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   RESULTS & DISCUSSION

   FINDINGS

   RECOMMENDATIONS/SUGGESTIONS

   CONCLUSIONS

   SCOPE FOR FURTHER RESEARCH

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   REFERENCES

   APPENDIX/ANNEXURE

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- Bowersox, Donald J., Closs, David J., (1996), "Logistical Management." Tata McGraw, Hill, New Delhi.
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- Always indicate the date that the source was accessed, as online resources are frequently updated or removed.

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PEPPER PRODUCTION TREND IN INDIA: AN OVERVIEW

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ABSTRACT

Pepper knows as black gold, is an important commodity traded globally since ancient times. A native of the Western Ghats, the fame of pepper brought traders from all over the world to the shores of the southern Indian state of Kerala. Pepper, one of the hottest agricultural commodities traded on the Indian commodity exchange, is on a bull run, at present.

KEYWORDS

pepper production, agriculture commodity.

INTRODUCTION

Black pepper (Piper nigrum L.) famous as "Black Gold" and also known as "King of Spices" is one of the important agricultural commodities of commerce and trade in India since pre-historic period. Black pepper is one of the important traditional spice crop cultivated in India. Its cultivation is mainly confined to the Southern states viz., Kerala, Karnataka and Tamil Nadu. Kerala accounts for 72% of the total production. The major pepper producing areas in Kerala are Idukki, Wayanad, Kannur, Kasaragod and Kozhikode districts. Unlike other crops, pepper is grown in a large number of small and marginal holdings, mixed with other crops like coconut, arecanut, coffee, cardamom etc. Pepper is cultivated as a pure crop in a very limited area and that too in small pockets.

The crop is the major source of income and employment for rural households in the predominantly pepper growing State of Kerala where more than 2.5 lakh farm families are involved in pepper cultivation. Karnataka, Tamil Nadu are the other major pepper producing States in the country. Kerala accounts for 80-90% of the total pepper production in the country. Idukki and Wynadu are the two major pepper producing districts in Kerala. The estimated area under pepper in India is 2, 36,180 hectares (2006-07) and the estimated production is 50,000 tons (2007-08). The production of Indian pepper has come down from 80,000 tons (2002) to 50,000 tons (2007-08 estimates).

CLIMATE AND SOIL

Black Pepper is a plant of humid tropics requiring adequate rainfall and humidity. The hot and humid climate of sub-mountainous tracts of Western ghats is ideal for its cultivation. It grows successfully between 20o North and South latitude and from sea level up to 1500 metres above sea level. The crop tolerates temperature between 10o and 40oC. A well distributed annual rainfall of 125-200 cm is ideal for the crop. Ideal pH ranges from 4.5 to 6.5.

VARIETIES

Over 75 cultivars of Black Pepper are being cultivated in India. Karimunda is the most popular of all cultivars in Kerala. The other important cultivars are Kottanadan (South Kerala), Narayakodi (Central Kerala), Aimperian (Wynadu), Neelamundi (Idukki), Kuthiravally (Kozhikode and Idukki), Balankotta, Kalluvally (North Kerala). Sixteen improved varieties of Black Pepper have been released for cultivation from Pepper Research Station, Panniyur, Kerala and Indian Institute of Spices Research, Calicut such as Panniyur -1 to 7, Sreekara, Subhakara, Panchami, Pournami, PLD-2, Sakthi, Thevam, Girimunda and Malabar.

INDIAN PEPPER SCENARIO

Black Pepper is one of the most important spices grown and exported from India. Like other spices, it too has great domestic demand so quantity left for export is limited. Black pepper is mainly used as spice and its consumption is also known to have many health benefits. In India, the harvesting period is Nov-March with South India growing almost all the black pepper production led by the state of Kerala followed by Karnataka and Tamilnadu. Idukki & Waynad in Kerala and Coorg in Karnataka are major pepper growing areas. U.S., Italy, Germany, Canada among other countries is big importers of Indian pepper due to its quality which is why it rules at the premium in International market. India also exports value added products like pepper oil, pepper oleoresins, green pepper in brine, dehydrated green pepper etc. India's main export is of Malabar grade black pepper. The country itself is a very big consumer of spices so the quantity available for export is limited as compared to its competitors. The country is also importing pepper from Sri Lanka, Vietnam, Brazil and Indonesia.

The prices of pepper are highly volatile. The availability of pepper futures in Indian commodity market has given the exporters an opportunity to hedge their risks.

VIETNAMESE PEPPER SCENARIO

More than 30% of the world productions of pepper come from Vietnam with in the year 2008 it was estimated 34.6%. Binh Phuoc, Dong Nai, Ba Ria - Vung Tau, Dak Nong, Gia Lai and Dak Lak are the main pepper producing regions of Vietnam. The total area under pepper cultivation is around 50,000 hectares with production in the region of 90000-100000 tonnes. The harvesting period is from the month of March to May. Vietnam is not only the biggest producer of pepper but also the largest exporter in world. Euorpean and Asian countries are the big buyers of Vietnamese produce besides U.S.

INDONESIAN PEPPER SCENARIO

Lampung province of Sumatra is the major black pepper producing region in Indonesia while Bangka region produces white pepper. The harvesting season is from the month of July to October. The production is in the region of 22000-25000 tons contributing 9-10% of the world's production.

BRAZILIAN PEPPER SCENARIO

Major production of the pepper in Brazil comes from the State of Para. The harvesting period for Brazilian pepper is August to October. Its estimated production in the year 2008 was 37000 tons contributing 14-15% of the global production. Brazil is one of the biggest exporters of pepper to U.S. market.

MALAYSIAN PEPPER SCENARIO

About 95% of the pepper is grown in the Sarawak region in Malaysia and thus in International market it is traded as Sarawak Pepper. About 14,000 hectares of land is under pepper cultivation in Sarawak, the major pepper growing area of Malaysia with an annual production in the region of 20,000 to 25,000 tonnes, contributing around 7-8% of the total world production. The harvesting season is from May to August with the months generally may and june being the peak of the season. It is not a big consumer like India so 90% of its production is exported to overseas market. Distribution of pepper cultivation for the year of 2009 and 2010.

Factors' affecting current production and productivity of pepper holdings, prices, acreage expansion, weather conditions, pests and diseases, Government policies, investment programs etc.The main constraint affecting production is low productivity. The major reasons are:

- Cultivation of poor yielding varieties
- Existence of senile and unproductive vines
- Losses due to pest and disease attack and drought
- Non-adoption of appropriate agronomic practices
- Decreasing soil fertility
- Increasing labour cost -resulting in neglect of crop management aspects by farmer
- Changing cropping pattern
- Changing climate
- Minor pests assuming major pest status

METHODS OF PEPPER PROCESSING

The crop takes about 6–8 months from flowering to harvest. The harvest season extends from November to January in the plains and January to March in the hills. When one or two berries in the spike turn bright orange or purple, it is time for harvest. Harvesting is done by hand picking of the spikes from the vines. The berries are separated from the spikes physically and dried in the sun or concrete floor or bamboo mat till it is crisp. Now, mechanical threshers are also used for separating berries from the spike. During sun drying the berries are periodically turned over to facilitate uniform drying. Properly dried pepper is cleaned and packed in clean gunny bags and stored hygienically. Graded or garbled Pepper and ungraded pepper are stored separately stacked in go downs, where wooden planks are used on the floors.

TRADE OF PEPPER WITHIN THE COUNTRY AND OVERSEAS - MARKETING CHANNELS

Pepper marketing channels consists of growers, Middle men (in some cases), Assembling market, Terminal markets and then exporters and domestic market. Under the present system the producers can sell their produce in several ways. The most widely practiced marketing channel is collecting directly from the producers by the local merchants, whole sale traders and then the exporters who is the final link in the chain. The private sector operation is mainly through commission agents who collect the produce from the small farmers and dispose of these produce to the retail trade, at a price determined by demand and supply.

DOMESTIC CONSUMPTION/PER-CAPITA CONSUMPTION

Domestic consumption in India is about 40,000 to 45,000 tons with slight variation depending on the production and price. A statement showing production, Export, Import, domestic consumption during 2009 and estimate for 2010 and projection for 2011.

DEVELOPMENT PROGRAMME FOR PEPPER, PRODUCTION PROGRAMMES

Spices Board is implementing a re-plantation/rejuvenation programme for pepper in the two major pepper growing districts of Kerala state, viz. Idukki and Wayanad and some of the North Eastern states. The cost of implementation of the programme in Idukki district is Rs. 120 crore and for Weygand and North Eastern states is Rs. 53.28 crore. The major components of the programme are production of planting material, re-plantation/rejuvenation of senile plantations, promotion of organic farming, promotion of integrated pest/disease management, training for the farmers etc.

TABLE-1: PEPPER PRODUCTION IN STATE WISE

State	2007-08	2009-10
Kerala	87605	153,711
Tamil Nadu	851	3,122
Karnataka	2360	18,857
Others	40	5609
Total	**90856**	**181,299**

Source: Economic Survey, Government of India, New Delhi

Table-1 shows the state –wise production of pepper in 2007-08 to2009-10. There has been change in production trend among states and the rising towards pepper production in states other than Kerela. The pepper production has gone up in Kerala; its contribution has fallen a bit from 98 percent in 1995-96 to 96 percent in 2002-2003. In 2009-10 Kerala share in the Production was 153,711tonnes. The Tamil Nadu is unchanged at 2007-08 851 tonnes has increase in 2009-10 3122 tonnes, but the Karnataka 2007-08, 2360 tonnes at 2009-10, 18857 tonnes with simultaneous rise in cultivation in productivity.

TABLE- 2: PEPPER PRODUCTION IN INDIA

Sl.No	Years	Acreage (ha)	Production (Mts.)	Yield
1	1997-98	181.5	57.3	316
2	1998-99	239.8	75.7	316
3	1999-00	195.6	59.0	302
4	2000-01	213.9	63.7	298
5	2001-02	219.4	62.4	285
6	2002-03	224.4	71.7	320
7	2003-04	233.4	73.2	314
8	2004-05	228.3	73.0	320
9	2005-06	260.2	92.9	357
10	2006-07	246.0	69.0	281
11	2007-08	197.0	47.1	239
12	2008-09	238.7	47.4	199

Source: Economic Survey, Government of India, Various Period, New Delhi

FIGURE-1

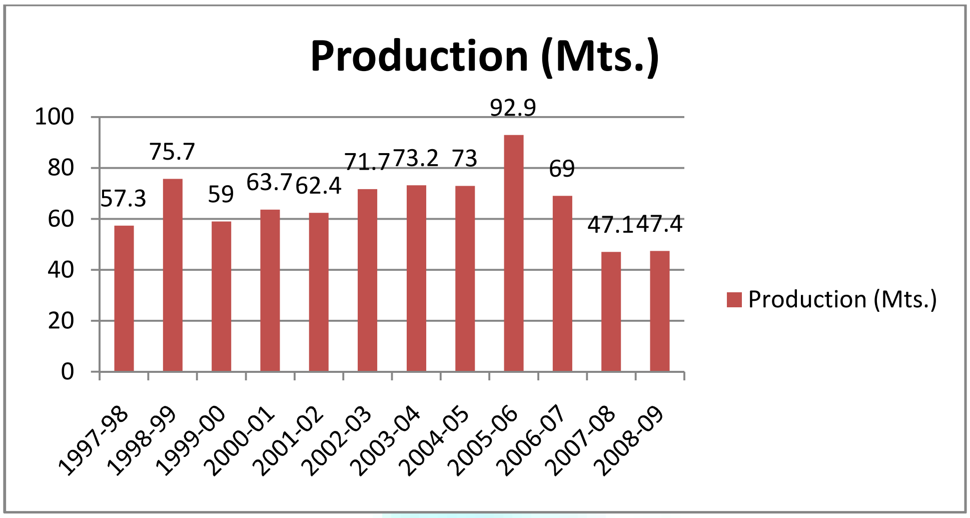

Table -2 pepper production has been rising from a range of 1997-98, million tons for 57.3, (7) percent than increasing from 1998-99 75.7 million tones, whereas2005-06 has been increasing the pepper production in 92.9 million tones. In India domestic consumption of black pepper was 52,000 tones in 2002 which rose to 58000 tons in 2003. This shows that the consumption is increasing in various sectors in india.

TABLE-3: TYPE OF PEPPER PRODUCTION 2009 - 2011 IN MTS

Year	Black	White	Total
2009	49,550	450	50,000
Estimate 2010	49,550	450	50,000
Projection 2011	48,000	-	48,000

GLOBAL SUPPLY-DEMAND DYNAMICS

According to the global figures released by the IPC (International Pepper Community), the balance sheet of supply–demand for 2010, indicates a shortage of nearly 22,216 tonnes. The IPC forecast this year's world pepper consumption to be around 3,20,000-3,50,000 tonnes—significantly higher than last year's global production of 2,85,000 tonnes. According to them, the global consumption—excluding China and India—had grown between 4-6% per year. The closing stock of 2009 or the carry-forward stock for 2010 is estimated to be at around 79,124 tonnes while the carry forward stocks for 2011 have been projected at 72,082 tonnes.

TABLE -4: BALANCE SHEET OF GLOBAL SUPPLY & DEMAND FOR 2010

Supply (tones)		Demand (tones)	
Production	290742	Production	320000
Carry Forward Stock for 2010	79124	Carry Forward Stock for 2010	72082
Total	369866	Total	392082
Shortage: 22216			

Source: Squeal to pepper Seasonal Report, March 2010

The analyzing all of the above mentioned factors, it is expected that the international demand–supply gap is expected to prevail during 2010. A clearer picture will be available from April onwards, upon confirmation of Vietnam's pepper production. The global pepper production in 2010 is likely to be higher, while the exports are likely to decline due to lower production in individual countries. A slight increase in production coupled with exhausted carryover stocks is expected to result in higher prices in the global market. For the year 2010, the production is expected to increase by 3% over the previous year to 2, 90,742 tonnes, while exports have been projected to be lower by 10.5%, against the previous year to 2, 18,074 tonnes. Moreover, it is evident that the productivity of traditional pepper producing countries is at low levels, making remuneration to the farmers not attractive to remain in the industry. For both black and white pepper, the lucrative prices witnessed from around early 2007 to early 2008 is yet to be achieved. Given the slow growth rate of pepper production and exhausted carryover stocks, the prices may continue to rise in the global market.

INDIAN SUPPLY-DEMAND DYNAMICS

According to the figures released by the Spices Board of India, the pepper balance sheet for 2010 appears to be balanced in terms of supply and demand. The production figures are hovering around 55,000 tonnes, while the consumption figures are hovering around 44,000 tonnes, annually. Exports have been targeted at around 25,000 tonnes, while imports are likely to be around 14,000 tonnes. The closing stock for 2009 is estimated around 11,350 tonnes, while the carry forward stocks of 2010 have also been projected at 11,350 tonnes.

TABLE 5: BALANCE SHEET FOR INDIA REGARDING PEPPER SUPPLY & DEMAND FOR 2010

Supply (tonnes)		Demand (tonnes)	
Production	55000	Domestic Production	45000
Imports	14000	Exports	25000
Ending Stocks of 2009	11350	Carry forward stocks	10350
Total	80350	Total	80350

Source: Squeal to pepper Seasonal Report, March 2010

CONCLUSION

Drying pepper in a hygienic surface is important to ensure the quality of black pepper. Spices Board support this by providing Bamboo mats/polythene sheets, giving assistance to the construction of concrete yards etc. Spices Board also give assistance for the purchase of mechanical pepper threshers. Pepper prices have shown a rise as expected with intermittent correction due to profit taking. The rise in prices has been supported by the fundamental factors of tight supply situation in the local and international markets. Lower production expectation for top producing countries is further supporting the rise in prices.

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With sincere regards

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