

# Tobacco Industry in India

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## Abstract

Agriculture, with its allied sectors, is unquestionably the largest livelihood provider in India, more so in the vast rural areas. It also contributes a significant figure to the Gross Domestic Product (GDP). Sustainable agriculture, in terms of food security, rural employment, and environmentally sustainable technologies such as soil conservation, sustainable natural resource management and biodiversity protection, are essential for holistic rural development. Indian agriculture and allied activities have witnessed a green revolution, a white revolution, a yellow revolution and a blue revolution.

Tobacco is one of the most economically significant agricultural crops in the world. It is a drought tolerant, hardy and short duration crop which can be grown on soils where other crops cannot be cultivated profitably. In India, Tobacco crop is grown in an area of 0.45 M ha (0.27% of the net cultivated area) producing 750 M kg of tobacco leaf. India is the 2nd largest producer and exporter after China and Brazil respectively. The production of flue-cured Virginia (FCV) tobacco is about 300 million kg from an area of 0.20 M ha while 450 M kg non-FCV tobacco is produced from an area of 0.25 M ha. In the global scenario, Indian tobacco accounts for 10% of the area and 9% of the total production.

**Keywords:** Tobacco, livelihood, rural development

## Introduction

The tobacco industry of India employs about 36 million people in farming, labour activities, manufacturing, processing and export activities. Compared with other tobacco manufacturing countries, India has low production, farming and export cost, making it a popular industry. The Indian manufactured tobacco has an edge over the other tobacco producing countries in terms of lower levels of heavy metals, Tobacco Specific Nitrosamines (TSNAs) and pesticide residues.

India's major tobacco manufacturing states are Gujarat, Andhra Pradesh, Uttar Pradesh, Karnataka, West Bengal, Telangana and Bihar. Out of these Gujarat, Andhra Pradesh and Uttar Pradesh account for around 45%, 20% and 15% of the country's total production respectively. Karnataka accounts for around 8% and rest of the States account for about 2-3% of the country's total tobacco production.

Unique feature of tobacco production in India is that varied styles of Flue-cured Virginia (FCV) and different types of non-FCV tobacco are produced under diverse agro-ecological situations spread all over the country. About 15 states in the country grow tobacco, significantly influencing the economy and prosperity of the farming community. FCV, Bidi, Hookah, Chewing, Cigar-wrapper, Cheroot, Burley, Oriental, HDBRG, Lanka, Pikka, Natu, Motihari, Jati etc. are the different types of tobacco grown in the country. FCV, Burley and Oriental tobacco are the major exportable types

## Objectives

To study tobacco as an export crop

To understand the drawbacks in the production of tobacco

To study the role of the tobacco Board in regulating production and marketing

## Methodology

Secondary data like journals, newspapers and the internet have been used to analyze the tobacco industry in India

## TOBACCO BOARD

Tobacco is an important commercial crop grown in India. In order to regulate production, promote overseas marketing and control recurring instances of imbalances in supply and demand, Tobacco Board was established by the Government of India under the Tobacco Board Act of 1975. The headquarters of Tobacco Board is at Guntur in Andhra Pradesh.

The Tobacco Board Act, 1975 aims at planned development of the tobacco industry in the country. The various activities of the Board outlined in the Act for the promotion of the industry are:

- a) Regulating the production and curing of Virginia Tobacco with regard to the demand in India and abroad.
- b) Propagating information useful to the growers, dealers and exporters (including packers) of Virginia tobacco and manufacturers of tobacco products and others concerned.
- c) Promoting tobacco grading at the level of growers.
- d) Establishment of auction platforms for sale of Virginia tobacco by registered growers and functioning as an auctioneer at auction platforms.
- e) Maintenance and improvement of existing markets and development of new markets outside India.
- f) Constant monitoring of the Virginia tobacco market, both in India and abroad and ensuring fair and remunerative price to the growers.
- g) Purchasing Virginia tobacco from the growers when the same is considered necessary or expedient for protecting the interest of growers with the prior approval of the Government of India.

### **(i) Regulating the Production of FCV Tobacco**

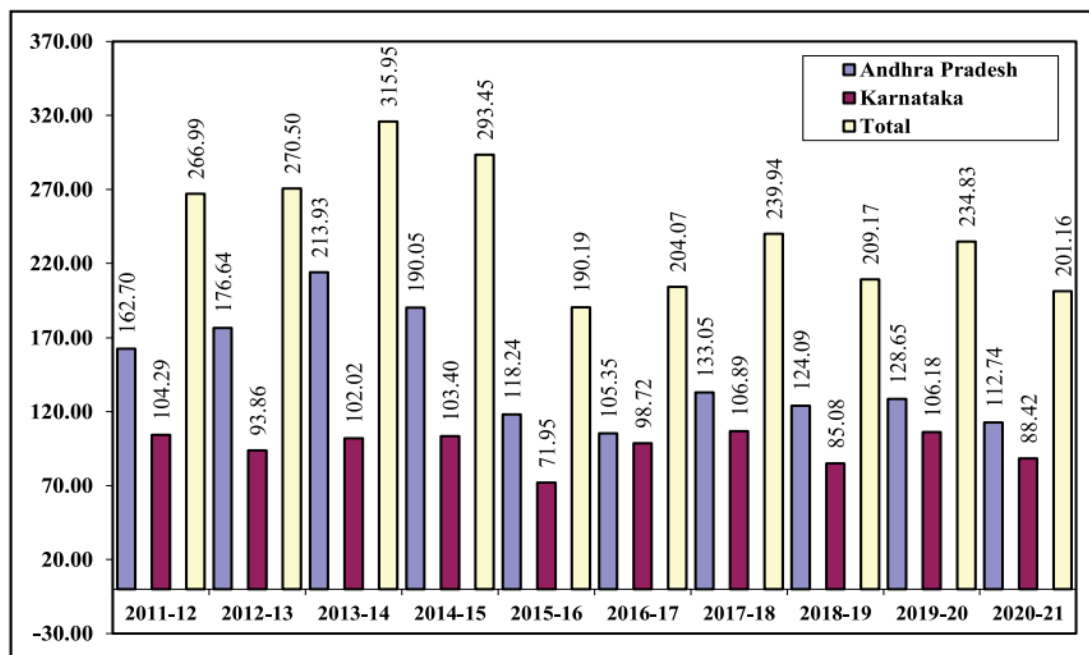
One of the important functions of the Tobacco Board is regulation of Production and curing of FCV tobacco having regard to the demand for tobacco in India and abroad. This objective is being achieved through Crop Planning and fixing crop size of FCV tobacco for Andhra Pradesh and Karnataka separately every year and by registering Commercial nurserymen, tobacco growers and barn operators.

### **(ii) FCV Tobacco Production in India**

FCV tobacco production in the last ten years has been fluctuating from year to year. These fluctuations reflect weather impacts on yield as well as market dynamics in terms of price elasticity of supply and the crop regulation done by Tobacco Board. FCV tobacco production has registered a Compound Annual Growth Rate (CAGR) of (-) 1.68 per cent during the period 2011-12 to 2020-21.

The production of FCV tobacco in 2020-21 is 201.16 mkg, as against 234.83 million kg produced during last year. The production of FCV tobacco in Andhra Pradesh is 112.74 mkg. & in Karnataka 88.42 mkg. FCV tobacco was cultivated in about 1,38,751 hectares during 2020-21 crop season.

During 2021-22 crop season Tobacco Board has fixed a crop size of 130.00 million kg for Andhra Pradesh and 97.00 million kg for Karnataka. As on 31st December 2021, a total number of 42,999 growers are registered with the Board in Andhra Pradesh covering 38,451 barns and an area of 58,263 ha. was planted during 2021-22 crop season. A total number of 41,438 growers are registered with the Board in Karnataka covering 53,695 barns and an area of 71,877 ha. was planted during 2021-22 crop season.



Source: Tobacco Board

**(iii) FCV Crop Production Policy for 2021-22 Crop Season**

The state wise crop size fixed during 2021-22 crop season in comparison with 2020-21 crop season is as follows:

(Crop size in mkg)

Crop Season	Andhra Pradesh	Karnataka	Total
2021-22	130.00	97.00	227.00
2020-21	115.00	88.00	203.00

#### (iv) Extension & Development Activities

Tobacco Board implements various extension and developmental schemes for improving productivity and quality of Indian FCV tobacco to make it competitive in the international market. Tobacco Board extends subsidy to the registered FCV tobacco growers under its various schemes to encourage the growers to adopt new and improved package of practices. Tobacco Board provides a comprehensive package of support and extension services to growers using a wide network of qualified and trained field staff, in collaboration with Central Tobacco Research Institute (CTRI), National Institute of Plant Health Management (NIPHM) and Research and Development wings of tobacco companies.

1. 6,926.31 Kgs of approved varieties of seed supply was arranged by Board through CTRI, Rajahmundry and ITC Research Division, Rajahmundry to FCV tobacco growers in Andhra Pradesh and Karnataka during 2021-22 crop season.
2. An alternative procedure for procurement and distribution of fertilizers through Committee of Farmers without involvement of Board is implemented during 2021-22 crop season in Andhra Pradesh and Karnataka successfully as was done in last year. A quantity of 20,132.80 MT of fertilizer was distributed to growers of Karnataka and 8,308.08 M.T to the growers in Andhra Pradesh.
3. In Andhra Pradesh, green manure crop was raised in an area of 8,927.60 ha for enrichment of soil health which would facilitate the growers in reducing the chemical fertilizers usage and quality improvement of crop.
4. In Karnataka 11.23 lakh trays and in Andhra Pradesh 6.64 lakh trays were supplied to growers for production of healthy and sturdy seedlings. The seedlings production in trays will ensure better establishment in field which in turn help in uniform crop growth with no transplantation shocks and reduced pests and disease incidence. An amount of Rs. 63.25 Lakh was extended to FCV tobacco growers of Karnataka towards subsidy @ 35 per cent to SC/ ST growers and 25% to other category growers.
5. Board is promoting IPM practices among FCV tobacco growers for enhancing product integrity and production of safer tobacco free of pesticide residues. During 2021-22 crop season, Board is arranging for distribution of some of the IPM inputs such as pheromone traps, yellow sticky traps, bio pesticides, marigold seedlings, jowar and bajra seeds to FCV tobacco growers of Andhra Pradesh and Karnataka.
  - a) Board arranged for distribution of 375 lts and 2,215 lts of Trichoderma and Pseudomonas Bio Pesticides to FCV tobacco growers of Karnataka and Andhra Pradesh respectively. Biopesticides would aid in control of soil borne diseases, which in turn reduces the use of chemical fungicides. An amount of Rs. 0.86 Lakh was extended towards subsidy @50 per cent to SC/ST growers and 30 per cent to other category grower beneficiaries in Karnataka.

- b) Subsidy of Rs. 0.16 lakh was accorded towards supply of pheromone trap and yellow sticky traps to growers of Karnataka.
- c) Board distributed 10 lakh marigold seedlings in Andhra Pradesh procured from CTRI Research station nurseries to tobacco growers at free of cost. In Karnataka, 3.80 lakh marigold seedlings purchased from CTRI were supplied at free of cost to growers.
- d) An expenditure of Rs. 1.25 lakh was incurred towards procurement of 1,998 Kgs of bajra seed @ Rs. 40/Kg and 570 Kgs of jowar seed @ Rs. 80/Kg from Karnataka State Seed Corporation, Government of Karnataka and were supplied at free of cost to FCV growers in Karnataka for growing as a barrier/border crop on field bunds, as a preventive measure for sucking pest attack viz., white fly, aphids.
- e) Board is encouraging growers to take up natural farming practices for production of organic tobacco. During 2021-22 crop season, 106 growers of Karnataka cultivated FCV Tobacco in 106 acres in Natural Farming mode. An amount of Rs. 5000/- per plot and Rs. 10,000/- towards cash incentive was extended to each grower for meeting expenses towards application of organic compounds, natural pesticides to be used in FCV tobacco cultivation in natural farming mode.
- f) The Board, as a part of eco-friendly measures is encouraging growers to take up cultivation of fast growing tree saplings to meet the fuel requirements for tobacco curing. As a part of this initiative, Tobacco Board has made it as a mandate for tobacco growers to take up planting of 10 number of fast growing tree saplings for renewal of grower registration.
- g) Mass plantation of 75000 tree saplings in 75 tobacco growing villages by FCV tobacco growers in all Auction platforms of Andhra Pradesh was taken up on 26th September 2021 on the eve of "Azadi Ka Amrit Mahotsav", an initiative of Government of India to celebrate and commemorate 75 years of independence of progressive India, an intensive, country wide campaign which focused on citizen participation.
- h) Board is implementing Model Project Area Scheme (MPA) with the objective of enhancing the productivity, quality and integrity of the FCV tobacco through intensive extension programme. During 2021-22 crop season, 17 villages in Andhra Pradesh and 14 villages in Karnataka were notified to implement Model Project Area Scheme. An extension worker is engaged for 4 months in model project village for advising the growers on Good Agricultural Practices from time to time and for collection of data. An amount of Rs. 8,000/platform is being allotted towards organization of extension programs.
- i) Board is extending financial assistance to encourage FCV tobacco growers to implement Post Harvest Product Management practices and as part of this program, Board is arranging for supply of canvas tarpaulins to avoid admixture of Non Tobacco Related Materials in packed tobacco and is promoting construction of bulk sheds for storage of tobacco.
- j) To promote energy conservation in curing of FCV tobacco, Board in collaboration with trade has taken up massive energy conservation program through insulation of barns by extending subsidy. During 2021-22 crop season, the insulation of 649 barns in Karnataka and 330 barns in Andhra Pradesh is targeted. Installation of Venturi furnace in 100 barns in Andhra Pradesh is proposed.
- k) Board is taking up grower trainings and capacity building programs of extension personnel extensively for imparting knowledge of Good Agricultural Practices in tobacco cultivation.

- l) Board along with trade has awarded a Research project “Development & Evaluation of FCV Tobacco Leaf Stringing Machine”, to ICAR – CIAE, Bhopal and ICAR – CTRI, Rajahmundry and entered into MOU with institutes.
- m) Tobacco Board awarded a research project and entered into an MOU with ICAR–CTRI, Rajahmundry on 03.12.2021 for evaluation of efficacy of Loose Leaf barn technology of FCV Tobacco curing in terms of feasibility and leaf quality in coordination with M/s. ITC. The construction of loose leaf barn was commenced in CTRI (RS), Kandukur and basement work was completed.
- n) Growers and Staff Training programmes, study tours and workshops on Integrated Pest Management practices, Sustainable Tobacco Production, management of CPA residues, elimination of NTRM and other Good Agricultural Practices were conducted.
- o) Up to November 2021 an amount of Rs. 107.83 lakh was incurred towards Extension and Developmental Schemes. Approximately, an amount of Rs. 380 lakh will be required to meet the expenditure towards implementation of Extension and Developmental Schemes (Andhra Pradesh and Karnataka) during the current crop season.

#### (v) Tobacco Auctions

The Auction system for sale of FCV tobacco was introduced for the 1st time in Karnataka in 1984 followed by Andhra Pradesh in 1985.

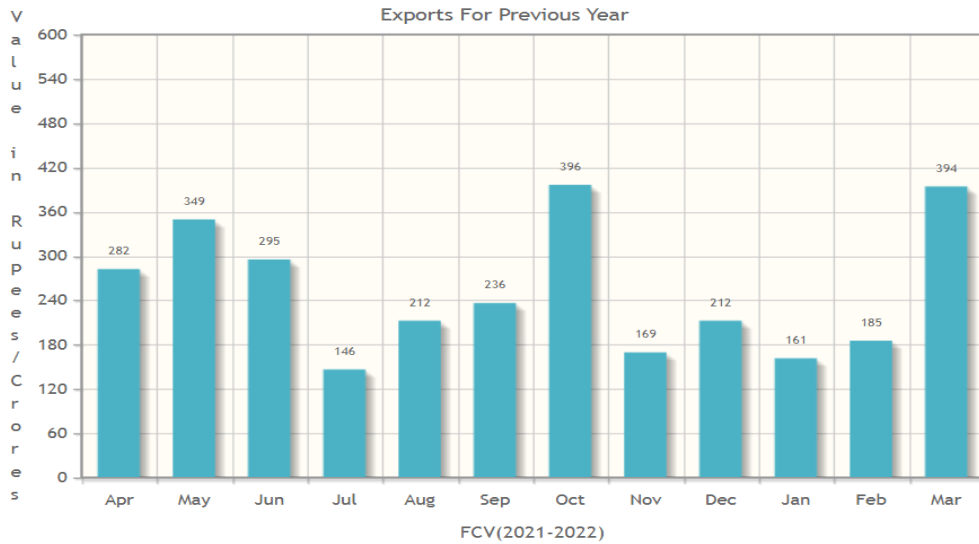
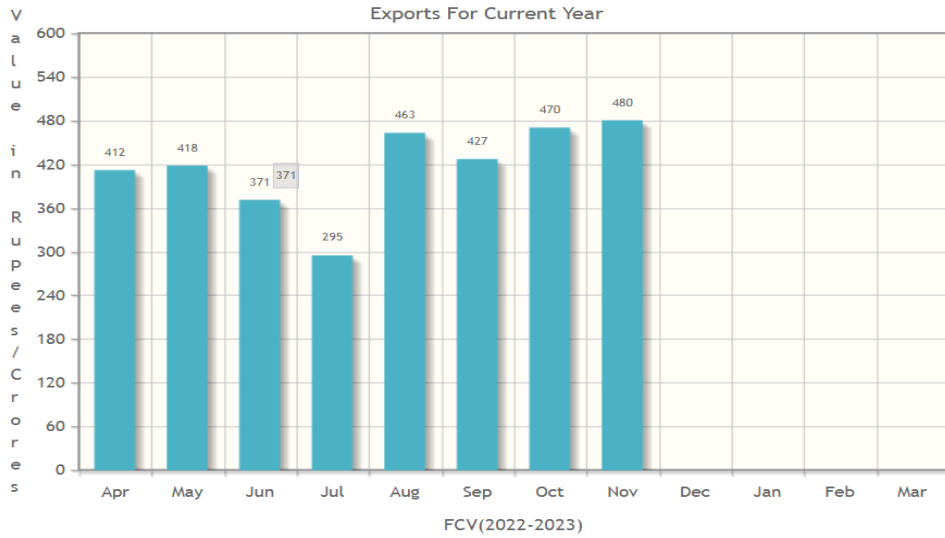
#### Progress made during 2021-22

- a) In Andhra Pradesh, during 2021-22, a total quantity of 107.39 mkg (million kg) of 2020-21 Andhra Pradesh FCV tobacco crop marketed at an average price of Rs. 145.97 per kg from 1st April 2021 to 16th September 2021 (the auction sales were commenced on 15th March 2021 and concluded on 16th September 2021).
- b) In Karnataka, during 2021-22, a total quantity of 35.15 mkg of tobacco of 2021-22 Karnataka FCV tobacco crop marketed at an average price of Rs. 153.07 per kg from 24th September 2021 to 7th January 2022 (the auction sales commenced on 24th September 2021 and are in progress)

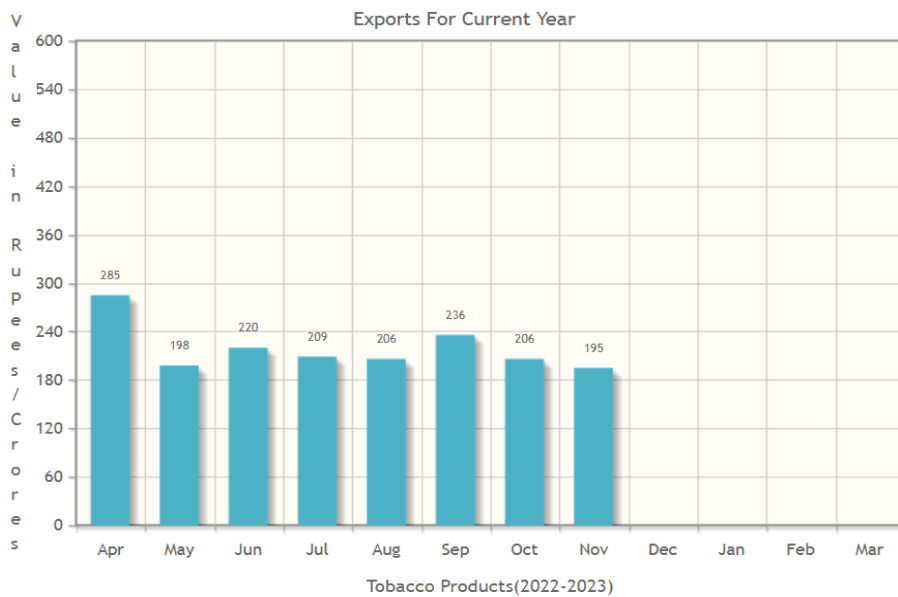
#### TOBACCO EXPORTS

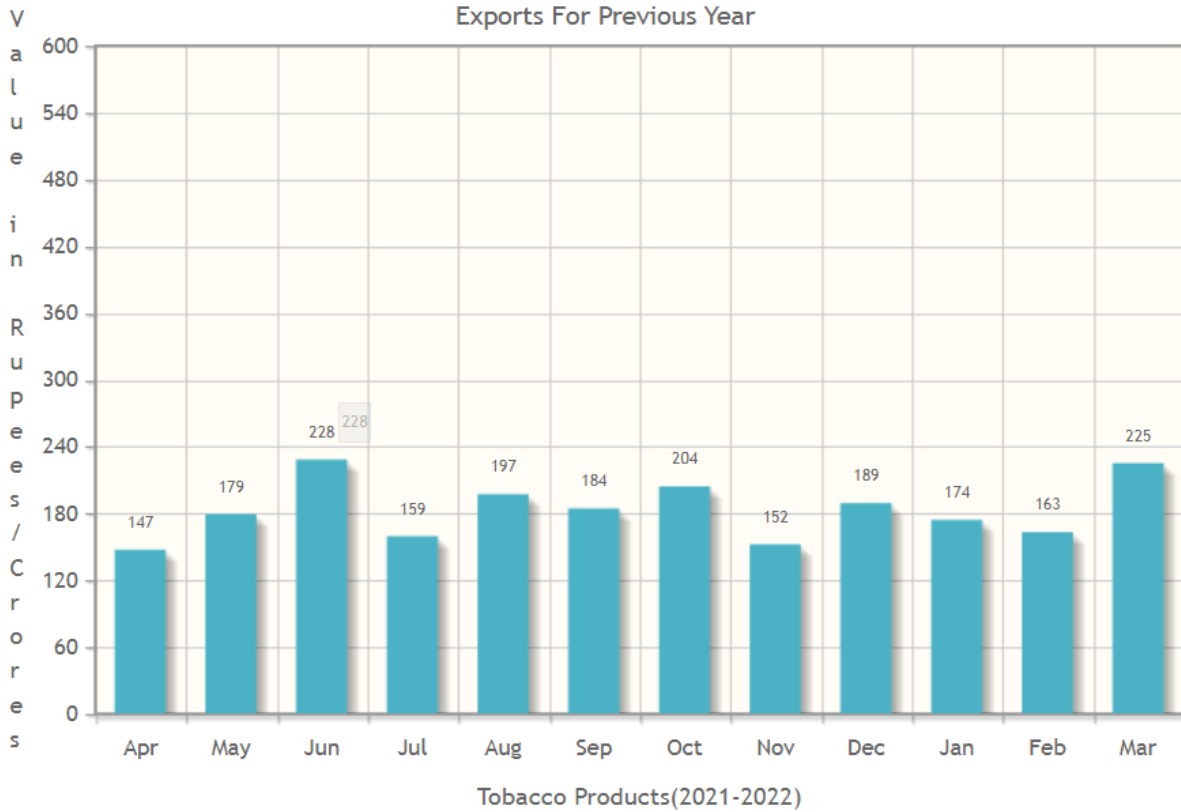
The Exports data as per the Tobacco Board for the Flue-Cured Tobacco, Tobacco Products and Unmanufactured Tobacco is given below. The details for 2022-2023 are compared with the 2021-2022.

**FCV - Flue-Cured Tobacco**

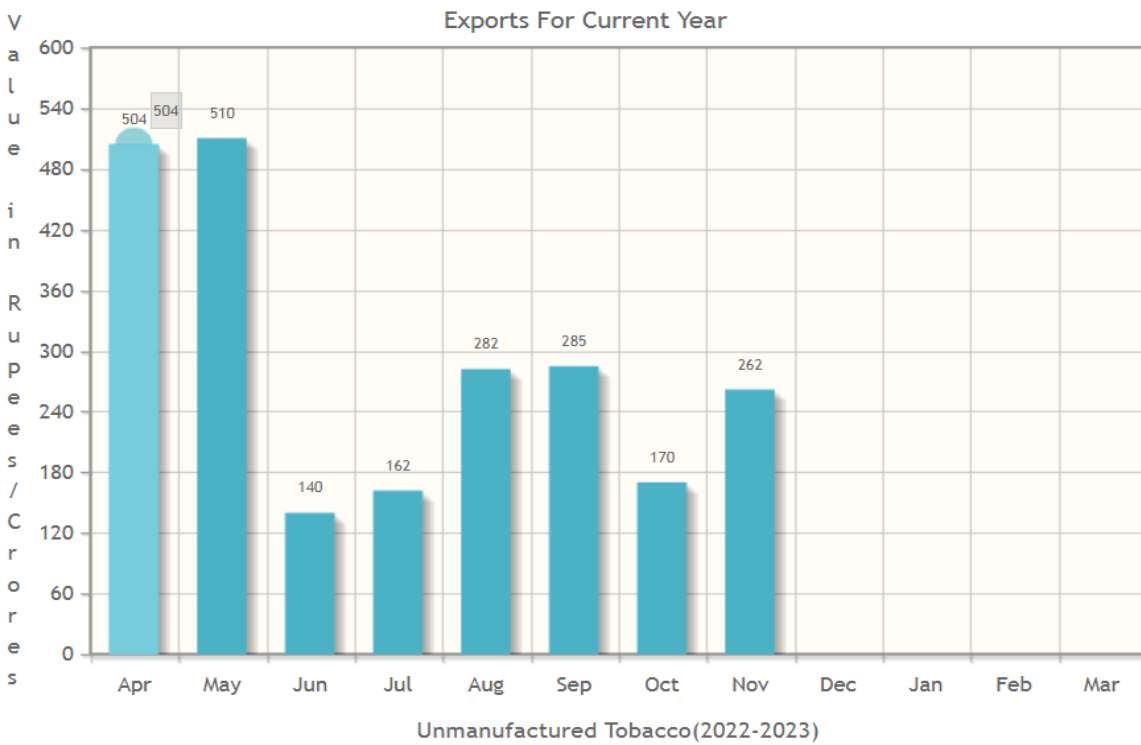


**TOBACCO PRODUCTS:**

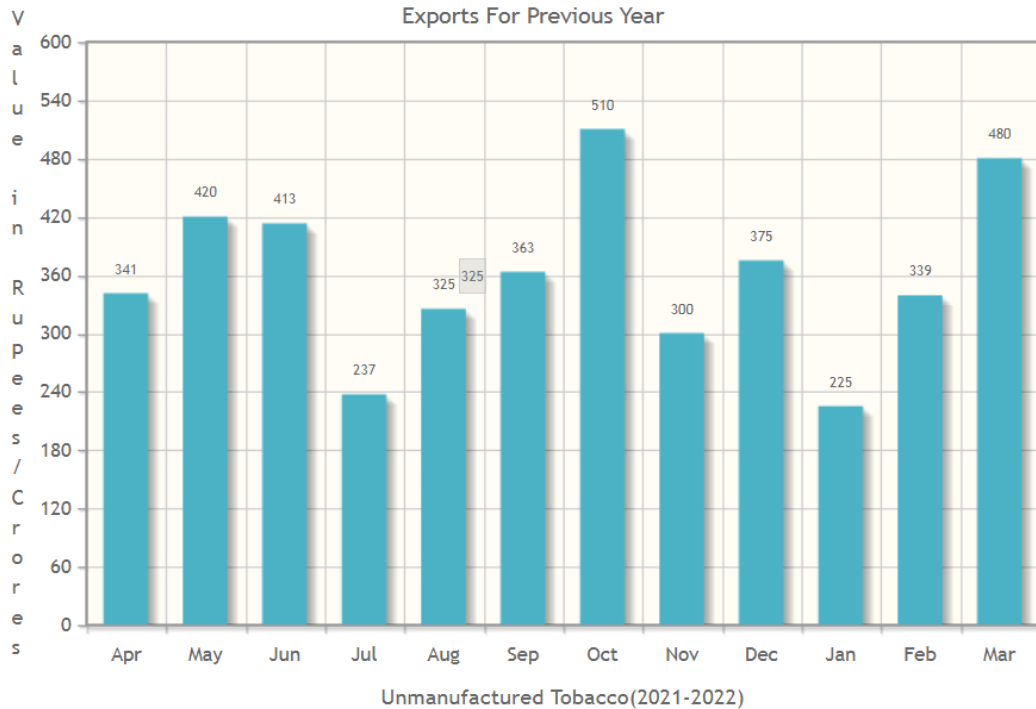




**UNMANUFACTURED TOBACCO:**





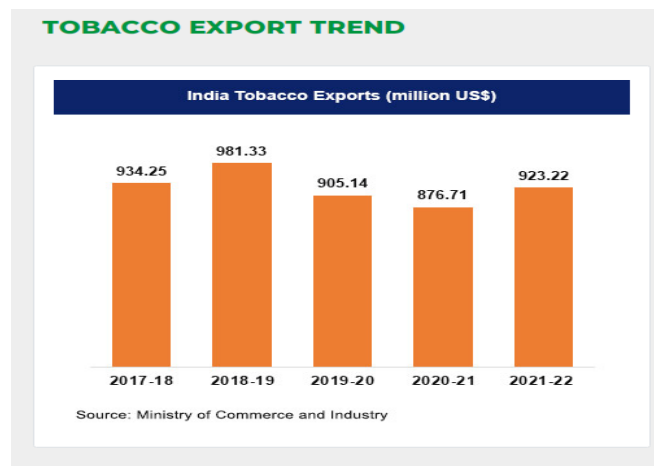


**TOBACCO EXPORT TREND:**

During 2022-23 (till August), India exported 68,550 tonnes of FCV tobacco. The quantity of total exports in August 2022 was 15,224 tonnes (valued at US\$ 56.21 million), a 192.2% increase from the same period in the previous year. The value of the total FCV tobacco exports during 2021-22 was Rs. 2,858 crore (US\$ 359 million). In the same year, the country exported 27,742 tonnes.

The exports of unmanufactured tobacco during 2022-23 (till August) was 65,682 tonnes. During April 2022 and May 2022, the exports of unmanufactured tobacco increased by 51% and 14%, respectively, over the same period in the previous year. The value of the total exports during the same period was Rs. 4,102 crore (US\$ 515 million). During the year 2021-22, India exported tobacco and tobacco products worth a total of US\$ 923.80 million.

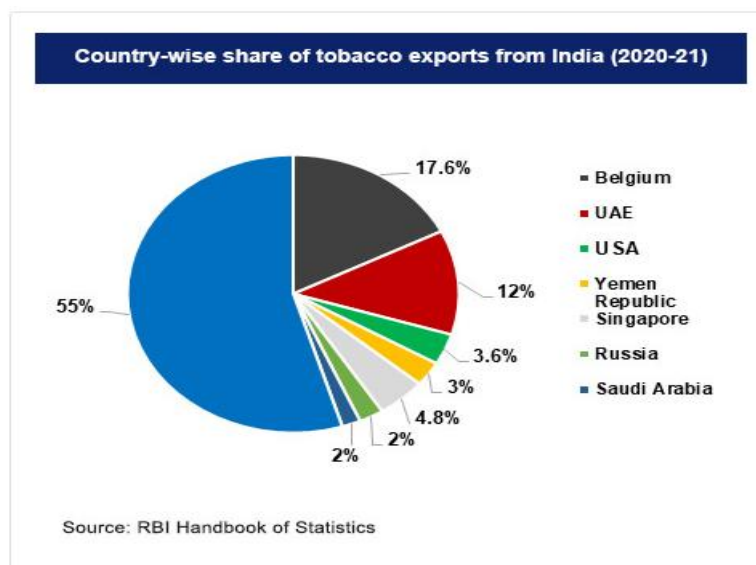
In September 2022, the export of tobacco from India was US\$ 125.24 million, a 72% rise from September 2021.



## MAJOR EXPORT MARKETS

India is the only country which produces tobacco in two seasons. It exports to more than 115 countries throughout the world. The country exports tobacco mainly to Belgium, the Philippines, Egypt, Arab Rep., Germany, Nepal, USA, Turkey, Nepal and many more countries worldwide. Out of these countries, Belgium is the biggest importer of tobacco at around 17% of the total exports from India. Egypt, Arab Rep. and the Philippines are one of the largest tobacco export destinations for India importing around 13% and 12% of the total. The country also exports to Indonesia, France, UAE, Russia, Korea, Sri Lanka, Malaysia, Venezuela, Ethiopia and Nigeria.

During 2021-22, India exported US\$ 164.8 million worth of tobacco to Belgium. This was an increase of 7% from 2020-21. UAE is among the top importers of tobacco from India, with 2021-22 imports valued at US\$ 134.6 million. The value of exports to Singapore and US during the same period was US\$ 34.3 million and US\$ 31.7 million, respectively. Some of India's other tobacco export destinations, i.e. Netherlands and Germany, imported US\$ 25.7 million and US\$ 15.2 million worth of tobacco from India during 2021-22, respectively.



As per the Monthly Bulletin on Foreign Trade Statistics by the Ministry of Commerce Trade Intelligence and Analytics Wing Data Management, Dissemination & Publication Division (Data Analytics Unit), India export of Tobacco was \$876.71 Million in 2020-21 and \$923.57 Million in 2021-22 with a 5.35% growth.

Earlier this year the ED of the Indian Tobacco Board shared that the Flue-cured Virginia (FCV) tobacco accounted for the majority of unmanufactured tobacco exports, representing 53.62% in terms of quantity and 68.47% in terms of value. India is the world's fourth-largest producer of FCV tobacco and third-largest exporter, selling its leaf to more than 50 countries. The crop in the southern region of Andhra Pradesh was severely affected by Cyclone Mandous in December 2022, forcing some farmers to replant

their tobacco. In response, the Ministry of Commerce extended interest-free loans to the growers participating in the Tobacco Board's Growers' Welfare Fund Scheme.

<b>Table 5: India's Merchandise Export of QE Groups: Growth for last 2 years and current year</b>				
<b>(Value in US\$ Million)</b>				
<b>Sl. No.</b>	<b>QE Groups</b>	<b>2020-21</b>	<b>2021-22</b>	<b>% Change</b>
1	Engineering Goods	76719.60	112163.39	46.20
2	Petroleum Products	25804.37	67471.70	161.47
3	Gems And Jewellery	26022.82	39099.11	50.25
4	Organic & Inorganic Chemical	22088.48	29364.78	32.94
5	Drugs And Pharmaceuticals	24444.03	24594.27	0.61
6	Electronic Goods	11093.29	15660.38	41.17
7	Rmg Of All Textiles	12272.21	16014.81	30.50
8	Cotton Yarn/Fabs./Madeups, Handloom Products Etc.	9827.89	15298.03	55.66
9	Rice	8829.21	9671.12	9.54
10	Plastic And Linoleum	7462.85	9824.55	31.65
11	Marine Products	5962.39	7772.36	30.36
12	Mica, Coal And Other Ores, Minerals Including Process	4331.80	5217.23	20.44
13	Leather And Leather Manufactures	3301.37	4381.47	32.72
14	Man-Made Yarn/Fabs./Madeups Etc.	3806.25	5614.62	47.51
15	Meat, Dairy And Poultry Products	3657.96	4141.00	13.21
16	Spices	3983.98	3896.03	-2.21
17	Ceramic Products And Glassware	3050.58	3464.84	13.58
18	Fruits And Vegetables	2612.77	2883.08	10.35
19	Cereal Preparations And Miscellaneous Processed Item	1859.91	2280.71	22.62
20	Carpet	1491.41	1789.89	20.01
21	Handicrafts Excl. Hand Made Carpet	1707.52	2088.16	22.29
22	Tobacco	876.71	923.57	5.35
23	Oil Seeds	1235.67	1113.64	-9.88
24	Oil Meals	1585.04	1031.94	-34.89
25	Coffee	719.66	1020.74	41.84
26	Other Cereals	705.38	1087.39	54.16
27	Iron Ore	4896.53	3248.23	-33.66
28	Tea	756.26	751.07	-0.69
29	Jute Mfg. Including Floor Covering	371.32	507.65	36.72
30	Cashew	420.43	453.08	7.77
31	Others	19910.78	29175.55	46.53
<b>India's Total Export</b>		<b>291808.49</b>	<b>422004.40</b>	<b>44.62</b>
<b>India's Total Export excl. Petroleum products</b>		<b>266004.12</b>	<b>354532.70</b>	<b>33.28</b>

Table 5 (contd.): India's Merchandise Export of QE Groups: Growth for last 2 years and current year								
(Value in US\$ Million)								
S. No.	QE Groups	November, 2021-22	November, 2022-23	% Change	April-November, 2021-22	April-November, 2022-23	% Change	% Share
1	Engineering Goods	8097.06	8072.78	-0.30	72016.68	70568.49	-2.01	23.90
2	Petroleum Products	5495.03	5398.42	-1.76	39433.26	62652.51	58.88	21.22
3	Gems And Jewellery	2392.09	2502.29	4.61	25912.58	26449.58	2.07	8.96
4	Organic & Inorganic Chemical	2351.11	2322.13	-1.23	18825.54	20405.40	8.39	6.91
5	Drugs And Pharmaceuticals	1831.13	1989.62	8.66	15894.38	16587.73	4.36	5.62
6	Electronic Goods	1448.42	2237.57	54.48	9322.35	14374.47	54.19	4.87
7	Rmg Of All Textiles	1072.64	1198.09	11.70	9660.65	10358.36	7.22	3.51
8	Cotton Yarn/Fabs./Madeups, Handloom Products Etc.	1226.69	803.17	-34.53	9857.62	7315.79	-25.79	2.48
9	Rice	671.83	800.52	19.16	5992.58	6981.90	16.51	2.36
10	Plastic And Linoleum	727.82	658.06	-9.58	6422.53	5801.82	-9.66	1.96
11	Marine Products	753.80	746.65	-0.95	5398.32	5586.59	3.49	1.89
12	Mica, Coal And Other Ores, Minerals Including Process	397.76	326.64	-17.88	3240.73	3443.82	6.27	1.17
13	Leather And Leather Manufactures	358.52	389.63	8.68	2773.41	3299.57	18.97	1.12
14	Man-Made Yarn/Fabs./Madeups Etc.	432.00	355.37	-17.74	3587.87	3290.90	-8.28	1.11
15	Meat, Dairy And Poultry Products	379.00	311.98	-17.68	2665.32	2709.27	1.65	0.92
16	Spices	314.97	273.86	-13.05	2640.30	2469.02	-6.49	0.84
17	Ceramic Products And Glassware	252.40	309.54	22.64	2271.49	2419.83	6.53	0.82
18	Fruits And Vegetables	189.62	237.05	25.01	1736.08	1908.79	9.95	0.65
19	Cereal Preparations And Miscellaneous Processed Item	164.64	202.09	22.75	1424.70	1740.21	22.15	0.59
20	Carpet	148.68	115.06	-22.61	1193.68	932.12	-21.91	0.32
21	Handicrafts Excl. Hand Made Carpet	160.31	98.67	-38.45	1382.78	912.85	-33.98	0.31
22	Tobacco	62.76	126.16	101.02	611.49	888.32	45.27	0.30
23	Oil Seeds	135.95	188.74	38.83	673.48	811.66	20.52	0.27
24	Oil Meals	109.19	128.35	17.55	636.65	777.17	22.07	0.26
25	Coffee	75.36	77.78	3.21	621.47	768.12	23.60	0.26
26	Other Cereals	89.81	138.11	53.78	619.45	707.70	14.25	0.24
27	Iron Ore	23.13	15.67	-32.25	2412.67	682.16	-71.73	0.23
28	Tea	62.63	79.56	27.03	501.77	561.73	11.95	0.19
29	Jute Mfg. Including Floor Covering	42.73	32.73	-23.40	315.39	302.61	-4.05	0.10
30	Cashew	36.91	30.43	-17.56	302.22	212.75	-29.60	0.07
31	Others	2291.06	1825.01	-20.34	17426.06	19343.68	11.00	6.55
<b>India's Total Export</b>		<b>31795.05</b>	<b>31991.73</b>	<b>0.62</b>	<b>265773.50</b>	<b>295264.92</b>	<b>11.10</b>	<b>100.00</b>
<b>India's Total Export excl. Petroleum products</b>		<b>26300.02</b>	<b>26593.31</b>	<b>1.12</b>	<b>226340.24</b>	<b>232612.41</b>	<b>2.77</b>	<b>78.78</b>

Source: DGCI&S, Kolkata (Note: The analysis is based on the Quick Estimates Groups of commodities, latest available upto November, 2022)

### ISSUES FACED BY FARMERS:

Federation of All India Farmer Associations (FAIFA), which represents millions of tobacco farmers and farm workers, has urged the Centre to take a relook at the high taxation and stringent regulations as they were crippling farming sector.

The association said that low production of the crop, lack of export incentives and non-stop smuggling of illegal/contraband stocks also need close monitoring by the Centre to bail out the tobacco farmers from the red.

### **CONCLUSION:**

Since Tobacco is a commercial crop for India and also leading in exports, the Indian Government ensures that adequate measures are undertaken to maintain the consistency of production and also that the farmers are well taken care of.

The issues stated above like export incentive and further regulations and monitoring can ensure that the farmers are protected and can ensure maximum growth of Tobacco which bring in export revenue to India and helps our Economy.

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