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PROCESSED FOOD INDUSTRY IN INDIA: AN ANALYSIS OF EXPORT COMPETITIVENESS

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ABSTRACT

This study examines the Export competitiveness and Export performance of Indian Processed Food Industry with respect to rest of the world. The study focuses on Export performance and competitiveness of Indian Processed Food Industry during the period of 2010-2015. Export competitiveness is calculated with the help of Revealed Comparative Advantage (RCA) of five different products group of processed food. Our results show that one out of five products has competitive advantage and rest four products don't have competitive advantage. The commodity which is more competitive in the international market is Rice.

KEYWORDS

export performance, export competitiveness, revealed comparative advantage.

INTRODUCTION

India has an agriculture based economy. About 43 percent of the country's total geographical area is used for agricultural purposes. Almost two-third of the total work-force earns its livelihood through farming and other allied sectors. Traditionally farmers grow crops for their personal use but now with technological advancement taking sizeable proportion of produced crops to the market. India is one of the key food producers in the world, with the second arable land area. Further the country is endowed with diversified agro-climate conditions that provide ample potential for growing wide range of fruits and vegetables crops across its geographical spread (Rana, 1986). It is the largest producer of milk, pulses, sugarcane and tea in the world and the second largest producer of wheat, rice, fruits and vegetables in the world (Kumar, 2010).

India's resource base endowment in terms of various horticultural crops, which constitute the supply base for items like processed fruits and vegetables, is rich and varied. It's different agro-climatic zones and soil prevalent in various parts of the country are ideal for growing a wide variety of tropical as well as temperate fruits and vegetables.

Processing refers to deliberate activity, which changes a commodity into a more usable form with value addition. The processed food industry can be classified in the form of major products such as dairy products, rice, processed fruit and vegetables, pickles & chutney and bakery products etc. India's food processing industry is in an infant stage. Only around 2 percent of fruits and vegetables are processed and the figure stand at 15 percent for milk, 6 percent for poultry and 26 percent for marine, as against 60-70 percentage of the overall food production in developed countries. This is against a processing of 30 percent in Thailand, 70 percent in Brazil, 78 percent in the Philippines and 80 percent in Malaysia (Dev, 2004). The fruits and vegetable farming for processing is not only employment intensive, but also enhances the gross as well as net returns of the farmers.

History of food industry is very ancient. The first food preservation industry was established in 1857 in India. But in the developed form processed food preservation was done in 1927 (Bhattacharya, 1975). Nowadays processed food industry employing over 1.6 million people and contributing 6.3 percent to the GDP, 16 percent to exports, 6 per cent of total industrial investment. Food retail accounts for 26 per cent of India's GDP and is growing at a compounded annual growth rate of 7-8 per cent. At present, the food processing segment holds a 32 percent share of India's booming food industry. Exports of processed food have grown at over 190 percent between 2002-03 and 2006-07, increasing from \$6.98 billion in 2002-03 to \$20.51 billion in 2006-07. The market size for processed foods is pegged at \$102 billion, with the potential to grow by 10 percent to \$330 billion by 2015 (www.indialawoffices.com).

REVIEW OF LITERATURE

Various studies have been conducted from time to time on processed food industry and its export. Brief review of important and related studies presented as below:

Akmal et. al (2015) analyzed the structure of export and competitiveness of Pakistan's basmati rice over the period 1987-88 to 2011-12 by using revealed comparative advantage (RCA) and regional revealed comparative advantage (RRCA) approaches. The analysis of export competitiveness revealed that the Pakistan has revealed comparative advantage in basmati export, implying revealed competitiveness of very high degree as basmati remained a dominant commodity of Pakistan's export basket.

Sampaathong et. al (2016) found that several problems emerge on Thai rice production, such as cost, payment and rice distribution at destination country. At the destination country, Thai rice has been mix with the low quality local rice, in this way the original quality is corrupted. In addition, the weak contribution from government may also give impact to Thai rice export. On the contrary, the competitiveness of Thai rice includes technology, production capacity and high quality of rice production. The major competitiveness of Thai rice is brand loyalty, Thai rice has well known as high quality rice up to now, thus premium segment should be a target for Thai rice export market.

Singh & Davar (2013) analyzed the impact of WTO on rice export competitiveness by using Blassa's Revealed Comparative Advantage Index and White's Revealed Competitive Advantage Index in respect of Agricultural Trade and Merchandise Trade in the changing scenario of liberalization, privatization and globalization. They concluded that the increasing competitiveness of Indian and Pakistani rice exports is a result of WTO implementation.

Makama et.al (2016) analyzed in the rice industry that the average nominal protection coefficient was 0.48 thus indicates that Rice producers in Karnataka (India) were disprotected and the average effective protection coefficient was 0.44 indicating a high export competitiveness of the India Rice. However, the average domestic resource cost was found to be less than one (0.37) this means that domestic resources were efficiently utilized in case of rice crop in above mentioned state of the country and also indicated that they have comparative advantage in the production of rice crop. All the indicators (NPC, EPC and DRC) were less than unity thus a reflection that the domestic price of Rice in the country is lower than the world market price and hence competitive worldwide. They recommended that, in order to improve the competitiveness of Indian Rice in particular and Agriculture in general, attention needs to be given to domestic market thereby rationalizing subsidies on certain inputs and improvement of domestic market performance.

Shamsudin et.al (2011) evaluated the market competitiveness of Small and Medium Enterprises (SMEs) in the Malaysian Food Processing Industry (FPI) in terms of technical efficiency and productivity growth. The findings suggested that Technical Efficiency (TE) was 0.756 during the period of 2000-2006, indicating that SMEs in the Malaysian food industry were able to expand their output by 24.4 percent while using the same level of inputs. Total Factor Productivity (TFP) growth was negative 1.3 percent. Processing and preserving poultry and poultry products were the sub-industry with the highest productivity growth, while manufacturing of tea had the lowest. Research and development (R&D), training and public infrastructure were determinants that positively affected the TFP growth.

Eskandari et. al (2015) analyzed that supportive government policies was named as the first step to enter the industry and the competitive scene. But strong management, for the systematic and strategic planning and coordination between organization units was the main reason for the success of the firm. A rich capital, to escape the mono-product economic, progress towards joining the global competition, skilled manpower, which prevents the creation and enhancement prob-

lems have been raised as a serious competitive challenges. However, purchaser’s acceptable quality, reasonably price which is both responsive to customer demand, the other hand, responsive to the shareholders capital that among the main priorities of the firm’s work has been recognized and in a sense, can be named, it is part of Porter’s scale advantage. According to them, the increased production reduced cost per unit of product due to the constant variable cost.

OBJECTIVES OF THE STUDY

1. To analyses the export performance of Indian Processed Food Industry.
2. To examine the competitiveness of Indian Processed Food Industry for the period 2010-2015.

RESEARCH METHODOLOGY AND DATA SOURCES

In this study, we analyze the export competitiveness and export performance of five processed food products of Indian Processed food Industry from the period of 2010 to 2015. These five processed food products are, Processed Fruit and vegetable Products, Dairy Products, Bakery Products, Rice and Pickle & Chutney. Secondary data has been used for the calculation and data for exports has been taken from APEDA. Export Performance of each selected processed food product has been calculated as a percentage of total export of all selected processed food products from India. Export share of each selected food product has been calculated as a percentage of total world export of that product. The analysis of comparative advantage has been undertaken using Revealed Comparative Advantage (RCA) index of Balassa. Balassa’s index of relative export performance by country and commodity, defined as a country’s share in world export of a commodity divided by its share in total world exports. The index for country i and commodity j is calculated as follows:

$$RCA = \frac{(X_{ij}/X_i)}{(X_{aj}/X_a)}$$

Where

- X_{ij} = Export of product j from India;
- X_i = Total processed food exports from India;
- X_{aj} = Total export of product j from the world;
- X_a = Total processed food exports from the world

The index of Revealed Comparative Advantage (RCA) is a measure of export performance that shows comparison of commodities of a country’s market share compared with the average percentage of exports of the country in total world exports. The index of RCA has a very simple interpretation. If it takes a value greater than unity, the country has a revealed comparative advantage in that product.

TABLE 1: EXPORT PERFORMANCE OF INDIAN PROCESSED FOOD INDUSTRY (In Percentage)

Product Name	2010		2011		2012		2013		2014		2015	
	India Export	India	India Export	India	India Export	India	India Export	India	India Export	India	India Export	India
	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)
Pickle & Chutney	45.36	0.40	48.03	0.42	51.62	0.26	66.90	0.22	55.96	0.19	56.11	0.21
Bakery	232.58	2.07	486.36	4.20	573.05	2.89	482.20	1.60	464.63	1.55	432.70	1.59
Dairy	37.79	0.34	37.90	0.33	41.87	0.21	97.53	0.32	82.28	0.27	21.77	0.08
Fruit & Vegetable	309.77	2.75	354.28	3.06	369.81	1.87	457.17	1.52	446.52	1.49	428.05	1.58
Rice	1745.65	15.51	2466.30	21.32	6306.12	31.83	24282.04	80.48	7989.63	26.63	8242.62	30.38
Other	8923.17	79.27	8212.03	71.00	12509.52	63.15	4884.58	16.19	21044.54	70.15	17973.44	66.24
Total	11256.54	100.3	11567.00	100.3	19810.13	100.2	30172.88	100.3	30001.29	100.2	27132.92	100.0

Source: Author’s own computation based on data from APEDA.

Table 1; shows contribution of each product in the total export of processed food. Pickle contribution has been decreased from 0.40% in 2010 to 0.21% in 2015. It has also analyzed that Bakery contribution has been decreased from 2.07% in 2010 to 1.59% in 2015, Dairy contribution has been decreased from 0.34% in 2010 to 0.08% in 2015 and processed fruit and vegetable contribution has been decreased from 2.75% in 2010 to 1.58% in 2015. In the last five years only rice contribution has been increased from 15.51% in 2010 to 30.38% in 2015.

Table 2 depicts that share of India Pickle Export in world pickle export has been slightly increased from 4.24% in 2010 to 4.36% in 2015. It has also analyzed that Indian Bakery Export share has also been increased from 0.59% in 2010 to 1.00% in 2015, Indian Processed fruit and vegetable export share has been slightly increased from 0.87% in 2010 to 0.98% in 2015 and India Rice export share has been increased from 8.55% in 2010 to 26.78% in 2015.

TABLE 2: SHARE OF INDIAN PROCESSED FOOD EXPORT IN WORLD PROCESSED FOOD EXPORT (In Percentage)

Product Name	2010		2011		2012		2013		2014		2015	
	Total Export World	Indian Share	Total Export World	Indian Share	Total Export World	Indian Share	Total Export World	Indian Share	Total Export World	Indian Share	Total Export World	Indian Share
	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)	(In Thousand MT)	(%)
Pickle & Chutney	1069.67	4.24	1078.28	4.45	1000.96	5.16	1209.80	5.53	1167.86	4.79	1286.91	4.36
Bakery	39.72	0.59	42420.16	1.15	37807.00	1.52	44127.39	1.09	40946.67	1.13	43356.77	1.00
Dairy	27891.87	0.14	28283.58	0.13	29713.92	0.14	31804.79	0.31	32581.09	0.25	33387.59	0.07
Fruit & Vegetable	35531.59	0.87	38267.29	0.93	68184.35	0.54	41526.65	1.10	40786.42	1.09	43672.06	0.98
Rice	20423.42	8.55	25172.89	9.80	26836.38	23.50	73918.02	32.85	33301.50	23.99	30779.92	26.78
Other	27891.87	31.99	28283.58	29.03	29713.92	42.10	31804.79	15.36	32581.09	64.59	33387.59	53.83
Total	124632.21	9.03	135222.19	8.55	163542.62	12.11	192586.64	15.67	148783.55	20.16	152483.24	17.79

Source: Author’s own computation based on data from APEDA.

However Indian Dairy Products export share has been decreased from 0.14% in 2010 to 0.07% in 2015.

TABLE 3: EXPORT COMPETITIVENESS OF PROCESSED FOOD INDUSTRY

Product Name	2010	2011	2012	2013	2014	2015
Pickle & Chutney	0.47	0.52	0.43	0.35	0.24	0.25
Bakery	0.06	0.13	0.13	0.07	0.06	0.06
Dairy	0.02	0.02	0.01	0.02	0.01	0.00
Fruit & Vegetable	0.10	0.11	0.04	0.07	0.05	0.06
Rice	0.95	1.15	1.94	2.10	1.19	1.50

Source: Author's own computation based on data from APEDA.

As indicated in Table 3 Rice is only one product out of total five products of processed food industry enjoys value of revealed comparative advantage greater than one (RCA>1). It means that Rice is more competitive in the world market as compared with the rest of four commodities. Products whose value of revealed comparative advantage less than one (RCA<1) are Pickle & Chutney, Bakery, Dairy products and Processed Fruit & Vegetable.

CONCLUSION

Finally, it is concluded that the rice is playing a major role in the export of all selected processed food products in India and growth in share of all selected processed food products is positive except dairy products. One product (Rice) out of total five products of processed food industry enjoys Revealed Comparative Advantage greater than one. In Conclusion we can say that only rice product of Indian Processed Food Industry performed better in world market as calculated by the Revealed Comparative Advantage.

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