Review of Literature
CHAPTER II

REVIEW OF LITERATURE

2.1. INTRODUCTION

Review of Literature is a critical analysis of a segment of a published body of knowledge through summary, classification and comparison of prior research studies, review of literature and theoretical articles. The aim of a literature review is to show that "the writer has studied existing work in the field with insight". A good literature review presents a clear case and context for the project that makes up the rest of the thesis. So, a good literature review raises questions and identifies areas to be explored. Thus in this part, the previous study pertaining to Coir Industry has been summarized.

2.2. REVIEW OF LITERATURE

Abdur Rahman\(^1\) made a study on the export of Coir Industry in order to analyse the fall in the export trend of coir goods which reveals that the Coir Industry in India which continued with the traditional method of production could not withstand the competition from Sri Lanka, and USA markets. The fall in production of mats and matting in West European countries also contributed to the fall in export of Coir Yarn from India. Introduction of highly competitive products and rising labour cost in European countries made coir production no longer remunerative. It prompted many of the European mills to close down their units or drastically cut the volume of production.

Soundarapandian and Shiny Philip\(^2\) identified some of the constraints faced by Coir Industry in Kerala. The study found that the major problem in Coir Industry is non-availability of husk at a cheaper rate. Because of the non-availability of husk, production was decreasing. In Kerala only 30 percent of the husk is utilized for coir production. The study also reveals that coir production also declined due to inappropriate climatic conditions. Finally, there was decrease in production due to the lack of demand in the market and traditional method of production. The study clearly suggested that the industry should not continue with the present method of production.
A study conducted by Isabella Rani and Krishnamoorthi, S.3 in Pollachi Taluk of Coimbatore District in order to analyse the investment pattern and employment pattern in the Coir Industry. It reveals that the labour share to the total cost accounted for 10.39 percent. It can be seen that the crushing units enjoy more profits than fibre units which implies that the vertical integration is more profitable than a single operational unit. The results indicate that the potential for increasing the turnover would be by using more and more of raw materials like coconut husk. The total labour force workout to 14.32 labourers per unit per day in the case of de-fibering units with conveyors, and 17.35 labourers per unit in the case of curling units. These units provide employment for both men and women.

A study conducted in Kerala by Coir Board 4 revealed that the production was known to the people of Kerala from time immemorial. The Industry was providing employment to half a million people of, which 80 percent are women. In Kerala, Coir Industry is only second to agriculture as a source of employment. The study found that 6044 units were located in India, of which 4525 units were in Kerala. The study also found that 99 percent of coir goods exported from India originates from Kerala. In 1993-1994, out of the total exports of Rs.158 crores, Rs.131 crores was from Kerala which account for 90 percent of export.

Sudeedharan and Sreedharan5 studied the internal markets of coir and coir products and found that the export promotion activities in India are low. This has to be stepped up considerably to increase the domestic sales. It reveals that more than 90 percent of the production is in the traditional way. They suggested measures for increasing the use of coir products and they also suggested that the Government agencies should also take steps to popularize the products.

The Coir Board6 survey on the brown coir fibre sector showed that the production of brown fibre has been steadily increasing in India over the last few years. Kerala recorded a steady increase in the output of brown fibre. The study identified that the value addition in brown fibre sector was low although unretted fibre had been increasingly used for the production of door mats and mattings in the traditional sector. The study was also conducted on export sector and it showed that the brown fibre had not shown any appreciable increase despite the other coir goods showing an increasing trend.
Baskaran Unnithan\textsuperscript{7} focused that the future of the Coir Industry in India lingers on the constructive measures adopted to increase productivity, improve quality, reduction of cost and above all by improving the marketing mechanism.

Shiny Philip\textsuperscript{8} made a study on manpower resource management in Coir Industry. The study states that small industrial sector had emerged as a vital segment of the Indian Economy. Coir industry is an important agro-based, labour intensive, export-oriented small-scale industry in Kerala. Therefore, manpower management in Coir Industry is important. The study was confined to the Alapuzha District of Kerala. On the basis of the analysis, it was found that manpower management policies were well practiced in public sector Coir Industries when compared to others. Coir industry in India needs a well defined personnel policy and it should be effectively monitored by the Directorate of Coir Industry and the Coir Board.

A Study was conducted by the Department of Economics and Statistics, Kerala\textsuperscript{9}, on coir and coir products in Kerala during the year 1984-1985. Its main objectives were to assess the number of coconut husks used for coir production, the production of Coir Fibre, Yarn products and the number of employees employed in the unorganized sector of the Coir Industry. The study covered the entire state of Kerala and it found that raw materials needed for coir production was insufficient and the number of persons employed in the unorganized sector of the Coir Industry was the second largest only to agriculture.

State Planning Board\textsuperscript{10} conducted a study and published a report on the special task force on Coir Industry. The study states that measures must be taken to increase economic availability of husk and measures must be taken to increase productivity of labour and quality of yarn. It also suggests that coir co-operative societies must be made more efficient and economically viable for improving the manufacturing sector, promotion and development of internal market etc.

Thomas \textit{et al.}\textsuperscript{11} examined whether modernization in Coir Industries will affect employment generation. The study deals with the Coir Industries and explains the affect of modernization of traditional industries with the objective of its affect on employment generation. This study raises a number of policy issues relating to technology, employment, organization and management of production of output.
Mathew, T.V.\textsuperscript{12} examined the Brown Coir Industry for expansion in Tamilnadu. The study states that among states producing Brown Coir Fibre, Tamilnadu holds the first place. He states that Coir Industry requires development of production activities both in the modern methods as well. Export and domestic markets for coir and coir products was steadily growing, unavailability of trained workers and mechanics of production were congenial to start an individual or combined units for exploiting the available resources.

Deepa\textsuperscript{13} made a study on reclamation of coir waste using fungal inoculants and evaluation of its performance as organic manure. This study reveals that Coir Pith, an agro residue, is available in large quantities for composting purposes. Recycling of coir wastes could be done through composting that avoids pollution of the source, at the same time results in enriched organic manure.

Ramanatha Iyer, T.S. and Girish, M.S.\textsuperscript{14} made an experimental study on coir fabrics for retaining walls. This study says that natural fibres like coir can be made suitable with proper treatment for reinforcement of function in cohesionless soils as well as filter fabric in cohesive soils. The study concludes that coir felt fabric walls are easy to construct for small heights.

Ajith Kumar, P.\textsuperscript{15} made an attempt to examine the economic utilization of Coir Pith. It reveals that Coir Pith, although light in weight, occupies a lot of space. Management of this waste material for economic advantage is, therefore, of crucial importance from the point of view of protection of environment and the future of this highly labour oriented industry. He recommended it as a substitute for peat because of its qualities as high water holding capacity, good drainage, absence of weed and pathogens, slow to decompose than peat, excellent wettability, superior to peat etc.

Jose, V.S. and Sankaranayanan, K.C.\textsuperscript{16} made a market survey for the demand of coir and coir products. The survey was conducted during the years 1984-1985 to 1999-2000. It states that during these years substantial growth was registered in the production of brown fibre due to the entry of Tamilnadu, which used mechanized defibering mill for brown fibre. The demand for coir is increasing all over the world, but it states that India could not perform well in the international market as other coconut producing countries are supplying similar products at reduced prices.
Sundaresan, S.\textsuperscript{17} made an attempt to study about the use of Rubberized Coir in automobiles. Of various alternatives tried like sisal fibre, jute fibre, the coir fibre was decidedly found to be the best. In Europe, almost all the more expensive car producers had been the consistent users of coir. It further states that concessions to this Industry will make it preferable in the furnishing of railway passenger coaches, bus seats, cinema theatre seats and cushioning materials for hotel resorts, thus enlarging its domestic market.

Pylee\textsuperscript{18} made an attempt to examine the problems and prospects of Coir Industry in India. He dealt with reference to the complaints of fibre shortage, bottlenecks of Coir Yarn and coir products. Because of shortage of fibre, the employment opportunities in Coir Industry underwent difficulties. The shortage also adversely affected the output of spinning and manufacturing sectors located chiefly in Kerala.

A study by Christy Fernandez\textsuperscript{19} on the strategic alliance for the development of Coir Industry in the APCC countries and demand prospects for coir products in Eco-friendly Applications deals with the serious challenges faced by the coir products from synthetic products. The Asian and Pacific countries together contribute 85 to 90\% of the total world production. But the market share for coir is declining and is far from its potential. Further the Study calls for the review and understanding of factors for the decline in the market share and to evolve strategies for retaining and expanding its share.

Applications of coir in Agricultural Textiles by Sudhakaran Pillai, M. and Vasudev, R.\textsuperscript{20} dealt with the various properties of coir and some of the specific applications. Coir, due to its characteristics of retaining moisture, is preferred in agriculture. It promotes the growth of new vegetations by absorbing water and preventing the water from drying out. Coir is also used for preventing soil erosion. The study concludes by saying that coir has a very great potentiality in agro textile application.

Soundara Pandian, M. and Jagadees Pandi, S.\textsuperscript{21} examined the prospects and problems of Coir Industry in the country. The major problem that had been identified in the Coir Industry was that the Coir Industry had stuck to the traditional methods of production due to historical and sociological reasons. The study further states that with
the present method of production, the industry cannot go far into the future. They suggested various measures for improving the Coir Industry. The measures are upgradation of skill of workers through training for increasing productivity and income. The study further states that the quality of Coir Yarn and coir products must be improved which promotes new coir products like geo-textiles, rubberized coir, needled belt, Coir Pith etc. Increase in export must be done through development missions, sponsoring delegations must participate in trade fairs.

Lanka Santha, P.E. and Calista R. Santha\textsuperscript{22} in their study examined that erosion control has become an essential part of every construction project. Impressive progress in new products and design methods has been made in the erosion control industry. This trend is continuing with increased ecological awareness to restore our environment. A full line of coconut fibre (coir) products are available for use in erosion control. Most of these products successfully comply with 3 E's (economic feasibility). The study concludes that designers and specifiers should educate themselves about various properties of erosion control products and their compliance to 3 E's. This will allow them to identify and understand how to use erosion control products in their designs to yield optimum erosion control designs.

Ganassamurthy, V.S. and Manickam, S.\textsuperscript{23} made an analysis of WTO and its impact on India's foreign trade. The analysis of the study showed that simple growth rate, qui-quennial average, co-efficient of variation of exports and imports and trade balance. The comparative study of pre-WTO regime and post-WTO regime, they found that after WTO exports and imports and trade balance showed a declining trend. To increase exports they suggested that Indian export should acquire high degree of competitiveness by adopting new technology for international-level quality. As India depends only on developed countries for its exports, steps should be taken to increase the volume of exports to developed countries also.

Kumarasamy Pillai\textsuperscript{24} has pointed out on product diversification in Coir Industry in Kerala, that the coir products were produced in the coastal belt of Kerala early in the eleventh century. Over the centuries, the same old equipments and production process
were used in the industry without any significant changes. Moreover, the products and the user areas also remained unchanged. However, in the recent past there is a welcome change noticed in the manufacturing sector of the industry with a view to attain quality improvement and to eliminate drudgery in the production process. Traditional equipments like spinning wheels are being replaced by motorized looms. Further, concerted efforts are made to identify new user areas for coir and coir products. He commented that all these developments have given a new look to the industry.

Kumarasamy Pillai\textsuperscript{25} focused that the utilization of trained hands by the industry was in a low order. Until such time it should be the endeavour of the brown fibre sector to convert as much as coir fibre into yarn using the latest technology available and feed the export oriented production sector of Kerala. Pillai suggested, if Kerala can produce best variety of Coir Yarn, using fibre imported from the brown fibre sector, they send value added products to meet the requirements of export oriented production sector of Kerala.

Manikandan Pillai\textsuperscript{26} formulated the model coir village scheme and focused on the welfare of coir workers. The scheme on model coir village programme gave major emphasis on extending assistance in improving the basic amenities and living conditions of coir workers. The enthusiasm with which workers received the programme and its success was a motivating factor for taking up welfare programmes for coir workers in a big way in the succeeding years. One of the components of the package was extension of the coverage of the model coir village programme to 50 more villages in Kerala and the socio economic needs of the villages selected were identified through a bench mark survey.

Kutty\textsuperscript{27} studied the marketing strategy for promoting sales of coir products especially in Kerala. He pointed out that marketing of coir and products in India and elsewhere would be important for the survival and growth of Coir Industry. He recommended well organized promotional measures to carry the message of coir to prospective consumers. Urban and Semi urban areas are bound to result in increased use of coir products. Kutty made some of the recommendations to promote the sales that are, sales campaign by way of advertisement in news papers, journals and periodicals, allowing 20 per cent rebate on selected good, participating in important national and
regional trade exhibitions, organizing of seminars/workshops in different countries to create awareness about new use of coir, sponsoring of market development missions to various countries and export development assurance to exporter etc.

Nandha Kumar made a study on recent development of coconut Industry in India and the study revealed that there was significant development in all the sectors of Coir Industry in Kerala in the recent past. The state accounts for more than 90 per cent of total coir products exported from the country. The state alone provides 3.16 lakh of employment and earns foreign exchange to the tune of Rs.180 crores. The Coir Industry in the state is set for a leap forward in the modernization of various processes and introduction of new products such as Geo-Textiles, Coir Ply, Coir Pith which minimize the usage of rubberized coir used in the manufacture of mattresses etc. But the state is yet to exploit the full potential of the natural fibre.

Joseph analysed the significance of the Coir Industry and revealed that the dalits and economically weaker sections of the society depend on Coir Industry for their livelihood. It is also significant because it plays a dominant role in the economy of the coconut growing sector particularly in Kerala. The study found that the current level of production of Coir Industry utilize around 25 percent of the annual yield of coconut husks. There is possibility to increase the utilization at least by 50 percent of husk production for industrial purposes. Therefore, there exists vast potential for stepping up of production of Coir Industry in India.

Gopala Krishna Asari, V. gave a clear account of rural coir co-operatives that have been introduced with a view to add to the production of coir and coir products and to take care of the welfare of the people employed in the Coir Industry. Asari details the structure and functioning of coir co-operatives in Kerala. The coir co-operatives should prove themselves to be the pivots for trade union activities while performing functions such as increasing the marketing facilities for coir products, purchase and sale of husks and enabling the member for getting cheap loans, bonus and subsidies. According to him, illiteracy among the employees in the Coir Industry and some political problems had been responsible for the slow and steady growth of coir co-operatives.

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Dinesh\textsuperscript{31} made a study on organizing the coir co-operatives. The study revealed that it is necessary to organize large cooperatives combining the operations right from the primary process to the finished products to promote marketing. The societies should be large enough to incorporate a variety of processing activities including marketing so that they might function as visible institutions if a right type of cooperative organization is created.

Thomas Isaac \textit{et al.}\textsuperscript{32} on modernisation reviewed that the scheme of co-operatisation in Kerala was slowly grinding to a halt. They revealed that even though there were around 420 Coir spinning cooperatives with nearly 0.23 million members, the share of cooperatives in total production was only about 10 to 15\%. They were able to provide work for only around 30\% of members, and even these face severe under employment. The basic reason for this dismal performance was the failure to procure sufficient raw husks. The cooperatives that pay full minimum wages and other benefits to the workers were unable to compete with the private sector in the husk market. The private entrepreneurs were able to offer higher prices for the husks because of the savings made by circumventing the minimum wage requirement.

Rajagopal\textsuperscript{33} analyzed the organizational and managerial perspectives of all Women coir cooperatives. For the purpose of the study, 60 women members from all coir fibre societies of East Godavari District of Andhra Pradesh were selected. The study revealed that improper accounting systems, low wage structure and lack of infrastructure were some of the reasons for the failure of the societies. The study suggested that there was need for training to both members and workers to provide quality of goods.

Badar Alam Iqbal\textsuperscript{34} explained on the development of coir goods. The main object must be to make improvement in the working as well as the economic condition of the labour force. Alam suggested the strengthening of coir cooperatives because cooperatives assure the optimum flow of workers. If cooperatives work properly and efficiently they will prove to be highly beneficial to entire labour force engaged in the manufacture of coir products.

Coir Board\textsuperscript{35} conducted a study on marketing of coir and coir products which indicated the expanding role of cooperative societies in developing a stable internal
market for Coir Yarn. At the same time change in policy towards modernization sets in new trends in the industry that would result in its organization on modern lines and making it more productive, efficient and remunerative. The joint effort of policy formulators, producers, workers, experts, traders, labour leaders, and all those interested in the development of the industry is no doubt commendable.

Vijayachandran Pillai conducted a study on the plight of rural coir cooperatives in Kerala. The case study explained the important problems faced by the coir cooperatives in Kerala. The study detailed the capacity utilization of cooperatives in the spinning and manufacturing sectors which was found to be low. The average capacity utilization of the spinning cooperatives was 43.38 per cent and the manufacturing sector was 61.25 per cent. The study also found that all the sample units in the two sectors were facing problems in the procurement of raw materials. The main reasons identified were shortage and poor quality of husks, shortage of finance, and competition from private sector units. It was also found that the majority of the cooperatives (65.48%) were not able to get the working capital requirements in time and as for the marketing of the product is concerned, the price fixed by coirfed was comparatively low, the primary cooperatives were selling the yarn to the private agents at a comparatively higher price.

2.3. CONCLUSION

The analysis of previous reviews helps the researcher to identify the problems to be taken up for the present study. Based on the problems identified, the researcher formulated the methodology for the present study. The methodology for the study is given in the first chapter and the analysis and the findings in the subsequent chapters.
REFERENCES


