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Natural rubber production and its Import- Export Policy

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Abstract: Self-sufficiency had been the main focus of development plans in NR sector till the last decade. Though importance of self-sufficiency cannot be reduced, competitiveness and sustainability have to be considered while setting up goals and formulating strategies pertaining to Rubber production in the country. NR consumption in the country in 2030 is projected at around 2.00 million tonne. It is envisaged that the domestic production is able to meet at least 75% of the NR requirement in 2030. In order to attain the projected production, average annual new planting and replanting would be to the tune of at least 8,000 ha and 10,000 ha respectively. Efforts would be made to get all the available mature area under rubber tapped.
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Introduction

Natural rubber is a critical and strategic industrial raw material and will remain so in the foreseeable future. Natural rubber is grown primarily in landholdings that are owned by small growers. Majority of rubber processing is also done in a decentralised manner in small farms. Therefore, notwithstanding the status of NR being a crucial industrial raw material, the possibility of treating NR as an agricultural product for all practical and legal purposes and income from rubber production as agricultural income would be explored in consultation with the Ministry of Agriculture & Farmers Welfare and Department of Revenue. Different stakeholders have pointed out that NR, being an industrial raw material or not included under the Agreement on Agriculture (AoA) of the WTO, has nothing inconsistent with its status as an agricultural product for domestic policies.

Sustainability in Production

Self-sufficiency had been the main focus of development plans in NR sector till the last decade. Though importance of self-sufficiency cannot be reduced, competitiveness and sustainability have to be considered while setting up goals and formulating strategies pertaining to Rubber production in the country. NR consumption in the country in 2030 is projected at around 2.00 million tonne. It is envisaged that the domestic production is able to meet at least 75% of the NR requirement in 2030. In order to attain the projected production, average annual new planting and replanting would be to the tune of at least 8,000 ha and 10,000 ha respectively. Efforts would be made to get all the available mature area under rubber tapped.

Complementary growth of all links of Rubber

Industry value chain There would be an orderly and complementary growth of all links in the Rubber Industry Value Chain viz., NR production and processing, manufacturing of tyres and general rubber products, trading, ancillary activities etc. Focussed efforts would be taken at synchronizing all initiatives and attempts towards growth of rubber industry as a whole.

Centre and State synergy

Efforts would be made for holistic planning and execution of rubber development programmes as per the present economic realities. Centre-State synergy will be promoted for collaborative and coordinated approach on policy and strategy formulation, implementation of programmes and projects, institutional arrangements and financial mechanisms in all aspects of rubber value chain development. Constitution/ presence of a State Task Force on Rubber 12 may also provide the additional impetus for resolving issues at State level and taking up specific rubber development activities.

Import- Export Policy

Due to deficit in the domestic market, low prices for some forms of rubber in the international market, price fluctuations and quality/technical considerations, NR import has seen a significant rise over the years. Recognizing the sensitiveness of NR import in terms of its impact on domestic price and raw material supply for end user industries, import policy on NR should accord protection to rubber growers against unwarranted imports adversely influencing domestic prices, and at the same time ensure availability of the raw material for consumers at affordable prices. Elimination of inversion in tariffs may be important for increasing

global competitiveness of Indian rubber products manufacturing sector but parity in tariff with other comparable commodities, implications on production and future availability of NR, livelihood concerns of small and marginal farmers etc., will also have to be taken into consideration. NR is not a traditional export oriented commodity and export may be promoted only to adjust temporary demand-supply imbalances in the domestic market, reflected in lower domestic prices. The brand "Indian Natural Rubber" distinguishing Indian rubber in the international market with its assured and consistent quality parameters may also be promoted.

Revamping Institutional Framework

With a view to streamline the objectives envisaged in the Rubber Policy and also to promote "Ease of Doing Business", the functioning of the Rubber Board would be aligned with the policy requirements. It is desirable that the role of the Government is more of facilitation and promotion rather than control and regulation, enabling relevant industries to grow and function in a competitive environment based on market forces. Harmonization with other relevant policies and laws would also be facilitated to address the concerns in the rubber sector on issues such as security of land and assets owned by rubber plantation companies, restrictions on felling rubber trees, transit rules, etc.

Integrating Climate Change Concerns

Climate Change with its three major dimensions of global warming, increasing seasonal weather variability and higher incidence of extreme/unusual weather events will have impact 13 on rubber plantations in the future. Rubber Research Institute of India (RRII) has reported that if the present warming trend continues, NR productivity in Kerala could be reduced by 4% to 7% and that in North East could go up by as much as 11% in the next decade. The change in climate also has its effects on incidence of diseases in rubber plantations. Focused research on Climate Change on assessing climate risk vulnerability and developing climate resilient technologies for adaptation and mitigation protocols would be taken up to address the challenges.

Area expansion

Plantation of Rubber in traditional rubber growing regions comprising Kerala and Tamil Nadu has reached near saturation. However, in the non-traditional rubber growing regions, especially in the North Eastern States there is ample scope for increase in area under rubber cultivation. As per the present estimates, more than 500,000 ha. of area is available for plantation in non-traditional areas. However, food security, forest and biodiversity conservation, edaphic & climate conditions and other socio-economic factors will have to be given due consideration for identifying suitable areas for rubber cultivation. Extension services coupled with financial assistance is vital in motivating growers to take up rubber cultivation. Adequate planting subsidy would be given for incentivizing rubber plantation. Priority would be given to marginal and small growers belonging to the resource poor communities. Use of modern technology in planning and implementation in areas such as assessment of potentially suitable areas for cultivation, advisories to rubber growers and provision of extension services, etc. would be promoted. Monitoring and outcome assessment would be regularly carried out using Information & Communication Technology (ICT) enabled tools. Another very important aspect is the institutional makeover, including infrastructure support of the Rubber Board in the non-traditional regions, to evolve an integrated approach towards development of rubber along with promotion of other farm livelihood and rubber integrated agro-forestry systems. Rubber based integrated farming systems would be developed taking into consideration location-specific factors. Such trials have been taken up in major rubber producing countries including Thailand and Malaysia, though adoption rate is not considerable. Efforts would be made for better networking and collaborations between the various line departments of the State and the Central government to make rubber plantations successful in the non-traditional areas.

Replanting of senile rubber areas

The share of rubber plantations in the highest age group of above 20 years is around 20% in the country based on historical planting trends, extending to around 1,60,000 ha. Out of this, around 30,000 ha needs to be replanted immediately to maintain age composition due to delay in replanting. The remaining rubber plantations will have to be replanted during the next decade. Apart from age of the trees, realised yield, tapping intensity followed and prices of rubber and rubber wood influence replanting. The focus in traditional regions would therefore be on systematic replanting of senile plantations with high yielding and disease resistant varieties. The extent of replanting would be increased in non-traditional regions in future. The annual replanting would be more than10,000 ha in a long term perspective. In order to promote plantation and replantation, the pattern of assistance provided by the existing schemes would be reviewed from time to time.

Productivity enhancement

Productivity of rubber plantations in India is one of the highest globally. However, growing market uncertainties and high labour costs have a direct correlation with productivity of Rubber plantations with people resorting to abandoning mature productive rubber areas. Formulation and adoption of appropriate agronomic practices and concerted extension strategies are required to be resorted to enhance productivity of rubber plantations. One of the key factors determining productivity is quality

of planting materials. Capacity of existing departmental nurseries under Rubber Board would be fully utilised for propagation of genetically superior and quality planting materials and budwood of clones developed by RRII and supplied to growers. RPS and SHGs may be provided financial and technical assistance for setting up nurseries. Certification of private nurseries for propagation of high yielding cultivars should be promoted.

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