes as Mango waste like Mango seed, Mango peels, fiber and Boiler cinder waste. This is becoming a highly problematic to dispose of these waste products at Factory premises, due to quality, hygienic problems by the Food Authorities and Foreign Buyers.

8. RAW MATERIAL

It is the major problem running 16.67 per cent of the total problems. In pulp production mangoes, sugar, chemicals and tin plates are the main inputs.

MANGOS

Mango fruits are purchased from mango mandi merchants in the District. Mandi merchants purchase fruits from farmers at low prices and sell to the Fruit Processing Units at high prices. The mandi merchants also appropriate 10 per cent of the sale proceeds accruing to the farmers as commission. Thus mandi merchants exploit the farmers by paying low prices and the Fruit Processing Units by charging high prices. High prices tempt the farmers to harvest and supply raw mangos to mandies. The sucrose content of raw or unripened mangos being low, to maintain the quality of pulp they require adding up of sugar incurring additional expenditure. In case of purchase of fully ripened or semi-ripened fruits, during transportation more than 10 per cent of them get spoiled and hence they have to be skulled out or discarded. Further, the quality of pulp will be inferior posing problems of marketing. Generally, in the case of mangos purchased within the district up to 3 to 5 per cent and from other districts within and outside the state 5 to 8 per cent of mangos get spoiled and are discarded.

Most of the mango gardens in the district are Un irrigated. Owing to vagaries of monsoons the mango yield generally fluctuates year to year. Empirical evidence shows that if there is a good crop in one year, in the next year there will be a poor crop. The Fruit Processing Units face scarcity of mangoes during slack years and are forced to pay high prices. Added to this, fluctuations in the demand for pulp causes wide fluctuations in the prices of mangos.

CHEMICALS

The chemical used in Fruit Processing Units is citric acid. The Processing Units face difficulties in procuring sufficient citric acid which is in short supply. But it is the most important chemical in the manufacturing of pulp. One tonne of production requires 0.7 kg to 1.25 kg of citric acid depending upon the acidity content of the pulp. The quality and durability of pulp depends upon the balance of acidity and sucrose content. Due to insufficient supply of citric acid, there is keen competition for the acid among the units resulting in price escalation and black marketing.

SUGAR

The sugar content in the pulp is called sucrose content. The sucrose content should be in the range of 16.5 per cent to 18.5 per cent. Usually sugar is used when fruits with less sweetness are used. Local varieties of fruits being more sweet require less or no sugar. But the fruits purchased from outside districts being less sweet require adding up of sugar. The units purchase sugar in open market at high prices.

TIN PLATES

Tins are used for packing pulp. Special coated tin plates are necessary for making pulp packing tins and are imported from Taiwan and USA, through government canalizing agencies. The units have to place indent for the tin plates with these agencies. These agencies take nearly one year to supply tin plates after the receipt of the indent. The units can also purchase from private agencies like Metal Bos Company, Poshia Ltd., etc., Heavy customs duties are imposed on the import of tin plates. The government of India exempts import duty on the tin plates used for export market. The units can claim refund of import duty on the quantity of tin plates used for making tins for packing pulp exported to foreign market. It is cumbersome process to prepare different accounts and claim refund. Sometimes the units entrust the work of collecting refund amount to the export houses. But the export houses sometimes are not passing properly on the refund amount collected from the government to the units concerned.

The import duty exemption is not allowed for the tins used for packing domestically marketed pulp. Hence these tins cost comparatively higher. There are some units are experimenting with packing pulp in glass jars. But glass jars are not popular for the simple reason that, they are not only costly but are also fragile, causing transport difficulties.

IMPORTANT SUGGESTIONS

1. Finance is the life blood to any industry. Financial institutions are advancing fixed capital to Fruit Processing Industry in the district. But capital, rapid technological changes are necessitating the replacement of obsolete machinery by up to date high cost sophisticated machinery. The financial institutions are not enthusiastic to provide these loans for modernization and are charging high rates of interest. There is need for liberalized provision of replacement loans at cheaper rates of interest.
2. Commercial banks are responsible for advancing working capital requirements of Fruit Processing Units in the district. Processing units have to hypothecate their inventories to get working capital loans. 65 per cent of the value of hypothecated inventories is taken as the limit for providing working capital advancement, which is not sufficient. Being a Seasonal Industry, the Industry works for 60 days only in a year and the rest of the year, it is kept idle. For working capital each bank is charging 12% to 15% as rate of interest which amounts to lakhs of rupees and which is more than the profit margin earned. Many units have become sick due to lack of required Working Capital and support of Financial Institutions. Unless the Government comes in a big way to help the industry, the industry may not survive collapse. So the Government should come to help in a big way.
3. The contiguous areas of Chittoor, Dharmapuri and Krishnagiri account for a major share of India's export of processed mango pulp. There are over 26 fruit processing Units in Krishnagiri and about 53 Fruit Processing Units in Chittoor district. On an average, each unit produces about 35 tonnes of pulp per day, and the peak production season lasts for about 90 days. The pulp is packed in 3.1-kg tin cans, six of which make up a carton. The pulp is exported to West Asia and the South-East Asian Countries. So, the Government of India should take necessary steps to provide infrastructural facilities, subsidy, Aseptic Packing unit under Common facility and other facilities for the development of Fruit Processing Units in Chittoor district.
4. The major obstacle in the advancement of working capital is that the fruit processing units are inflating the value of hypothecated goods submitted to the banks. Disbelieving the correctness of the indicated value of the hypothecated goods the banks are fixing lower working capital borrowing limits. Therefore to bale out processing units from working capital constraints, it is necessary to raise the working capital borrowing limits.
5. If the processing units fail to repay debt obligations in stipulated time intervals penal rates of interest are charged. Due to difficulties in marketing and long gap between the sales of the pulp and the receipt of the sale proceeds, the processing units are unable to meet debt obligations promptly. Therefore taking the peculiar marketing conditions of the units into consideration, time intervals may be extended or relaxed and the rate of interest reduced.
6. With the present 70 per cent operational capacity utilization, the total pulp production from the existing units would be of the order of 7,000 M. Tonnes using 10,000 M. Tonnes of mango fruits. The surplus fruits available in the district are locally consumed and exported to other districts, states and countries. The export of mangoes to other states and countries is facing serious competition from increasing production of mangoes throughout India. Further, due to drought conditions, more and more new orchards are coming up in the district with an enormous scope for more supply of fruits in future. Therefore, it is necessary for the development of production capacity of Existing units in the district by providing fixed and working capital requirements sufficiently.
7. It is not the scarcity of mangoes but the gradually increasing prices of mangoes, which is affecting the cost structure of the processing units. The price increase to a certain extent is due to the operation of middlemen between producers of mangoes and proprietors of processing units. If processing units form a consortium or a purchasing organization and purchase fruits directly from the farmers, then there will be possibility of reducing the cost.
8. Citric acid is the main chemical used in pulp production which is in short supply. There is prevalence of black marketing. Scarcity and high price is resulting in improper use of citric acid affecting the quality of pulp. Therefore, government should ensure adequate supply of citric acid at reasonable prices. Further proper supervision and control should be exercised in maintaining the quality of pulp. Any defect in the quality of pulp production shall be dealt with severely.
9. Sugar is purchased in the open market at high price leading to inadequate use of sugar in pulp production. This results in low levels of sucrose content. To avoid this defect it is better to supply sugar at controlled rates.
10. High cost of tin plates results in hike of packaging expenses. There is an urgent need to reduce the packaging and marketing expenses in order to reduce the price of pulp to make it available within the reach of common man.
11. Further it is advised to improve the economic conditions of the units, there is need for improving the operational efficiency of the units by increasing the utilization of installed capacity from 70 per cent to 100 per cent.
12. At present the units are working for 90 days only from May to July during Mango season. And no other fruits are available to process further because the district is continuously under famine conditions. The processing units are providing huge employment for thousands of skilled and unskilled workers. But by proper utilization of fruits in the district and importing from neighbouring district, the units can prolong their production season to 120 days. This will reduce the production costs, increase employment opportunities to labourers and improve profitability of the units.
13. The capacity utilization and prolongation of the period of operation depend upon the size of the market. At present, production is linked to the purchase orders especially from foreign exporters. Therefore, market expansion, both internal and external is imperative for improving the profitability of the units.
14. Processing units being small cannot undertake by themselves, the expensive advertisement activities. Therefore a marketing organization financed by processing units should be created for the purpose.
15. Serious efforts should be made to expand external market as processing industry is rapidly increasing throughout the country. This task of expansion of foreign market should be undertaken by State Trading Corporation, Ministry of Food Processing Industry, APEDA and other organizations specially created for the purpose.
16. Pulp is a food product and its utility depends upon purity and quality. Therefore meticulous care should be taken for ensuring scientific production, packing, boiling and cooling. In order to minimize costs, it is reported that some processing units are not observing scientific methods of packing and cooling. The durability of the pulp is greatly reduced and soon gets spoiled and become poisonous. The processing units shall be forced to observe stipulated methods of production, packaging and boiling and cooling as per international standard.
17. Success of any industrial activity depends upon technical efficiency and ethical standards followed in the production process. It is high time for the producers to realize that it is the quality of the product, which attracts consumers that ultimately determine the profitability and prosperity of the industry. Good government policies and honest and efficient administration are essential prerequisites for proper and efficient functioning of any economic system.
18. The existence of honest administration is essential for rapid industrial development in a country. Unnecessary official interference may stall the prospects of industry. The government should positively come forward to lend a helping hand to the industrial entrepreneurs. It really paves the way and goes a long way to string them and revitalise the Fruit Processing industry in general and Chittoor district in particular.

CONCLUSION

Fruit processing industry in Tirupati Region of Chittoor District of Andhra Pradesh is a seasonal industry, the industry works for 60 days only in a year and the rest of the year, it is kept idle. Fruit Processors' effort to run the Industry through out the year with other fruits is not successful due to lack of market facilities and involvement of huge capital and the interest burden on the Industry is heavy. For Working Capital each Bank is charging 12% to 15% as rate of interest which amounts to lakhs of rupees and which is more than the profit margin earned. Some times many Units have become sick due to lack of Working Capital and support from Financial Institutions. The heavy burdens of Interest accumulated month after month have become a big liability. The Fruit Processing Industry in Tirupati Region is facing several financial crises in the District.

In view of the facts mentioned above one feels that the fruit processing industry in needs lot of encouragement from the Ministry of Food Processing Industry, APEDA and Horticultural Department of Andhra Pradesh. The entrepreneurs need financial assistance by way subsidized loans from the government, subsidized power, modernized packing system to export of fruit pulp and serious efforts should be made to expand external market as processing industry is rapidly increasing throughout the country. This task of expansion of foreign market should be undertaken by Central government, state government of Andhra Pradesh, Ministry of Food Processing Industry, APEDA and other organizations specially created for the purpose.

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With sincere regards

Thanking you profoundly

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