



OUTLOOK FOR INDIAN NATURAL RUBBER PLANTATION INDUSTRY



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Natural Rubber (NR)- significance

➤ Unique features

- Strong
- Flexible
- Water proof

➤ Raw material in more than 40,000 products

- Latex based
- Dry rubber based

➤ Main NR yielding plant

- *Para rubber tree (Hevea brasiliensis)*- 99%

Other NR yielding plants

- *Guayule Rubber- Parthenium argentatum*
- *Ceara Rubber – Manihot glaziovii*
- *Panama Rubber- Castilla elastica*
- *Assam Rubber- Ficus elastica*

Versatile benefits of rubber cultivation

- **Livelihood support-** through employment and revenue generation
- **Rural development-** by way of rubber based industrial establishments
- **Ecological benefits-** enriches soil's organic matter by litter recycling, prevents soil erosion, greening etc
- **Climate resilience-** Natural green cover and Carbon sequestration potential comparable to natural forests

Rubber plantation resource

➤ **Natural Rubber (NR)**

- Latex
- Sheet Rubber
- Cup Lump leading to Block Rubber

➤ **Rubber Wood**

- Furniture, panels, parquet, charcoal, wood fuel etc

➤ **Honey**

- Medicines, Cosmetics, Food

➤ **Rubber Seed oil**

- Paint & soap industrial use, bio diesel etc

Indian Rubber Plantation Industry

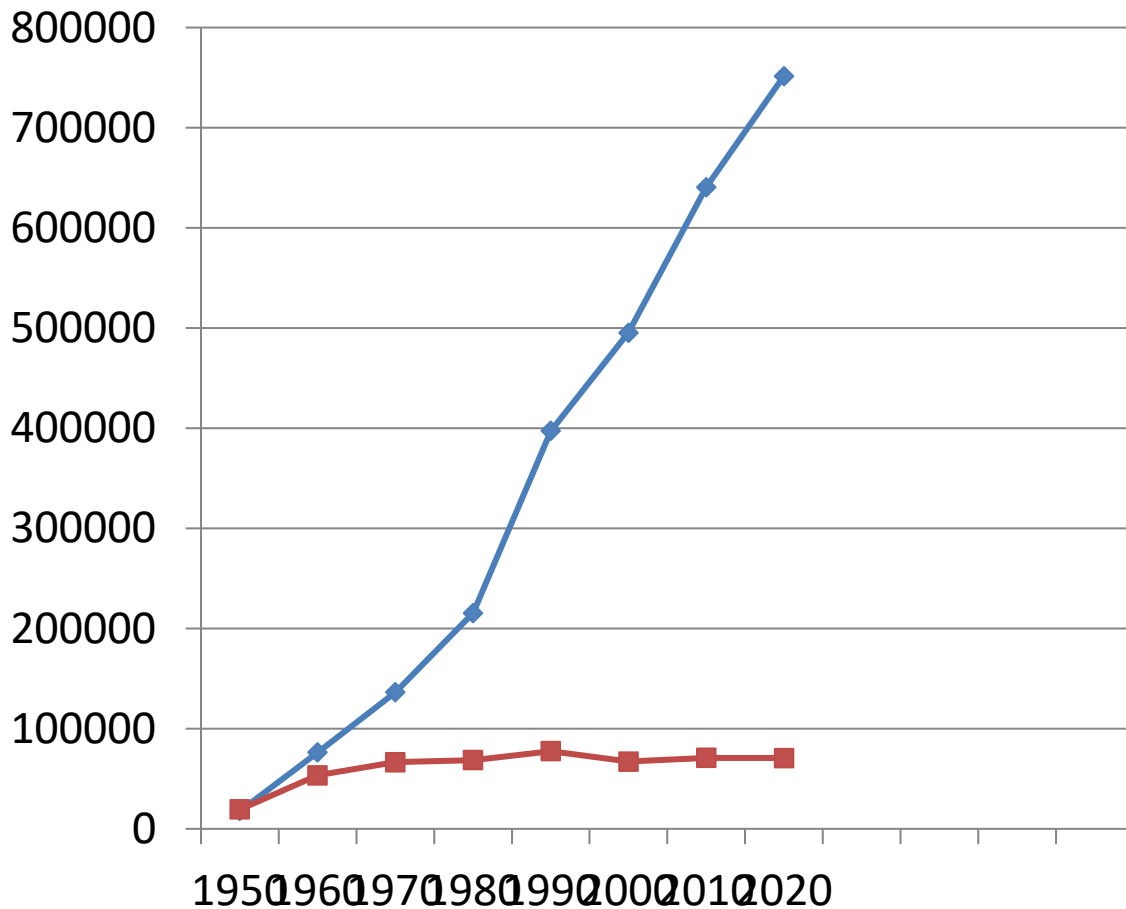
Major mile stones.....

- Experimental efforts initiated in 1873 at the Calcutta Botanical Gardens
- Commercial cultivation introduced by British planters
- The first commercial Hevea plantations established at Thattekadu in Kerala (1902)
- Early period on plantation scale
- 1958 onwards largely on small scale basis
- Presently, small holders dominate the sector

Decadal growth of Rubber plantation sector- Estate & smallholding (No.of units)-1950 to 2020

Year	Number of units	
	Smallholdings	Estates
1950	13472	457
1960	57174	547
1970	110929	649
1980	236000	553
1990	781000	332
2000	992000	316
2010	1190000	550
2020	1320000	534

Decadal growth of Rubber plantation sector- Estate & smallholding (Area in Ha)- 1950 to 2020



Year	Area (Ha)	
	Smallholding	Estate
1950	17826	19421
1960	76375	53530
1970	136425	66673
1980	215443	68723
1990	397465	77618
2000	495358	67312
2010	640600	70960
2020	751650	70850

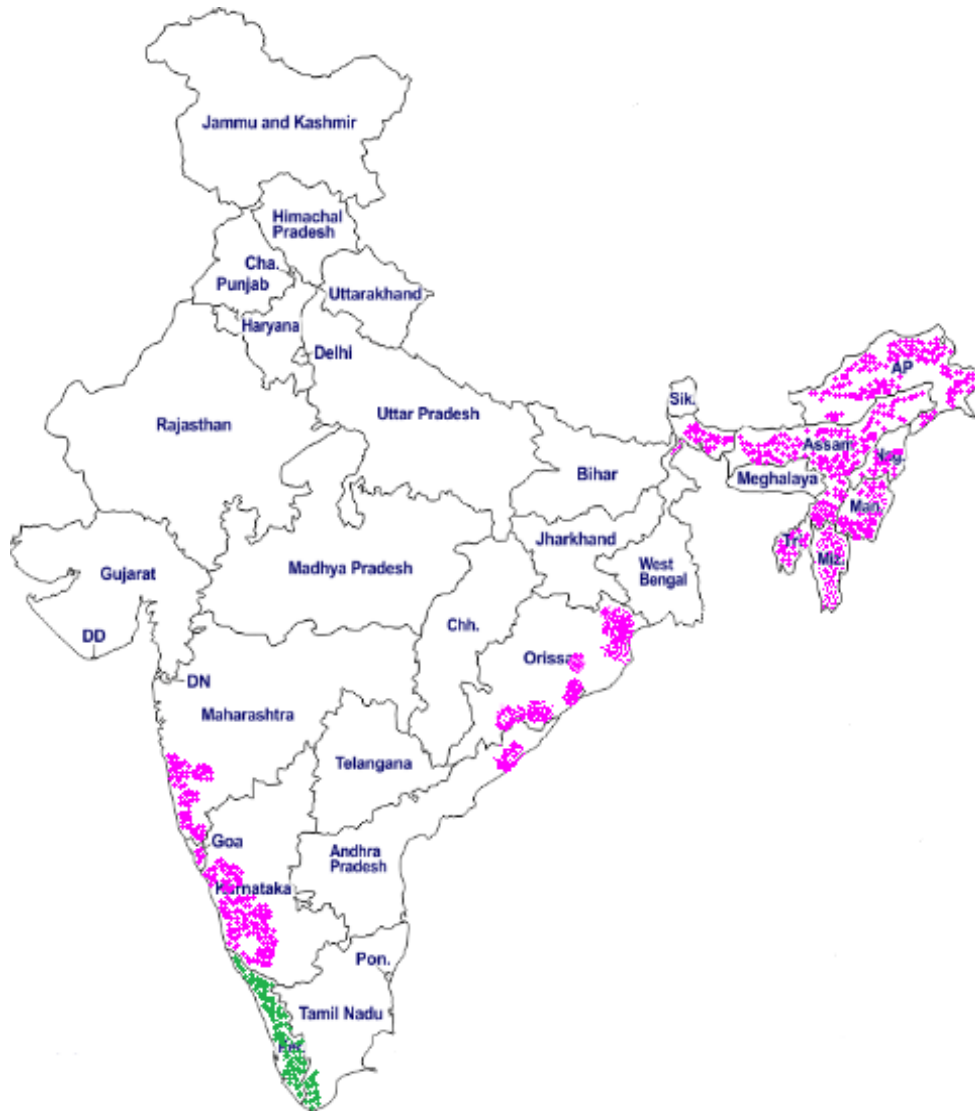
◆ Small holding-Area (Ha)

■ Estate- Area (Ha)

Present scenario

- Grown in 16 states and one UT
- Total Number of estates- 534
- Total number of small holding units-1.32 million
- Total Area under estates-70850 Ha
- Total area smallholdings- 751650 Ha
- Grand Total- 822500 hectares
- Share of smallholdings- 91% (Area); 92% (Production)
- Small growers- owners possess less than 10 hectare
- Average holding size- 0.57 ha

Rubber Growing States



Traditional Area

Kerala & Tamil Nadu



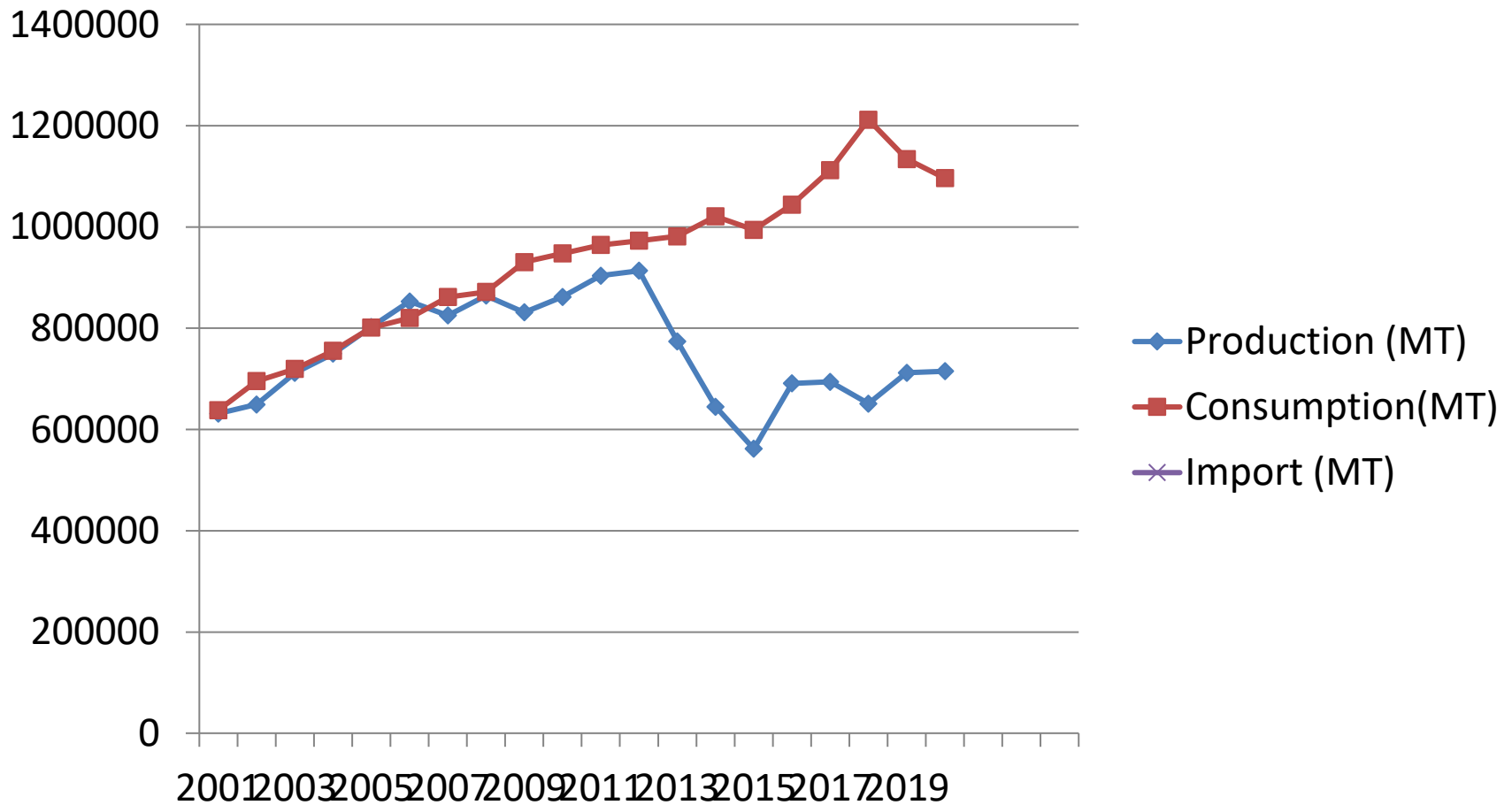
Non-traditional areas

Karnataka, Maharashtra, Goa, Andhra Pradesh, Odisha, West Bengal, Andaman & Nicobar Islands

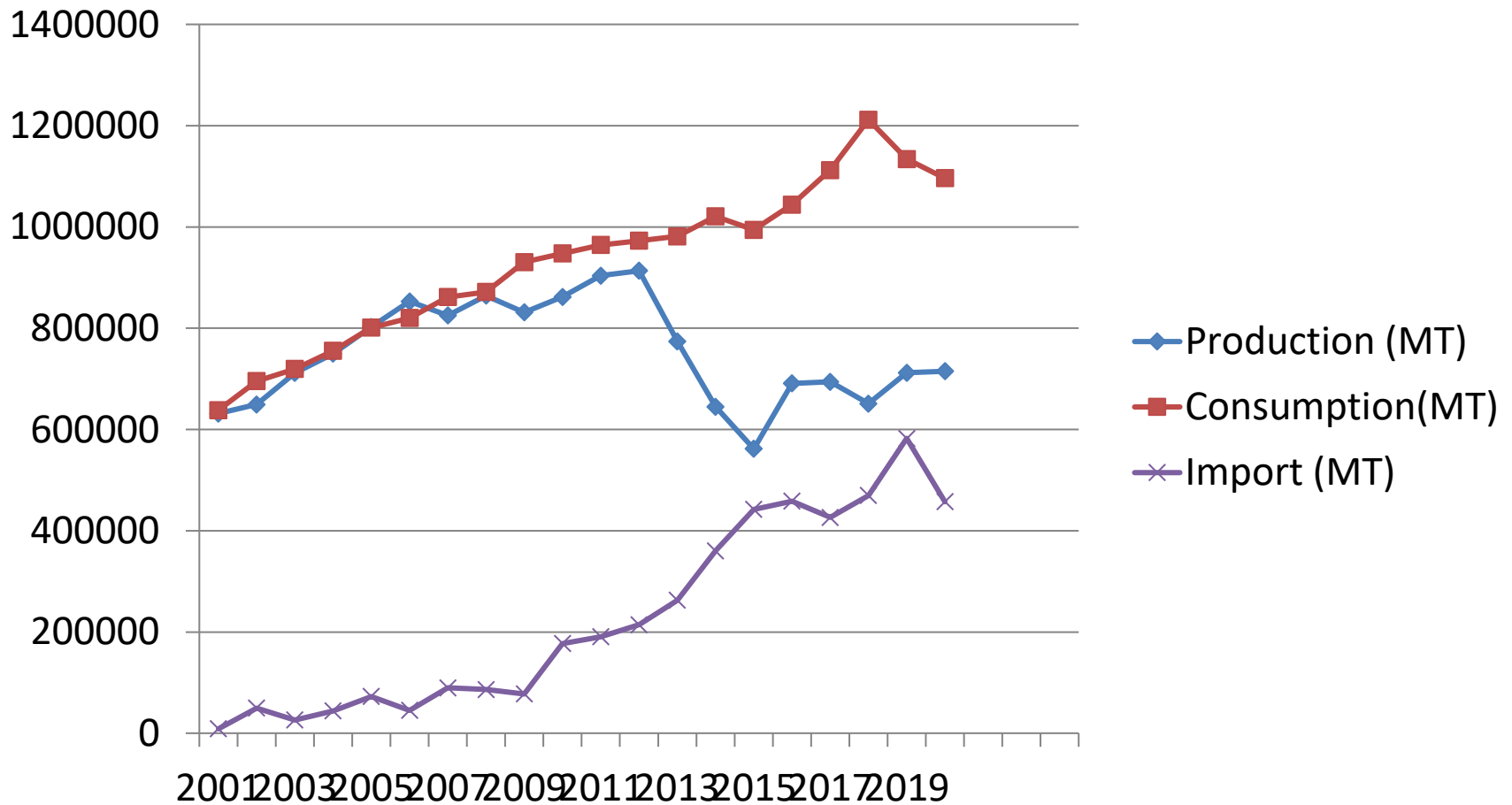
Northeastern States

Tripura, Assam, Meghalaya, Nagaland, Arunachal Pradesh, Mizoram, Manipur

Production & consumption of NR (2000 to 2020)



Production, consumption & import of NR (2000 to 2020)



Global Ranking

- Sixth largest producer of NR in the world
 - Domestic NR production- 715,000 MT (2020-21 Provisional)
- Second largest consumer of NR
 - Domestic NR consumption- 1096410 MT (2020-21- Provisional)
- Global market share
 - Production- 5.3%
 - Consumption- 8.2%

India is a net importer of NR

Outlook for Indian Rubber Plantation Industry

Self Reliance in NR Production

➤ Goal

Self reliance in NR production and sustainability of Indian rubber plantation sector

➤ Focus

- Reorientation of activities towards Self reliance in NR production
- Human resource development for global competitiveness
- Management of rubber related knowledge through advanced Extension and Advisory Services (EAS)
- Fostering linkages and collaborations with public, private, national and international organizations

Self Reliance in NR Production

Strategies

- Generation of advanced planting materials of regional specific clones for better adaptation
- Area expansion (New planting) & replanting of uneconomic holdings
- Promotion of Good Agricultural Practices (GAP) for Productivity enhancement in existing plantations
- Reformation of harvesting systems for economy of scale
- Human Resource development- Skill development of stakeholders
- Cluster development and empowerment
- Women empowerment
- Quality improvement of primary produce
- Marketing facilitation
- Advanced Advisory and extension services
- Integrated farming for sustainable livelihood
- Sustainability of Indian Natural Rubber plantation

Scope under Trees Outside Forest (TOF) Certification

- The Network for Certification of Conservation of Forests (NCCF) has developed the certification standard for the TOF resource in India
- TOF in Indian context consists of
 - agro forestry
 - urban trees and forests (UTF)
 - scattered trees in farmland/homesteads, trees along roads, canals, railway lines
 - orchards/gardens
- One of the “non-forestry” tree plantations/TOF of potential interest established by the agricultural sector is Rubber

NCCF certification

➤ Benefits

- Establishment of new units

➤ Targets

- Enhance production level through sustainable management
- Ensure better markets and premium price for certified products
- Facelift of rubber wood industry
- Supplement the database of rubber area
- Active participation of consuming industry

Challenges in implementation

- Large number of individual units
- Scattered units across 16 states
- Rubber holdings are mostly private owned, small and marginal farmers, large farmers, communities, companies or Private/Government undertakings
- Dominance of small, marginal/tiny holdings (1.32 million)

Opportunities

Clauses under Cooperative/federation/NGO Driven model (NCCF)

- “A number of farmers themselves may constitute a cooperative and can undertake management and certification process of their trees”
- “NGOs working for farmer welfare can take a lead in organizing and supporting TOF certification”

(This will reduce the individual cost of certification and ensure better negotiating power for farmers to sell their products)

Way forward

Farmer associations in rubber plantation sector

➤ Rubber Producers Societies (RPS)

Village level voluntary organization of 50 to 200 rubber farmers (NGO/cooperative working nature)
Present status-more than 2500 functional RPS

➤ Companies in RPS sector

Jointly promoted by Rubber Board and RPSs
Shareholders- RPSs and the Rubber Board
At present there are 17 companies

These organizations can take a lead in organizing and supporting TOF certification in Rubber plantation sector

➤ Scope for investment of entrepreneurs in private sector

A photograph of a rubber tree plantation. The trees are arranged in rows on a grassy slope. Each tree has a black latex collection cup attached to its trunk with a white string. The ground is covered in green grass and some small plants. The sky is overcast.

THANK YOU