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Marketing practices of fertilizer producers in Haryana

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ABSTRACT

Fertilizer is defined as any substance which is organic or inorganic, natural or artificial, supplies one or more of the chemical elements required for plant growth. Carbon, oxygen and hydrogen are directly supplied by air and water and therefore not treated as nutrients by the fertilizer industry. One of the vital industries for the Indian economy is the Indian Fertilizer Industry as it manufactures a very critical raw material for agriculture which is the major occupation of the country. The fertilizers especially like the ammonia urea plants are energy demanding in their operation. The fertilizer industry is passing through a critical phase which promises to significantly alter the future of the industry. The country needs to ensure smooth and timely availability of fertilizer to all parts of the country. The marketing divisions of the fertilizer industry will continue to handle millions of tonnes of fertilizer material. Greater responsibilities will be thrust upon the marketing personnel as they are among the limited gateways to rural India. New opportunities are likely to unfold in the rural sector which will encourage fertilizer industry to add new activities for their marketing divisions. The present study investigates the different aspects of the process of marketing of fertilizers. Specifically, an attempt has been made to study the marketing practices of the fertilizers producers supplying fertilizer to the farmers in Haryana.

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Introduction

The role played by agriculture in the economy of a developing country like India is, indeed, very significant since it forms the backbone of our economy. The ability of the nation depends on the strength of agriculture to feed its large and growing population. Unlike in the developed countries, in India, agriculture has continued to maintain its pre-eminent place in the national economy even after the country has went through a good measure of industrialization. For most of the developed countries, agriculture ceased to be the major sector of the national income where industrialization took place at a rapid Pace. For example in the United Kingdom, agriculture contributes only 2 per cent of the national income; in U.S.A. it is 3 per cent; in Canada, it is 4 per cent in Australia, it is 5 per cent, and so on. The more developed a country industrially, the smaller is the share of agriculture in national income. However, even after India becoming one of the major industrialized countries of the world, its agriculture continues to contribute about 1/3 to its national income.

Agriculture in India has made a remarkable progress in the last three decades. Although an important place was given to agricultural development in the 1st and 2nd Five Year Plans, a major break-through (popularly called as Green Revolution) could only be made in mid-sixties with the introduction of High Yielding Variety (HYV) seeds.

The significant feature of agricultural development was the manifold increase in the use of chemical fertilizers. Corresponding to the increase in food grain production, a decade after the beginning of green revolution (1966-1976), fertilizer consumption increased from 7.84 lakh tonnes fertilizer nutrients to 28.93 lakh tonnes fertilizer nutrients, registering an On the other hand, the production of fertilizers viz. nitrogen and phosphate reached to 109.62 lakh tonnes and 37.59 lakh tonnes

during the year 2000-01 representing a growth rate 6.4 per cent and 31.7 per cent respectively. The production of these two inputs has been recorded 91.62 lakh MT of nitrogen and 32.32 lakh tonnes of phosphates by the end of January 2002. The rapid build-up of fertilizer production capacity in the country has been achieved as a result of favourable policy environment facilitating large investment in the public, cooperative and private sectors. In spite of the increased production of nitrogen and phosphates, entire requirements of potassic fertilizers for direct use as well as for production of complex fertilizers is being met through imports.

Review of Literature

The review of literature is as follows:

Dr. D. H. Parish, Director, Outreach Division, International Fertilizer Development Centre (IFDC) - Alabama, U.S.A in his article The Role of Fertilizers in Increasing Food Productivity in Developing Countries has highlighted the role of fertilizers in agriculture. He was of the view that fertilizer use in the tropics will continue to grow and will be a major contributor to increase food production well into the 21st century. Most developing countries need to improve their fertilizer policies, and sector management, in order to encourage efficient and profitable use of fertilizers and related inputs by the millions of small farm food producers.

Dr. Rajinder Prasad, Head, Division of Agronomy, Indian Agricultural Research Institute, New Delhi in his article published in "Fertilizer in Agricultural Development" stated that fertilizer use efficiency (FUE) can be determined chemically, biologically and economically. Chemically determined efficiency generally known as recovery of applied fertilizer material refers to the percentage of applied nutrient taken up by a crop. The "biological efficiency" is used by the biologists and agronomists and is determined as kilograms produce per kg.

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Nutrient or fertilizer. While the biologists prefer to use the total biological produce, most agronomists would consider only the economic or marketable produce.

Dr. D.L. Hawksworth describing the role of Marketing, states that marketing is the identification of a farmers need and the meeting of that need in the most cost effective manner possible rather than deciding what the farmer needs and then attempting to supply the needs by a bureaucratic allocation system.

Victor L. Sheldon, Marketing Specialist, International Fertilizer Development Centre (IFDC), Albama - U.S.A emphasised the need of planning in fertilizer marketing by saying that both Marketing and Supply should be integrated with a single system, the fertilizer sector management process begins with a determination of the farmers' needs for production of both tradition and commercial crops

Dr. H.L.S. Tandon emphasising on the need of training of fertilizer dealers. He pointed out the consensus appears to be that training of dealers is the essentials of an efficiently run, service oriented business is becoming increasingly important. In doing so, the marketing system will be positively responding to the concept of sale plus service and yet another link in the fertilizer marketing chain will be strengthened.

Mr. Sheldon further opined that it is important to realized that fertilizer marketing is target marketing as opposed to Mass Marketing. There are many possible ways to satisfy the need of each farmer group. Fertilizers have different composition, forms and features. Fertilizer use can be adjusted through information related to application method, timing and placement.

As per Dr. K.K.S. Chauhan, Managing Director, KRIBHCO said that planning and implementation of a sound marketing programme to ensure the marketing of about 45 million tonnes of fertilizer material, by the turn of the century, would require tremendous efforts... There will have to be complete shift in marketing approach from 'distributive stage' to 'marketing stage.'

Objectives of the Study

- 1.To analyse the marketing practices of selected producers of fertilizers in Haryana.
- 2.To examine the role of Intermediaries in distribution and promotion of fertilizers in Haryana.
- 3.To study the buying behaviour of farmers with reference to fertilizers.
- 4.To examine the impact of Govt. Policy on marketing of fertilizers.
- 5.To suggest strategic measures to make the marketing of fertilizers more effective.

Research Methodology

The research methodology is as follows:

Sample Size and Sampling Technique

While analysing retail marketing practices in fertilizers, all the authorised dealers numbering 334 of different fertilizers companies operating in Haryana have been determined as universe/population.

A sample of six companies has been selected from the universe of fertilizer companies operating in Haryana for the purpose of studying their marketing practices. For the above the sample is taken according to simple random sampling techniques.

Data Analysis

To achieve the desired objectives the collected data have been analysed properly by using statistical tools like tabulation, diagrammatic presentation,

A Profile of Sample Units

As stated in the research methodology, a sample of six firms manufacturing fertilizers has been taken for the present study. It is essential to know the sector-wise distribution of these companies.

Product Line:

Product wise position of sample companies is given in Table 2. It is evident from the table that Urea (Nitrogenous) is being produced by all the six companies, whereas Phosphatic and Complex are manufactured by two companies. Further, one company is manufacturing Bio-fertilizers also belong to cooperative sector. It is interesting to note that cooperative sector has its presence in the manufacturing of all type of fertilizers. However, public and private sectors dominate the fertilizer market in Haryana and have the largest market shares in the sale of area. Hence, it is found that all the fertilizer companies are producing urea on large scale basis and distributing in the market.

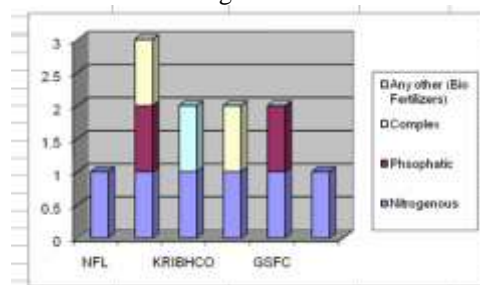


Figure 1: Product Wise Distribution of Fertilizer Companies

New Product Development in Fertilizer Companies:

Given the increase competition in most market today, companies that fail to develop new products or improve the existing products are exposing themselves to great risk. Their existing products may vulnerable to changing consumer needs and preferences, new technologies, etc. The fertilizer companies are also not exception to the above. They need to change their existing products continuously according to the need of the farmers. The position of the survey companies in this regard is presented in table 3. Table reveals that only three companies out of the six have introduced new products during the last years. One of them (KRIBHCO) belongs to cooperative sector which has brought out 'Bio-Fertilizers and seeds' as its new product in the market. Further, one company (GSFC) belonging to private sector has brought innovation in its product. The new product introduced by this company is ASP (Phosphate). This new product has a reformulated proportion of ingredients and has been found helpful in increasing the fertilizer-use-efficiency and thus, it has become commercially viable. Another company which has brought innovation in its product also belongs to the private sector (CFCL). The new product introduced by this company is Bio-Fertilizers which are bacterial cultures mixed with appropriate inert material, which is referred to as a carrier. This new product has been formulated with the new technology and made easy to use by the farmers. It has been found that application of Bio-Fertilizer can supplement the availability of nitrogen to plants through Biological, nitrogen fixation.

New Technology for Innovation

The table 4 indicates that factors affecting to product innovations in respective fertilizer companies. It has been a consensual view of 3 companies which introduced new product, that fertilizer-use-efficiency should be improved as far as

possible. This motive led them to make innovation, in whatever manner it was possible KRIBHCO under the cooperative sector, GSFC and CFCL under private sector were able to make use of technological breakthrough brought out by different agencies in India and abroad-and market survey.

Test Marketing By Fertilizer Companies

Before introducing a new product in the market test marketing is a prerequisite factor. Test marketing can be carried out in several ways as has been shown in table 5. Table 5 depicts that all the three companies which have developed new products have been carried out test marketing by way of field survey before launching their new products in the market. In addition to field surveys, KRIBHCO has chosen trade shows, product use test and research trials for test marketing to introduce new product to the farmers. On the other hand, GSFC and CFCL have done test marketing by using display at dealer shop, product use test besides conducting field trials.

About the type of material used for packing, we may observe from table 6 that majority of the companies use poly package for fertilizers. The table also shows the proportions of the two types of packages being used by KRIBHCO and GNFC companies. It can be observed that jute and poly pack are used in equal proportion, KRIBHCO and GNFC in the proportion of 40:60. During survey, it is found that fertilizer companies use poly packages reluctantly under instructions from the government of India, otherwise jute packages are preferred by the companies because of the liking of the farmers. As there are some specific provisions in the Fertilizer Control Order (FCO) for packaging and labeling. so information on this aspect was collected to enquire whether Fertilizer companies follow these provisions. During the survey, it has been noticed that the companies follow strictly all provisions prescribed by FCO.

Packaging of Fertilizers:

Packaging is recognized are of the important 'Ps' of marketing mix by the producers and works beyond the protective and product handling functions. Hence, packaging should be considered by the producer as something more than a bag for fertilizers. However, in the fertilizer industry, packaging is still used only for protecting the materials from pilferage.

Functions of Packaging :

Packaging is one of the significant marketing decisions. Various functions are considered before finalising the packaging of fertilizer either in the form of jute or poly package. The ranks are converted into score by assigning them weights as 4,3,2 and 1 from 1st to 4th ranks respectively. By multiplying frequency with the weight for various ranks, the scoring has been done. The score for various companies is shown in Table 7.

A glance at the table 7 shows that the most important function of packaging of fertilizer is 'improved appearance of the product', the score being the highest 17.

Further, 'safe delivery' with a total composite weight score of 10 is the second important function for packaging. This is also supported by the public, private and cooperative sector companies with a composite weighted score of 2, 3 and 5 respectively.

The third important factor considered in fertilizer companies is 'sales by description' with a total composite weighted score of 9 which also holds true in the case of all the companies. Hence, on the whole, improved appearance of the product and safe delivery are two important functions of packaging of fertilizer.

Promotion-Mix in Fertilizer Companies

Promotion-mix of a company involves advertising, sales promotion, personal selling, publicity and public relations. In the present competitive business environment, all the companies need to promote their products by adopting different techniques of promotion-mix. Table 8 shows the promotion-mix used by the fertilizer companies in Haryana. It can be seen that all the six companies operating in Haryana make use of advertising, sales promotion, personal selling, publicity and public relations as a part of their promotion strategy. Thus, all the companies irrespective of sector concerned are very much sincere to promote their fertilizers by adopting different advance techniques of product promotion.

Advertising Media used by the Fertilizer Companies

Selection of media of advertising is one of the important decision variably for marketers. The media use pattern in case of fertilizer companies could be seen from the table 9. It is clear from said table that the major medias of advertising are radio, television, Press advertisement, audio-visual aids, transit-advertising, out-door advertising and also direct-Mail. It is found from analysis of table 8 that public sector company (NFL) uses T.V., Newspapers, Magazines and leaflets and transit advertising. The cooperative sector companies (IFFCO & BRIBHCO) use radio, T.V., audio-visual aids, newspapers, corporate folders, magazines/leaflets, outdoor and transit advertising. However, only one cooperative sector company (IFFCO) uses direct mail media of advertising. Further, advertising mix of the private sector companies include medias such as radio, T.V., audio-visual aids, magazines, leaflets, out-door, transit advertising. Corporate folders and direct mail are used by only one private sector company (GNFC). Thus television is used by all the companies except CFCL and magazines/leaflets are used by all the companies.

Advertising Objectives

For marketers, generally the most important objective of advertising is to increase the sales volume by capturing the new market and consequently the profit. The responses received on the relative importance of advertising objectives in case of fertilizer companies are presented in Table 10. It is obvious that promoting sale in the advertising objective for 5 companies out of six. Another significant advertising objective which has been reported by more than 80 percent of the companies 'creating and reinforcing brand loyalty. Further, to increase brand awareness and launching new product are among the more important objectives of advertising. Moreover, 4 companies adopted the advertising objective of fertilizer as introducing the product in new market. In private sector, the advertising objective of one company (CFCL) is as 'Neutralising competitors advertising'. Whereas, another (GSFC) has the objective of 'introducing new product'. Exactly similar responses have been given by the two cooperative sector companies. In the private sector, most of the companies have been advertising objectives of 'promoting sales', increasing brand awareness and brand loyalty, advertising objectives which have been reported by one private sector company is to 'neutralising competitor advertising' and 'to introduce new product.'

Promotional Budget in Fertilizer Companies

There are various criterion for deciding budget for expenditure on promotional activities by firms. Regarding the criterion adopted by respondent companies, the information is available in Table 11. It is obvious from the table that while 'capacity to spend' method is used by NFL and CFCL, both

private and cooperative sector firms use objective and task approach in companies out of six. Another significant advertising objective which has been reported by more than 80 percent of the companies 'creating and reinforcing brand loyalty. Further, to increase brand awareness and launching new product are among the more important objectives of advertising. Moreover, 4 companies adopted the advertising objective of fertilizer as introducing the product in new market. In private sector, the advertising taking this decision. Private sector companies use 'percentage to sales' method more frequently. However, not even a single company is found following 'matching the competitions' for deciding promotional budget.

Free Gifts to Dealers and Farmers

Sales promotion programmes play an important role in fertilizer promotion and, as such, these are an important component of marketing strategy. These programmes are particularly aimed at maximising sales to the farming community. Table 12 shows distribution of companies according to frequency of free gifts to dealers and farmers. It is found that the public sector company (NFL) distributes free gifts to the dealers and farmers only 'sometimes'. IFFCO provides free gifts to the large farmers on 'yearly basis'. While another cooperative sector firm (KRIBHCO) provides free gifts to the dealers and farmers on 'yearly' as well as 'occasionally'. In the private sector one company (GNFC) distributes free gifts to the dealers and farmers on 'yearly' basis, whereas another company (CFCL) distributes free gifts to the dealers on the 'yearly' basis and to the farmers 'occasionally'. However, it is obvious from the table that no fertilizer company uses the distribution of free gifts to the dealers and farmers on 'monthly basis. It is observed from the survey that one private sector company (GSFC) does not distribute free gifts to dealers and farmers.

Mini Kits Distribution by the Fertilizer Companies

Distribution of Mini kits to the small and marginal farmers is also an element of the promotional programme adopted by fertilizer companies. The productivity of different crops at the small and marginal farmers fields is so low that even a marginal increase in investment on the right type of inputs would give higher results. For this purpose, Mini kits are distributed by the fertilizer companies among small and marginal farmers. Each Mini kit contains a pack of fertilizer, improved seed and plant protection chemical etc. Sometime, spray pumps are also to be distributed in the form of Mini kits.

Table 13 indicates that NFL has distributed 10000 Mini-kits in the form of fertilizers (5 Kg. each) in the year 2001-02. However, IFFCO distributed 5000 Mini-kits of fertilizer, 50 of HYV seeds and 12 spray pumps as Mini-kits among the small and marginal farmers in Haryana during 2001-02. Another company, KRIBHCO, distributed 5000 Mini-kits of fertilizer, 300 of HYV seeds and 14 spray pumps as Mini-kits during the year 2001-02. It has been noticed that only one company belonging to private sector (GNFC) has distributed 1000 Mini-kits of fertilizers during the year 2001-02. GSFC and CFCL have also carried out such programmes but the actual figures are not available.

Conclusion

The present study investigates the different aspects of the process of marketing of fertilizers. Specifically, an attempt has been made to study the marketing practices of the fertilizers producers supplying fertilizer to the farmers in Haryana. Further, we have also analysed the retail marketing practices of companies; as these companies perform the role of intermediaries by adopting the sales process through own depot / sale points. Fertilizer producers are not only producing and selling quality products but also educating the distributors and farmers through exhibition, demonstrations and extension lecture programmes, etc. Further, they produce the quality of fertilizers as required by farmers, which help them to increase their sales. To conclude, IFFCO and KRIBHCO belonging to cooperative sector are providing best services to the farmers through their own service centres.

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Table 1: Sector Wise Distribution of Companies

Sector	Number of Companies
Public Sector	1
Cooperative Sector	2
Private Sector	3
TOTAL	6

The table 1 shows that out of six sample companies operating in Haryana one belongs to the Public Sector, two belongs to the cooperative sector and remaining three companies to private sector.

Table 2: Product Wise Distribution of Fertilizer Companies

Name of the Product	Number of companies						Total
	Public	Cooperative			Private		
	NFL	IFFCO	KRIBHCO	GNFC	GSFC	CFCL	
Nitrogenous	1	1	1	1	1	1	6
Phosphatic	--	1	--	--	1	--	2
Complex	--	1	--	1	--	--	2
Any other (Bio Fertilizers)	--	--	1	--	--	--	1

Table 3: Distribution of Companies as per application of new product and nature of change introduced

Name of Company	Product Innovation / New Product	Nature of Change
PUBLIC SECTOR (I) NFL	--	--
COOPERATIVE SECTOR (I) IFFCO (II) KRIBHCO	Bio fertilizers and seed	Improvement in Quality and Quantity
PRIVATE SECTOR (I) GNFC (II) GSFC (III) CFCL	ASP (Phosphate) Bio-fertilizers	Change in Manufacturing Process and made easy to use. Proportion of ingredients have been changed Made easy to use.

Table 4: New Technology for Innovation

NAME OF COMPANIES	SOURCES OF TECHNOLOGY
KRIBHCO	Research & Development from National Research Centre, Universities, abroad research centres, etc.
GSFC	Conduct Market Survey.
CFCL	Conduct market Survey.

Table 5: Fertilizers Companies as per Test Marketing Practices

Mode of Test Marketing	Cooperative Sector (KRIBHCO)	Private Sector		Total
		GSFC	CFCL	
Product use Test	1	1	--	2
Trade Shows	1	1	--	2
Display at dealership	--	1	1	2
Research trails	1	1	--	2
Any other	--	1	--	1

Table 6: Companies According to Type of Packaging and Packaging Material Used

Name of the company	Jute bags	Poly bags	Both	Proportion	
				Jute	Poly
PUBLIC SECTOR					
i) NFL	--	1	--	--	100%
COOPERATIVE SECTOR					
i) IFFCO	--	1	--	--	100%
ii) KRIBHCO	--	--	1	50%	50%
PRIVATE SECTOR					
i) GNFC	--	--	1	40%	60%
ii) GSFC	--	1	--	--	100%
iii) CFCL	--	1	--	--	100%
Total	--	4	2	15%	85%

Table 7 : Distribution of Companies as per Functions of Packaging

FUNCTION OF PACKAGING	PUBLIC SECTOR		COOPERATIVE SECTOR			PRIVATE SECTOR			TOTAL
	NFL	IFFCO	KRIBHCO		GNFG	GSFC	CFCL		
	WS	WS	WS	CWS	WS	WS	WS	CWS	TCWS
Safe Delivery	2	1	2	3	1	3	1	5	10
Improved appearance of the product	3	3	3	6	3	2	3	8	17
Sales by description	1	2	1	3	2	1	2	5	9

WS : Weighted Scores

CWS : Composite Weighed Score

TCWS : Total composite weighted score

Table 8 : Promotion Mix in Fertilizer Companies

Promotion Mix Variables	Public Sector companies	Cooperative Sector Companies	Private Sector companies	Total
Advertising	1	2	3	6
Sales Promotion	1	2	3	6
Personal Selling	1	2	3	6
Publicity	1	2	3	6
Public Relations	1	2	3	6

Table 9 : Advertising Media used by Fertilizer Companies

Media	Public Sector	Cooperative Sector	Private Sector	Total
Radio	--	2	2	4
TV	1	2	2	5
Audio Visual aids	--	2	3	5
News papers	1	2	2	5
Corporate Folders	--	2	1	3
Magazines/leaflets	1	2	3	6
Direct mail/letter writing	--	1	1	2
Outdoor	--	2	2	4
Transit advertising	1	2	2	5

Table 10 : Advertising Objectives of Fertilizer Companies

Objective	Public Sector	Cooperative Sector	Private Sector	Total
To Promote sale	1	2	2	5
Increasing brand awareness	1	--	3	4
Creating and reinforcing brand loyalty	1	1	3	5
Neutralising competitors advertising	--	--	1	1
Introducing New Product	--	--	1	1
Introducing product in new market	1	1	2	4

Table 11 : Promotional Budget Criterion

Criteria	Public Sector	Cooperative Sector	Private Sector	Total
Capacity to spent	1	--	1	2
Percentage of sales	--	--	3	3
Matching competitors	--	--	--	--
Objective and task approach	--	2	2	4

Note: Some companies have responded to more than one criterion

Table 12 : Frequency of Free Gifts to Dealers and Farmers

Companies	Yearly		Monthly		Occasionally		Sometimes	
	Dealer	Farmer	Dealer	Farmer	Dealer	Farmer	Dealer	Farmer
<i>PUBLIC</i>								
i) NFL	--	--	--	--	--	--	1	1
<i>COOPERATIVE</i>								
i) IFFCO	--	1	--	--	--	--	--	--
ii) KRIBHCO	1	1	--	--	--	1	--	--
<i>PRIVATE</i>								
i) GNFC	1	1	--	--	--	--	--	--
ii) GSFC	--	--	--	--	--	--	--	--
iii) CFCL	1	--	--	--	--	1	--	--
Total	3	3	--	--	--	2	1	1

Table 13 :Distribution of Mini kits to Small and Marginal Farmers for the year 2001-02 (Number)

Name of Company	Number of the Mini kits			
	Fertilizer	HYV seeds	Agricultural implement	Plant protection chemical
<i>PUBLIC COMPANY</i>				
i) NFL	10,000	--	--	--
<i>COOPERATIVES</i>				
i) IFFCO	5000	50	12 (Spray pumps)	--
ii) KRIBHCO	5000	300	14 (Spray pumps)	25
<i>PRIVATE</i>				
i) GNFC	1000	/	/	/
ii) GSFC	/	/	/	/
ii) CFCL	/	/	/	/

Note : / indicates that no information were provided