REPORT OF THE STUDY GROUP ON CASHEW

COMMERCIAL PUBLICITY, MINISTRY OF COMMERCE, NEW DELHI

Report of the Study Group on Cashew

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DIRECTORATE OF COMMERCIAL PUBLICITY
MINISTRY OF COMMERCE, GOVERNMENT OF INDIA, NEW DELHI

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CHAPTER ONE

INTRODUCTION

In pursuance of a recommendation made by the Board of Trade at its 11th meeting held in Calcutta in February 1964, the Ministry of Commerce set up, in April 1964, a Study Group on Cashew to look into the question of cashew exports and cashew production and to advise the Government on the steps to be taken for achieving the targets fixed for cashew kernel exports in the Third and Fourth Five-Year Plans and for finding the raw nut supply required for these exports.

Composition of the Group

The Group consisted of the following :—

Chairman

Dr. P. S. Lokanathan, Director-General, National Council of Applied Economic Research.

Members

Shri B. P. Patel, Chairman, State Trading Corporation of India Ltd.

Shri S. Hamid, Joint Secretary, Ministry of Commerce.

Dr. D. K. Ghosh, Director (Foreign Exchange), Planning Commission.

A representative of the Ministry of Food and Agriculture.

Secretary

Shri G. R. Kadapa, Deputy Secretary, Ministry of Commerce.

Terms of Reference

2. The terms of reference of this Study Group were as follows :

(a) Review of the steps now being taken to develop the production of raw cashew nuts within the country;

(b) assessment of the future requirements of indigenously produced raw cashew nuts for the Indian cashew processing industries having regard to:—

(i) possibilities of increased exports of cashew kernels;

(ii) possibilities of increased domestic consumption of cashew kernels;

(iii) possibilities of reduced availability of raw nuts from foreign sources.

(c) suggesting measures for increasing production of raw nuts for meeting the estimated requirements;

(d) indication of the regions in which increased production could be achieved;

(e) study of the adequacy of the present arrangements for storage of raw nuts and their transportation to processing factories and suggesting measures for their improvements; and

(f) making such other recommendations as may be considered necessary to maintain optimum supplies of domestic raw nuts to the cashew industry.

3. The Group could not meet till the middle of July due to the pre-occupation of some of its members with other urgent matters. However, in June, Shri B. P. Patel and Shri Kadapa had discussions with officials of the Department of Food and Agriculture of the Government of Maharashtra, which has embarked on a very ambitious programme of new cashew cultivation.

4. The Group held in all, four meetings in Delhi. After the first meeting a questionnaire (Annexure I) was prepared and issued to the four leading cashew growing States in India, *viz.*, Kerala, Mysore, Madras and Andhra Pradesh. Shri Kadapa undertook a quick tour of these States and had detailed discussions with the officials concerned (Annexure II). He also had discussions with officials of the Cashew Export Promotion Council and the Indian Central Spices and Cashewnut Committee at Ernakulam. Based on the replies furnished by the four Southern States to the questionnaire as well as on the information gathered at the discussions which Sarvashri Patel and Kadapa had with officials of the Maharashtra Government earlier, a statement (Annexure III) was prepared and placed before the 2nd meeting of the Group on August 16, 1964. This statement, as also the other information on cashew obtained by us, was discussed in detail. The observations and recommendations of the Group are contained in this report.

CHAPTER TWO

CASHEW PRODUCTION

The cashew tree is said to have been introduced in India from Brazil by the Portuguese early in the 16th century. It was introduced in Goa for covering the bare hills and for checking soil erosion. However, it was only after the close of the First World War that this commodity gained commercial importance when the first shipment of a little over 10,000 tonnes of cashew kernels was exported to the U.S.A. In fact, the export trade in cashew has developed only in the last 25 years or so. But today, it is one of our major foreign exchange earners, ranking among the 10 top export earners and the second biggest dollar earner for India. Export earnings through cashew in 1963-64 were of the order of Rs. 225 million (including export of cashew shell liquid). These have also shown a steady increase in the past few months. Though the U.S.A. is a major importer of our cashew, exports of this commodity to Europe and other parts of the world are also increasing year by year with the result that there has been diversification of the market for this precious commodity. Export figures of cashew kernels from India for the last 10 years have been as follows:—

Year	Quantity in tonnes	Value in Rs. thousands
1954-55	34,558	106,968
1955-56	31,358	129,246
1956-57	31,557	145,347
1957-58	36,779	151,570
1958-59	41,021	158,526
1959-60	38,791	160,513
1960-61	43,625	189,130
1961-62	41,755	181,705
1962-63	47,558	193,612
1963-64	50,995	214,147

2. However, not all the cashew that is exported from India is grown in India. In fact, nearly 3/4th of it is imported from

abroad (Mozambique, Tanganyika and Kenya). Nearly 1,55,000 tonnes of raw cashewnuts were imported in 1963-64. Though, therefore, India holds a virtual monopoly in cashew trade—supplying more than 90 per cent of the world demand for cashew kernels—she has to depend heavily on raw nut imports from abroad. If we are to achieve even a reasonable amount of self-sufficiency in the production of raw nuts required for maintaining and increasing cashewnut kernel exports, serious efforts will have to be made so as to step up cashew production in the country. This can only be achieved by:—

(a) bring more area under cashew cultivation;

(b) improving the yield per acre and

(c) ensuring that all cashew grown in the country is properly collected and processed.

3. Fortunately, cashew is a very economical plant which can grow on a variety of land such as laterite soil, loamy soil and sandy soil. India abounds in such soils, espcially in the four Southern States and in Goa, Maharashtra, Orissa and West Bengal. While cashew kernel has made its impact on the sophisticated markets of the world as a delicious nut, cashew shell liquid has assumed great industrial importance. This liquid is used for water proofing and as a preservative in the painting of boats, fishing nets and light wood work. It also forms part of the raw material used in the manufacture of automobile brake linings, typewriter rollers and insulating varnishes. Cashew shell liquid residue is used as a weather repellant as well as insecticide for coating telegraph poles and railway sleepers. Also, cashew apple is a juicy fruit and quite palatable when fully ripe. It is rich in Vitamin C. The apple is also used in the manufacture of vinegar and pickles. In Goa, cashew apple is used for the preparation of a liquor called 'Feni'.

4. The cashew tree, depending on the suitability of soil, takes approximately five years to bear fruit. The yield keeps on increasing till the tree is 10 years old when it reaches maximum maturity. The yield is maintained for another 10 years, and from the twentieth year onwards it starts declining. The average life of a cashew tree is about 30 years. The cashewnut yield, however, varies from 50 to 800 kgs. per acre depending on the soil conditions, use of fertilisers and chemicals and age of the tree. Due to collection difficulties the yield per acre is very much less in forest areas as compared with non-forest areas.

5. In the past, only Kerala, Mysore, Madras, Andhra and Goa took to cashew cultivation in any appreciable measure.

During the Third Plan, however, Maharashtra has also taken up a programme of extensive cashew cultivation. Maharashtra, Mysore and Orissa have also planned for an increase in cashew acreage of 5,00,000, 3,00,000 and 1,00,000 acres, respectively during the Fourth Plan.

6. On the basis of the information supplied by the State Governments, the following picture emerges regarding cashew cultivation and raw nut production in the country:—

Area under cashew cultivation at present	9,88,674 acres
Area of fruit-bearing cashew cultivation at present i. e. cashew acreage which is more than five years' old.	3,75,367 acres
Production of raw nuts at present . .	1,35,623 tonnes
Estimated total area under cashew cultivation by the end of the Fourth Five-Year Plan	22,75,200 acres
Estimated area of fruit-bearing cashew cultivation (i.e. cashew cultivation which will be 5 years or more old by the end of the Fourth Five-Year Plan)	13,37,200 acres
Estimated production of raw nuts by the end of Fourth Five Year Plan.	3,27,989 tonnes* or say 3,28,000 tonnes

* This figure is arrived at by adding to the present production of 1,35,623 tonnes (derived from 3,75,367 fruit-bearing acreage) the estimated production of 1,92,366 tonnes (worked out at the rate of roughly 200 kgs. per acre for the estimated additional fruit bearing area of 9,61,833 acres) in 1970-71.

7. The cashew cultivation and production programme/estimate in the various cashew growing States in India are briefly explained below :-

KERALA

8. Kerala is foremost among the cashew growing areas in the country. Because of ideal climatic and soil conditions and because of the fact that most of the cashew grown is in non-forest areas and in compact plantations, the yield per acre is much more in this State than any other in India, the average yield being nearly 600 kgs. per acre. However, there is no possibility for further extension of cashew cultivation in this State as no spare land is available for this purpose. All the same, during the remaining two years of the current Plan 3,000 acres are proposed to be brought under cashew cultivation.

9. The total area under cashew cultivation in Kerala is as follows:—

	Acres
More than five year old	1,24,189
Five year old	15,336
Four year old	4,697
Three year old	1,754
Two year old	66,965
One year old	Nil
To be planted in the remaining two years of the Third Plan	3,000
Total	2,15,941

10. The estimated production by the end of the Fourth Plan is as follows:—

	Tonnes
1963-64	94,000
1964-65	97,067
1965-66	98,006
1966-67	98,356
1968-69	1,11,749
1970-71	1,12,349

MYSORE

11. The coastal belt of Mysore as also some of the interior areas like Belgaum District have climatic conditions and soil suitable for cashew cultivation. In fact, some of the individual cashew plants in Khanapur Taluk, Belgaum District are said to yield as much as 10 kgs. of cashew per tree. Mysore has also done well in the field of cashew research. The Research station at Ullal has been doing excellent work in this respect. Mangalore in Mysore State has also facilities for cashew processing. There are large tracts of land suitable for cashew cultivation in the State. These are available both in the forest and the non-forest areas. The State has embarked on a large-scale programme of cashew cultivation.

12. The total area under cashew cultivation in Mysore is as follows:—

	Acres
More than five year old	47,330
Five year old	16,962
Four year old	23,503
Three year old	17,730
Two year old	19,444
One year old	17,421
To be planted in the remaining two years of the Third Plan	38,000
Total .	1,80,390

13. The present yield of cashew along with the estimated production by the end of the Fourth Plan is as follows:—

	Tonnes
1963-64	8,770
1964-65	12,162
1965-66	16,862
1966-67	20,408
1967-68	24,296
1968-69	27,780
1969-70	31,580
1970-71	35,380

MADRAS

14. Cashew is grown on a variety of soils in the Madras State, though most of it is grown in the red soil tracts of South Arcot and Thanjavoor districts. Madras also has the advantage of having a good portion of its cashew grown on plantation basis in contiguous areas. A research station has recently been set up at Kuppanatham, in South Arcot District, in the midst of cashew area. A programme of research covering all aspects of cashew cultivation has been approved by the Madras Government. Almost all cashew collected in the State is sent to Kerala for processing.

15. The total area under cashew cultivation in Madras is as follows:-

	Acres
More than five year old . . .	1,52 000
Less than five year old . . .	30,000
To be planted in the remaining two years of the Third Plan	56,627
Total	2,18,627

16. The present yield of cashew along with the estimated production by the end of the Fourth Plan is as follows:—

	tonnes
1963-64	12,500
1968-69	18,000
1970-71	29,824

ANDHRA

17. Cashew is confined to the sandy coastal areas of the State where it is grown in contiguous areas. Sandy soil suitable for cashew is to be found in the coastal belt or in the red sandy loams of the Telangana region. The coastal districts of East Godavari, Visakhapatnam, Srikakulam and Guntur are the main cashew growing districts, though some cashew is grown in the forest areas as well. Not much land has, however, been brought under cashew cultivation during the last three years in Andhra Pradesh, though a total of 2,900 acres is expected to be added to the cashew area during the remaining two years of the current Plan.

18. The total area under cashew cultivation in Andhra is as follows:—

	Acres
More than five year old	36,784
Five year old	4,020
Four year old	1,255
Three year old	212
One or two year old	19,822
To be planted during the remaining two years of the Third Plan	2,900
Total	64,993

19. The estimated production by the end of the Fourth Plan is as follows :-

	Tonne
1963-64	7,653
1964-65	8,457
1965-66	8,708
1966-67	8,750
1968-69	12,721
1970-71	13,301

MAHARASHTRA

20. Maharashtra, which possesses a large area of land suitable for cashew cultivation, had practically very little cashew grown till recently. However, since the beginning of the current Plan this State, which has ideal climatic and soil conditions along the coastal belt as also in some of the interior districts like Thana and Kolhapur, has embarked on large-scale plantation of cashew. In fact, if the programme envisaged by the Maharashtra Government for the Third and Fourth Plans goes through, this State will have brought under cashew cultivation more than a million acres of land which would be more than all the other States put together. The only disadvantage, however, is that cashew plantation in this State is not in contiguous areas but scattered in small holdings. All the same, with proper supervision and proper methods of cultivation and collection, this State should play a big part in the cashew production and cashew export programme of India in the coming years.

21. The total area under cashew cultivation is as follows :

	Acres
More than five year old	10,100
Five year old	2,750
Four year old	60,800
Three year old	94,300
Two year old	94,700
One year old	1,16,600
To be planted in the remaining two years of the Third Plan	1,78,000
Total	5,57,250

22. The estimated production by the end of the Fourth Plan is as follows:—

	Tonnes
1963-64	5,000
1964-65	15,550
1965-66	17,710
1966-67	36,570
1967-68	55,510
1968-69	78,830
1970-71	114,430

GOA

23. As mentioned in para one of this chapter, cashew first made its appearance in India in Goa and it has remained an important agricultural produce of Goa eversince. Goa has the ideal terrain and climate for cashew and it has its own processing plants. Though it had originally 80,000 acres under cashew cultivation, nearly 3/4th of the trees have since declined and as such only 20,000 acres, all of which fruit bearings, are at present available. However, the Goa Administration has embarked on an extensive cashew plantation programme and proposes to plant 3 million trees (*i.e.* 30,000 acres) per year, beginning with the current financial year.

24. The total area under cashew cultivation in Goa is as follows:—

	Acres
More than five year old	20,000
To be planted in the remaining two years of the Third Plan	60,000
Total	80,000

25. The estimated production by the end of the Fourth Plan period is as follows: —

	Tonnes
1963-64	6,000
1970-71	8

OTHER STATES

26. The other States in India where cashew is grown to some extent are West Bengal, Orissa, Madhya Pradesh, Gujarat, Tripura and Andaman and Nicobar Islands. The area under cashew cultivation and the total production of cashewnuts in all these States put together are as under:—

Area under cashew cultivation at present	.	10,000 acres
Area under cashew cultivation by 1965-66	.	20,000 „
Production of cashewnuts as on date	.	1,700 tonnes
Production of cashewnuts by 1970-71	.	3,700 tonnes

27. Both by way of acreage as well as raw nut production, the estimates in the foregoing paragraphs would appear to be far from unsatisfactory. But it is observed that, in spite of more than 135,000 tonnes of raw nuts being produced indigenously, 150,000 tonnes of cashew are still being imported from abroad (mostly from Mozambique, Tanganyika and Kenya) to achieve an export figure of a little over 50,000 tonnes of cashew kernels. If all that is produced were to be available for processing and export, we might not have had to import so much raw nut from abroad. This leaves no alternative but to conclude that there exists an unduly high rate of wastage (due to inadequate methods of collection) or indigenous consumption of nuts produced in the country. Only one-third of the total production of nuts seems to find its way into the export market.

The following table explains the position in detail:

(Qty. in tonnes)

Year	Quantity of kernels exported.	Quantity of raw nuts required to produce kernels in col.2 [Col.(2) X (4)]	Quantity of raw nuts actually imported	Estimated quantity of indigenous raw nuts utilised for export. [Col.(3)—(4)]
1	2	3	4	5
1953-54 .	26,630	1,06,520	64,000	42,520
1954-55 .	33,444	1,33,776	85,000	48,776
1955-56 .	30,957	1,23,828	62,000	61,828
1956-57 .	30,781	1,23,124	51,097	72,027
1957-58 .	36,158	1,44,632	99,081	45,551
1958-59 .	40,373	1,61,492	1,25,400	36,092
1959-60 .	38,178	1,52,712	95,916	56,796
1960-61 .	42,927	1,71,708	1,15,480	56,228
1961-62 .	41,087	1,64,348	1,00,246	54,102
1962-63 .	47,781	1,91,124	1,52,846	38,278
1963-64 .	50,179	2,00,716	1,54,939	45,777

28. It will be seen from the above table that in 1963-64 only 45,777 tonnes of indigenous raw nuts were utilised for export. Since 65,000-70,000 tonnes of raw nuts produced in India during that year are reported to have reached the processing factories, 20,000-25,000 tonnes of these raw nuts can be said to have been consumed locally. The remaining 65,000-70,000 tonnes of indigenous raw nuts can be presumed to have been wasted due to inadequate collection facilities. While conceding that a certain amount of domestic consumption is unavoidable it goes without saying that some restraint in the indigenous consumption of this nut is necessary. Further, a good deal of improvement will have to be made in the collection, transportation, marketing and processing of raw nuts grown in the country.

29. It is also clear from the above table that while exports of cashew kernels from India have increased from year to year in the last decade, such exports are sustained mainly by large-scale imports of raw nuts from abroad. It also becomes apparent that the proportion of wastage-cum-consumption within the country is also on the increase from year to year. This becomes all the more obvious considering that in 1956-57 as much as 72,027 tonnes of indigenous raw nuts went into the export markets whereas in 1963-64 this figure dwindled to a mere 45,777 tonnes when there was nothing to indicate that the raw nut production in the country had also declined. This aspect of the problem, therefore, needs to be gone into with great care as otherwise all our efforts at increasing cashew production within the country and cashew kernel exports from the country will be set at naught if there is excessive consumption within the country or if the collection and marketing of raw nuts are not improved and perfected. We would, therefore, like to see the production of 3,28,000 tonnes of raw nuts in 1970-71. However, if concerned to pay the utmost attention to this vital problem.

Stepping up Output

30. That there is an awareness for stepping up cashew production in the country is apparent from the figures of cashew cultivation for the last 5 years and those estimated for the coming 7 years in the various States. It will be noticed that in 1970-71 we shall be in a position to count on raw nut production of 3,28,000 tonnes. But considering that out of the total production of 1,35,000 tonnes today as much as 90,000 tonnes are either consumed locally or wasted due to inadequate collection methods, it is difficult to estimate how much actually would be available for the export market out of the estimated production of 3,28,000 tonnes of raw nuts in 1970-71. However, if strict measures are taken to curtail all wastage and discourage

excessive consumption of cashew within the country, we should be able to depend on at least 1,78,000 tonnes of indigenous raw nuts to be available by 1970-71 for purposes of processing and export—this figure being reached after allowing for a further increase of 60,000 tonnes by way of domestic consumption or wastage, over and above the 90,000 tonnes that are being consumed or wasted at present. Considering that approximately four tonnes of raw nuts are required to derive one tonne of cashew kernels, we can expect to have 44,500 tonnes of indigenous cashew kernels available for export by 1970-71. Since the cashew kernel export target for the Fourth Plan is 65,000 tonnes, we shall still need to import 82,000 tonnes of raw nuts required to get the balance of 20,500 tonnes of cashew kernels.

31. Viewed against the import of 1,55,000 tonnes of raw nuts today and against the enhanced export target of 65,000 tonnes of cashew kernels by 1970-71 (compared to 50,000 tonnes today) the prospect of having to import 82,000 tonnes of raw nuts in 1970-71 should not be looked at with pessimism. Our efforts at increased production should primarily be directed towards ensuring adequate supplies for the targets set our for the Fourth Plan so that we are not left at the mercy of uncertain foreign supplies. Though indications are that our requirements of imported raw nuts in 1970-71 will be reduced to about 82,000 tonnes, we consider that we should not cut our raw nut imports in anticipation of this but that the cut should be based on the actual increase in the indigenous production of cashew and actual availability of indigenous raw nuts for export. The targetted production should not, therefore, be taken as a basis for reducing imports of raw nuts. The production will develop gradually and the Government will undoubtedly have to take into account from time to time not only the progress in the schemes for increase in production but also the important element of reciprocity in trade with foreign countries.

32. It is also to be remembered that at present the cashew processing capacity in India is of the order of 3,00,000 tonnes per annum and a good part of the capacity remains unutilised. Thus, it may be necessary to continue cashew imports also for the purpose of feeding these factories and affording employment opportunities to our under-employed labour. Further, any sudden reduction in the import of this commodity from our traditional suppliers may induce them to start their own processing factories. There are already some indications to this effect. The establishment of processing factories in Portugal and the U.K. and the reported manufacture of an easily installable cashew processing plant by an Italian firm should warn us about

the certain reduction in the flow of raw nuts into India. Once they have their own processing facilities, the East African countries will no doubt be able to export kernels directly to countries which have hitherto been our chief buyers.

Imports

33. There is, therefore, no reason to be unduly alarmed about the level of imports reached so far because even if domestic production is achieved as described above, the country could still afford to continue the present level of imports since the foreign demand can absorb production coming both out of domestic and imported raw nuts. We are convinced that so far as cashew nuts are concerned, the world market, especially the U.S.A., West European countries and the U.S.S.R., can absorb a very much larger quantity than we are planning to export during the Fourth Plan.

34. There is also a further justification for having an import policy in respect of cashew nuts. This arises from the fact that these developing countries in Africa, which are our traditional suppliers of raw nuts, can become more favourable markets for our exports. If, therefore, we do not buy from them, our export of other commodities might be more difficult. Also, while it is not necessary to stress this point very much, the more we export the less will be the necessity for them to process themselves. Any undue reduction in our imports might drive them to certain policies which may not be favourable to India in the long run.

35. While we have cautioned against materially reducing our raw nut imports there is no doubt, considering that even by 1970-71 we shall have to depend on imported raw nuts to the extent of 82,000 tonnes, serious efforts will have to be made for increasing our cashew cultivation and stepping up our cashew production. Since much will depend on the performance of Maharashtra, Mysore and Orissa which have embarked on ambitious programmes of cashew cultivation during the Fourth Plan we suggest that the Joint Consultative Committee of the Ministries of Food and Agriculture and Commerce should watch the progress of cashew cultivation in these States and review their progress from time to time. We also feel that if all that is aimed at by way of production targets is to be achieved, steps will have to be taken to ensure that the targetted additional acreage is actually brought under cashew cultivation by the States. For this every possible assistance will have to be given to the cultivator. It is true that the Central Government as

well as the State Governments are aware of the fact that cashew is a valuable cash crop. But it has not proved sufficiently attractive to the cultivator. Until such time as the cultivator himself realises that cashew is a lucrative commodity he will not make efforts to go out of the way to grow it. At least in the initial stage—which may be for a period of five or seven years—the Government will have to offer sufficient inducements to cultivators to bring more land under cashew production. We understand that one of the important inhibiting factors in this regard is the ceiling on land fixed under the Land Reforms Act. We strongly feel that this artificial barrier should be lifted by the State Governments, as in the case of tea and rubber, so that cashew too can be grown as a plantation crop on a large scale. Further we feel that the present financial assistance by way of a loan ranging from Rs. 80 to 100 per acre, which is offered to cultivators in some of the States, is far too inadequate for the purpose. Unless the State Governments undertake to develop the land themselves for purposes of cashew cultivation, we suggest that intending cashew cultivators be offered an advance of Rs. 200 per acre of which 25 per cent may be an outright grant and the remaining 75 per cent may be treated as loan. However, considering the fact that cashew yield starts only after the 5th year from sowing, the repayment of loans should not start before the 6th year after it is granted and the recovery should be in 8 annual instalments. We also feel that for the same reason interest should not be charged for the first five years and the ultimate rate of interest for the cultivator should be as low as possible and in no case should be more than 6 per cent—the difference, if any, in the interest being made up by the Government itself. The State Governments should also ensure that the existing channels of financing, namely co-operative credit societies and the like, are persuaded to grant loans to cashew cultivators promptly and liberally.

Aid to Cultivators

36. Similarly in the matter of soil fertilisation and pest control, the State Governments should go to the assistance of cashew cultivators if they are not to be deterred by the expensiveness of this item. Some States like Maharashtra have, however, requested that the Centre should finance the schemes. But we feel that a special mixture suited for cashew cultivation be evolved and the Government of India and the State Governments concerned should share the cost, on a 50:50 basis, for the preparation of such a mixture. From the figures of estimated additional area proposed to be covered in the Fourth Plan—figures as supplied by the State Government to the Ministry of Food and Agriculture/the Study Group on Cashew—the total

additional acreage that will be brought under cashew cultivation will be 9,38,000 acres:

Name of the State		Additional acreage proposed to be covered in the Fourth Plan
		Acres
Maharashtra		5,00,000
Mysore		
Forest area	1,50,000 acres	3,00,000
Non-forest area	1,50,000 acres	
Orissa (Including the carry forward of the unfulfilled target in the Third Plan)		1,00,000
Madras		15,000
Andhra		7,250
West Bengal		5,250
Assam		4,200
Bihar		3,500
Tripura		1,750
Madhya Pradesh		525
Andaman & Nicobar Islands		525
	Total-	9,38,000

37. At the rate of Rs. 50 per acre as outright grant and Rs. 150 per acre as long-term loan, funds required for the extension of cashew cultivation during the Fourth Plan will be Rs. 18·76 crores, of which Rs. 4·69 crores will be as an outright grant and Rs. 14·07 crores as long-term loans. It is also felt that since the additional area proposed to be brought under cashew cultivation during this period is so large, the funds earmarked for research and development should be increased from Rs. 52·80 lakhs, already provided for in the Fourth Plan budget to at least Rs. 62 lakhs, including the Government of India's contribution towards the cost of preparing the mixture for soil fertilisation which may be approximately Rs. 10 lakhs. The total financial commitments on the part of the Government of

India for cashew cultivation and development would be as follows:

	Rs. crores
(*i*) Outright grant	4·69
(*ii*) For research and development . .	0·62
(*iii*) For advancing long-term loans . .	14·07
Total	19·38

Since the Plan provisions are just being finalised, we suggest that this matter be taken up with the Planning Commission immediately with a view to including these enhanced figures in the Fourth Plan budget.

38. Considering that cashew exports today are fetching us Rs. 22·50 crores in foreign exchange, which will undoubtedly go up to at least Rs. 30 crores recurring by 1970-71, an initial investment of Rs. 5·31 crores as grants and Rs. 14·07 crores as loans for this important industry should not be considered as excessive

CHAPTER THREE

PUBLICITY AND EXPORT PROMOTION

That cashew kernel exports have gone up in the last ten years by 100 per cent in terms of value and 90 per cent in terms of quantity is proof of the popularity of this delicious nut in the sophisticated markets of the world. We have observed that 55 per cent of casnew exports last year were to the U.S.A., 36 per cent to Europe and the remaining 9 per cent to other parts of the world. Cashew has also been popular because of the fact that it is the least expensive edible nut next to peanut (groundnut). It goes well with coffee or with cocktails and is highly fancied in the preparation of cookies, pastries and puddings. A sprinkling of cashew always enhances the taste of rice preparations, sweet as well as spiced, and cashew can also be used with advantage in the preparation of Indian, European and Cantonese dishes. Curried cashews, cashew baked fish steaks and cashew pies are also figuring in the menus both in India and abroad. There is no fear, therefore, of cashew ever losing its popularity in the homes, restaurants and bars in countries throughout the world. The real problem, insofar as Indian cashew is concerned, is one of competition from other cashew growing areas. India has had the benefit of a head start in the research and development of cashew as well as in the provision of adequate processing plants. The labour employed in Indian cashew plantations and cashew factories is also known to be skilful and experienced. But, with the development of such facilities in other cashew-growing areas of the world, India may face stiff competition from countries which have hitherto been our raw nut suppliers.

Measures

2. We have already pointed out earlier in this report the measures to be taken by the Central Government and the State Governments in India for extending cashew cultivation and improving it through the use of fertilisers, chemicals, etc. In order to maintain adequate outlets for our cashew exports and to enlarge them from year to year, it is imperative that we should not slacken our efforts in publicising and popularising cashew in outside markets. The steps taken by the Ministry of Commerce in establishing the Cashew Export Promotion Council to carry on cashew publicity in foreign countries and to boost exports of this valuable commodity are commendable. The informative and instructive literature on cashew brought out by

the Cashew Export Promotion Council was examined by us. We would like to congratulate the Council on the excellent quality of posters, folders and pamphlets produced by it and on the attractive get up of its Journal. It is also gratifying to note that, in collaboration with cashew importers in the U.S.A., a joint publicity programme has been undertaken by the Council. We were also heartened to hear good reports about the prominent cashew exhibit put up by the Council at the Indian Pavilion at the New York World Fair. But in order to sustain and increase the popularity of Indian cashew in the Western world a continuous programme of publicity and public relations is necessary. It is gratifying to note, therefore, that the Cashew Export Promotion Council is shortly going to set up an Export Promotion Office in Europe with headquarters at Brussels. With the right men incharge of this office and with the necessary backing of the Indian Missions in Europe there is no doubt that this venture will prove highly successful. We would, in fact, consider there is need for a similar office in the U.S.A. where the possibilities for expanding our cashew exports are almost limitless.

Control on Quality

3. We would, however, like to stress the need for keeping a close watch on the quality of cashew that goes out of India as also on the quality of our packing. We have noted with satisfaction that a preshipment inspection for cashew has been instituted by the Cashew Export Promotion Council since April last year. We feel that such inspection should be continued with vigour and deterrent action taken against defaulters. Once we get a bad name it will be difficult for us to regain our place in this competitive field.

4. Proper packaging, attrative labelling and sound merchandising are the essential pre-requisites of present day exports. Haphazard packing and cheap labelling will undo all the efforts put in by way of quality control and export promotion. Because of susceptibility to insect infestation and breakage, our traditional wooden boxes have become out of date and unacceptable. Cardboard cartons with craft paper lining are considered suitable for packing. However, our exporters are said to be experiencing a great difficulty in obtaining cardboard cartons and craft paper as also tin plates required for packing. Since good packing is highly necessary for preserving the freshness and edibility of cashew kernels as also for better storage and transhipment, we would urge the Government of India to provide the necessary quota/import facilities in these items to the cashew industry until such time as we are really in a position to produce these items indigenously and in sufficient quantities.

5. We would like to express our thanks to the various State Government authorities who answered our questionnaire at a short notice and supplied us with supplementary information at the time of personal discussions. We would also like to thank officials of the Cashew Export Promotion Council and the Indian Central Spices and Cashewnut Committee for the publicity literature and statistical information supplied by them.

Chairman

Sd./- P. S. Lokanathan.

Members

Sd./- B. P. Patel.

Sd./- S. Hamid.

Sd./- D. K. Ghosh.

Sd./- N. K. Dutta.

Secretary

Sd./- G. R. Kadapa.

New Delhi,
Tuesday, the 24th November, 1964.

CHAPTER FOUR

SUMMARY OF OBSERVATIONS AND RECOMMENDATIONS

1. Cashew is one of our major foreign exchange earners today, ranking among the ten top export earners and the second biggest dollar earner for India. (Chapter Two. Para 1).

2. Cashew kernel, cashew apple and cashew shell have all their distinctive uses and they all possess rich potential, commercially as well as industrially. (Chapter Two. Para 3).

3. Since only one-third of the total quantity of 1,35,000 tonnes of raw nuts produced in the country is going into the export market by way of kernels, nearly 90,000 tonnes of raw nuts are either consumed or wasted due to inadequate collection facilities, thereby making it imperative for this country to rely on large-scale import of cashew nuts to maintain our cashew kernel imports. (Chapter Two. Para 28).

4. The question of improving and perfecting the methods of collection, transportation and processing of raw nuts should be further gone into by the Government. There should also be restraint on excessive consumption of cashew within the country. (Chapter Two. Para 28).

5. Any wastage of this precious nut or undue consumption of it within the country is detrimental to the interests of our export promotion. (Chapter Two. Para 29).

6. It is heartening to see that there is awareness for stepping up cashew production in all the State. (Chapter Two Para 30).

7. By the end of the Fourth Five-Year Plan, India should be able to produce 3,28,000 tonnes of raw nuts and thus count on the availability of 1,78,000 tonnes of indigenous raw nuts for processing and export after making allowance for 1,50,000 tonnes towards wastage and indigenous consumption. (Chapter Two. Para 30).

8. We consider that we should not cut our raw nut exports in anticipation of the estimated reduction in the import of raw nuts by 1970-71 but on the basis of actual increase in the indigenous production and the actual availability of indigenous raw nuts for export. (Chapter Two. Para 31).

9. We are convinced that so far as cashew nuts are concerned, the world market, especially the U.S.A., West European countries and the U.S.S.R., can absorb a very much larger

quantity than we are planning to export during the Fourth Plan. (Chapter Two. Para 33).

10. Any undue reduction in our raw nut imports from our traditional suppliers might drive them to a certain policy which may not be favourable to India in the long run. (Chapter Two. Para 34).

11. Since much will depend on the performance of Maharashtra, Mysore and Orissa which have embarked on ambitious programmes of cashew cultivation during the Fourth Plan, we suggest that the Joint Consultative Committee of the Ministries of Food and Agriculture and Commerce should watch the progress of cashew cultivation in these States and review the programmes from time to time. (Chapter Two. Para 35).

12. At least in the initial stage, the Government will have to offer sufficient inducement to cultivators to bring more land under cashew production. One important step towards this measure would be to lift the ceiling on land under the Land Reforms Act, as is already done in the case of tea and rubber. (Chapter Two. Para 35).

13. Since the present financial assistance offered to cashew cultivators is far too inadequate, we suggest that such cultivators be offered an advance of Rs. 200 per acre, of which 25 per cent. may be an outright grant and the remaining 75 per cent. may be treated as a loan. The interest on such loans, which should not be more than 6 per cent. should not be charged for the first 5 years. The repayment of loans should be in 8 annual instalments starting from the sixth year or even later. (Chapter Two. Para 35).

14. By way of assistance to cashew cultivators in the matter of soil fertilisation, a special mixture should be got prepared for free distribution to cultivators—the cost of preparing this mixture being shared equally by the Centre and the State Governments. (Chapter Two. Para 36).

15. Considering that 9.38,000 acres of additional land is proposed to be brought under cashew cultivation during the Fourth Plan, a provision of Rs. 19·38 crores will have to be made in the Fourth Plan towards the expenditure on cashew research and development and towards grants and loans to cashew cultivators. (Chapter Two. Para 37).

16. In order to maintain additional outlets for our cashew exports and to enlarge them from year to year we should increase our efforts in publicising and popularising cashew in countries abroad. (Chapter Three. Para 2).

17. While congratulating the Ministry of Commerce and the Cashew Export Promotion Council on the good work that they have done in publicising cashew in foreign markets and in setting up a Cashew Promotion Office in Europe, we consider that there is need for a similar office in the United States where there are vast possibilities for expanding our cashew exports. (Chapter Three. Para 2).

18. In order to ensure a good name for our cashew in foreign markets, the pre-shipment quality control instituted by the Cashew Export Promotion Council should be vigorously enforced. (Chapter Three. Para 3).

19. In order to offer better packaging and merchandising facilities to cashew exporters in India, the Government should assist them with quota/import licences for tin plates, cardboard cartons, craft lining etc. until such time as our country is in a position to produce and supply these items indigenously and in sufficient quantities. (Chapter Three. Para 4).

ANNEXURE I

QUESTIONNAIRE:

1. Total acreage under cashew cultivation sub-divided into—

   (a) Acreage under cashew cultivation which is :—
   (b) one year old.
   (c) two year old.
   (d) three year old.
   (e) four year old.
   (f) five year old.
   (g) more than five year old.

2. The type of soils on which cashew has been planted so far.

3. Proposed increase in the acreage of cashew cultivation during the remaining two years of the Third Plan and during the Fourth Five-Year Plan.

4. Types of soil under which the new cashew cultivation is to take place.

5. Whether cashew cultivation is in contiguous or compact areas or whether it is distributed.

6. The total yield of cashew during the years 1961-62, 1962-63 and 1963-64.

7. The average yield of chashew per acre (in kgs.).

8. Methods adopted in the collection of cashewnuts.

9. Methods employed in marketing the nuts collected.

10. Name of large purchasers of cashew nuts in your State.

11. Average price per kg. secured for these nuts during the last three years.

12. Name of processing units located in your State and their annual processing capacity individually.

13. Mode of transportation of raw nuts from the producing centres to processing units.

14. What percentage of processed nuts in your State is exported out of the country ?

15. Names of exporters of processed cashew kernels in your State.

16. If the processed cashew is not exported out of India how much of it is consumed within your State and how much of it is sent out to other States.

17. What are the factors which come in the way of further extending cashew cultivation in your State and in the availability of nuts ?

18. What are your requirements of fertilisers, insecticides and pesticides required for cashew cultivation ? How are these chemicals procured by you and how are they supplied to the cashew cultivators ?

19. Is there any cash subsidy given by the State Government to cashew cultivators for new acreage to be brought under cashew cultivation ?

20. What are the research facilities available in your State for cashew cultivation and development ?

21. What are the measures of quality control adopted by your State for ensuring the quality of nuts exported out of India?

22. Is there any agricultural cess on the cashew grown in your State ? If so, what is the total amount of revenue collected through this cess ?

23. Is there any sales-tax or purchase tax on cashew, if so, what is its quantum ?

24. What is the total number of persons employed in cashew cultivation in your State ?

25. What is the total number of persons employed in the processing of cashew in your State ?

ANNEXURE II

Discussions held by Sarvashri B. P. Patel and G. R. Kadapa with the Agriculture and Food Department officials of the Maharashtra Government

19th June, 1964 (At Bombay)

1. Shri R. C. Joshi, Secretary, Agriculture and Food Department.
2. Shri Shukre, Deputy Secretary, Agriculture and Food Department.
3. Shri Phednis, Superintendent of Horticulture.

Discussions held by Shri G. R. Kadapa with officials of the State Governments of Madras, Kerala, Mysore and Andhra and with officials of the Cashew Export Promotion Council and the Indian Central Spices and Cashewnut Committee between the 7th and 12th September, 1964.

7th September, 1964 (At Madras)

1. Shri T. Jayadev, Chief Conservator of Forests.
2. Shri K. Sriraman, State Marketing Officer.
3. Shri M. S. Sethuraman, State Marketing Officer.

8th September, 1964 (At Trivandrum)

1. Shri K. K. Ramankutty, Agricultural Commissioner.
2. Shri A. K. K. Nambiar, Additional Secretary, Agriculture Department.
3. Shri Janardanan Nair, Director of Agriculture.
4. Shri Gopalakrishnan Nair, Director, Bureau of Economics and Statistics.

9th September, 1964 (At Ernakulam)

1. Shri T. S. Menon, Vice Chairman, Cashew Export Promotion Council.
2. Shri K. R. Pillai, Secretary, Cashew Export Promotion Council.
3. Shri T. V. Antony, Officer on Special Duty, Cashew Export Promotion Council.
4. Shri E. K. Balasundaram, Secretary, Indian Central Spices and Cashew Committee.

Shri S. G. Ayyadorai, Development Officer, Indian Central Spices and Cashewnut Committee.

11th September, 1964 (At Bangalore)

1. Shri K. Tejappa Shetty, Superintendent Cashew Research Station, Ullal (Department of Horticulture).
2. Shri L. Hanumaiah, Assistant Superintendent of Horticulture.
3. Shri K. Ramagowda, Additional Technical Assistant to the Chief Conservator of Forests.

12th September, 1964 (At Hyderabad)

1. Shri D. V. Reddy, Director of Agriculture.
2. Shri P. S. Rao, Chief Conservator of Forests.
3. Shri L. Venkataratnam, Headquarter Deputy Director of Agriculture (Research).
4. Shri K. Subha Rao, Director of Marketing.
5. Shri Ramanna, Deputy Director of Marketing.
6. Shri Bhujanga Rao, Fruit Specialist.

ANNEXURE

Table showing summary of answers given by the State Maharashtra to the questionnaire issued by the Study Group on

Questions	Kerala	Mysore
1. (*a*) Total acreage under cashew cultivation.	2,12,941	1,42,390
(*b*) One year old . .	Not available	17,421
(*c*) Two year old . .	66,965	19,444
(*d*) Three year old .	1,754	17,730
(*e*) Four year old . .	4,697	23,503
(*f*) Five year old . .	15,336	16,962
(*g*) More than five year old.	1,24,189	47,330
2. The type of soils on which cashew has been planted so far.	(*a*) All soils except under water logged conditions. (*b*) Loose sandy soils with good drainage. (*c*) Laterite soils. (*d*) Soils not fit for growing more remunerative cash crops.	Red, Laterite soil on the West Coast and mixed soil on the plants. Hilly slopes and on waste lands.
3. Proposed increase in the acreage of cashew cultivation during the remaining two years of the Third Plan and during the Fourth Five Year Plan.	(*a*) 3,000 acres (*b*) Fourth Plan period not available.	(*a*) 38,000 acres (*b*) 1,50,000+1,50,000 in forest areas.
4. Types of soil under which the new cashew cultivation is to take place.	Waste land not suitable for cultivation of other crops (maximum such land available 70,000 acres mostly in Cananore District).	Red Laterites soils, mixed soils, hilly slopes and waste lands.
5. Whether cashew cultivation is in contiguous or compact areas or whether it is distributed.	Both compact and scattered areas.	Mostly scattered but mainly in South and North Canara District.
6. The total yield of cashew during the year 1961-62, 1962-63 and 1963-64.	1961-62—84,400 tonnes (raw nuts) 1962-63—90,500 tonnes 1963-64—94,000 tonnes (forecast)	1961-62—8070 tonnes 1962-63—8,220 tonnes 1963-64—8,770 tonnes

III

Governments of Kerala, Mysore, Madras, Andhra Pradesh and Cashew

Madras	Andhra Pradesh	Maharashtra
1,62,000	62,093	3,79,250
Detailed split up not available but less than 5 years old 30,000	Not available	1,16,500
5 to 10 years old 48,000 and more than 10 years old 84,000 acres.	Do.	94,700
	212	94,300
	1,255	60,800
	4,020	2,750
	36,748	10,100
Red, sandy and small areas of back soil.	Sandy soil or other lighter soils.	Hilly terrain in the Coastal belt or similar terrain in Thana and Kolhapur Districts.
(*a*) 56,627 acres	(*a*) 2,900 acres	(*a*) 1,78,000 acres.
	(*b*) 7,250 acres	(*b*) Five hundred thousand acres.
Red loams and Red Laterite soils.	Sandy soils in the Coastal Andhra Pradesh or on red sandy loams in the Telangana Region.	Coastal belt specially Ratnagiri and Kolaba Districts.
Plantation basis 83,452 acres: Scattered basis : 23,327 acres. Forest area (compact) 54,610 acres.	Cashew area is mostly confined to the Sandy Coastal areas where the plantations are contiguous.	Not compact area: small holdings. Mostly in Kitchen gardens.
1963-64—12,500 tonnes	1961-62—not available	1961-62—not available
	1962-63—7,644 tonnes	1962-63—not available
	1963-64—7,653 tonnes	1963-64—5,000 tonnes.

Questions	Kerala	Mysore
7. The average yield of cashew per acre (in kgs.)	600 Kgs. per acre.	100 to 200 kg. per acre.
8. Methods adopted in the collection of cashewnuts.	(*a*) Hand plucking of matured nuts from the trees. (*b*) Picking of fallen nuts.	By engaging labour for picking nuts at 10 paise per kg Smaller plantations work is done by home labour.
9. Methods employed in marketing the nuts collected.	(*a*) Sale by growers themselves to merchants, commission agents or factory representatives. (*b*) Lease of collection to cashew merchants. (*c*) Sale by village merchants to wholesalers or factory owners.	Large producers sell direct to factories or through Cooperative Marketing Societies. Smaller growers sell to touring agents who in turn sell to main agent and from there to factory agents.
10. Names of large purchasers of cashew nuts.	See list in the reply.	All processing factories are buyers. See list of 10 factories in the answer.
11. Average price per kg. secured for these nuts during the last 3 years.	See list in the reply.	1961—60-65 paise pe Kg. 1962—65-75 paise per kg. 1963—80-110 paise per kg.
12. Names of processing units located in the State and their annual processing capacity individually.	See list in the reply. 74,000 tonnes of cashew kernels.	See list in reply. Capacity 35,000 tonnes; quantity handled only 29,000 tonnes.
13. Mode of transportation of the raw nuts from the producing centres to the processing units.	By water-ways and by road.	Mostly by trucks and by boat from North Canara.
14. What percentage of the processed nuts in the State are exported out of the country.	90 per cent.	90 per cent.
15. Names of the exporters of processed cashew kernels in the State.	See list in reply.	See list in reply.
16. Quantity of cashew consumed within the State and quantity sent out to other States.	10 per cent.	Within the State 3 per cent. Exported out side the State 7 per cent.

Madras	Andhra Pradesh	Maharashtra
150 kgs. per acre.	500 kgs. per acre	500 kgs. per acre
Village merchants collect the produce, pool it and take it to assembling market.	See details in the answer.	Hand picking.
The growers sell the produce either to the village merchant or to the agents of the cashew processing units who visit the villages. Commission agents also buy the cashew (Names of Assembling Markets as in the list.)	See details in the answer.	Unscientific and unsatisfactory.
Not available	See details in the answer.	Not available.
1961—Rs. 90 per Qntl. 1962—Rs. 78 per Qntl. 1963—Rs. 75 per Qntl.	See details in the answer.	Not available.
Processing units as in the list to the answer. Processing capacity individually not available.	See details in the answer.	Not available.
By hand carts to Assembling Markets which are usually 5 to 10 miles away.	By head loads, carts and lorries. Occasionally by rail.	Head loads and bullock carts.
34 per cent (Total production of cashew kernels: 3500 tonnes; exports outside the country 1200 tonnes).	Not available	Not available.
The processors are exporters.	No exporters except the factory owners.	Not available.
Total production 3500 tonnes; total exported 120 tonnes; sent to other States 1,500 tonnes; consumed in the State 800 tonnes.	Within the State 30 perc ent. Exported outside the State 70 per cent.	Not available.

Questions	Kerala	Mysore
17. Factors coming in the way of further extension of cashew cultivation.	Extensive cultivation not possible since waste land extremely limited.	Restricted assignment of Government waste land.
18. Requirements of fertilisers and chemicals.	Manuring is not practical for cashew plantations. Research work is in progress.	No special requirements since cashew grown mostly as neglected crop.
19. Financial assistance for new cashew cultivation.	Rs. 100/- per acre advance to cultivators in five instalments for bringing additional area under cashew. No subsidy given.	Seedlings and airlayers should be supplied at 50 per cent subsidy. No cash subsidy given. Long term loans granted.
20. Research facilities	(*a*) Regional Cashew Research Station, Anakayam (Calicut District).	Central Cashew Research Station at Ullal, started 1953.

Madras	Andhra Pradesh	Maharashtra
The area suitable for cashew cultivation is the limiting factor. Further extension, however, is being attempted. (See list in the answer).	Nil.	(*a*) Lack of knowledge on the part of cultivators about the value of cashew as a cash crop. (*b*) Temptation to consume cashew as a vegetable. (*c*) Paucity of funds with the Government for manuring and plant protection campaigns in respect of cashew.
2460 tonnes of ammonium sulphate and 2460 tonnes of muriate of potash (1/2 Kg. of ammonium sulphate and 1 1/2 kg. of muriate of potash per plant. The Agricultural Deptt. meets the fertilisers and pesticides as per any other crop.	No special requirements.	Fertilizers and plant protection chemicals to the tune of Rs. 68,56,640 during the remaining two years of the 3rd Plan will be required. The State Govt. would seek Central Govts'. financial assistance in this regard.
Long term loan of Rs. 80/- per acre advanced.	No cash subsidy, but long term loans to prospective cashew growers at Rs. 100/- per acre upto a maximum of Rs. 2000/- per individual. (Rs. 1,50,000/- per year allotted by ICAR purely for cashew development.	No subsidy, but Rs. 100/- per acre long term loan granted for new cultivation.
Research station recently established at Kuppanathan in South Arcot Dist. which is the leading cashew area. This Station is run by Govt. with 50 per cent grant from ICAR. There is also a Cashew Research Station under the State Sericulture at Vandabur.	A Cashew Research Station at Bapatla working since 1954.	A Cashew Research Station at Vengurla in Ratnagiri District.

Questions	Kerala	Mysore
21. Quality Control	Cashew Export Promotion Council have started their own quality control from 1-4-1963 through issue of certificates under the "Cashew Products Export Grading and Marketing Rules".	This is done by C. E.P.C.
22. Agricultural Cess, if any	Nil	No agricultural cess
23. Sales tax or purchase tax	A sales tax of 10 percent	2 percent purcha tax is paid on the raw nuts. Since the last purchaser has to pay the tax it is the manufacturer who pays this tax. There is no sales tax on cashew.
24. Total number of persons employed in cashew cultivation.	About 20,000	There is no regular employment of labour for cashew cultivation. Mostly home labour.
25. Total number of persons employed in processing of cashew.	78,300 persons (under the labour Act children cannot be employed in the factories).	8600 persons.

Madras	Andhra Pradesh	Maharashtra
Not available since no exports take place from Madras port but only from West Coast.	Kernels graded according to Agmark specifications. See details in the answer.	Not available.
Not available	Not available	Not available.
Not available	Not available	Not available.
8,957 holdings.	Not available	Not available.
160 persons (16 units with an average of 10 workers each).	The industry is a part time industry having work only for 5 to 6 months in a year. The labour employed in general by this industry is approximately 1200 including men and women.	Not available.

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