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ASEAN AND NORTHEAST INDIA: FODDER INDUSTRY IS A NOVEL PARADIGM SHIFT**DHANANJOY DATTA****RESEARCH SCHOLAR, HUMANITIES & SOCIAL SCIENCE DEPT., NATIONAL INSTITUTE OF TECHNOLOGY, AGARTALA****FACULTY ASSOCIATE****FACULTY OF MANAGEMENT STUDIES****ICFAI UNIVERSITY****KAMALGHAT****ABSTRACT**

In every nation's agricultural sector, fodder and livestock are two core sub sector which contributes hugely in the particular countries national economy. Fodder is an agricultural term for animal feed and fodder crops are those plants that are raised to feed livestock. Basically, fodders are of two categories: Green fodder and Dry fodder as natural produce has its own significance for the livestock nurturing peoples. At present, the country faces a net deficit of 61.1% green fodder, 21.9% dry crop residues and 64% concentrate feeds. Now a day's fodder and livestock sub sector are recognized as vital part of peri urban economy because of increasing peri urban livestock farming and rising fodder marketplaces are pointers of quick shifting economic situation in livestock and fodder sub-sector. So, in this context the study is an attempt to know the opportunities exist for fodder trade and development in North East India and its extension to the South and East Asian countries in the preview of the agreement happened between India and ASEAN. For this, an assessment and comparative study have been done between North East India fodder market operations and South and East Asian countries. This study contains the reviews of information from the government officials of north-east state of India and information from the South and East Asian countries which will include various sources like: book published, journals, report on fodder etc. with regard to production, demand and importation of animal feed products. This will help to understand the researchers, policy maker, exporters, importers, Government officials about the opportunities, ground of cooperation need to be focused and gap exist for trade and development in the fodder sub-sector which is prerequisite for sustainable socio-economic development of concerned regions.

KEYWORDS

Fodder Industry, Indian Economy, North East India, South and East Asia, Sustainability.

INTRODUCTION

The North East of India consist of the eight states of Assam, Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Nagaland, Tripura and Sikkim, is a pool of prosperous normal resources and a gorgeous incorporation of diverse populace and civilizations. It definitely is an area waiting to take place. Blessed with huge biodiversity, hydro-energy prospective ness, oil and gas, coal, limestone, forest wealth, fruits and vegetables, flowers, herbs and aromatic plants, uncommon and wealthy flora and fauna, North East India has all the possibility to change into a marketable center and tourist glory. The provinces contribute to boundaries with China in the north, Bangladesh in the South-West, Bhutan in the North-West and Myanmar in the East. This formulates the North-East as a potential hub for development of international trade and commerce.

On the other side, India's commitment with the Association of South East Asian Nations (ASEAN) started with its "Look East Policy" in the year 1991. ASEAN has an association of ten countries namely Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam. India turns out to be a Sect oral conversation associate of ASEAN in 1992 and complete discussion collaborator in 1996. In November 2001, the ASEAN-India affiliation was promoted to the meeting stage. The 1st ASEAN Economic Ministers (AEM) – India conference were held on 15th September 2002 in Brunei Darussalam where the Ministers, after discussing the Joint Study Report determined to set up an ASEAN-India Economic Linkages Task Force (AIELTF). The AIELTF was solicited to organize outline frame conformity to improve the ASEAN-India trade and economic collaboration earlier than the 2nd AEM – India consultations. North-East India is habitually portrayed as the Gateway to South-East Asia. India's 'Look East' Policy aspires at changing the North-East into a active hub of a flourishing and amalgamated economic breathing space, connecting the two high-prospective areas with a system of highways, railways, pipelines, and communication lines crisscrossing the province. The enormous complementarily occurring out of India's 'Look East' Policy and our South-East Asia focal point and the 'Look West' Policy of South-East Asian countries like Thailand, confers increase to massive opening for India and ASEAN nations to enlarge their trade and investment relationships, by means of the North-East as a most important crucial point. However, as point out formerly, in spite of these immense advantages, the North-East has not full-grown at equivalence with the rest of the nation, and the area's prospective ness has not been penetrated appropriately. Whereas the important proposals in use by the Indian Government to endorse economic growth, tourism and development in the North-East region can be principally welcomed, though, the main concern to be focused to the development of roads in the North-East province is glowing replicated in the Union Government's aim to spend almost Rs.50, 000/- crores on the roads sector in the North-East India during the Eleventh Plan phase. The East-West passageway venture, which will join Silchar in Assam to Porbandar in Gujarat and this, will go an extended method in humanizing connectivity and changing the area into an exciting trade and industry region.

LITERATURE REVIEW

In order to build up an appropriate perception of the research problem recognition and to expand a theoretical structure to carry out the assessment of existing opportunities of trade and development for fodder in North East India and ASEAN, the following literature has been reviewed.

Ridzwan A. Halim in 1996 concludes that increasing demand for meat and milk as a result of population growth and rising incomes makes it imperative that ruminant and fodder production be expanded in the Southeast Asia.

F.Y.Chin in 2002 summing up that fodder is not considered of widespread importance in the Southeast Asia region, as most ruminants are still under smallholder farmers who practise a traditional village system of rearing.

In a seminar hosted by ICAR Research Complex for North-Eastern Hill region, Umiam, November 1999, National Academy of Agricultural Sciences in collaboration with Indian Society of Hills Farming deliberated on the theme "Strategies for Agricultural Research in the North-East" and concludes that Feed and fodder resource enhancement should receive urgent attention to avoid fodder scarcity in north east region followed by research in the related area are very essential.

MOTIVATION AND PRACTICAL UTILITY OF THE STUDY

The main rational of the study is to ascertain the Opportunities of Trade and Development for fodder in North East India and with ASEAN so that collaborative efforts can be develop to improve the fodder production, trade and developmental efforts can be taken to meet the fodder deficit and research related co-operation, co-ordination can be initiated. Research related resources; consultancy can be exchanged among various parts North East India and ASEAN. These attempts may help in developing strategic advantage and prerequisite for sustainable socio-economic development of concerned regions.

OBJECTIVE

The main objective of this study is to assess the fodder as Opportunities of Trade and Development in North East India and in the South-East Asian nations. Specifically, brief review of fodder report published by different researchers, Government officials like IGFR and policy makers in India with special focus on

North-East India and highlights on the some important fodder report from the South-East Asian nations with their status. Finally, about the opportunities, ground of cooperation need to be focused and gap exist for trade and development in the fodder sub-sector.

METHODOLOGY

This study is mainly based on the secondary data collected from the various sources like Published report of Govt. of India, North East India, Govt. of Tripura, South-East Asian nations, Web Articles, Journals and research report etc. Brief study for this research have been done through the assessment of existing research report, articles related to production, demand and importation of animal feed of the concerned region. Specifically, brief review of Fodder report published by different researchers, Government officials like IGFR and policy makers in India with special focus on North-East India and highlights on the some important fodder report from the South-East Asian nations with their status. Finally, about the opportunities, ground of cooperation need to be focused and gap exist for trade and development in the fodder sub-sector from the literature available with the help of research jury.

OUTLINE OF THE PROJECTED LIVESTOCK POPULATION ESTIMATION IN INDIA

The below mentioned projected livestock population estimation in India are based on 10 & 11th five year plan document, Government of India which shows the increasing rate of livestock population. So it is important to maintain the sustainability in livestock feed and fodder but presently the nation facing the shortfalls of livestock feed and fodder.

TABLE 1: PROJECTED LIVESTOCK POPULATION ESTIMATES (MILLION ADULT CATTLE UNITS) (In million tonnes)

Year	Cattle	Buffalo	Sheep	Goat	Equine	Camel	Total
1995	180.5	82.8	4.0	9.2	0.5	0.9	278.0
2000	187.1	87.7	4.1	9.9	0.4	1.0	290.0
2005	192.2	92.6	4.2	10.5	0.3	1.0	301.0
2010	197.3	97.5	4.3	11.2	0.3	1.0	312.0
2015	202.3	102.4	4.4	11.8	0.1	1.1	322.0
2020	207.4	107.3	4.5	12.5	0.1	1.1	333.0
2025	212.5	112.2	4.6	13.2	0.1	1.1	344.0
2030	217.7	117.3	4.7	13.9	0.1	1.1	354.8

Source: Based on 10 & 11th five year plan document, Government of India.

OUTLINE OF THE CONTEMPORARY INDIAN FODDER OPERATIONS STATUS (FORAGE AND FEED-DEMAND AND SUPPLY SCENARIO IN INDIA)

Fodder pedestal cheaper forage and feed techniques are requisite to diminish the charge of superiority livestock produce as the fodder only comprises 70% of the milk creation rate. Presently, there is marvelous stress of animals fodder on accessible sum of forage and feed, as cultivated land obtainable for fodder cultivation has been declining. Approximately, India currently is facing a mesh shortfall of 64% feeds, 61.1% green fodder and 21.9% dry crop residues. Supply and demand situation of feed and fodder are mentioned in Table 2. From the Table 2 it appears that if India wants to meet up the existing stage of fodder produce and wants to meet up the prerequisites of the increasing rate of livestock population which will meet the requirements of growing human population, tremendous and serious efforts are required. To make a proper balance India has to fulfill the fodder deficit from all corners of fodder including dry crop residues and feed after utilizing uncultivated land, unexploited feed reserves and increasing fodder productivity in mass scale.

TABLE 2: SUPPLY AND DEMAND SCENARIO OF FORAGE AND ROUGHAGE TILL 2030 (In million tonnes)

Year	Supply		Demand		Deficit as % of demand	
	Green	Dry	Green	Dry	Green	Dry
1995	379.3	421	947	526	59.95(568)	19.95 (105)
2000	384.5	428	988	549	61.10(604)	21.93(121)
2005	389.9	443	1025	569	61.96(635)	22.08(126)
2010	395.2	451	1061	589	62.76(666)	23.46(138)
2015	400.6	466	1097	609	63.50(696)	23.56(143)
2020	405.9	473	1134	630	64.21(728)	24.81(157)
2025	411.3	488	1170	650	64.87(759)	24.92(162)
2030	416.7	503.4	1207.1	670.6	65.45(790)	24.90(167)

Figure in parenthesis indicates actual deficit.

Source: <http://www.igfri.ernet.in/pdf/Vision-2030.pdf>. Based on 10 & 11th five year plan document Vision 2030, Government of India.

TABLE 3: STATE WISE DRY & GREEN FODDER PRODUCTION IN NORTH EAST INDIA (000 TONNES)

States	2000-01			2001-02			2002-03		
	Dry Fodder	Green Fodder	Total Fodder	Dry Fodder	Green Fodder	Total Fodder	Dry Fodder	Green Fodder	Total Fodder
Arunachal Pradesh	471	7731	8202	478	7731	8209	518	7731	8249
Assam	6146	3372	9518	5962	3372	9334	5745	3372	9117
Manipur	547	903	1450	549	903	1452	539	903	1442
Meghalaya	333	1400	1733	347	1400	1746	343	1399	1742
Mizoram	200	2615	2815	207	2692	2899	208	2771	2979
Nagaland	649	1311	1960	726	1314	2039	903	1316	2219
Sikkim	274	437	711	259	437	696	267	437	704
Tripura	705	909	1614	803	909	1712	751	909	1660

Note:

- Green fodder production is estimated assuming an average yield per hectare of 1.5 tonnes from the forest areas, 0.75 tonnes from permanent pastures and grazing lands and 40 tonnes from cultivated areas.
- For dry fodder, productions of various crops are projected using growth trends and crop residue production is estimated using standard conversion ratios for cereals, pulses and oilseeds.
- Total fodder is the sum of dry and green fodder production.
- Areas under Forests, Fodder crops and Permanent pastures etc. for these years have been projected based on past data.

Source: <http://kashvet.uni.cc>

OUTLOOK OF SOUTHEAST ASIA FODDER MARKET

The Regional Working Group (RWG) on Grazing and Feed Resources for Southeast Asia was created in 1989 at a summit in Serdang, Malaysia. Since then usual gatherings have been organized at Los Banos in Philippines (1991), Khon Kaen, Thailand (1993), Nha Trang, Vietnam (1995) and Vientiane, Lao P.D.R. in January 1996. But these kinds of efforts are not sufficient for the ASEAN countries because if we go through the country specific fodder history, it reveals that every nations depends on the imports of fodder. For these two case study are given and import figure of the different ASEAN countries are also given to understand the fodder scenario.

MALAYSIA DOMESTIC FODDER MARKET

Malaysia utilizes over 3 million tonnes of fodder substances every year. It is predicted that 82% of the fodder comes from corn produces, 12% from foodstuff dispensation squander, 3% from additional cereals, 2% from milk and 1% from starchy origins. Industry sources consider the Malaysia's local and domestic fodder produce are not sufficient to assemble the requirements of its livestock sub-sector. Therefore, there is high demand of fodder substances to meet the requirements of fodder and an import of fodder in huge quantity is the only way. ('Characteristics of Malaysia's Animal Feed Market, Agriculture and Agri-Food Canada, <http://www.ats.agr.gc.ca/ase/5231-eng.htm>). The major kinds of fodder imported by Malaysia are prepared animal feeds (202,000 tonnes in 2007) and soybean meal (851,000 tonnes imported in 2007). Wheat and corn are the major imported grains to Malaysia.

OVERVIEW OF INDONESIA DOMESTIC FODDER MARKET

The livestock sub-sector in Indonesia consists of huge figure of tiny ranches. Out of them some are organized just about co-operatives. There are also existences of small number of commercial farms. Livestock sub-sector fodder supply is covered by domestic produce. But there is huge demand for fodder imports from big livestock farms and fodder market operation have very vital role. In 2007 Indonesia imported A\$1,283 million tonnes of fodder produce and it was A\$916 million tonnes in 2003. Approximately 80% of all fodder subsistence is require for the poultry sub-sector. Most popular feed types are Corn and soybean. Indonesia imports fodder from USA, Australia and New Zealand. In 2007 Indonesia imported 532,000 tonnes from USA, 152,000 tonnes from Australia and 92,000 tonnes from New Zealand.

TABLE 4: ANIMAL FEED IMPORTS FROM WESTERN AUSTRALIA BY THE FEW ASIAN MEMBER COUNTRIES IN 2008-09

Country	Tonnes	\$'000
Brunei	161	131
Indonesia	31	18
Malaysia	2,415	1,625
Philippines	557	372
Singapore	98	55
Thailand	207	141
Vietnam	205	162

Source: Western Australian Animal Fodder Export Market Report, March 2010.

TABLE 5: WESTERN AUSTRALIA EXPORTS OF CEREAL HAY AND CHAFF BY DESTINATION COUNTRY, 2002-03 TO 2008-09 ('000 tonnes)

Country	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09
Japan	241,466	244,683	266,092	316,292	263,211	154,019	280,906
South Korea	6,620	18,580	30,717	18,239	25,763	45,100	81,509
Taiwan	5,334	5,692	9,800	8,092	8,304	12,972	19,731
Malaysia	11,657	16,464	1,894	1,820	1,340	1,578	1,378
Hong Kong	979	816	741	574	112	310	849
UAE	961	508	369	208	170		293
Bahrain							280
Singapore	417	15,662	165	268	129	66	98
Brunei	108	37	43	57	58	83	91
Jordan							77
Mauritius		27	45	24	39	26	26
United Kingdom							21
Macau					15		17
Indonesia	30	620	130	154	183	5	6
Thailand	82				2	7	3
Cocos Island			7	22	3		
Kuwait			5,100				
Oman	160						
Philippines		425	100				
Qatar				15	19		
Russian Federation						120	
Saudi Arabia	875						
USA	110						
Total	268,799	303,513	315,203	345,764	299,348	314,286	385,285

Source: Western Australian Animal Fodder Export Market Report, March 2010.

TABLE 6: INDIA'S TARIFF REDUCTION SCENARIO IN MAJOR AGRICULTURAL SECTORS WITH ASEAN

Chapter Description	2007 Average MFN (%)	Drop in Tariff by 2010 (% Point)	Average Preferential Tariff in 2013 (%)
Meat and edible meat offal	30.0	5.0	0.0
Products of animal origin, nesoi	28.7	4.8	0.0
Edible fruit, nuts, peel of citrus fruit, melons	27.4	4.5	0.0
Coffee, tea, mate and spices	30.0	5.0	0.0
Lac, gums, resins, vegetable saps and extracts, nesoi	27.0	4.5	0.0
Vegetable plaiting materials, vegetable products, nesoi	30.0	5.0	0.0
Animal, vegetable fats and oils, cleavage products, etc	31.0	6.3	0.0
Miscellaneous edible preparations	30.0	5.0	0.0
Residues, wastes of food industry, animal fodder	29.1	5.0	0.0
Average for the above nine agricultural sectors	29.2	5.0	0.0

These are sectors in which India's imports from any of the ASEAN-5 countries constituted at least a 5% share in total imports from the world in 2007. Nesoi = Not elsewhere specified or included.

Source: Author's calculation based on India's AFTA tariff reduction schedule to ASEAN-5 and CLMV.

ROAD AHEAD, OPPORTUNITIES AND GAPS EXIST FOR TRADE AND DEVELOPMENT IN THE FODDER SUB-SECTOR:

From the above discussion it reveals that Indian fodder marketing operations are require huge assistance and support on various grounds. If we compare the Southeast Asia marketing operations and Indian market scenario, both are lagging behind. Australia fodder markets are export oriented and other countries such as Japan, South Korea, Taiwan, Malaysia, Indonesia, China and middle-east fodder sub-sector are import oriented. Presently, India import various fodder seeds from Australia but can exclusively follow in the Western Australia fodder market Table no 4 and 5. Focus on prioritized area of forage research with commensuration allocation of manpower and material resources have been a main problem. Apart from this there are several gaps have been mentioned, this is from the India perspective. Taking into consideration the prerequisite to fodder assortment for a huge quantity of yearly and recurrent fodder produces, Grassland or silvi pasture exploration did not include characteristics of soil damp protection and irrigate cropping which could have improved entire biomass output diverse beneath rainfall feed location. Conventional grazing land studies with fruitful series of grasslands. Lake of understanding of grazing land and farm animal connections in entire efficiency framework etc. Above all the biggest finding is the Indian fodder deficit which is a serious shortcoming of fodder sub-sector. In ASEAN-India Free Trade Agreement fodder need an immediate and urgent attention because tariff reduction will not help the two regions. Gaps and shortcoming of Indian fodder market are innumerable. Here fodder regulation bodies and departments are need to more proactive to bring the effectiveness and efficiency in the fodder market operation.

GROUND OF COOPERATION NEED TO BE FOCUSED

Feed and fodder resource development should be given urgent concentration and consideration. Research may be called for: (i) on farming of indigenous grasses, fodder trees for feed and fodder (ii) dietary necessities of different kind of animals, including cross-breds and (iii) protection of feed and fodder for the bend phase. These stepladders are desirable for development in animal nutrition. Management arrangement on research and animal produce processing and marketing research are other areas, which require concentration. To elevate yield of accessible crops, rigorous research efforts are necessary to (i) identification and categorization of appropriate varieties of existing crops, (ii) utilize newer technologies to speed up crop improvement, (iii) evolve suitable agro-techniques (iv) develop an integrated pest and nutrient management system and (v) expand suitable soil and water managing techniques. Grassland development system must be introduced in the summit agenda and should be on focused for the region to become economical.

CONCLUSION

Future Priorities between the two regions can be intended to support to training activities organized by the IGFR in India and The Regional Working Group (RWG) on Grazing and Feed Resources for Southeast Asia for this purpose some discussions should be on priorities. Support for small activities between the two regions can be enhanced and Preference will be given to those projects that deal directly with transfer of fodder material and technology to farmers. Strong commitment on continue to support and exchange of information among two regions. Research Program areas should be identified but may be expanded as deemed necessary. These need to be implemented very carefully. Necessary fund allocation and timely release of the fund will help success of the research results. It is hoped that successful implementation of the research programs will help to achieve the animal food production and improve the nutritional standard of the population, improve the income of the farmers, increase employment opportunities and reduce poverty status of the concerned country. Though the situations of Livestock research are very much effective and structured but there should be collaborative efforts to improve the Livestock and related areas in both the country. India may take strategic advantage of collaborative efforts and can do the optimum utilization of existing resources. It will enhance the inclusive growth and livelihood in the region.

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