CHAPTER I

INTRODUCTION & PROFILE OF COFFEE INDUSTRY

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INTRODUCTION

Coffee is one of the important beverages which is non-alcoholic like tea, cocoa etc. It has been said it comes next to oil in political and economic importance. A large number of countries in Latin America, Africa and elsewhere rely heavily on coffee exports for their income, and this has made coffee important in politics. It is one of the important commercial crop grown in tropical regions. Coffee possess a unique and characteristic aroma and it is one of the most popular beverages consumed throughout the world\(^{(1)}\). It is one of the major traded commodities in the International market with an annual turn over of about 10 billion dollars\(^{(2)}\).

Now coffee production is spread throughout the world. Brazil tops the list of coffee producing countries, the second place being occupied by Colombia\(^{(2a)}\). India's contribution to the world production is nearly 3 percent.
1. ORIGIN:

The first authentic account of the origin of coffee was written by Abd-al-kadir in 1587. Its title originally written in Arabic is given below:

\[
\text{Orndat } \text{as } \text{Safwa } \text{fi } \text{Hall al Kahwa}
\]

It is pronounced (reading right to left)

\[
\text{Omdat } \text{as } \text{Safwa } \text{fi } \text{Hall al Kahwa}
\]

or in the literary style:

Omdatu s safwati fi Hallu ‘l Kahwati, which means, literally,

“The maintenance of purity as regards the legitimacy of coffee”

Kahwa, is the Arabic word for coffee. The author is Abd-al-Kadir ibn Mohammed al Ansari al Jasari al Hanbali. That is, he was named Abd-al-Kadir son of Mohammed.

There are contradictory views regarding the origin of coffee. Linnaeus first believed that its place of origin was Arabia, but later on he thought that its origin might be in Ethiopia and Arabia and later it spread to Sudan\(^{(1)}\).
Abd-al-Kadir ibn Mohammed lived in the tenth century of the Hegira-the sixteenth of our era, and wrote his book in 996 A.H or A.D. 1587. Coffee had then been in common use in Arabia since about A.D. 1450 (4).

During the same period, there had been references about coffee in European texts also. The first European text on Coffee date back to the second half of the sixteenth century. Charles de sluys (Clusius) was the first European analyst and botanist to provide information on certain morphological characteristics of Coffee beans (1574). A few years later, the German traveller Leonhard Rauwolf in 1582 published a report on his travels in Syria in 1573 and gave some details on Coffee and its use in the Lavant.

The most detailed description of the Coffee plant and its berries, however, was that of the Italian botanist Prospero Alpino who in 1592 after staying sometime in Egypt published a book on the plants of Egypt “De plantis Aegypti” in which a chapter was devoted to Coffee.

Bieber states that the Coffee plant has always existed and has always been known in Abyssinia. Coffee abyssinia or Coffee kaffensis (wrongly described, accordingly to this author, as C. arabica by Linnaeus) has been found from time immemorial, in the wild or Semi-wild state, in the forest zones of the Southern Mountains of Ethopia (5).
Nearly all the versions however agree in affirming that it started in Yemenite Sufi circles.

Coffee was a part of commerce before it came to any written record. It was appreciated by the Arbs of Yemen who first grew it before A.D-575. The great Abd-al-Kadir had taken coffee from Ethiopia and sent it to other parts of the Arabs world at dates we do not know but before his death in 855. It was being used in Mecca by 1511, and was known as early as 1540 to be an old important part of the Ethiopian Culture. It spread slowly in the Levant as a medicine and an exquisite speciality but it was not until 1554 that it reached Constantinople.

But no authentic record has so far been available to exactly pinpoint the place and date of Origin of Coffee. Thus the origin of Coffee is totally shrouded in mystery. The veil of legends which had their Origin in Arabia and Europe eluded the truth of the discovery of the Coffee plant. Even-though some authors have attempted in vain to trace the genesis of Coffee in the Greek mythologies no historian has yet positively established how and when Coffee plant was discovered and its cultivation methods developed.

Among the Arabian authors mention should first be made of Ahmed Ibn Abd-al-Ghafar, who taught the use of Coffee in Yemen, Chiefly in Sufi circles, in the course of religious Practices held at night. According to this
author, Coffee drinking was introduced in to Aden by the Mufti Mohamed Ben said Dhabhani. The second tradition attributes its introduction into Arabia to Ali Ben Omar al Schadhili of the schadhili order who also spent some time in Ethiopia and who died at Al-makha in 1418.

There is one tale about the origin of Coffee. There is a story of a goat-herd person known as Kaldi. He found his animals dancing and Cavorting after eating fruits and branch tips of certain bushes. He was curious to know about this bush. So one day he tasted the fruits and became refreshed and stimulated to dancing with his goats in the Arabian hills. Below in the flickering heat at a far distance lay slumbering the age-old wide sanctorial space where grew up the city of Mecca.

It so happened that a drowsy monk of Mecca was passing by and admired the wakeful herd-boy and talked to him. Kaldi told him his secret and asked the monk to try the fruits. The monk then ate the fruits and felt better. In this time he could pray longer awakenly. This soon became a great value to the people of Mecca and later on it spread to the other parts of the world.

The legends and early writings indicate that Arabia is the origin of Coffee Haarar also wrote in his book titled “Modern Coffee production” that Coffee originated from Arabia.

(8)
According to another tradition the credit for introducing Coffee to Arabia Felix belongs to another Suji, Abn Beker Ben Allah al Aiderus, who died at Aden in 914 of the hegira (1508-09 A.D).

A brief history of the growth of Coffee drinking:

Now it was widely recognised that certain peoples of Africa had used coffee from time immemorial. Outside its natural habitat of Africa, Coffee was first used in Arabia nearly always as an infusion by the yemenite Sufi groups in the town of Aden and so introduced it into Syria, Iran and Turkey.

The first public Coffee house (Kahveh Kharch) at Constantinople was opened in 1554. Coffee became popular in all Islamic Countries during the sixteenth and seventeenth centuries. Early in the seventeenth century Coffee progressed from the Near East to the Christian Countries of Europe, brought in by Venetians and Hollanders. It seems that the first coffee beans appeared in Venice about 1615. The first coffee houses became the rendezvous of intellectuals and Politicians, and centres of liberal propoganda which the governments of the time would not tolerate.

The exact date of the introduction of Coffee in to United States is not known but official reports make it certain that in 1670 it was being drunk in colonial New England\(^{(10)}\).
2. **AREA PROFILE - South India**

India is one of the oldest civilizations with a kaleidoscopic variety and rich cultural heritage. It has achieved multifaceted socio-economic progress during the last 52 years of its independence, it has become self-sufficient in agricultural production and now the 10th industrialised country in the world. It covers an area of 32,87,263 sq.km. The climate of India may be broadly described as tropical monsoon type. India's population as on 1-3-1991 stood at 846.30 million. It is the 7th largest country in the world. India is bordered with Pakistan on the West, Bangladesh and Burma on the East, China, Tibet, Nepal and Bhutan are on the northern border. Bounded by the Great Himalayas in the North. India's southern part consists of four states.

1. Karnataka
2. Kerala
3. Tamil Nadu &
4. Andhra Pradesh

The area population, languages, literacy rate and main occupation of the people are given in Table 1.1.
### Table 1.1
Area Profile - South India

<table>
<thead>
<tr>
<th>States</th>
<th>Area (Sq.km)</th>
<th>Population</th>
<th>Principal Languages</th>
<th>Literacy (percentage)</th>
<th>Main occupation of the people</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Karnataka</td>
<td>1,91,791</td>
<td>4,49,77,201</td>
<td>Kanada</td>
<td>55.98</td>
<td>Agriculture</td>
</tr>
<tr>
<td>2. Kerala</td>
<td>38,863</td>
<td>2,90,38,000</td>
<td>Malayalam</td>
<td>90.59</td>
<td>Agriculture</td>
</tr>
<tr>
<td>3. Tamil Nadu</td>
<td>1,30,058</td>
<td>5,58,58,946</td>
<td>Tamil</td>
<td>63.86</td>
<td>Agriculture</td>
</tr>
<tr>
<td>4. Andhra Pradesh</td>
<td>2,75,068</td>
<td>6,65,08,008</td>
<td>Telgu &amp; Urdu</td>
<td>45.11</td>
<td>Agriculture</td>
</tr>
</tbody>
</table>
1. Karnataka

Karnataka is the eighth largest state in India, both in area and population, formerly it was known as Mysore. On November 1973, the name Mysore was changed to Karnataka under “The Mysore State Act 1973”. The two important river systems of Karnataka are the Krishna and the Cauvery. Karnataka is predominantly agricultural. About 76 percent of the population lives in rural areas, 71 percent of its working force is engaged in agriculture and allied activities which generates about 49 percent of the state income. It stands first in the production of electronic equipments. Karnataka lies to the south of Goa & Maharashtra to the West of Andhra Pradesh to the west of Tamil Nadu and to the North of Kerala. It has a sea coast of nearly 400 km.

2. Kerala

Kerala came into being 7 years after India. The modern state of Kerala was formed on 1st Nov. 1951. Kerala is one of the smaller states in India, just 1.3 percent of the total area of India. Kerala is a land of rivers and backwaters, and is bounded north by Karnataka, east and south east by Tamil Nadu, south west and west by the Indian Ocean. 73.61 percent of population are living in rural areas. Nearly 40 percent of the total
area is used for agriculture. Kerala is the only state in India where sex ratio is favourable to women and ranks first in the literary map of the country. Coconut, rubber, cocoa, cardamom, coffee, tea, cashew, tapioca and rice are the major items cultivated in Kerala. Kerala’s estimated population during July 1995 was 309.37 lakhs.

3. Tamil Nadu

Tamil Nadu has a hoary antiquity is bounded on North by Andhra Pradesh and Karnataka on East by Kerala on East by the Bay of Bengal and on the south by the Indian ocean. It is the eleventh largest state in India. The economy depends largely on agricultural sector as more than 70 percent of the population are engaged in agriculture. Tamil Nadu is the chief patron and exponent of Bharata Natyam and Cambatic Music. The important tourism centres are Kodaikanal, Ooty, Yercaud, Mamallapuram, Rameswaram, Kanyakumari, Courtallam etc... Major industries in the state are cotton.

4. Andhra Pradesh

Andhra Pradesh came into being on 1st Nov 1956. It is the fifth largest state in India; both in area and population. It is bounded by Bay of Bengal in the East, Maharashtra in the West, Madhya Pradesh and Orissa in the North, Tamil Nadu & Karnataka in the South. This state provides a major link between the north and south of India. The important rivers are Krishna and Godavari. About 70 percent of the people are engaged in agriculture. Rice is the major food crop.
3. COFFEE IN INDIA

Coffee is one of the most important agro based industries in India from the socio economic and ecological points of view. India is one of the major coffee producing and consuming countries of Asia accounting for about 2 percent of the global area and has an average share of about 4 percent of the world production and 3 percent of International trade. Coffee is India’s single largest foreign exchange earner and world’s single largest traded commodity. The export earnings from coffee was Rs. 1648.51 crores in 1999. The country is aiming at a production target of 2,95,000 MTs during 2000-2001\(^{(15)}\).

Coffee was known in India 400 years back though the commercial cultivation started as early as 1840. Since that time, the industry has grown to an unexpected dimension due to the effort of Coffee Board in developing the plantations. Now barren lands have been converted into green treasure lands. Some of the milestones in Coffee Industry Development in India are--

- 1670- Introduction of Arabia Coffee in to India - Baba Budan
- 1870- Identification of Coorg cultivator
- 1900- Introduction of Robusta
- 1917- Spotting of Kents cultivator
- 1940- Release of S. 795
- 1950- Release of S. 274\(^{(16)}\).
Coffee was probably introduced into Southern India by a Muslim pilgrims early in the seventeenth Century. For a long time it was an unimportant backyard crop and its cultivation as a plantation crop began only from 1837 onward. About 92,000 hectares of Arabica are said to have been planted around 1875(17). Baba Budan brought seven seeds from Mecca during 16th century. He sowed the Coffee seeds near his hul at Chickmangalur in the mountains of Mysore. The British introduced Coffee to the Malabar coast in the 17th century. They collected their planting materials dicectly from Aden.

The Indian coffee Industry is bout 150 years old. The Britishers commenced coffee plantation in India. Soon, the affluent Indians also started coffee cultivation. Later on as years passed by, other people also followed suit and coffee cultivation grew gradually and steadily in India. The coffee industry grew purely by the grower’s own efforts till the Coffee Board was fomed (18).

The Coffee plantations in India were laid down by Shri. Cannon in 1830, and by Shri Glasson in 1840. The cultivation of Coffee flourished and by 1900 Arabian Coffee was Cultivated in the State of Mysore ad Coorg on the Southern slopes of the Western Ghats and the Nilgris Hills. It was Cultivated also in Trvancore Shevaroy and Palani Hills of Madras (19).
It is echoed in another publication also, it is alleged that Bhaba Bhutan a Soofy Saint has brought coffee plants to India, long back to the British Coffee gardens (estates) from Yemen, to Baba Bhutan Giri Hills of Karnataka, South India in 1640\(^{(20)}\).

The present study titled, “Coffee Industry in South India - An economic Analysis” is an attempt to find out the answer, to the fundamental problems faced by the coffee industry to increase the demand and production and stabilise the prices favourable to producers and consumers. The South Indian States Karnataka, Kerala and Tamil Nadu accounts for 98 percent of coffee production and about 92 percent of area under coffee cultivation. Hence the study has taken South India as the main field of study.

4. STATEMENT OF THE PROBLEM

Production of coffee in India is very poor when compared to other tropical countries of the world. Karnataka alone accounts for more than 70 percent of the total production of coffee in India\(^{(21)}\). One of the main reasons for the low production is attributed to low productivity ie 900kg per hectare- well below the 1475kg per hectare in Vietnam.

The bulk of the coffee production in India depends on foreign markets for its survival. Nearly 70 percent of coffee produced in India is exported. The export earnings, in turn, is vulnerable to the international price volatility. Globalisation coupled with the collapse of ICA and Indian Coffee Board
have further compounded the instability of the coffee industry in South India.

Against this scenario, the panacea lies in domestic demand. Although India has a vast market for consumption, it is unfortunate that domestic consumption is very poor. Coffee consumption is limited to a large extent in South India. Tamil Nadu accounts for the large share of consumption.

What are the factors that contribute to this low demand of coffee in India? What are the factors, apart from finance, that lead to such low productivity?

These are some questions that need to be tackled to understand the problems plaguing the coffee industry in all dimensions.

5. **OBJECTIVES OF THE STUDY**

1. To identify the factors that contribute to the low productivity of coffee in South India and to analyse the role of Coffee Board to increase production of coffee.

2. To study the financial problems faced by the study units and to assess the foreign exchange earnings by coffee export.

3. To study the problems of marketing of coffee.

4. To analyse the future demands.

5. To offer suggestions and recommendations to strengthen the coffee industry in South India.
6. SCOPE OF THE STUDY

The outcome of the study will be useful in the context of liberalisation of Indian Economy to the coffee growers, consumers, and government. The study shall put forward valuable suggestions and recommendations to the government to formulate appropriate policy guidelines to boost production and consumption. The growers shall get valuable suggestions to increase the productivity of coffee. The Coffee Board (or) the state marketing agencies shall be helped to adopt appropriate marketing strategies to boost local demands.

7. HYPOTHESES

The following hypotheses are framed

1. The domestic consumption for coffee is not elastic.

2. The policy of the Govt. failing to promote internal market inspite of price fluctuation.
8. METHODOLOGY

Research methodology has been adopted in connection with this research work.

a) Sample Size

The following sample design is adopted for the study. The break-up of the constituency of the survey is given in Table 1.1

(b) COLLECTION OF DATA:

Both primary and secondary data were collected and used for this study. Primary data have been collected by the researcher himself from--

(a) Coffee planters

(b) Coffee exporters

(c) Various financial institutions providing loans to the industry

(d) Coffee Board officials

(e) Restaurants and coffee outlets

(f) Coffee Consumers

(g) e-mail interview and so on

Secondary data have been collected from various journals, conferences, daily new papers, various books, magazines, internet etc.
**Total Break-up of the respondents of the survey**

<table>
<thead>
<tr>
<th>Serial No</th>
<th>Constituency</th>
<th>No. of persons interviewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Coffee retailers</td>
<td>100</td>
</tr>
<tr>
<td>2.</td>
<td>Coffee planters</td>
<td>100</td>
</tr>
<tr>
<td>3.</td>
<td>Coffee outlets</td>
<td>100</td>
</tr>
<tr>
<td>4.</td>
<td>Hotels and Tea shops</td>
<td>100</td>
</tr>
<tr>
<td>5.</td>
<td>Coffee Consumers</td>
<td>120</td>
</tr>
<tr>
<td>6.</td>
<td>Financial Institutions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Private / Government</td>
<td>40</td>
</tr>
<tr>
<td>7.</td>
<td>Coffee Board Officials</td>
<td>20</td>
</tr>
<tr>
<td>8.</td>
<td>Coffee exporters</td>
<td>20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>600</strong></td>
</tr>
</tbody>
</table>
A detailed questionnaire was prepared to cover the objectives of the study. The questionnaire was prepared in consultation with the guide and experts in the same field.

Totally 600 respondents were taken for the survey. Out of the total, retailers, planters, outlets, hotel and tea shops were given one-sixth representation respectively ie 100 respondents each. Then one-fifth representation was given to consumers ie 120 numbers. The remaining respondents were 80. Out of this, 50 percent representation given to financial institutions and the remaining 50 percent was equally divided between Coffee Board officials and exporters.
(i) PERSONAL INTERVIEWS:

The researcher has selected important large scale and small scale coffee growers, consumers, sellers, exporters, financial institutions, etc., from diverse socio-economic strata to assess their views on the coffee industry. This personal interview was facilitated through a survey.

(ii) SURVEY:

A random sampling survey was conducted in the four states to analyse the dynamics of market forces and institutional interventions, which ultimately determine the performance of the Coffee Industry in South India. The survey has covered eight constituencies for the study.

The researcher has visited the selected areas in the four states and interviewed the different constituents. The survey enumeration was tabulated and analysed in consultation with the guide. The constituency for the survey include planters, retailers, consumers, officials of the various financial institutions, Coffee Board officials, etc.

(iii) SEMINARS FOR COFFEE GROWERS / CONSUMERS AND GOVT. OFFICIALS:

One seminar was conducted for the three important players of the coffee industry to elicit their opinions on the various facets of the coffee industry relevant to the research.
(iv) DISCUSSION WITH RESEARCHERS:

Researcher also contacted those who have already done their research on particular aspects of coffee industry to get more clarification.

(v) QUESTIONNAIRE

A detailed questionnaire is prepared for the following category of people.

i) Coffee Retailers
ii) Planters
iii) Coffee outlets
iv) Hotels and Tea shops
v) Coffee Consumers
vi) Financial Institutions - Private / Government
vii) Coffee Board officials
viii) Coffee Exporters

(vi) TABULATION

The data thus collected are tabulated under various headings. Master table for analysis was prepared for each topics under research.
(vii) DATA ANALYSIS

The data are analysed by the researcher with the help of the guide. Most of the analyses and computations are done through computer. The findings of the analyses are used as a tool to formulate suggestions and recommendations.

c. PERIOD OF STUDY:

The period of the study is restricted to 1991 to 2000 for the purpose of accuracy in data analysis. The official data to a large extent are available from reliable official sources for the period from 1991 to 2000. But for the next three to four years the estimated projections are taken for the study.

(d) TOOLS APPLIED

The following tools are used to find out the relation between production, and Area of cultivation of coffee, Annual average growth of export, price relative index of coffee export and to find out the future demand for coffee.

1. Correlation Analysis

To find out the relation between the production and area under cultivation of coffee.

2. Trend Analysis

To find out the growth of Three years Annual Average of exports.
3. Price Relative Index

To find out the price relatives of Coffee export earnings per Kg. during the period 1991 to 1999.

4. Straight Line Fitting

To focus the future demand position

9. CHAPTERISATION

There are seven chapters, in this study. The first chapter is Introduction and Profile of the coffee industry. The first chapter depicts the first authentic account of the origin of coffee, the period in which coffee was introduced in India and the various objectives & scope of the study; Besides, it gives the methodology adopted in collecting the data, period of study and various tools applied in the study etc... are discussed.

The second chapter is “Review of Literature”. In this chapter, various journals, periodicals, dailies, reports, magazines, study reports etc., are reviewed and the gist is incorporated.

In the third chapter, “Production and Productivity” is discussed. This chapter analyses, the production and productivity statistics of coffee in the world including South India. Further, it indicates varieties of coffee produced in India, Climatic factors, nature of soil etc... to cultivate Coffee. It also deals with statewise production and productivity of Coffee in South India.
The fourth chapter is “Finance”. It enumerates the importance of finance in the coffee industry, various financial institutions granting loans to the industry, Credit facilities available with Commercial banks, various bottle-necks in getting finance are analysed. Moreover, the role of NABARD in the development of the industry is also discussed.

The fifth chapter is “Marketing and Pricing”. The various factors influencing coffee pricing, requirement of market mechanism, requirement of global market situation, Indian coffee market situation etc., are discussed. Besides, the role of the Coffee Board in fixing pricing and marketing of coffee, price trend of coffee in India are also analysed.

The sixth chapter is “Demand and Consumption”. It deals with demand, and supply position of coffee in the world including South India. It also shows the export earnings and focusses the future demand for coffee in India. Further it analyses clearly the consumption pattern of coffee in South India for the last 10 years and forecasts the consumption level of coffee in South India for the next five years.

The final chapter deals with “Suggestions and Conclusion” about the whole study. Indian Coffee Industry stands only with the help of the export market. It survives only with the help of foreign market which absorbs two-third of its total production. It cannot stand unless the share of domestic market is increased. Some valuable suggestions to improve the status of the Coffee Industry in South India is also provided.
10. LIMITATIONS OF THE STUDY

1. The period of the study is limited to ten years only to facilitate more accuracy in the analysis.

2. The data available from the official sources on finance and local consumption are at times inadequate. Hence, the researcher relied on survey and field investigation.

3. Since the area under the study is very large, the constituents of the survey are limited to 600, giving representation to all Southern States.

4. Since South India alone accounts for 98 percent of Coffee production, the other Non-traditional Coffee producing areas in North India are Omitted as their impact on the study is negligible.

5. At times, certain respondents are not co-operative in their response. They used to give unreliable or misleading answers. However, every effort has been taken by the researcher to reduce biased/incorrect information supplied by the respondents.
11. DEFINITION OF "TERMS"

1. The Board

The Board means, "The Coffee Board constituted under Section 4 of the Coffee Act 1942".

2. Coffee

Coffee means, "Commodity derived from the fruit of Rubiaceous plant known by that name, and includes raw coffee, cured coffee, uncured coffee, roasted coffee and prepared coffee".

3. Dealer

Dealer means, "A person carrying on the business of selling coffee whether whole sale (or) retail.

4. Estate

Estate means, "An area administered as one unit which contains land planted with coffee plants".

5. Registered Estate:

Registered estate means, "An estate in respect of which an owner is registered under sub-section (1) of section 14, and includes also any estate in respect of which an owner if required to be registered under the provisions of that sub-section".
6. Free Sale Quota:

Free Sale Quota means, “That portion, stated in terms bulk (or) weight of the whole of the coffee produced by the estate in the year which a registered estate is permitted under this Act to sell.

7. Bag:

“Bag” means 60 Kilogrammes (or) 132.276 pounds of green coffee; “tons” means a metric ton of 1000 kilogrammes (or) 2,204.6 pounds; and “pound” means 453.597 grams.

8. “Coffee Year”

Coffee year means the period of one year, from 1st October to 30th September; and first coffee year means the coffee year beginning from 1st October 1962.

9. Export of coffee

It means, “except as otherwise provided in Article 38, any shipment of coffee which leaves the territory of the country where the coffee was grown
12. ABBREVIATIONS USED

NIA - Non-Traditional Areas
NCA - Non-Conventional Areas
CB - Coffee Board
ISQ - Internal Sales Quota
IQS - International Quota System
FSQ - Free Sales Quota
ACPC - Association of Coffee Producing Countries.
ICO - International Coffee Organisation
USAD - United States Agricultural Department
ICA - International Coffee Agreement
II PM - Indian Institute of Plantation Management
NABARD - National Bank for Agricultural and Rural Development
RRB - Regional Rural Bank
UPASI - United Planters Association of South India
R and D - Research and Development
ISEC - Institute of social and Economic change
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