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# THE INDIAN SUGAR INDUSTRY

ITS PAST, PRESENT AND FUTURE.

BY

**M. P. GANDHI, M.A.**

*Secretary, Indian Sugar Mills Association; Secretary, Indian Chamber of Commerce, Calcutta; Secretary, Federation of Indian Chambers of Commerce and Industry, (1929-30); Secretary, International Chamber of Commerce, Indian National Committee (1929-30).*



1934.

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GA  
FOREWORD

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BY

SHETH WALCHAND HIRACHAND.

The story of the Sugar Industry in India should read like a romance in the history of Industries of any country in the World. Although India is to-day mainly an agricultural country and was first in the world to produce sugarcane and sugar, she has been for more than two generations importing the whole of her sugar requirements from foreign countries. Sugar after all is a slightly refined process near gur or jaggery which India has been making for ages. The import of sugar, even for a poor country like India, came to enormous figures, like a million tons per year, causing a drain of about Rs. 15/- crores per year. When, however, public disaffection became acute and the Government saw that various other public organisations were catching not only the imagination of the masses but were also successful in doing concrete good to the masses and there was the pressure of local agitation, the Government agreed to give real protection to this industry. It is said that even to this the Government agreed, because the introduction of this protection did not adversely affect any British Industry. Immediately after the protection was granted and within a short period like three years India will produce almost all the sugar that she requires. In spite of the acutest depression in the whole world and in spite of the shyness of Indian Capital and illiteracy nearly Rs. 20/- crores are estimated to have been invested in this industry in most modern machinery. It is a gratifying feature of this scheme of protection that almost 95

per cent of the new Sugar factories are Indian owned and managed. This to my mind is a convincing illustration of what protection can do. Not only is the country expected to produce all the sugar she requires but after 1934-35 season, it is expected that the country will have to look out for outside markets for export of her sugar.

I think at the end of the 15 years, probably earlier, we should be able to do away with protection. My reasons for thinking thus are that while the Indian Sugar Committee in 1920 would have been satisfied with a recovery of 8 per cent some of the Indian Factories are now getting an average recovery of a little above 11 per cent. Similarly it seems quite possible to get an average like that of Java of 60 tons per acre of Adjali (16 month) sugar cane crop. As a matter of fact a production of 50 tons per acre has already been attained. Similarly for plant sugar cane 45 tons per acre of Java varieties seems practicable. It might be interesting here to note that in the Deccan a Prize of Rs. 1000/- is being offered by the Maharashtra Chamber to the cane grower who gets 100 tons of sugar cane per acre. With these facts before us one is justified in thinking that at the end of 15 years of protection the country should be able to do away with protection. After all, being an agricultural country, we ought to excel in a commodity like cane. Although we are not yet an industrialised country we are producing the cheapest and the best pig iron in the world as also the best cement and comparatively cheap cement too. Similarly production of cheap sugar also is, to my mind, only a question of a few years.

The Industry has given employment to about 1500 Graduates in chemistry and mechanical Engineering plus about one hundred thousand factory workers, in these days of unemployment. This industry has found a new cash

market for about sixty lakhs of tons sugar cane worth about Rs. 6 crores which gives employment to half a million agriculturists. To this splendid service and response of the Indian Industrialists the Government however have returned a kick in the shape of the excessive excise duty of Rs. 1/5 per Cwt. recently announced. The basic principle underlying the imposition of this duty is wrong inasmuch as it is founded on the idea of adding a surcharge equivalent to the excise duty. This is not fair to the industrialist as price of sugar to the consumer in the country is already much cheaper than this surcharge would justify. It is estimated that the consumer is already getting a benefit of at least about Rs. 2-10-0 per Cwt., owing to internal competition as against the surcharge of Rs. 1-5-0 which is thus not operative. The benefit to the consumer on this account alone comes therefore to about 3 crores of rupees per year.

The main argument, however, would be that a legislature and a Government having solemnly assured the industrialist of an uninterrupted protection for 15 years should not go back upon their word by adding to the basic cost of the industrialist by imposing an excise duty. If the Industrialist's profit became reduced owing to molasses not fetching any price or price of sugar falling owing to internal competition, he took these risks with open eyes and is prepared to face these; but there is no justification on any grounds of equity or business morality for the Government to add to his cost by means of an excise duty.

A careful analysis of the balance sheets of sugar companies for the 1933-34 crushing season will easily explode the theory of profiteering. I hope that this monograph will be published annually and balance sheets of a few factories will be given therein, for the information of the public, as it will be very useful.



The monograph is planned in a scientific way and should be useful to scholars desirous of studying this industry.

BOMBAY :  
*3rd March, 1934.*

WALCHAND HIRACHAND

## AUTHOR'S PREFACE

Encouraged by the appreciation and the response that my last two monographs on the Indian Cotton Textile Industry—Its Past, Present and Future, and How to Compete with Foreign Cloth, met with from the public, I have ventured to publish the present monograph on the Indian Sugar Industry—Its Past, Present and Future. The idea of this publication first originated in my mind during June, 1933, in view of the very great interest that was evinced by the public in the development of this industry after the grant of protection to it by the Government of India in April 1932. The absence of any information about the extent, the peculiar features, and the prospects of development of this industry in India, with the exception of the valuable Reports of the Indian Sugar Committee (1920) and of the Indian Tariff Board (1930) which have become obsolete with respect to several matters, impelled me to undertake a scientific research on the subject and to prepare a comprehensive monograph giving authoritative, up-to-date and reliable information pertaining to the industry, in order that it may furnish some help and guidance to the industrialists, scholars, and public men, taking a keen interest in the industrial development of this country in general, and of this industry in particular.

I have attempted to treat the subject-matter of the monograph in a scientific manner and have discussed briefly most of the important problems in a similar spirit. I have also given considerable statistical and other relevant information relating to the Sugar Industry in India, as also in other parts of the world, in order to enable a fair comparison being made of the stage of development of the industry in India with that of other countries, and to point

directions in which further improvements are possible and feasible. Due to the hurry in the preparation of this monograph, several defects and deficiencies have been left therein, and I will feel very grateful if any of my readers will be good enough to make suggestions calculated to enhance the utility of this treatise in any way. I shall consider myself amply rewarded if the publication of this monograph at this juncture is helpful in crystallizing the opinion of the industrialists, the public and the Government in regard to various problems confronting the industry, e.g. fixation of prices of cane, licensing of factories, allocation of zones, utilization of by-products, directions of research, and improvement in agriculture, manufacture, etc., relations between cane-growers and sugar-manufacturers, single sugar selling organization, imposition of an excise duty on Indian factory sugar etc. and thus enabling the industry as well as the Government to concert effective measures for increasing in any manner the efficiency and prosperity of this industry, representing a total investment of over Rs. 25 crores, giving employment to over 80,000 workers, stopping the drain of about Rs. 15 crores every year, and supporting no less than 15 million agriculturists whose interests are indissolubly bound up with this industry.

I have endeavoured to show that India is situated exceptionally well in regard to manufacture of sugar from cane, and I feel that if suitable encouragement is given to this industry, India should be able not only to supply fully the quantity of sugar required by her, which she has already practically done, but also to supply sugar to other countries in the world. What is needed is a bold and continuous policy of encouragement to this industry, by the Government of this country, in appreciation of the importance and advantages of development of industries in India.

If circumstances are favourable and the need is felt, I hope to make this publication an Annual one, and to deal with the latest features in the industry in all parts of the world, in order that those interested in the development of the Indian Sugar Industry may keep abreast of the times and may be able to measure the progress made by the industry from year to year and to effect continual improvements therein, in order to enable India to rank, before long, amongst the most efficient sugar-producing countries of the world, and to supply the requirements of sugar to other parts of the British Empire, if not, indeed, to other countries of the world.

I must express my great indebtedness to my friend Mr. R. C. Srivastava, Sugar Technologist to the Imperial Council of Agricultural Research, Cawnpore, for the very valuable help he has readily given to me at all times. I am also obliged to my friends, Mr. S. P. Shah, and Mr. S. Lall, Directors of Industries, United Provinces, and Bihar and Orissa, respectively, and to Mr. Charan Das, Secretary of the Imperial Council of Agricultural Research, for the assistance they have so kindly given to me from time to time.

I must also thank Mr. B. M. Birla, Mr. J. M. Lownie, Mr. Walchand Hirachand, Mr. D. P. Khaitan, Lala Shri Ram, Mr. Noel Deerr, and other friends who have so kindly discussed with me various problems pertaining to the industry, and encouraged me in other ways in bringing out this publication. To Mr. Walchand, I am, indeed, very grateful for having kindly agreed to write a foreword to this monograph.

I have given a few striking facts about the industry in India in "The Sugar Industry at a Glance", appearing in front of the 1st page.

It would hardly be necessary for me to observe that the views expressed in this monograph are my own and have no necessary connection with the views of any of the Associations with which I have the honour to be associated.

*Dated 22nd March, 1934.*

C/o INDIAN SUGAR MILLS ASSOCIATION,  
135, Canning Street, Calcutta.

M. P. GANDHI

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## THE SUGAR INDUSTRY AT A GLANCE.

### 1. Sugar-Cane Factories\* & Khandsari.†

Year.	No. of Factories.	U.P.	Behar.	Factory Production Tons.	Khandsari† Production Tons.
1931-32	31	14	12	158,581	2,50,000
1932-33	57	33	19	290,177	2,75,000
1933-34	135	70	34	650,000 (Est.) (Govt.'s Estimate is 5,86,000.)	2,60,000

### 2. Total Production of Sugar and Gur and Yield of Raw Sugar in Tons.

Year.	Total Sugar (Tons).	U.P. Factory Production only	Behar.	Gur for direct consumption.	Yield of Raw Sugar (Gur).
1931-32	4,78,000	66,312	75,091	27,72,000	38,80,000
1932-33	6,56,000	140,344	126,610	32,45,000	46,84,000
1933-34	10,00,000‡ (Est.)	.....	.....	30,00,000 (Est.)	50,67,000¶

### 3. Total and Per Capita Consumption of Sugar in India.§

Year.	Consumption of Sugar in Tons.	Per Capita Consumption in lbs.		
		Sugar.	Gur.	Total.
1932-33	9,82,000	6	17.7	23.7
1931-32	9,40,000 (Est.)	5.8	20.4	26.2
1933-34	9,40,000 (Do.)	...	...	...

\* For a complete list of Factories, Names of Managing Agents, capacity etc., see Appendix III.

† Estimates of Khandsari Production are Conjectural. An Enquiry has been undertaken for ascertaining Khandsari Production in U. P. in 1933.

‡ Please correct the mistake in the total on page 57 where 1100000 is printed instead of 10,50,000. A deduction of 50,000 tons is made on account of damage to factories due to the recent earthquake, and late starting of several factories.

¶ India continues to lead as the largest sugar producing country in the world. Till 1931, Cuba was leading.

§ For consumption in other countries, see page 67.

4. *World's Production and Consumption (in Metric Tons).*

Year.	Total Production of Sugar.	Production from cane.	Production from Beet.	Consumption.	Excess of Production over Consumption.
1931-32	27,000,000	18,000,000	8,910,000	26,000,000	750,000
1932-33	26,000,000	17,000,000	8,000,000	25,000,000	70,000
1933-34	26,000,000	17,000,000	8,000,000	25,000,000	30,000

(These figures are approximate only)

5. *Average and Maximum Percentage Recovery in India and Java.*

Year.	India (average).	U.P. (average).	Behar (average).	Bombay (Maximum).	Java (average).
1931-32	8.89%	8.59%	9.06%	...	11.92%
1932-33	8.66%	8.55%	8.60%	11.1%	...
1933-34	9.00% (Expected).	...	...	...	...

6. *Uses of Cane.*

Year.	Percentage of Cane Crushed in Factories.	Quantity Crushed in Factories (Tons).	For Gur Manufacture in Tons.	By Khandsari Tons.	For Chewing Tons.	Total Cane Crop in Tons.
1931-32	4.1%	17,83,000	29,871,000	5,000,000	5,400,000	43,316,000
1932-33	6.6%	33,50,000	34,595,000	5,500,000	5,500,000	50,000,000
1933-34	10.0% (Est.)	55,00,000	...	...	...	55,000,000 (Est.)

7. *Crushing Season and Capacity of Factories in India.*

(a) Average Cane-crushing capacity of Factory per day of 22 hours	...	...	...	...	600 Tons
(b) Average duration of Cane-crushing Season All-India in 1932-33	...	...	...	...	134 Days
(c) Maximum Duration	do.	do.	in 1932-33	...	184 Days
(d) Average Duration	do.	do.	in U. P.	...	144 Days
(e) Average Duration	do.	do.	in Behar	...	154 Days

8. *Acreage under Sugar-Cane ; Total & Average Production of Cane per Acre.*

Year.	Total Acreage.	Acreage under Improved varieties.	Average Cane production per Acre (in Tons).	Total Cane Crop (in Tons).
1931-32	3,076,000	1,170,000	14	43,316,000
1932-33	3,321,000*	1,814,000	15	50,000,000
1933-34	3,305,000	...	16	55,000,000 (Esti.)

\* Please correct the figure on page 17, line 21, accordingly.

9. *Cost of Production of Cane per Maund.*

- (a) Definite figures are not available. Cost of Production varies from Province to Province from annas 0-2-0 to annas\* 0-10-0 per Maund.  
 (b) Average Cost of Production in Bihar, according to Bihar Government's figures, is roughly between 2½ to 3 annas per Maund.  
 (c) Enquiry into Cost of Production undertaken by Imperial Council of Agricultural Research. Report awaited 1936.

10. *Average Price of Cane paid by Factories to Cultivators.*

1932-33	...	...	Rs. 0-6-0 Per Maund.
1933-34	...	...	„ 0-6-0 „ „

11. *Import of Sugar into India (Value and Quantity) & Revenue therefrom.*

Year.	Quantity in Tons.	Value.	Yield of Revenue to Government of India from Import Duty.
1931-32	5,16,000	Rs. 6,01,00,000	Rs. 8,00,00,000
1932-33	3,69,500	Rs. 4,12,00,000	Rs. 6,84,00,000
1933-34	2,50,000	Rs. 2,70,00,000	Rs. 4,80,00,000
1934-35	1,10,000*	Rs. ...	Rs. 2,05,00,000*

12. *Import Duty on Sugar† and Sugar Candy† and Proposed Excise Duty on Factory Sugar.*

On Sugar ... .. Rs. 9-1-0 per Cwt.  
 Rs. 7-4-0 Protective Duty and Rs. 1-13-0 Surcharge.  
 (From April 1932 to 31st March 1934).

(Proposed Change with effect from 1st April, 1934.)

On Sugar ... .. Rs. 9-1-0 per Cwt.  
 Rs. 7-12-0 Protective Duty and Rs. 1-5-0 Equivalent Excise Duty.

13. *Excise Duty on Internal Production of Factory Sugar.*

Proposed at Rs. 1-5-0 per Cwt. (Roughly equivalent to  
 Rs. 0-15-4.5 per maund).

With effect from 1st April, 1934.

\* Government's estimate.

† Please amend Table No. 3 on pages 10,11 accordingly. For import duties on sugar in other countries, see Table No. 3.

‡ On Sugar-Candy Rs. 10-8-0 per Cwt. (from 20th February 1934) in place of Rs. 9-1-0 per Cwt.

Sugar Excise Duty Bill introduced in Assembly on 13th March 1934.

Expected Yield of Revenue 1934-35 Rs. 1,47,00,000.

14. *Price of Sugar.*

Indian (1st & 2nd Quality Average)	...	Rs. 7-12-0 per Maund Ex-Factory (February 1934)
Imported Sugar, at Calcutta	... ..	Rs. 10-2-0 per Maund (February 1934)

15. *Transportation Cost on Sugar.*

Railway Freight	...	About 1000 miles—about Rs. 1-4-0 per Md.
Steamer	..	From Java to Calcutta—about Rs. 0-3-6 per Md.

16. *Expenditure on Research (through the Imperial Council).*

Total Amount spent from 1930-31 to 1933-34	...	Rs. 11 Lakhs.
.. .. proposed to be spent upto 1937-38	...	Rs. 20 Lakhs.

21st March, 1934.

M. P. GANDHI.

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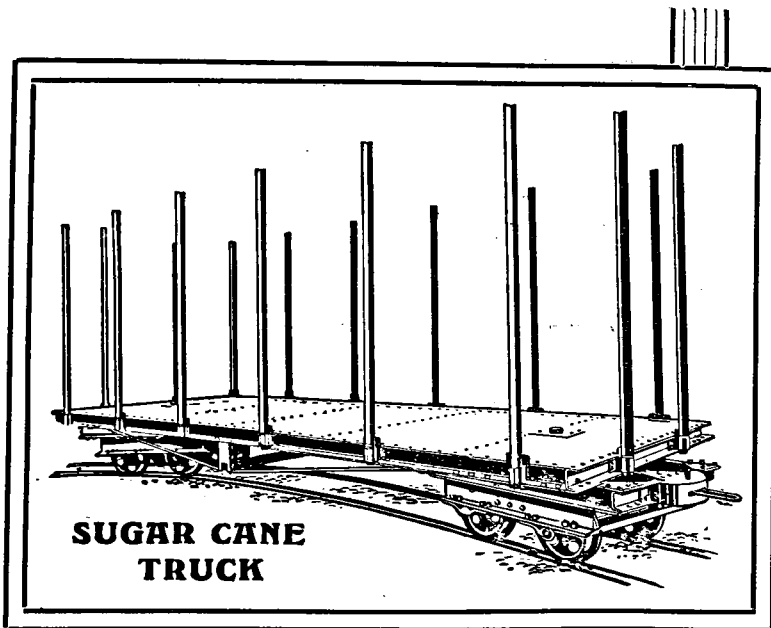
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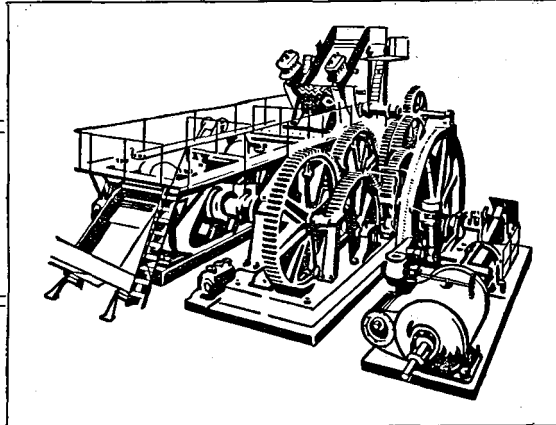
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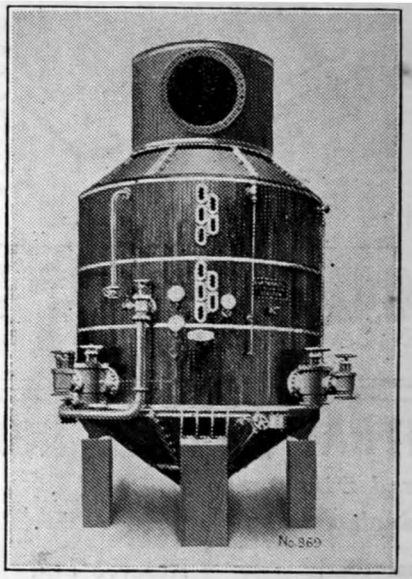
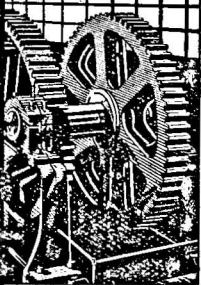
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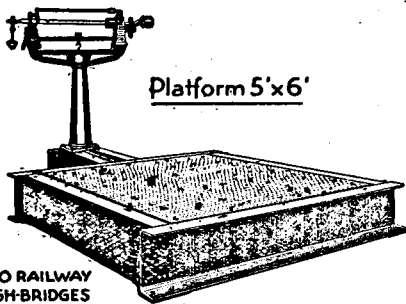
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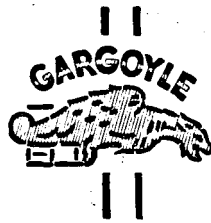
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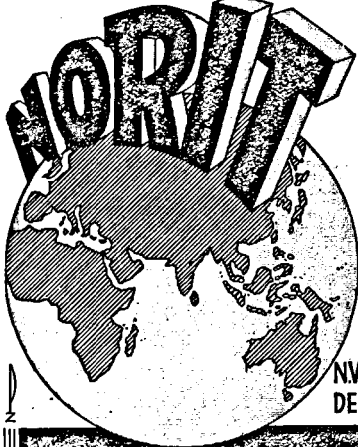
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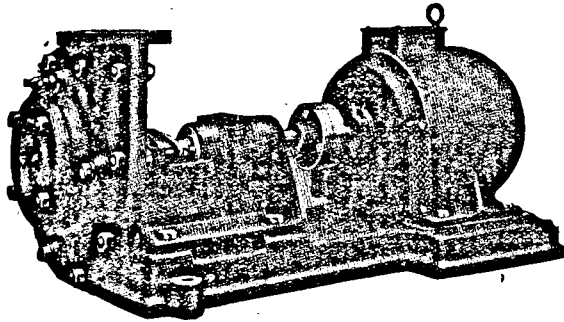
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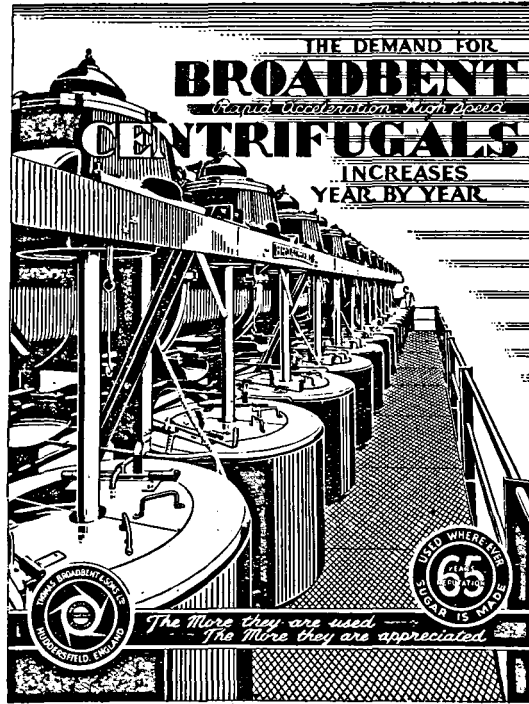
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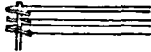
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	Rs.
Total Policies in force at end of 1932	- 8,13,60,271.
Total Assets exceed	- - - - 1,90,00,000.
Claims Paid exceed	- - - - 1,00,00,000.

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# **NEW ZEALAND INSURANCE COMPANY, LIMITED.**

INCORPORATED IN NEW ZEALAND.

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**ESTABLISHED 1859.**

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**Paid Up Capital - - - £ 1,500,000.**

**Total Assets Exceed - - £ 3,000,000.**

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Subscribed Capital - - ,, 1,53,20,700.

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THIS IS THE TITLE OF A WELL-  
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:: NOT COMMENCED MAKING ::

JUTE CARPETS, DURRIES, ASANS, DECK-  
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CLOTH, STAIRCASE CARPETS, BILLIARD  
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ESTABLISHED 1919.

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Authorised Capital . . . . .	6,00,00,000.
Subscribed Capital . . . . .	3,56,05,275.
Paid-Up Capital . . . . .	71,21,055.
Total Assets . . . . .	1,56,90,992.
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£1,000,000

(at Current Sterling  
Rate of Exchange)

Annual Premium  
Income Exceeds

£ 1 0 , 0 0 0 , 0 0 0



Total Assets

at 31-12-32

(at Current Rate of  
Exchange)

Exceed

£ 2 7 , 0 0 0 , 0 0 0

Claims Paid

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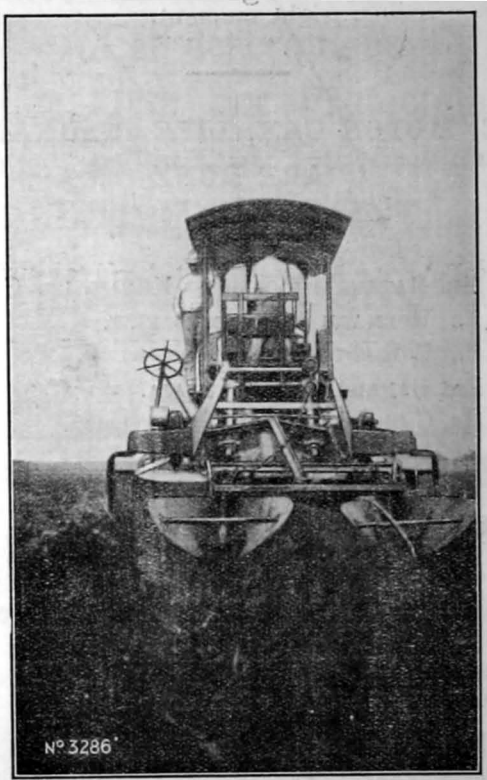
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1916	71,812	2,11,121	6½%
1921	91,378	3,14,000	7½%
1926	87,829	5,75,000	13½%
1932	1,36,414	7,48,000	15%

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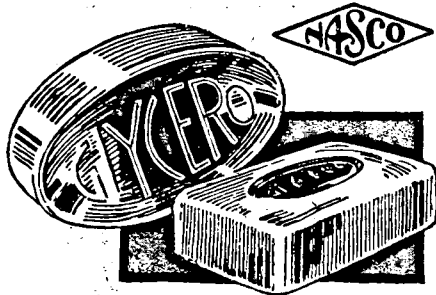
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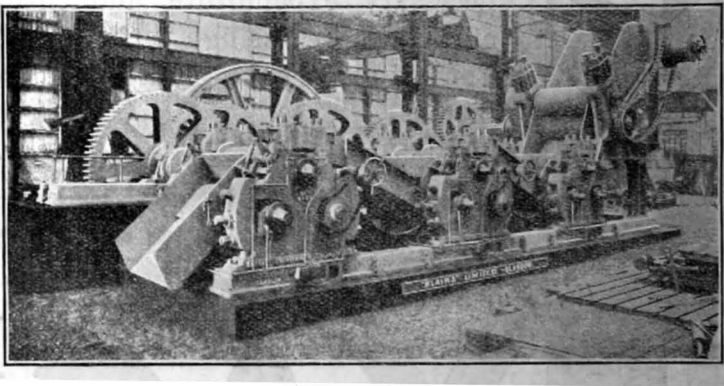
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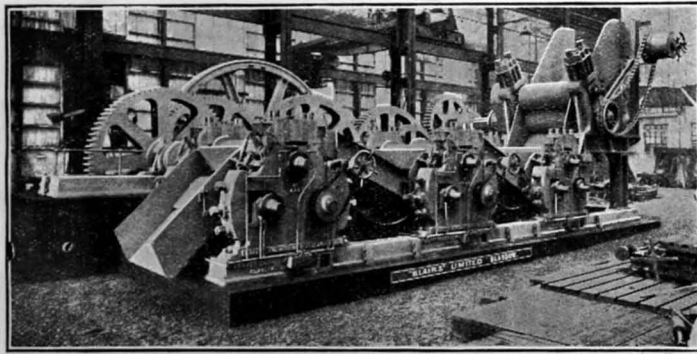
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