

Tamarind:

Tamarind is of immense food value especially in the southern districts of Orissa and other southern states of India. Apart from being used in preparing pickles, charu, and juice, tamarind has a number of medicinal uses like maintaining body temperature and digestion. Besides, in some places tamarind seed powder is used as cattle feed.

Tamarind is a major source of livelihood for forest dwellers in the districts of Gajapati, Raygada and Koraput. The collection from the two forest divisions is more than half of the total tamarind production in the state. There is a strange ecological correlation between tamarind and paddy production in the state. Both quantitatively and qualitatively tamarind has three types of production, bumper, medium and lean. Experience shows that rice production is inversely proportional to tamarind. In a bumper year for tamarind, rice production is relatively less than medium and lean years of tamarind. This means during rice scarce year tamarind takes care of subsistence.

Collection and Processing

Collection generally starts in the month of February-March and continues till June. Tribal collect raw tamarind and sell it to authorised agents at the rates fixed by government. They are collected from government forests, privately owned trees as well as from community lands. During a high production or bumper year, one person working from 7 in the morning to 4 in the afternoon can collect 30 - 50 kg of tamarind. Collection of tamarind does not require special skills which means even children along with women can collect.

Tamarind has a tremendous scope for value addition at primary level. Though such local level processing of tamarind by primary groups and community institutions is common in tamarind-rich zones of southern Orissa, there was hardly any incentive for these initiatives because of the policy restrictions on storage and marketing till recently. There have been a number of such initiatives for value addition by cooperatives of primary groups at various levels.

Processing of tamarind normally means deseeding and removing paru (or chera in Oriya). Normally in terms of weight 2 kg of raw tamarind yields 1 kg of processed tamarind that is sold to the local trader in Rs. 9-10/ per kg.

In all the tamarind rich areas where the dependence on tamarind is heavy, primary collectors

encounter a strange problem vis-à-vis the buyers or their agents. During the sale, if the weather condition is cloudy or overcast they are accused of putting water in their products to inflate the weight. In such a situation, the agent counts every 10 kg as 8 kg and as a result, tribal lose 2 kg in every 10 kg. The decision of the agent regarding the quality of the tamarind is final and there is no authorized Govt. agency to check whether the allegations are true or not.

Tamarind production in Orissa is substantially high, more than 10000 MT per season on an average (figure - 15). But in the last decade (except 1994-95 and 1996-97), tamarind production has gone down to 7500 MT per season. There are a number of reasons for decreasing rate of production of tamarind. For example, due to the inactivity of authorised leaseholders, large chunk of tamarind is ciphered away in the alternative market without getting entered in the Govt records.

Production and Pricing

Figure : Tamarind Production (in MTs)

Fig.15- Tamarind Production (in MTs)

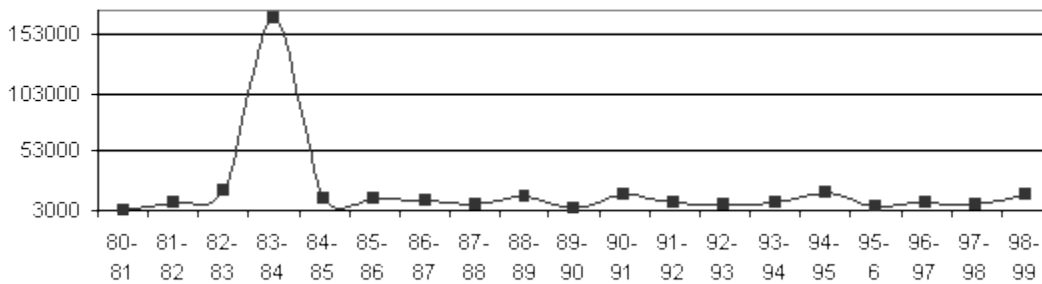
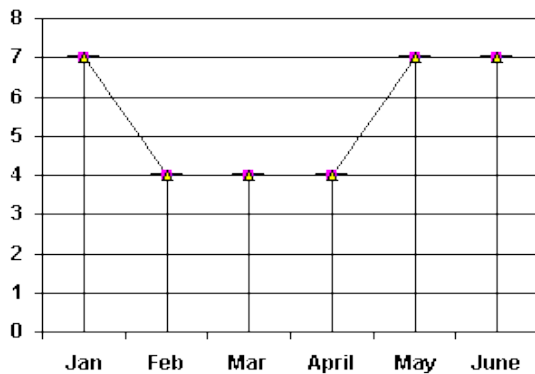


Figure : Average Informal Rates of Deseeded Tamarind in 1998 Crop Year in the districts of Gajapati, Raygada and Koraput.



Policy and its Impact

Like any other non-nationalised forest produce, tamarind trade operated in the normal procedure of monopoly lease till March 2000. TDCC was the major leaseholder of tamarind and reportedly made a good profit in the produce. Apart from TDCC, Kalinga Tamarind Products Ltd. operated in three ranges of Rayagada forest division. Though monopoly was withdrawn, at the operational level it existed denying processing and storage rights to the tribal. Since tamarind could be easily processed at the household level, rights to process and store beyond a mere 100 kg could possibly add to household income. Interestingly, though monopoly rights given to the Govt. Corporations were withdrawn, the long-term monopoly trade agreement with private parties existed.

Besides, one of the pressing issues in tamarind trade was non-functionality of authorised leaseholders like TDCC. Tamarind production is very high in the southern districts of Orissa and consumption needs of bordering districts of AP are dependent on it. So there is always a possibility of tamarind being smuggled across the State because of the relatively small and closed market. Apart from the alternative market, tamarind that should have ordinarily been sold to TDCC is sold to GCC.

Local middlemen and sahuikars, who have gained the status of 'friend in need' for tribal, especially when TDCC or other authorised leaseholders refuse to buy, operate the trade, which was illegal till March 2000. Interestingly, tamarind trees are sold at throwaway prices to sahuikars at a time when the fruit is not even half ripe. These sahuikars use the same tribal to pluck ripen fruits and apparently the labour charge for plucking fruits is included in the previous deal when the trees are sold. Besides, the other channel of trade is smuggling out of the State.

In Gajapati district, there exists a trading community called Kampu, natives from AP who shuttle between the two states. This community by virtue of knowing both languages play a major role in shipment of tamarind across the border. Similarly, in Koraput district, most of these illegal trades are done by the SCs who are a powerful trading community. Tribal, on the other hand, fail to excel in such trade and suffer. According to them SC communities are smarter and that is the reason for their survival in this kind of trade.

This consistent and constant failure of the leaseholders in the realisation of the development objectives of monopoly has not only created an undue dependence of the primary collectors on these alternative markets but these markets have become a familiar feature in rural forest economy. Besides, absence of a fair market support, in many parts of the State, has forced the primary collectors to sale in throwaway price. This problem of alternative market and distress sale is particularly acute in bordering districts.

The situation has changed since March 2000, when Tamarind was among the NTFP, the ownership rights of which have been handed over to the Panchayat. Only marginally, as the trade done by the local traders have now become legal and primary collectors continue to get low prices. In the first year post new policy, the prices dived to Rs. 1-2 a Kg in most of the areas where Tamarind is traded in Orissa. However, the prices rose a bit in the year 2002 when the price hovered between Rs. 2- 4. Interestingly, in the year 2001, in the neighbouring states of Chhatisgarh and AP, the price of Tamarind was much higher between Rs. 4-6. This was due to the administered price by GCC in AP and the Imli Andolan in Bastar. The traders made good of this opportunity of differing prices and made a lot of money.

Issues in the trade

Especially for the non-nationalised NTFP there is no structured or organised trade route and so also the institutional set up or arrangement for the trade. Based on the demand in the market and variation in profit margin the institutional arrangements are made for the trade. For the produces like Harida (Harra), Beheda and Sal seed the demand in the market has declined because of several reasons. Important among them is the increased use and acceptance of their substitutes. In case of other produces too there is a declining trend in the demand market.

The market for NTFP is virtually in the hands of private traders and it is very complex to understand and predict. There is no adequate data available for proper analysis of the

production and trends in marketing. The private traders really decide the price factor and the procurement strategies, targets, geographical areas to be covered under the trade. Efforts were made to analyse the prices for different NTFP in seven districts through sample studies (refer table 3.2). There is a substantial variation in the procurement prices of the same produce in different markets, which is basically determined by the local traders and their agents. This difference is more visible in case of Amla, Harida and Beheda. The regulatory mechanisms of the government have failed to ensure better prices to the primary collectors. In case of some of the produces there are a number of intermediaries, which make the trade more complex. More the number of intermediaries, lesser are the margin distributed among them. But it is not always that the primary collector does not just loose by the fact that there is more number of intermediaries in the chain.

Table - Price of forest produces in seven different villages of seven districts

Produce	Districts (Village)						
	Sundergarh (Kusumdihi)	Sambalpur (Badnuagaon)	Gajapati (KontaiKulir)	Keonjha (Janjali)	Mayurbhanj (Hatigoda)	Bolangir (Matiapali)	Bargarh (Jarjagada)
Aonla	Rs. 2.50-3			Rs.5	Rs.3		Rs.6-7
Mahula Seed	Rs.5-7	Rs.7	Rs.5	Rs.6	Rs.7-8	Rs.6-8	Rs.4-5
Mahula Flower	Rs.3-6	Rs.2-5	Rs.3-4	Rs.7-8	Rs.4-9	Rs.3-6	Rs.5-6.50
Char Seed	Rs.8-10	Own Consumption	Not Available	Rs.15	Rs.20	Rs.10-12	Rs.15-20/ point
Sal leaf plates	Rs.7/ per Chaki (80 plates)	Rs.7 per Chaki	NA	Rs.10 (100 plates)	Rs.10 (100 plates)	Rs.8 (80 plates)	Rs.8/100 plates
Tamarind	NA	NA	Rs.5-7	No buyer	NA	NA	NA
Hill Brooms	NA	NA	Rs.12-15	NA	NA	NA	Rs.6
Harida	Rs.1	No buyer		Rs.4.50	Rs.2	Rs.1	Rs.2.50

Neem seed	NA	NA	NA	NA	NA	Rs.4	Rs.6-8
Honey	NA	NA	NA	NA	Rs.40	NA	Rs.40
Sal Resin	Rs.25	NA	NA	Rs.32-42	Rs.12-15	NA	Rs.30
Behada	50paisa- Rs.1	NA	NA	Rs.2.50	Rs.3	50 paisa- Rs.1	Rs.1
Kusum	Rs.2.50	NA	NA	NA	Rs.3	NA	NA
Siali leaves	NA	NA	NA	NA	Rs.50-1000	NA	NA

Source: Field study

It could be noticed that the traders and the intermediaries are having their network to procure NTFP from the accessible areas. In many remote villages, where there is a high potentiality of a variety of NTFP but the primary collectors don't collect many of them as there is no buyer available in their locality. Gradually there is a distinct shift in the economic activities revolving around NTFP to petty wage work in other sectors. In the bordering areas NTFP trade gets more significant attention, as there is variation in price. There is poor control or regulatory mechanism for inter border trade. Most of the trade runs illegally. There is also misconception in people that they get more prices across the border. In reality they work more and get less if the transaction cost is properly calculated. After the devolution of power to the Gram Panchayat the trends in the market have not yet changed, it still favours the traders and intermediaries.