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<td>December 2014</td>
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<tr>
<td>AUTHORS</td>
<td>Food and Agribusiness Strategic Advisory &amp; Research (FASAR), YES BANK</td>
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Fruits & Vegetables Availability Maps of States

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The Food Processing Industry in India rests on strong pillars of the Indian economy - Agriculture and Manufacturing, which are the key sectors of a developing nation. A strong integrated policy is required to overcome all the challenges that the industry is facing today. There is a need to map required interventions in terms of storage facilities, logistics and processing units at the right place for the right commodity. Towards this, there is a need to prepare National Food Grid, which shall help in ensuring availability of food in every part of the country throughout the year. For this vision, we need thorough planning, strong backup data and rigorous ground work to understand the challenges and modalities of food production, surplus and deficiency.

The first step towards this Food Grid is this “Fruits & Vegetables Availability Maps of India Booklet” which puts forth an overview of the production and availability scenario of key food commodities in the country. The content of this booklet gives an insight on what is grown where as well as the surplus and deficit status of various commodities at the national as well as state level.

I am grateful to YES BANK with whom we have jointly developed this document. I hope that this booklet proves to be functionally handy and gives a more logical & planned touch to interventions by industry in the food processing sector.

(Harsimrat Kaur Badal)

Dated: 09 DEC 2016

Place: New Delhi
Food Processing, a USD 180 Bn industry in India, growing annually at close to 9%, contributing to 13% of the national exports and employing 60% of India’s working population directly or indirectly, has all the ingredients to catapult India into a virtuous cycle of sustainable development, inclusive growth and lower food inflation. However, with only 3% of the overall gross bank credit, 2.6% of overall FDI inflows and a mere USD 28 billion of fixed capital deployment, the true potential of this highly significant sector still remains untapped.

This is all the more predominant and critical for perishables which constitute half of India’s farm produce. Within perishables, fruits and vegetables constitute around 60% but processing levels are at 2% only. Value chain interventions from financial institutions for farm gate, post harvest management, modernization and capacity expansion in Food processing and its eco system with right policy & regulatory enablers in place, are essential for maximizing sustainable development and economic growth for the nation.

Additionally, roll out of appropriate GST reforms, alignment of priority sector lending norms to the farm & industry needs, enhanced incentives for industry development and further promotion of FDI in the sector are some of the key measures that shall enhance credit flow and investments in the sector in a big way. These initiatives coupled with financial inclusion will not only benefit the rural economy but also create a multiplier impact on other high-growth sectors such as Manufacturing, Healthcare and Tourism amongst others, which have significant employment generation potential.

YES BANK, in partnership with the Ministry of Food Processing Industries, Government of India (MoFPI) is organising the National Conference on Spurring Financing & Investments in the Food Processing Sector to deliberate on the potential and challenges of India’s Food Processing industry. On this occasion, I am pleased to present the YES BANK-MoFPI ‘Fruits & Vegetables Availability Maps of India’ which provides an extensive review of the production and availability scenario of major commodities produced in India at the National as well as State levels.

I am confident that this joint publication will be a useful reference for Industry, the Government and policy makers for long-term planning and development of India’s Food Processing industry.

Sincerely,

Rana Kapoor
MD & CEO YES BANK
Food processing coupled with allied interventions including post harvest management, cold-chain, logistics & distribution are the building blocks of an integrated and efficient food supply chain for any country. In order to appropriately plan for these key interventions, visualize production patterns of important crops as well as assess the surplus or deficit of availability of prominent crops, among others, are critical for planning any well conceived nation-wide food infrastructure and supply chain roll out arrangement.

The Food Availability Map is a step in this direction wherein at the national level, prominent food commodities that form a major part of the daily consumption basket of our population and at the state levels, prominent fruits & vegetables have been mapped for production. Availability estimates for all maps have been derived on the basis of consumption figures from the NSSO data.

The maps in this booklet shall be a handy tool for designing a national food grid for the country for planning targeted supply interventions in specific commodities and geographies from production, processing, cold chain, logistics & distribution perspectives. This shall have far reaching benefits for optimally planning activities and investments in specific commodities, geographies and interventions across production, consumption and intermediate value addition levels.
### Food Availability Overview of India

- 22 commodities, constituting over 60% of the national agri production account for more than 50% of the Food Inflation CPI
- All major agri commodity classes are covered - Cereals, Oilseeds, F&V, Meat, Poultry, Fish and Dairy
- Form a prominent part of daily food consumption basket of Indian consumers

**For every commodity**
- Top 3 production states

**For 13 major commodities**
- Top 3 surplus states
- Top 3 deficit states

**Also includes:**
- Mapping of Cold storage gap
- Registered Geographic Indications
- Graphs for Annual food wastages
- Current food processing levels across major perishables
- State wise share of food processing industries

### Fruits and Vegetables Availability Maps of India

- 30 commodities (15 fruits & 15 vegetables) constituting over 85% of the F&V production in India

**For every commodity**
- Top 3 production states
- Top 3 surplus states
- Top 3 deficit states

### State Wise Fruits & Vegetables Availability Maps

- Top 5 fruits and top 5 vegetables produced for every state

**In each state**
- Top 5 fruits produced
- Top 5 vegetables produced
- Top 3 surplus & deficit fruits
- Top 3 surplus & deficit vegetables

**Also includes:**
- Mapping of Cold storage gap
- Registered Geographic Indications
- Major ICAR Institutes
- State Trivia**

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* For every commodity for which the NSSO data is available.
** State trivia are not specific to Fruits and Vegetables only.
All production data in the booklet are in lakh MT.
HOW TO READ THE MAP

Production
The production data in the map is represented through icons enclosed in a yellow boundary. The production figures have also been mentioned besides these icons in Lakh MT.

Surplus and Deficit
The green and red boundary icons represent the surplus and deficit commodities in all maps. The surplus and deficit for each commodity has been calculated basis the difference between the production and consumption data for the identified commodities. The production data has been sourced from the official websites of the Department of Agriculture Cooperation (DAC), National Horticulture Board (NHB), Department of Animal Husbandry, Dairying & Fisheries (DAHD), state portals and the consumption data has been sourced from the latest available National Sample Survey Office (NSSO) data (68th round).

Cold Storage Gap
The background of the National Food Production and Availability Map has been coloured with three different shades of blue, representing the intensity of cold storage gap. The data has been sourced from NHB.

All Agri Based Geographic Indications (GI)
All major registered Geographic Indications (GI) for agri commodities have been marked on the National Food Availability Map as well as the respective state maps. The data has been sourced from the website of Intellectual Property India.

Major ICAR Institutions
Major Indian Council of Agricultural Research (ICAR) Institutes and Directorates have been marked on respective State maps.

LIMITATIONS
• Due diligence has been done to source data for the latest available years and from the most relevant websites. However, due to unavailability of the same, previous years’ data has been used in some cases.

• The surplus and deficit has been calculated on the basis of the difference between production and consumption of the commodities and the processing amounts, wastages and trade numbers have not been factored into, due to unavailability of reliable data.

• The production & consumption numbers are generalized and may vary from time to time based on cyclicity and seasonality.

• Logical assumptions have been made in cases where data was unavailable.

• No investments/business decision are to be taken solely on the basis of information provided in the booklet.
The map highlights the top three surplus and deficit states for 14 major Fruits produced in India.

The map highlights the top three production states for 15 major Fruits, which constitute over 90% of the total Fruits produced in India.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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The map highlights the top three production states for 15 major Vegetables which constitute over 85% of the total Vegetables produced in India.

The map highlights the top three surplus and deficit states for 14 major Vegetables produced in India.

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Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

Andhra Pradesh, contributes to around 70% of shrimp production in India. The geographical location of the state allows marine fishing as well as inland fish production. Most exported marine exports include Vannamei Shrimps, which is currently the largest export earner in the seafood basket.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

Commodities

The map highlights the top five surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Surplus - Deficit

Production (in Lakh MT)

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State Trivia

Arunachal Pradesh, which translates to the "land of the dawn-lit mountains", is also known as the Orchid State of India or the Paradise of the Botanists. The state is blessed with over 500 species of medicinal plants, which has a huge potential for enhancing the economy of the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals
State Trivia

The state of Assam is the world’s largest tea-growing region. Historically, Assam has been the second largest commercial tea production region after Southern China. Southern China and Assam are the only two regions in the world with native tea plants.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

The state of Bihar accounts for 45% of India’s total Litchi production. Shahi Litchis from Muzaffarpur are famous within as well as outside India. Bihar also accounts for 90% of the world production of Makhana.
State Trivia

Chhattisgarh is one of the greenest states of India with over 44% of its total area under lush forests. The forests of Chhattisgarh are not only known for their diverse flora and fauna but also contain about 88 species of medicinal plants. The use of ethnomedicine, which has been practiced by aboriginal tribes since centuries, predating even Ayurveda, is also being promoted in Chhattisgarh.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

Coconut Palm and Cashew Nuts are grown extensively as major crops in Goa, both of which produce the famous country liquor ‘Fenny’. Goa is a major exporter of cashew from India and its salted and roasted nuts are enjoyed all over the world. The Portuguese introduced Cashew to Goa along with the secrets of fermentation and distillation to produce what has become one of Goa’s most important drink.

Commodities

The map highlights the top three surplus fruits and top three deficit fruits & vegetables for the state.

Production - Highlights the top three fruits produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

Milk cooperatives of India owe their origin to the state of Gujarat. The AMUL model is world famous and the most successful one in India. The Anand city of Gujarat is also known as the milk capital of India.
State Trivia

Dairy farming is an essential part of Haryana’s rural economy. Haryana, with 720 grams availability of milk per capita per day against the national average of 290 grams, ranks second in the country after Punjab. The Murrah breed of water buffalo from Haryana is world famous for its milk production.
State Trivia

During the beginning of the 20th century, Satyanand Stokes introduced apple cultivation in Himachal Pradesh and now around 1.3 lakh hectares has been brought under apple orchards in the state. Kinnaur Apples are the most favored variety in India.
State Trivia

Saffron is one of the most expensive spices in the world. Iran, Spain, India, and Greece dominate the world trade for saffron. Kashmir is the largest producer of saffron in India.
State Trivia

Jharkhand is a major producer of Bael fruit in India. Also known as the wooden apple, the fruit is a remedy to many diseases and also has a connect with the Indian mythology. Medicinally, the root is the most important part of the tree. It is also one of the trees categorized as climate purifiers as they emit more amount of oxygen as compared to other trees.

**Commodities**

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

India is the largest producer, as well as, consumer of Areca nut. Accounting for 60% of the country’s production, Karnataka is the largest producer of Areca nut in India. Considered as an auspicious ingredient, the Areca nut is still used along with betel leaf in religious ceremonies.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Surplus

Deficit

Production (in Lakh MT) - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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Kerala is renowned the world over for being the major producer and exporter of the 'King of Spices' - Pepper. Besides Pepper, Kerala is also the largest producer of Cardamom and Nutmeg spices.
State Trivia

Madhya Pradesh is the second largest producer of Coriander and Garlic and is a major exporter of seed spices.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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Maharashtra is a leading state in production of Grapes in the whole country. The state also accounts for nearly 80% of the Grapes exports from India. Maharashtra is also the largest producer of Alphonso Mangoes, the most sought after variety for exports.
Passion fruit, a native of Brazil is a high value and export oriented crop. Passion fruit stands out not only for its exotic and unique flavor and aroma but also for its amazing nutritional and medicinal properties. Manipur is the largest producer of Passion fruit in India, where the fruit grows naturally.

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

India is the largest producer and exporter of Turmeric in the world. The Jaintia Hills district of Meghalaya produces some of the finest Turmeric in the world with its “Lakadong” variety. Due to its high curcumin content, robust aroma, colour and organic nature, this variety has a good market potential in India and abroad.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

The Mizoram Government has been aggressively promoting oil palm cultivation since 2005 under its New Land Use Policy and has declared its northern most district of Kolasib the state’s first oil palm district.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state. The map highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

Naga Mircha or the Bhut Jolokia (Ghost Pepper), the traditional chilli variety of Nagaland, is the hottest chilli of the world as its pungency level is about 400 times more than the normal ones. Guinness World Records certified that the ghost pepper is the world’s hottest chilli pepper. The chilli is grown in the North Eastern region of India, Myanmar and Bangladesh.
State Trivia

“Kewda flowers, mostly collected from Ganjam district of Odisha are very famous for extraction of essential oils. Odisha produces around 80% of the country’s Kewda extract.”

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Commodities

The map highlights the top five Fruits & Vegetables produced in the state.

Sources:
National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

Punjab, also called the land of five rivers is one of the most fertile regions on the earth. Punjab is called the “Granary of India” or “India’s bread-basket”. It is one of the largest contributors to the national pool of wheat and rice for the public distribution system. Besides this, the state is also one of the largest producers of honey in the country and contributes almost 25% of country’s honey production.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

India is the largest producer, consumer and exporter of Coriander in the world. Rajasthan accounts for more than 50% of India’s Coriander production.

Central Institute of Arid Horticulture, Bikaner
National Research Centre on Seed Spices, Ajmer

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

The Government of Sikkim stepped into Organic Mission process from 2003, the year when it stopped imports of chemical fertilizers in the state. The government plans to convert Sikkim into a totally Organic State by 2015.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

Bananas are the fifth largest agricultural commodity in world trade after cereals, sugar, coffee and cocoa. India, Ecuador, Brazil and China alone produce half of total bananas of the world. In India, Tamil Nadu produces around 20% of the total production. Tamil Nadu is also the largest producer of Tapioca from which Sago is produced, however Maharashtra is the largest consumer of the product.

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Commodities

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<th>Deficit</th>
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<tr>
<td>Apple</td>
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<td></td>
</tr>
<tr>
<td>Carrot</td>
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</tr>
</tbody>
</table>

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

The Government of Sikkim stepped into Organic Mission process from 2003, the year when it stopped imports of chemical fertilizers in the state. The government plans to convert Sikkim into a totally Organic State by 2015.

FRUITS & VEGETABLES AVAILABILITY MAP

TAMIL NADU

National Research Centre
for Banana, Trichi

Eathamozhy Tall Coconut
Nilgiri (Orthodox Tea) Logo
Sirumalai Hill Banana
Virupakshi Hill Banana
State Trivia

Telangana is a newly formed state of India. The major strengths of the state lies in cotton cropping, which is practiced on about 14 lakh hectares. In comparison, USA grows the crop on an area of 18 lakh hectares.

Commodities

Mango  Citrus Fruits  Banana  Grapes  Apple  Papaya  Guava  Pineapple  Tomato  Brinjal  Onion  Cabbage  Potato  Okra  Cauliflower

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

The data for Telangana has been derived basis-district wise data of former Andhra Pradesh.

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State Trivia

Rubber and Tea are the important cash crops of the state. Tripura ranks second only to Kerala in the production of natural rubber in the country. Tripura is also the largest producer of Jackfruit in the country.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals
State Trivia

Uttar Pradesh is known for its Dusseheri variety of mango. The state is one of the largest producers of this variety in the world and its export plays a significant role in the state’s economy.

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

Uttarakhand is the largest producer of temperate fruits like peach, pear and plum in India.

Commodities

The map highlights the top three surplus and deficit Fruits & Vegetables for the state.

Production - Highlights the top five Fruits & Vegetables produced in the state.

Sources: National Sample Survey Office, National Horticulture Board, State Government Portals

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State Trivia

India is one of the world’s leading producers of tea accounting for 23% share by volume. The tea produced in India is among the finest in the world. Darjeeling tea is well-known all over the world and is the first Indian product to be recognised by the European Union as a protected GI.

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About

The Ministry of Food Processing Industries (MoFPI) is a ministry of the Government of India responsible for formulation and implementation of the policies & plans for the food processing industries within the overall national priorities and objectives. The ministry was set up in the year 1988, with a view to develop a strong and vibrant food processing industry, ensuring value addition to agricultural produce, diversification & commercialization of agriculture, generation of employment, enhancing income of farmers and creating surplus for the export of agro & processed foods. In the era of economic liberalization, all segments including: private, public and co-operative sectors have defined roles to play and the Ministry promotes their active participation. The Ministry has a clear goal of attaining these objectives by facilitating and acting as a catalyst to attract quality investments from within India and abroad into this sector with the aim of making food processing a national initiative.

About YES BANK

YES BANK, India’s fourth largest private sector Bank, is the outcome of the professional & entrepreneurial commitment, vision & strategy of its Founder Rana Kapoor and his top management team, to establish a high quality, customer centric, service driven, private Indian Bank catering to the Future Businesses of India.

YES BANK has adopted international best practices, the highest standards of service quality and operational excellence, and offers comprehensive banking and financial solutions to all its valued customers. YES BANK has a knowledge driven approach to banking, and a superior customer experience for its retail, corporate and emerging corporate banking clients. YES BANK is steadily evolving its organizational character as the Professionals’ Bank of India with the uncompromising Vision of “Building the Best Quality Bank of the World in India by 2020”.