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REVIEW OF LITERATURE ON INDIAN DAIRY INDUSTRY

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ABSTRACT

Research in every field is unending and there is no limit to it. Dairy industry is one of the promising industries of Indian economy, as it is catering to the needs of millions of people. Consumption of Milk is very vital to each and every human being, irrespective of age and any other demographic characteristic. Hence, the market for milk and milk products is evergreen and ever growing. Indian dairy sector is now being dominated by hundreds of dairy units both in cooperative sector and private sector. The present article is an attempt to review the literature available on Indian dairy industry.

KEYWORDS

dairy farmers, dairy cooperatives, marketability, marketable surplus, milchi animals, operational flood.

INTRODUCTION

Milk as a consumption item has no doubt failed to stimulate Indian economy. But it surely was Dr. Kurien who gave it a new impetus to the supply aspect of milk as well. He did this by way of the NDDB (National Dairy Development Board) and the GCMMF (Gujarat Cooperative Milk Manufacturers and Marketing Federation). And he created the Indian distinction of the milk cooperative movement which has changed this country.

The outcome is obvious – India is the most desirable producer as well as the largest producer worldwide with a production of 146.3 million tonnes of milk as on 31st March, 2015. That, too, with small farmers – each having between 2-10 heads of cattle as an outdoor dairy farming. More tremendously, this industry grew with almost no subsidy from the Indian government. What makes the Indian dairy sector unique is its ability to pay 80% of the market price to the farmer. Kurien ensured that everything else – milk assortment, processing, packaging, distribution and advertising – used to be managed inside 20% of the advertising fee. That made the farmer earn more, which incentivized him to provide more. Milk therefore provides revenue for farmers, diet for Indians, and rural prosperity for the economy. With Modi's imaginative and prescient of doubling rural incomes, milk is certain to play a greater role.

OBJECTIVE OF THE STUDY

The study is carried out to understand the extent of the research work carried out in the field and understand the uncovered issues, if any that can pave the path for additional research in the field.

RESEARCH METHODOLOGY

The study is based on available literature extracted from different databases. The articles are gathered from different databases like J- gatePlus, Ebsco host.com, Google Scholar and Google. The basic purpose is to understand how an economy like India which once suffered from insufficient of milk has now become not only self sufficient but also a country which got the potential to export milk products to global market. The review is based 50 articles published so far on the subject matter of issues and challenges faced by dairy cooperatives, dairy farmers and other beneficiaries, only some of the significant studies have been highlighted in the present article.

The current survey of literature is exclusively based on review of articles published so far in different national and international journals on dairy industry.

Review of literature is the key to any kind of research. It throws light on the areas of research that has already been taken place in a specific field of knowledge and helps to identify the grey areas in which attention is to be made by prospective researchers.

REVIEW OF ARTICLES IN NATIONAL AND INTERNATIONAL JOURNALS

Balasubramaniam (1960)^[1] in his article, "Role of processing of agricultural produce in India's rural economy", observed that processing improves the marketability of agro products and reduces the marketing costs and margins, thereby, raising the profitability of farmers. The author opined that the processing of food stuffs reduces perishability of food stuff and thereby helps in enhancing their storage capacity. Deepak Shah's (1993)^[2] study analyses the state-wise disparities in Milk Production in India. This study provides an insight into the differential values in milk production and brings forth various issues that require some bold initiatives on the part of policy makers. Data used for this study were collected from secondary sources. Time series data for fifteen years (1977/78 – 1991/92) on annual milk production of different states and Union Territories were collected from various issues of the annual publication 'Bulletin on Food Statistics' published by the Directorate of Economics and Statistics, Ministry of Agriculture, New Delhi.

Chaudhuri (1996)^[3] in his study documented early attempts (1890-1924) towards agricultural development in India such as the Royal Commission on Agriculture, the Bombay plan, the Milk Producers Cooperative at Anand, other post-independence dairy development plans, the intensive cattle development project, the fourth five-year plan, the National Dairy Development Board; canalization of imported dried milk, and milk pricing policy.

Agha iqbal Ali, Mukesh et al (1996)^[4] in their article presented marketing opportunities of milk cooperatives in India. This article enumerates the marketing performance of dairy cooperatives in India.

Prabhakara Sharma (1997)^[5] studied the problems of Godavari Co-operative dairy of AP and suggested ways to improve its performance by quoting that the dairy units should reduce its fixed cost burden so as to serve the very purpose of its existence. Krishnan (1997)^[6] examined different aspects of dairy scheme implemented by a rural bank in Kerala. The study examined the progressive role of Regional rural Banks in granting loans to dairy farmers to buy milchi animals and also studied the loan repayment behavior of beneficiaries of RRBs in Kerala and found that RRBs are playing a constructive role in changing and uplifting the living standards of dairy producers.

Kulkarni et al. (1997)^[7] presented the review of present laws affecting processed food in India especially milk products in India. The aspects studied under this were milk standards, standards for milk products, tailor-made products, additives, sampling, publicity, quality certificates and licensing. Alagh (1997)^[8] covered gradual changes that took place in Indian agricultural sector and suggested ways to improve Indian dairy sector

Vyas (1997)^[9] highlighted the policy framework that present for dairy sector both in India and across the world and studied the demographic, socioeconomic, technological and legal aspects of dairy business and also suggested measures to be taken to promote both quantity and quality of milk in India. Bhasin (1998)^[10] identified the Trade Related Intellectual Property Rights (TRIPs) Agreement, set out in the text of the Uruguay Round of GATT and the policies adopted by the World Trade Organization. The study covered the aspects of copy rights, trademarks and other IPRs in relation to Indian dairy sector

Singh and Singh (1998)^[11] studied the post-independence era of dairy development and suggested measures to develop the same in India as well as other developing countries. The rationality of major policy measures to promote dairy development were examined, which includes cross breeding policy, modern technology (milk and cattle feed processing plants), marketing of liquid milk and milk products, producer and consumer prices and price policy, organizational and institutional policies, public investments, grants and subsidies, inter-state variations in dairy development, dairy science education, training and research. The effect of India's New Economic Policy announced in 1991, and the new world-trading regime were also discussed.

Manmohan Munjial (1998)^[12] predicted that the removal of the non-tariff trade barriers from the global dairy trade, taking effect by the year 2000 would result in an increase in the export of Indian dairy products. The implications of ISO 9000, the HACCP system and two European Union Directives, EC 92/46 (regulating the production and marketing of milk products) and EC 93/43 (governing the hygiene of foods) for the Indian dairy industry were discussed. However the author felt that the quality of Indian dairy produce shall be enhanced to avail such benefits.

Katar Singh (1999)^[13] studied the impact of WTO trade agreements on India's dairy industry. The study was discussed in terms of: production, terms of trade, quality standards, product mix, prices and investment. It was felt by the authors that if India reduces subsidies on export of milk products, Indian dairy industry would gain benefit from trade liberalization. The author also felt that continuous technical up gradation is mandatory for Indian dairy industry to sustain competition in the Global market. Brajesh Jha (2000)^[14] has expressed that though India stands high in terms of milk production, it lags behind in global market with respect to quality in dairy products. Hence the author suggested that the quality standards of Indian dairy units shall be raised to improve the position of Indian dairy industry. Kurien (2000)^[15] examined the impact of globalization on agriculture in poorer countries with particular reference to the WTO, the convention on biodiversity, and trade liberalization, which must focus on current techno-economic conditions of the dairy industry. The study examined the phenomenal growth in milk production in India since 1971, the contributory role of research and development in this and possible areas of research to ensure increased productivity of Indian dairy livestock.

Sharma (2001)^[16] studied the effect of Exim policy on dairy sector after the removal Quantitative Restrictions (QRs), tariff rates will be the only instrument for India's trade policy. The impact of removal of quantitative tariff barriers on Indian agricultural sector specially on dairy sector has been examined. Suresha et al (2001)^[17] studied phenomenal growth of Indian dairy industry for the past three decades. The author observed that having entered into a WTO agreement, which includes Technical Barriers to Trade (TBT), Sanitary and Phytosanitary (SPS) measures, and Codex Standards, Indian dairy industry is left with no option to produce qualitative milk products in order to withstand competition across the globe.

Surya Muruthi (2001)^[18] has analyzed the ways to improve returns from dairy farming and suggested ways for the same. He expressed that yield of milk production can be improved substantially with lower cost through crossbreeding in case of cows and selective (upgrading) breeding in case of buffaloes, adopting cost-effective feeding practices, prevention and control of diseases among milch animals and other scientific practices to tap higher market for milk. He stated that these measures can help not only in promoting income and employment among rural landless but also help in raising the standard of living of people.

K. Singh and R.S. Pundir (2002)^[19] et al identified Problems and prospects of smallholder dairy production and marketing in South Asia. The authors opined that low productivity of milch animals is a serious constraint to dairy development in all the countries. They felt that professional management of Dairy plants, cattle feed factories along with the usage of technical inputs and services shall be present in order to make dairying business a profitable one in Indian context.

K. Rajendran and Samarendu Mohanty (2004)^[20] et al wrote article on "Dairy Co-operatives and Milk Marketing in India: Constraints and Opportunities." They found that most of the dairy farmers are in unorganized sector and as such they are confronted with some problems such as; low productivity; insufficient and improper animal feeding and health care; lack of an assured year-long remunerative producer price for milk; poor provision of infrastructural facilities for procurement, processing and marketing of milk and milk products.

Sareen (2002)^[21] described export promotion activities like certification procedures, particularly for dairy products in India. Issues concerned to exports as well as some activities of the Export Inspection Council to facilitate exports of food products were highlighted.

Sharma and Sharma (2002)^[22] studied the strengths and global challenges confronted by Indian dairy sector in an open economy environment. The findings of the study indicated that the Indian dairy industry (both production and processing sector) was technically very advanced and the Indian dairy industry had witnessed phenomenal growth during the last three decades despite the restrictions on the imports and exports of dairy products. The study concluded that policy makers should make efforts to protect Indian dairy industry against unfair competition in a liberalized environment. It also pointed out that reduction tariff, domestic support and export subsidies shall be improved in order to make Indian dairy sector as a global leader.

Choudhary (2003)^[23] gave a brief report on the current picture of milk production in India and the policies that persuade the milk producers in this country. The policies for importing and exporting milk and milk products as well as the taxation of these commodities were discussed in the study. A study entitled, "Role of Milk Producers' Co-operative Societies in Tribal Area of Dharni Tahsil," (2007)^[24] by U.N. Autkar, A.B. Gattewar and G.B. Pakhare examines the role of milk producers co-operative societies in the tribal area of Dharni Tahsil. Marketable surplus and self consumption of milk by members worked out to be 94.27 and 5.73 % respectively. A wide disparity between prices by milk societies and private agencies was observed the study.

Amrita Patel (2004)^[25] analyzed the impact of specific measure, on exports of dairy products, which made were distortions in international trade. It's mainly due to the high levels of subsidies and tariffs, apart from other import protection measures. The producer support estimate for milk in OECD countries was estimated to be US\$ 41 billion in 2002-03 as compared to US\$ 48 billion in 1986-88. It indicated only marginal downsizing. Export subsidies continue to be significant factor in world dairy trade with the eligible quantities close to 59 per cent of estimated world trade.

Anand Lodade (2006)^[26] study is a micro-level case study of dairy farming activities in "Dharpudi" village. The study was conducted on two dairy co-operative units, i.e., Shramik Sahakari Dugdh Vyavasaik Sanstha and Vithal Mahila Sahakari Dugdh Vyavasaik Sanstha. The study found out that there was lot of awareness among rural population with regard to the prospective of dairy farming by the usage of hybrid and high-milk yielding cows and buffaloes. However, the study pointed that the rates of interest on loans borrowed for the purpose of buying cattle are very high, most of the farmers are not attracted engage in dairy farming activity in a large scale. The study concluded that there is lack of awareness among dairy farmers with regard to the usage of right kind of fodder and there is a need to enhance their knowledge.

Siddaram Houde, J. S. Sonnad, K. Shivashankar and Basavaraj Banakar et al (2007)^[27], in their article entitled, "Processing and Marketing Management of Milk and Milk Products in North Karnataka", observed that in Dharwad and Belgaum districts of Karnataka both private sector dairy units and cooperative dairy units are using one channel of distribution for marketing their milk i.e., (Processor Distributor/Dealer/Retailer Consumer) channel. The study pointed out that though private sector dairy units have more capacity than cooperative dairy units, the capacity utilization is higher among the latter. So the authors suggested that private sector dairy units have to emphasize on enhancing their capacity utilization for which the procurement of milk and enlarged marketing efforts are prerequisite. The study also suggested that private sector dairy units shall also widen their product-mix.

Manoj kumar, et al (2007)^[28] in his article entitled, "lot sizing decisions- a case study of Indian dairy supply chain" focused on developing a mathematical optimization approach for lot sizing decisions with a view to coordinating multiple milk collection centres, and the paper also discussed the strengths, weaknesses, threats and opportunities of Indian dairy supply chain.

N. Rangasamy and J.P. Dhaka et al (2008)^[29] in their article entitled, "Marketing Efficiency of Dairy Products for Co-operative and Private Dairy Plants in Tamil Nadu — A Comparative Analysis", compared the marketing practices of dairy units in both the sectors. The study also compared the prices of flavored and unflavored milk in both the sectors. The study concluded that the marginal returns of marketing dairy products are higher in private sector than in cooperative sector. The study suggested that cooperative societies in dairy industry should focus on customer –driven approach to launch variety of dairy products.

Dr. Santosh Singh Bais, Prof. Ramesh B. Agadi (2008)^[30] et al in their article entitled, "Marketing of Branded Dairy Milk Products in Gulbarga District in Karnataka — A Survey of Consumers and Milk Vendors", conducted a study to analyze the demand and supply of the dairy milk in Gulbarga. 2. To find out the average sales

per day of the various brands of dairy milk. 3. To ascertain the consumers attitude towards the available dairy milk products. 4. To study the factors influencing the respondents to buy a particular dairy milk product. The authors identified that Market for milk was found quality conscious then price sensitive due to this factor loose milk was found developed strong based branded milk manufacturers should take note of it.

Shiv Raj Singh and K.K. Datta et al, (2010) ^[31], in their article entitled, "Understanding Value Addition in Indian Dairy Sector: Some Perspectives", has assessed the need for value addition in the dairy sector, and has suggested measures to be taken by policy makers to raise the prospects of Indian dairy sector. The authors identified that the traditional dairy products were mainly manufactured by the unorganized dairy farmers whereas expenditure on milk and milk products is higher in rural areas when compared to urban areas.

Anjani Kumar et al (2010) ^[32] in his article entitled, "Milk Marketing Chains in Bihar: Implications for Dairy Farmers and Traders" highlighted the different kinds of milk chains and their impact on dairy farmers. The data collected through field surveys was used to estimate the costs and returns for different stakeholders in milk supply chain, viz. milk producers, traders and processors. Partial budget analysis was carried out to estimate and compare costs and returns of these stakeholders. Quantities of inputs used and output obtained, marketed and consumed were calculated as the mean of sample households in the survey area. The study observed that the profit margin of those farmers who are marketing milk through modern milk supply chain is more than that of others because of their ability to adopt modern practices to run their farming activity which helped them to reduce cost of producing milk.

Ashraf Imam, M N Zadeh, and Laxmi Rani Dubey et al (2011) ^[33] in their article entitled, "Dairy Marketing Strategies in the Context of Globalization: Issues and Challenges", enumerated the growth of dairy industry both in India and across the world during the past few decades. The authors felt that in order to see India as a global leader in world dairy market, certain problems faced by Indian dairy industry need to be addressed like poor yield of milk, poor quality of dairy products etc. They identified that While village-level milk prices are increasing in quality, two problems limit the power of these incentives. First, villagers are only paid directly for quantity. They suggested that villagers shall receive year-end bonuses if the average village quality is high, but individual incentives are weak.

P. Kalaiselvi, Dr. M. Somasundaram et al, (2011) ^[34], published an article entitled, "World wide dairy development- At a glance", in which they explained in detail about the evolutionary past of dairy development across the globe. The author felt that Indian dairy firms need to be highly competitive in order to sustain in world dairy market where there exists many barriers.

Dr. Vinita P. Mehta et al (2011) ^[35] in her article entitled, challenging customer delight and relationship marketing (a secret to success with local milk products in India). She observed that On one hand the internal customer delight is necessary required for successfully implement as a resource planning. On the other hand a good system can be source of sustainable competitive advantage, higher profits and scalability.

T. Hima Bindu, Dr. S.E.V. Subramanyam et al (2012) ^[36], in their article entitled, "study on financial health of dairy industry in Andhra Pradesh based on z a score analysis", studied the financial health of dairy industry by choosing five dairies in AP namely National Dairy Development Board, Heritage Foods India Limited, Amrit Corporation Limited, Gskch Limited and Ravileela Dairy Products Ltd. To measure the financial health of the select units, Z-score analysis was used.

Vijay Paul Sharma (2012) ^[37] presented the dynamics of structural transformation of the Indian economy and the major drivers of transformation, giving an overview of the past achievements and future challenges of Indian agriculture, finally they identified the key policy issues and strategies to accelerate sustainable broad-based growth in the agriculture sector in the country which is a pre-requisite for the development of food processing industry. Emily breza, Arun g. chandrasekhar, Ashish shenoy et al (2012) ^[38], in their article entitled, "skimming off the top: the unintended consequences of market expansion in the Indian dairy industry", stated that milk transportation costs, spoilage of milk are significant barriers to Indian dairy Industry, mainly to Karnataka Milk Federation.

Dr. R. Subramaniya Bharathy et al (2013) ^[39] in an article entitled, "A study on dairy practices and opportunities in dairy industry in India". The article highlighted the overall growth of dairy business in India and stated that this growth in dairy sector is able to generate rural employment, contributes to GDP and is also enhancing income generation among dairy farmers.

N. Gunasegari, Dr. N. Periyasami et al (2013) ^[40], in their article entitled, "operational performance of the pondicherry co-operative milk producers' union limited" enumerated the working of the dairy unit under study and offered suggestions to PCMPUL that it should concentrate on development of dairy products like desserts, puddings, custards, sauces, mousse, stirred yoghurt, nectars and sherbets to capture the dairy market. The authors also suggested that the cooperative dairy unit should also focus on reducing the procurement cost of milk to improve profitability.

A. V. Manjunatha, M.K. Gana Shrutya, V. Ramachandra et al (2013) ^[41], in their article entitled, "Global Marketing systems in the Dairy sector: A comparison of select countries", highlighted the importance of dairy marketing systems, and compared the dairy marketing systems of various developing countries including India.

R. Subramaniya Bharathy and M. Selvakumar et al (2014) ^[42], in an article entitled, "A study on problems encountered in milk production in Salem district of Tamilnadu: An empirical study" Highlighted the problems confronted by dairy firms in India. They identified that Low income and employment, agricultural failure, low procurement cost of milk, high cost of feed, urbanization, lack of medical facility, prevalence of middlemen are some of the problems faced by dairy farmers faced in area.

S Ayyappa Naik Nenavath et al (2014) ^[43] in an article entitled, 'A study on marketing effectiveness of sales promotion strategies on dairy industry a case study, AP'. The study reveals that in two towns of Guntur and Ponnuru, the majority of respondents stated that the leakage problems are higher in packaging. The management of Sangam dairy organization has to identify well in advance areas where leakage is occurring and has to take corrective steps at the production level, quality control level, transportation side and lastly, at the time of delivery of products to the customer.

Mrs. B. Jayalakshmi, Dr. S.Senthil Kumar, et al (2014) ^[44], in their article entitled, "A study on principles and performance of dairy products marketing promotion in India with spl reference to Tamilnadu state", highlighted the milk consumption patterns in India, role of Tamilnadu dairy development department and its functions. The authors concluded that India would definitely be a place for FDIs and other large-scale investments in dairy sector.

Anil Chand, Vivek Swami, Dr. Jaimini Tipnis et al (2015) ^[45], in their article entitled, "structural changes in dairy farming for better margins and local economy development in Indian context", highlighted the strengths, weaknesses and opportunities and threats confronting Indian dairy Industry. The study concluded that most of the smaller dairy farms incur financial losses—the value of their production does not exceed full costs, including the costs of capital and time committed by their owners. Large farms incur much lower costs, on average, than smaller farms, and these advantages accrue across a wide range of sizes. They identified that Primary processing by bulk chilling, better supply chain management, improvement of animal health and breeding services along with extension of existing facility, simplified and Specialized finance and credit, with good technological support are need of time.

Vijay Paul Sharma, (2015) ^[46] et al in his article entitled, "Determinants of Small Milk Producers' Participation in Organized Dairy Value Chains: Evidence from India" studied the factors affecting the smallholder milk producers' participation in modern supply chains, the impact of this participation on their growth income, production, and technology choices and concluded that Market infrastructure such as roads, provision of veterinary services, distance from milk collection centre, markets, price risks, etc. are found to have significant effects on farmers' marketing choices.

Nirmal Kumar. B, Sabarninath. P et al (2015) ^[47], in an article entitled, "Preparation of Safety Manual for Dairy Industry – A Review", enumerated the general hazards present in the industry, safety systems needed in the dairy industry, need for health and safety training, identification of possible dangerous situations in dairy industry and narrated the possible remedies to prevent pollution from dairy units and promote safety of workforce.

Devulapalli Raghava et al, (2015) ^[48], in an article entitled, "Marketing of dairy products in AP: A study of Cooperative and Private dairy units", conducted a sample survey in Guntur district of AP with a view to observe the promotional tools and techniques followed by dairy units, channels of distribution followed by them and concluded that both private and cooperative dairy units have to take rigorous measures to advertise their products and make efforts to improve quality of milk products.

Kaushlendra Vikram Mishra et al, (2015) ^[49], studied the marketing strategies of Small –scale milk producers in Azamgarh district of Uttar Pradesh. He suggested that small scale milk producers have to join hands with cooperative society to improve their marketing efficiency in collective manner.

Dr. P. Alamanathan, Dr. S. Naseer Mohamed Jaffer (2015) ^[50] et al in their article entitled, "Distribution channels of milk and the problems encountered by the members of primary dairy co-operatives in Pondicherry U.T.", studied the problems faced by the Members of Primary Dairy Co-operatives in Pondicherry. Data was collected from the producers of milk residing in the villages of Union Territory of Pondicherry which consists of four regions namely Pondicherry, Karaikal,

Mahe, and Yanam. The study concluded that the Government must initiate steps to manufacture various end products of milk like Padas, pannier, packed curd, quality butter milk which may become sometimes as alternative to other soft drinks in the market in hot countries like ours.

CONCLUSION

From the above review of literature, it is clear that many studies have already been conducted to examine and analyze the issues and challenges pertaining to the different participants in dairy industry viz., milk producers, Dhudiyas, milk chilling units, and packing units. Though Operation flood in Gujarat has led to remarkable progress in dairy sector, still a lot is to be done to uplift the socio-economic conditions of small and marginal milk producers, create and sustain market for milk products like ghee, butter, paneer, cheese and others. Though Indian market offers a larger scope for marketing milk and milk products, the Nation's dairy sector has also got a scope to peep into world market as well. Many research studies conducted so far across India however concentrated more on issues and challenges confronted by cooperative sector dairy units. Since, Indian dairy market is also witnessed by the ever increasing growth of private firms, there is a necessity to study and evaluate the problems and prospects of private sector dairy units in general and also specific issues like supply chain practices of dairy firms and prospects of product-line expansion etc.

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