PREFACE

It was during June-September 1983 that an ad hoc assignment, accompanying a foreign plywood expert, made it possible for the undersigned to visit and study sixteen plywood plants - most of them quite large, of course by Indian standard. These were (and still are) located in Assam, West Bengal, Madhya Pradesh, Maharashtra, North and South Karnataka, Kerala and the Andaman Islands. While on this tour, there also came opportunities to witness logging operations in nearby dense forests. Altogether, this unique occasion provided a brief but interesting and instructive experience of the complex plywood-making processes and a first-hand familiarity with the typicalities of some of the major constraints the plywood units were and are still facing. This observance later kindled our inquisitiveness for an in-depth search on a broader perspective.

Although it was in the early years of this century that plywood as a cheap disposable packing material - then popularly known as venesta board - was first introduced in India, the phenomenal rise in consumption of commercial plywood and at the same time the startling growth of the plywood industry in this country are relatively recent developments. Rise in consumption notwithstanding, the use of commercial plywood, still confined to the affluent population in and around the metropolis, is not as widespread in this country as
in the developed ones. In effect, the vast domestic market and sizable export opportunity are suggestive of a promising future for the plywood industry in India. Yet, beset with multiple maladies, varied in nature and magnitude, this not-too-old labour-intensive industry is languishing in the midst of a deep crisis that threatens its very survival. Sooner or later this industry too may go the same sickening way as did the shipping and jute industries in India! Such a ruinous eventuality should and could well be averted, with appropriate measures as are warranted by the ailments. The emergence of this industry as also its prospects, problems and probable solutions are thus of interest.

This research work brought us in close touch with numerous veterans and experts one way or the other associated with this industry. Our heartfelt greatfulness must go first to the late Dr. Mihir Motayed, a physician-turned-plywood-entrepreneur and a former President of the Plywood Manufacturers' Association of West Bengal, whose inspiration and recollections of historically important events had been of immense help to us. Our sincere gratitude goes to Mr. S. Guha, Executive Officer, Plywood Manufacturers' Association of West Bengal, for his valued suggestions and extraordinary help in allowing us study various reference materials. Among the many others whose cooperation had been especially helpful were Mr. Subir Mazumder (Assam Bengal Veneer Industries Ltd., Goolabari, West Bengal), Mr. S. P. Mittal (Sudarshan Plywood Industries Ltd., Tinsukia and Margheritta, Assam), Mr. K. S.
Lauly and Mr. K. S. Sapath (Indian Plywood Manufacturing Co. Ltd., Dandeli and Dharwar, Karnataka), Mr. Slefchai M. A. Vagh (Hunsur Plywood Works Ltd., Hunsur, Karnataka), Late Mr. S. M. Dutta (Sarda Plywood Industries Ltd., Jeypore, Assam), Mr. K. K. Kela (Vidharbha Veneer Industries Ltd., Nagpur, Maharashtra and Betul, Madhya Pradesh), Mr. A. K. Saharia (Assam Forest Products Pt Ltd., Makum, Assam), Mr. A. K. Ramchendran (Mafatlal Plywood Industries Ltd., Bangalore), Mr. P. Naha (Calcutta Field Station, Indian Plywood Industries Research Institute) and Mr. H. N. Dwivedi (Tea Board, Calcutta). A particular indebtedness is also due to Mr. K. K. Hwang, a South Korean national and an FAO accredited plywood expert, for his invaluable comments on the workings of the plymills in India in general vis-a-vis those in South Korea and Japan, among the largest in the world.

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