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DEVELOPMENT
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Who Feeds the Urban Poor?

The Indian food-processing industry:
an alienated 'formal' sector
versus an attuned 'informal' sector

by
Dina Abbott

DPP Working Paper No 35

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Faculty of Technology

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Table of Contents

	Page
Acknowledgements	
1 Introduction	1
2 An Overview of the Indian Food-Processing Industry	3
3 Formal Sector Commercial Food Processing	5
3.1 A Need to Revive Internal Markets	5
3.2 Food Processing: Present Policies	6
4 Exploring the Snacks and Convenience-Food Market	9
4.1 New Images and New (Westernised) Products	9
4.2 Towards a 'Local Flavour'	11
5 Understanding Consumer Demand	13
5.1 Convenience Foods: an Indian Meaning	13
5.2 Generalisations on Attitudes Towards Food	15
5.3 'Pollution and Purity': Caste Hierarchies and Food	16
5.4 Social Attitudes: the Ideal of 'Annapurna' and Consumer Resistance from Women	20
5.5 Consumer Demand: Other Reservations	24
6 The 'Informal' Sector: More Attuned to Local/Mass Needs?	25
6.1 Elite and Upper-Income Groups	25
6.2 Middle and Lower-Middle Income Groups	28
6.3 Lower-Income Groups	31
7 Conclusions	36
References	37
Table 1	27
Table 2	35

List of Figures

1	<i>Tiffins</i> Arriving at Bombay's Exclusive Office Development
2	Bicycle Boys Transporting to Local Factory Workers
3	<i>Tiffins</i> Awaiting Transportation to College Students
4	A Typical ' <i>kholi</i> ' Room
5	Sharing Floor Space
6	Board and Lodge with the ' <i>khannawalli</i> '
7	Boarding Conditions with the ' <i>khannawalli</i> '

Acknowledgements

This paper is adapted from original research carried out on women who cook meals at home to feed migrant workers in Bombay (Abbott, 1993). The paper only begins to question the somewhat neglected theme of food consumption (rather than production) and I would like to explore this further. Therefore, I welcome any comments and can be contacted through Development Policy and Practice Research Group at the Open University.

I already have Ines Smith and Alan Thomas to thanks for their comments on the draft version.

1 Introduction

In recent years, especially since the 1991 trade liberalisation, food-processing has taken off in a big way in India. In this, it has received considerable backing from the Government. The success of the Indian food-processing industry¹ has been astounding, and is currently considered to be one of the most important industries in India.

This paper looks at that success story and the Government's input to it. It argues that whilst the food-processing industry has clearly made an impact on global markets, its success at home is limited. This is because the industry has only been able to reach certain segments of the domestic market, that is the elite and upper-income groups,² especially those residing in urban areas. In effect, the Indian food-processing industry does not benefit the lower income group that makes up India's masses.

In circumstances where profit alone is the main motive, perhaps it does not matter whether the poor benefit or not. However, throughout its revival, the Indian Government has maintained that the food-processing industry must play an instrumental role in alleviating poverty. Moral and ethical questions concerning the direction that the food-processing industry is currently taking therefore loom large in India, and there is severe criticism of policies that allow food stuffs to be exported whilst people at home are hungry.

Considerable effort from university research institutes and Government bodies has thus been directed at finding out why the lower income groups³ continue to reject factory-processed foodstuff, even if it is heavily subsidised (such as bread). There have been several answers forthcoming, the main ones being that the poor cannot afford these products or that they are too rigid in their consumption habits to attempt new tastes. In other words, there is a heavy emphasis on 'market-reasoning'.

¹ I have yet not come across a clear definition of what the food-processing industry in India is. Policy documents such as the National Five-Year Plans suggest that food-processing is an all inclusive category that (a) includes food preparation, and (b) only includes that which can be broadly regarded as factory production (including that carried out by co-operatives). In this paper I use the term food-processing industry in a similar way.

² India's elite is a very wealthy and strong group. Slightly below are the upper income groups, sometimes categorised as the 'middle class' in official documents. Out of a population of 900 million, the middle class make up an estimated 150-200 million. Their living standards range from extremely high to high, and are comparable to those of western market economies of the 1960s (GOI 1994 P23).

³ Millions of people in India live on the poverty line or below it. Thus the 'lower income' band is very broad, and it is difficult to say exactly what this is. For the purpose of this paper, people in the band live precarious lives, living from month-to-month in good times, and day-to-day at other times. Whatever the case, they are most likely to be in deep debt.

This paper recognises the importance of this type of market-reasoning, but it argues that nevertheless, this is a narrow reasoning. Perhaps the real resistance from the Indian customer, particularly the poor, lies elsewhere, within the complex inter-workings and intricacies of social and religious ideologies that shape food consumption habits. Unlike the market type of reasoning, the reasoning here is not easily quantifiable. It is also not easy to apply across a whole range of people and is individualistic, factors which perhaps large-scale mass production simply cannot cope with.

This paper thus suggests that the failure of the food-processing industry to reach the poor is perhaps not so much due to price or taste, but social and religious ideologies that give a unique flavour to Indian food consumption habits. Therefore, the Government needs to change its approach quite radically if it is to reach out to the poor and remain committed to making the food-processing industry instrumental in poverty alleviation.

In order to explore what such a rethink might involve, the paper takes a very simple route and begins with the question, 'what are the consumption habits of Indians, particularly the poor, and how are these influenced?' It does this by exploring the social and ideological beliefs that shape consumption habits across differing groups in one city, Bombay⁴.

This leads to the second question which is, 'If the officially defined food-processing industry is not meeting the needs of the poor, who is?' The answer lies within the several layers of food-processing and food-preparation activities that are carried out daily by a busy informal sector.⁵ Unlike the 'official' food-processing industry, it is the formal sector which is able to take care of the intricate individual demands of poor. It does this in a highly organised and efficient manner, and has done so for generations.

In view of this, the paper asks whether it is not time to reassess the importance of the informal sector? For many poor people, food supply from the informal sector is essential, not peripheral. Yet many suppliers face daily crises with access to raw materials, access to credit facilities and so on. Should not these suppliers and their

⁴ Bombay was chosen for two reasons. Firstly because I carried out my PhD research there (Abbott 1993). Secondly, Bombay is considered to be a 'trendsetter' in food (as well as other fashions) with its huge cosmopolitan population.

⁵ There is a lot written about what comprises the formal and the informal sector. There is no room here to enter into that debate. For the purpose of this paper, informal sector activities are those carried out on streets, footpaths and homes, whether this is in production or/and sales, whether this is carried out as self-employment, or whether it is contracted out by small shops or other outlets.

activities be included in policy making and should they also not reap many of the benefits offered to formal sector food-processing?

2 An Overview of the Indian Food-processing Industry

It is difficult to produce a neat definition and categorisation of the food-industry itself. This is because unlike other industries (say car or steel, for instance), the product is not manufactured in a relatively homogenous manner; it does not have limited and readily identifiable distribution channels and outlets; or clear information flows. In fact, the product, manufacture and markets of the Indian food-industry are all extremely diverse. It is also difficult to pinpoint where the food industry is exactly located. Certainly for the Ministry that (until very recently) has been concerned with the industry, responsibility stretches from the very planting of the grain to the final distribution of it. Thus, the responsibilities of the Ministry of Food and Civil Supplies include (a) managing the food economy and procurement of food grains; (b) overseeing and providing control of production and marketing of processed food-products; and (c) controlling prices, protecting the consumers and providing measures to ensure that various essential commodities for mass consumption are supplied through a controlled public distribution system (GOI 1987 p403-421). Somewhere within this chain of linkages (extending right from the initial technical supplies for agricultural needs, through to product distribution, and final consumption) lies the 'food industry'.

Within this abstract and large industry, the Indian Standard Industrial Classification (SIC) for food-processing lists some 250 classifications covering a huge range of food products across a wide continuum. This stretches from the initial stages of processing (for example cleaning grain, slaughtering meat) to final stages when the food product is ready for direct consumption (such as bakery products).

Products are generally categorised as the following:

- * Fruits, vegetables and related products such as tea, coffee, sugar, cocoa and spices
- * Foodgrains
- * Meat, poultry and dairy products
- * Fish
- * Confectionery and bakery products
- * Alcoholic and non-alcoholic beverages
- * Cereal products and snack foods
- * Semi-cooked and ready-to-eat foodstuffs such as papadoms, pickles and jams

Using these classifications, the Government collates data on production, exports and internal and foreign revenue earning capacity. Whilst the SIC definitions are useful in that they enable information flows from well-established sectors of the industry (for example sugar, spices, and plantation crops such as tea and coffee), this still records only that production which is carried out in the formal sector. For instance, whilst the Government of India (GOI) can confidently state that the sugar industry ranks second among the major agro-industries or that the production in 1986-87 was 40.15 lakh tonnes, these figures indicate production carried out specifically at 377 large-scale factories (GOI 1987 p470-471). What these figures do not include, is the production carried out, at the village level where raw sugar (*guar*) is produced for local consumption, as well as the lower-scale of the urban market.

Therefore, whilst SIC is primarily a classification of products, it is nevertheless limited on product information, focusing only on specific types of production places. In turn, the information on distribution also focuses on specific, more established formal outlets. The resulting definition of what officially comprises the 'food-processing industry' (and activities therein) therefore remains demarcated within narrow boundaries.

Information gathered through this type of demarcation has, however, led the GOI to believe that certain sectors of the food-processing industry have a growth potential, especially as far as exports and foreign revenue earning capacity are concerned. The growing importance of food-processing as an industry is perhaps reflected in the fact that in July 1988 it was seen fit to establish a new ministry specifically for food-processing, separating this from the Ministry of Food and Civil Supplies (the first of its kind in a developing country).

The new Ministry sees food-processing as playing an important role in creating employment opportunities, fostering rural industrialisation, improving agricultural productivity, reducing wastage of perishable food items and improving food availability. Therefore, whilst it is recognised that 'a large part of the food-processing industry is in small scale and household sectors', the thrust of Government commitment is towards the formal sector⁶ which promises to deliver results more rapidly and with clear accountability (GOI 1994 p18-19). The next section will therefore take a closer look at formal sector food-processing to show what is happening here.

⁶ Once more policy documents do not make it clear exactly what is meant by the formal sector of food-processing. The emphasis is, however, on some kind of factory production, whether this is a smaller factory or a large Indian or multinational group (see for instance GOI 1994 p19).

3 Formal Sector Commercial Food-processing

3.1 *A Need to Revive Internal Markets*

Commercial food-processing in India covers a vast and diverse range of products. Therefore, it is necessary to select only those activities that are of direct relevance to this paper. Thus, I will focus on products that have excited current thinking (i.e., 'western' type convenience products for the internal market) and explore the reasoning behind this.

Every product has its history. Similarly, an attempt to introduce 'western' products to Indians came (inadvertently) when the first fruit and vegetable canning factories were established towards the end of the second world war. The intention was to (a) meet the demands of British and American soldiers who failed to obtain products suited to their tastes from home countries (because ships were diverted to the war effort); and (b) to control the influx of American canned food (Indian Institute of Foreign Trade 1980). But, despite several incentives (such as import restrictions; tariff protection; reduction in transport charges; protected defence markets; and so on), local manufacturers could not fill the gap. The specialist market was simply not large enough nor stable enough to sustain this industry over any length of time. And, the hope of capturing internal markets did not materialise because such products were rejected by the majority of domestic consumers (reasons will be discussed at some length later). By 1960, the Government had little choice but to make a move towards exports of canned fruit and vegetables (Jetley 1983).

As stated earlier, changes in one link of the 'food industry chain' necessarily affect others. Similarly, the reasons for a renewed interest in this sector of food-processing, can be linked to the Green Revolution. New technologies and improved farming methods have increased fruit and vegetable production to a current rate of approximately 70 lakh tonnes. India is now one of the largest producers of fruits and vegetables and grows virtually every range of this product in the world (Bhanu 1989; Chander 1989). And, within the last ten years India has significantly increased its fruit and vegetable exports, particularly, with 'exotic' items such as mangoes (Singh 1988) and new items such as broccoli and asparagus. In fact, in 1994, India rated as the second largest producer of fruit and vegetables in the world (GOI 1994 p40-51).

But, whilst exports are increasing, so is competition from other developing countries, and the need to capture the (alternate) vast internal market remains paramount. This need is further exacerbated by moral and ethical issues of increased wastage (reflecting the increase in production). In a country where many are hungry, nearly 30-35% of fruits and vegetables (valued at Rs3000 crore) were destroyed every year

in the 1980s because of inadequate post-harvest facilities, infrastructures and linkages with the food-processing plants (Chander 1989). It is therefore significant that the 'Twenty-Point Programme' for 1986 states that:

'particular stress will be placed on the expansion of fruit and vegetable processing facilities in order to cut down heavy loss of these perishables and even out the seasonal glut of supply. Though the processing capacity has doubled from 2 to 4 lakh tonnes during 1980-85, it is still a mere 1% of the total production of fruit and vegetables in this country'

(GOI 1986 p17).

The plan was, then, to make available Rs3 crores for providing financial and technical incentives towards State Governments and Co-operative undertakings in food-processing.

Yet another push for reviving commercial food-processing has come indirectly from another area, i.e. the tourist industry. Tourism is at present one of India's healthiest industries accounting for over Rs1,300 crore annual foreign exchange earnings (Singh 1988). The projected target figure of 1,000,000 tourists (showing a growth rate of 812.38%) was already achieved by March 1987 (GOI 1988 p551-555). In order to meet with the demands of increased tourist traffic, Government has encouraged the construction of five-star hotels and similar accommodation. Thus State Governments allowed 500 new five-star hotels to be constructed in 1985, and licences were given to another 300. Since then, the specialist hotel-trade has thrived and on average, there are at least 40,000 people per day requiring five-star accommodation (Basak 1987; Singh 1988). Altogether, therefore, tourists, employees of foreign concerns and embassies, the Indian elite, as well as linkages created by air-traffic and hotel catering, have created a sizeable specialist market for westernised products, packaged and processed to western standards (Basak 1987; Singh 1988).

Factors such as these have led to a considerable change in policy and a revival in food-processing and food-preparation. The next section will discuss what these changes are.

3.2 *Food-processing: Present Policies*

The failure of the 1947 attempt at fruit and vegetables processing meant that this sector of the industry did not receive much attention until the announcement of the Fifth Five Year Plan (1975-80). The Plan argued that a food-processing industry holds the potential to eradicate malnutrition, generate employment, and earn foreign

currency. Thus, a Rs2 crore budget (in comparison to Rs5 lakh of the previous plan) was set aside for research and development into horticulture and food-processing (Jetley 1983).

At the same time, the emphasis was undoubtedly on exports. Beginning from raw-material production, agricultural subsidies were made available to those who changed production to meet foreign requirements (of 'exotic' fruits and vegetables, for instance); and tax allowances were given to those who processed export products (such as frog's legs, cashew kernel and shrimps).

But export requirements of processing, packaging and presentation are higher than that of the home market, which meant that technology and know-how had to be imported. Under the 1985-1988 Import policy, the GOI granted an 'Open General Licence' which gave freedom to import food-processing equipment and machinery (such as cubers, deseeders, automatic packaging) able to meet export standards. The GOI also encouraged foreign collaboration as well as foreign financial input. Thus, Indian large-houses such as the Kotharis and Modis (who had not previously ventured into this arena) entered into food-processing with the help of foreign finance. In turn, this type of activity created further linkages and foreign engineering companies such as Larsen and Turbo, and Vulcan Laval commenced production of food-processing equipment and machinery (Singh 1988).

However, in the last five years, the orientation towards export food-processing has undergone some radical changes. Such changes relate to a variety of reasons. In part they have to do with the discourse surrounding social and ethical arguments of an export-oriented industry, and the accusation that food-processing has moved even further away from the needs of the majority of the population (Baron 1980; Desai and Gopalan 1983). In part, these changes have to do with the idea of 'self-sufficiency' and 'self-reliance' carried over from agriculture, to agriculture related industries.

Included in the idea of 'self-reliance' is the need to counter import technology as well as foreign joint ventures (in reversal to the previous approach). It is argued that the former will bring forward indigenous technological development and the latter will allow for a more complete control of pricing for the home market. There has been therefore a wide and heated discussion on any form of import venture, a classic example of which has been the controversial entry of PepsiCo (Pepsi and Coca Cola).⁷

⁷ Multinationals have always awaited eagerly to enter into the vast Indian market, but their attempts have usually been thwarted by policies which safeguard home industries. In 1989, after much wrangling, PepsiCo was eventually allowed in on the condition that for \$1 of imports, PepsiCo would export \$5 worth of goods

Within these new approaches to the food-processing industry, pricing is regarded as an important determinant. The assumption here is that the inability to capture home markets relates directly to pricing. Thus, the Director of The Central Food Technology Institute (CFTRI), Dr Amla, stated that:

'a new policy will soon be announced to govern the important aspects of the food-processing industry..... the major task before the policy makers was to ensure that due to the rush for setting up of food-processing units, the price of the basic food products did not go up and processed foods using such basic food products should be priced in such a way that the common man cannot buy them..... the prices of some products like biscuits and bread were pegged at a low level enabling millions of people to buy them. Every other processed food should use the bakery products as a model to succeed in the Indian market'

(Business Standard May 1989).

In a bid to realise these policies, the GOI has declared food-processing, packaging, and preservation industries as 'high priority' and has instructed The Industrial Development Bank of India (IDBI) to favour loan applications for them. The Finance Ministry is considering a proposal to reduce central excise duty from the current level of 15.27% to 5% 'across the board', together with concessional duties of 35% for such industries, on import of capital goods. There is also talk of granting five-year tax free allowances in order that these industries can increase competitive effectiveness both at home and abroad. The package also proposes to give assistance to overseas Indian joint ventures and to permit rural co-operatives. Foreign investors will be allowed to effect linkages with such co-operatives in order to produce export items on a 100% 'buyback' basis. The reasoning behind this package is that currently the government receives some Rs60 crore annually from duties on processed food items. If this duty is reduced, prices will be adjusted accordingly and home demand may rise. In turn the government will increase revenue from sales (Business Standard Jan 1989; also GOI 1987 p408-409). In fact, since trade liberalisation, incentive packages to foreigners have become even more attractive.

This type of governmental encouragement has aroused considerable commercial interest, so much so that food-processing is now generally viewed as an up-and-coming sector (or the 'sun-rise' industry as dubbed by policy makers). Of particular

(with an absolute obligation of Rs 194 crore in 10 years). Pepsico was also barred from using its own brand name in order to protect home-produced soft drinks. PepsiCo however, renewed controversy when it launched the little disguised brand name Pepsi Era into the Indian market. As feared, this has had a devastating effect on the home soft-drink industry and top brands including Limca, Gold Sport and Thumbs Up (previously owned by Parle Pvt Ltd) have now been sold to Coco Cola (GOI 1994 p103).

interest to the fruit and vegetable sector of the industry are two major product areas: (a) fruit juices and the soft-drink market; and (b) the snacks and convenience food markets. The next section will concentrate on the latter because it is important to see how a proposal to enter these markets (and the hopes of capturing lower-income groups) will affect those informal sector producers who currently have a hold here. At the same time, it is planned to develop snacks and convenience foods simultaneously with fruit juices and soft drinks, and therefore the discussion of one cannot really avoid the other. The discussion provides a general picture of current product developments and thinking within formal sector food-processing.

4 Exploring the Snacks and Convenience-food Market

One of the major success stories of the food-processing industry has been that of the soft drinks sector (consisting of non-alcoholic carbonated drinks, and those based on fruit juices and concentrates). This is because policy has emphatically denied imports and foreign ventures into soft drinks, and pushed the home industry, at least until PepsiCo's recent entry (see footnote 7). Of direct concern to this paper is, however, not the soft drinks sector itself, but lessons that have been learnt from it and transferred to the development of snack and convenience-food markets. Of these, the two main lessons are (a) the need to develop new, possibly westernised, market images and products; and (b) the need to meet local tastes. This section will consider each in turn.

4.1 *New Images and New (Westernised) Products*

For a long time, the largest manufacturing group in food-processing has been United Breweries, marketing sauces, squashes, and soft drinks under the brand names of Kissan and Dipys. Whilst Kissan showed a gross profit of Rs220 lakh for year ending June 1988 (an increase by 746.2% compared to year ending June 87 when it stood at 26 lakh) (Kasbekar 1989), there is at present concern over the increasing competition from other new entrants such as Noble Soya's milkshake, Amul milkshakes, Frooti, Appy, Volfruit from Tata subsidiary Voltas, and more recently Lipton's Tree Tops.

Perhaps because of their virtual stability in the market (because of no real competition so far), Kissan and Dipys have never gone into advertising in a big way. They do not advertise on television and their product advertisements in newspapers is irregular. Also, despite exports of certain products (such as Kissan mango pulp), their packaging and presentation has remained fundamentally similar over a period of time. However other products (such as those named above) have gone heavily into advertising. In addition, in a country where hygienic conditions are irregular and

often minimal, the concern over health hazards from contaminated 'outside' foodstuffs is paramount. The new entrants have been able to utilise modern packaging materials and western ideas of marketing to promote an image of an antiseptic safe-to-drink product available in disposable, colourful cartons.

The importance of packaging and presentation was recognised by Food Specialists Limited (a milk products company which was already collaborating with foreign firms and multinationals, operating under the brand names of Lactogen, Cerelac, Nespray, and Milkmaid) who have branched into westernised products, and have successfully launched Maggi sauces (such as tomato ketchup). The marketing of these sauces has focused on 'value-for-money' and has included gimmicks to emphasise this (such as free colourful dispensers with each bottle). In 1983, Food Specialists Limited took this success a stage further with the launch of Maggi noodles, the first convenience instant food product of a westernised type to enter the domestic market. Backed by an expensive television commercial the company sought to revolutionise rigid attitudes towards such products, and hoped to gain markets with lower as well as higher income groups (although both the commercial and the advertising are aimed primarily at the latter).

The two-minute 'wonder' noodle has broken market myths and has established itself as an acceptable convenience product for the higher income groups. Food Specialists Limited continue to push this product and this is reflected in the fact that in 1988 Rs942 lakhs were spent on advertising, an increase of 15% from the previous year (Sivaraman 1989). The product has, however failed to capture the imagination of the lower-income groups (again reasons for this will be considered in detail later).

Following Maggi's success, others have come up with products promising even less cooking and handling time and have borrowed western packaging and presentation methods. For instance, All Seasons Food, whose products also include ketchups and sauces (marketed as 'exotic and exclusive') have expanded into snack foods and instant soups which merely require heating. Tasty Bites Eatables Limited have been even more innovative, and offer non-westernised, Indian products which cover a range from the easily recognised and accepted humble '*dal*' (lentils), to food that would require more elaborate preparation (this is especially courageous in view of the fact that these products can be bought more cheaply, fresher, and ready cooked from numerous informal sector suppliers). In early 1989 Parle Exports (who up to recently have been concentrating on soft drinks) entered in direct competition with Maggi noodles by launching Bisca Kwick-chow noodles which can be consumed directly from the container after adding boiling water (based on the idea of Pot Noodles sold in the UK).

A point of concern for domestic entrants to the snack and convenience-food market is PepsiCo's decision to enter it, however cautiously, (and the fact that two more American giants Delmonte and Kellogg's⁸ are waiting on the sidelines, also for the Indian soft-drink and snack/convenience food market). PepsiCo's launch of potato crisps and cornmeal products is, for the moment, to be limited to northern India and already farmers in Punjab (especially Channo village in Sunguar district and Zahura village in Horshiarpur district) have signed contracts to provide raw materials at pre-fixed prices for PepsiCo and two of its three Indian partners Punjab Agro-Industries, and the Tata firm Volta (Joseph 1989).

The current picture is therefore one of intense competition, both domestic and, depending on the Government's decision, possibly foreign. Everyone is fighting to develop even more product ranges for a 'ready-and-waiting' urban market.

4.2 Towards a 'Local Flavour'

Yet the success of a product cannot depend on packaging and product presentation alone. One of the most mind-boggling puzzles for the commercial sector of food-processing has been the unresolved dilemma over what constitutes the Indian taste. Whilst in comparison to cooked food products, taste considerations for soft drinks have been relatively easier to accommodate (for example, carbonated drinks including the new 'Pepsi Era' are modified to suit the sweet Indian palate) even here, it is a fallacy to underplay the significance of taste in the acceptability and success of a product.

An example is Kothari General Foods' pull-out from a joint foreign venture with US General Foods Corporation. The venture projected an annual turnover of Rs90 crore on the basis that their new product Ju-C (a concentrated fruit squash) would easily win over from the then current rival product Rasna because it was cheaper and carried a prestigious foreign brand-name. What the company failed to take into account was that Ju-C crystals were exported from America and the taste reflected the American preference for a slightly bitter, as opposed to an Indian sweetened flavour. Losses (excluding interest and depreciation) between period ending March 1987 and March 1988 thus rose from Rs108.50 to Rs239.41 lakh respectively. It was with exasperation that Dr Kothari (Director of Kothari General Foods) in his speech to shareholders admitted that:

⁸ By 1994, both companies had made considerable inroads into Indian markets, with Kellogg's firmly established in the cereal market.

'The tastes and preferences of the Indian consumers may be difficult to fathom'

and the company is now looking to increase its already existing export market for instant coffee instead (Business Standard 1989).

It is this type of failure that is an area of major concern for policy makers concentrating on commercial food-processing. It is therefore fit that Dr Amla (Director of CFTRI mentioned earlier) should point out that:

'market opportunities arising out of changing ethos and kitchen management should have a 'local flavour' to them...the fast food concept was in vogue centuries ago in India and now it is struggling to take off....By 2000 AD, the food habits of Indians will undergo a drastic change in view of further changes in kitchen management, which will lead to the setting up of more food-processing units'

(*ibid* 1989).

Current commercially produced snacks and convenience food products (particularly those produced by large Indian and foreign firms) reflect the attitude evident in Dr Amla's statement. The idea here is not that of coming to terms with consumer taste/demand, or catering for a mass market (because this is too complex, varied and specific), but to aim for specialist groups who will be more willing to change food habits and accept factory-produced, westernised 'trendy' products and flavours.⁹ Social and ethical questions of how close these products are to the requirement of the majority are given minimal consideration as products move further and further towards narrow markets.

Thus, whilst commercial food-processing aims to 'revolutionise' tastes and food habits, this may be easier said than done even for the upper and middle-income groups, let alone the lower-income groups who constitute the urban majority. The section that follows will consider reasons for this, and will take each income group in turn to examine exactly:

(a) what makes up the demand for semi-cooked and fully-cooked foodstuffs; (b) how such demand is currently satisfied; (c) what factors have already changed or are in the

⁹ Recent entrants to food-processing have cultivated the idea that their product is fashionable and 'trendy', that it is the 'done thing' to buy these products if you want to project yourself as a young, open-minded, well-off person/family. The choice of the brand name Pepsi Era reflects this. Embodied in the name is the image of new 'era' and commercial features which utilise images of 'trendy' young 'yuppies' to advertise the product.

process of changing these demands and food habits; and (d) what are the reservations and resistance to commercial sector food-products of each group.

In doing so, I will show that (a) the concepts of western type fast and convenience foods cannot be easily transferred to the Indian situation, where these concepts hold radically different meanings and are influenced by a number of complex variables which include, but are not exclusive to, price; and (b) that the informal sector has the ability to meet exacting consumer needs (for various income-groups) and has historically established itself as the efficient supplier of a variety of food-products at various stages in processing. It is, therefore, the nascent commercial sector that will, at present (and perhaps for some time) have to accommodate and seek gaps in the market left by the informal sector, rather than the other way round.

5 Understanding Consumer Demand

5.1 *Convenience Foods: an Indian Meaning*

The commercial food-processing sector, then, aspires eventually to capture the lower as well as the upper segments of the urban market for convenience and fast food products. Such hopes (as reflected in Dr Amla's statement) are based on the notions that the market is already accustomed to the idea of convenience foods, and is now ready (and can be willed further) to accept changes.

There may be some logic to this type of deduction, but at the same time, this approach is problematic because it is based on two primary assumptions that in fact obscure a clear understanding of consumer needs. These are (a) the assumption that the shape and type of convenience and fast-food product requirements of an Indian-city dweller are similar to those of his/her western counterpart; and (b) the assumption that the necessity for such a product can be generalised (and therefore manipulated?) over a whole range of income groups, once the main obstacle of pricing is controlled.

Here, firstly the conceptual links that immediately associate convenience and fast-foods with the west, obscure the understanding that although such food may have been 'in vogue for centuries', it holds radically different meaning to the person in Bombay, and as such, requirements vary for differing income groups and for men and women. Indian 'convenience' foods are embedded in their specific social and religious context and have developed their own shape very efficiently over a period of time. Therefore, it is a fallacy to carry over meanings associated with western convenience and fast-foods which, in turn, have their own social and historical settings.

Secondly, in order to work towards an understanding of Indian meanings of 'convenience' and 'fast foods', it is imperative to move away from the western idea that the primary acceptance of such products is the dependence on the saving this makes to time and labour, especially in view of changing life-styles.¹⁰ There is little doubt that there are also many changes in the life-styles of women in Bombay (from a whole range of income groups) who are increasingly pressurised to seek some form or another of income generation. It is women who are primarily responsible for food preparation, and they who might benefit directly if time and labour saving products were available. However (as detailed in section 5.4), the complex inter-workings of an ideology that subordinates women by over-stressing the ritual and social significance of 'home-cooked' food, and a need to follow religious and caste observations, significantly undermine the concern over time and labour saving, especially for upper and middle-income groups. In some cases, such concerns also undermine those of price.

The undermining of western practical notions of time and labour saving in turn overemphasise the significance of social and religious concerns, so much so that they provide seemingly valid reasons and motives for the non-acceptance rather than the acceptance of semi-cooked and completely-cooked food produced outside of the home. Consumer demand has to be understood within this context.

Thirdly, there has to be recognition that the requirements and necessity of convenience and fast-food products in Indian cities are considerably at variance with their western counterparts, and have to be set within the overall context of daily work and food consumption patterns. For example, whilst there is a tendency in Britain to follow a breakfast, lunch, evening meal pattern (no matter how the composition of these has undergone change over a number of years), in Bombay or Delhi 'breakfast' in the western sense does not exist for many middle and lower income groups. Whilst upper income-groups sometimes use westernised cereals and other local products such as bread and jam for breakfast, and the lower middle-income groups may breakfast on savoury snacks and tea, masses in the lower-income brackets will have tea on its own or with leftovers from the previous night's meal (if available). The result is that lunch, which is often consumed away from home is often the most important meal of the day. Yet, the long hours and physically arduous work that most lower-income groups undertake, necessitates that whatever meal they receive is nutritious and filling.

¹⁰ The idea of 'western' convenience foods is that they require a minimum time to cook. These foods have become increasingly sophisticated and can be cooked and consumed in the same container within minutes. However, they require associated paraphernalia, e.g. fridge freezers, microwave ovens. The situation cannot simply be transferred onto a poor society.

Such requirements cannot be met by convenience and fast-food products as we know them in the west, or by those currently offered by the Indian commercial sector of food-processing. The idea of 'convenience' and 'fast-foods' therefore changes meanings. Rather than primarily reducing time and labour input, such foods are not only obliged to meet social and religious demands, but also to fulfil nutritional and calorie requirements.

The meaning of 'convenience' and 'fast-foods' in an Indian situation is, therefore, radically different. The western concept of such products embody images of mass-produced and mass-marketed universally available items which have to be purchased as semi-cooked or completely-cooked products from recognised outlets. In Bombay, however, 'convenience' food means the transporting home-cooked food to the workplace of the individual, be this a footpath or a modernised office block in the city centre. Thus, Bombay has developed a unique system whereby millions of '*dabas*' or '*tiffins*' journey from suburbs to the centre of Bombay, to arrive by midday everyday.¹¹

Surely, therefore, what constitutes 'convenience' and 'fast-foods' in Bombay needs to be rethought if consumer demand for these products is to be 'fathomed' at all.

5.2 Generalisations on Attitudes Towards Food

In a city such as Bombay, which houses a huge and diverse population, it is clearly problematic to single out variables and quantify generalisations that shape social attitudes. Yet, there are some factors that are sometimes so influential that it is difficult not to notice their effect, even if an accurate data set and analysis is not available/feasible.

As far as food is concerned, I think that there are two dominant influences that shape attitudes, both of which are not easy to identify but nevertheless are constantly present, consciously or otherwise. The first one is based on religious (Hindu) ideas of 'pollution and purity' within rituals of food production and food consumption. And the second is based on ideological assumptions about women's true roles, in this case, women as 'Annapurna' (the goddess who is the eternal provider of food). I will discuss each of these in turn.

¹¹ A tiffin is a metal container which consists of 3-4 stacked tins clipped together.

5.3 *'Pollution and Purity': Caste Hierarchies and Food*

Caste is such a major and problematic topic that it is somewhat overwhelming to even raise the issue. Numerous aspects of caste have been debated time and time again throughout the 19th and 20th centuries and this discourse continues to add to the already voluminous literature. Given the short space here, I will therefore move at once to that strand of caste which will make some contribution to the understanding of consumer demands for processed food stuffs: namely the notion of pollution and purity, especially in matters concerning food. Here, I will argue that this notion acts as such a powerful ideological mechanism, that despite of changes within occupational and other structures, the idea of 'pollution and purity' continues to shape attitudes and social practice in matters of food consumption, for some groups more than others.

Meanings of 'pollution and purity'

To begin with, there needs to be some clarification as to what is meant by 'pollution and purity' in order to understand how this affects attitudes towards food and related consumer demands.

The notion of 'pollution and purity' is central to the understanding of caste hierarchy. To the orthodox Hindu, both at the bottom and top rungs of the ladder, each individual's destiny is ordained by a deity or providence (as pronounced in the 'Manu Smitri': 1st Century BC). There is no shifting from the caste you are born into, even if wealth, and therefore social status, increases. Caste only changes when the individual is reborn, and where his or her destiny then lies is determined to a certain extent by the actions carried out in present life. These actions are measured in terms of attainment of physical and spiritual purity and avoidance of pollution.

What is important to appreciate here is that whilst 'purity' and 'pollution' are two opposites, they nevertheless work simultaneously. Whilst 'purity' is desired, 'pollution' has to be avoided at every cost, because certain types of 'polluting' contact can in effect wipe out years of 'purifying' actions. In this sense, the need to avoid 'pollution' overrides that to gain 'purity'.

There are differing schools of thought as to where these ideas of social hierarchy and the caste system originate. Two varying extremes are Manu's explanation based on providence¹² and a more earthly one set within an overall economic/political

¹² The 'Manu Smitri' which dictates Hindu laws explains how Purusha, the Omnipotent.. 'assigned separate duties to classes that had sprung from his mouth, arms, thighs and feet. Teaching, studying, performing sacrificial rites, and non-attachment to sensual pleasure... these he assigned

framework.¹³ These explanations define broad occupational categories, but in practice, caste contains further divisions and categories within categories. The 'working tools' that measure the individual's or the group's ability to manoeuvre within such sub (or sub-sub) caste category is dependent on their ability to gain 'purity' and avoid 'pollution'.¹⁴ The rules governing 'pollution and purity' are defined laboriously for each caste-group. The higher-up the caste, the more care will be taken to avoid 'pollution' in order to safeguard the position that has been achieved in this life and ensure that in the next. Thus for instance, whereas vegetarianism may help to 'purify' a Harijan, eating meat will not necessarily 'pollute' him (as this is 'allowed' and is reflective of a lower-caste position). For the Brahmin, however, meat-eating can be highly 'polluting'.

Such rules are complex. And, even if the urban situation of congestion does not allow literal physical segregation as in the village, segregation of an internalised kind continues. An internalised type of segregation is then, manifested in matters of food.¹⁵

to the Brahmins; protection of the people, giving away wealth and performing sacrificial rites, study, and non-attachment of sensual pleasure, he assigned to the Khastriya; tending to cattle, trade and commerce, usury, and agriculture, study, sacrificial rites, and non-attachment to sensual pleasure he gave to the Vasiya. The Lord has prescribed only one occupation (karma) for the Shudra, namely service without malice to the other three classes' (quoted from Klass, 1980 p.37, in Franco and Chand, 1989, p.2606).

- ¹³ A political/economic explanation and justification of class is given by Romila Thapar... 'when the Aryans first came to India, they were divided into three social classes, the warriors of aristocracy, the priests, and the common people. There was no consciousness of caste... professions were not hereditary... the three divisions merely facilitated political and economic organisation. The first step in the direction of caste (as distinct from class) was taken when the Aryans treated the Dasas as beyond the social pale, probably owing to the fear of the Dasas and even greater fear that assimilation would lead to a loss of Aryan identity. Ostensibly, the distinction was largely that of colour, the Dasa being darker and of an alien culture... the Sanskrit word for caste 'varan' actually means colour. Initially, therefore the division was between Aryans and non-Aryans. The Aryans were 'divija' or twice-born (the first by physical birth and the second by initiation to caste status), consisting of Khastriya (warriors and aristocracy), the Brahmins (priests), the Vashiyas (cultivators); the fourth caste, the Shudras, were the Dasas and those of mixed Aryan-Dasa origin' (quoted from Thapar, 1966 p.37, in Franco and Chand, 1989).
- ¹⁴ The term 'sanskritisation' was first used in 1952 when Srinivas (quoted from Srinivas, 1962 p.42) analysed caste vertical mobility thus: 'The caste system is far from a rigid system in which the position of each competent caste is fixed all the time. Movement has always been possible, especially in the middle regions of the hierarchy. A low caste was able in a generation or two, to rise to a higher position in the hierarchy by adopting vegetarianism and teetotalism, and by sanskritising its rituals and pantheon'. Since then, there has been a vast literature on the ability to sanskritise (Mandelbaum 1970; Srinivas 1962; Stall 1963; and so on). Certain groups, however have been denied rights to sanskritise, for example the Harijans who have instead turned to other means of vertical mobility. The classic example is mass conversion of the untouchables to Buddhism under the leadership of Dr. Ambedkar (himself an untouchable and the writer of the Indian Constitution) (Beteille, 1969 p.95).
- ¹⁵ There are numerous anthropological studies detailing endogamous marriages, physical segregation in matters of abode, and food preparation and consumption. The latter proved a subject of fascination for the British in pre-independent India, especially reflected in their frustration of what they saw as unbelievable 'fussiness' even during times of crisis (eg the famine of 1874) (observations by Max Muller obtained from Bougle (1971 p150)). Here Bougle's essays are

Urban reality: 'pollution and purity' in practice

In reality, putting the theory of pollution and purity into practice is difficult. As Franco and Chand (1989 p2606) indicate:

'Today, this hierarchical structure is manifested less frequently in reference to biological purity than in certain commonly observed attitudes: a deep rooted presumption of superiority in some 'jatis' and the consequent contempt in their behaviour towards other 'jatis' whom they treat as untouchable'.

Evidence provided by both urban and rural studies shows that the caste system has undergone considerable changes (to a larger extent in the urban and to a lesser extent in the rural situation).¹⁶ Whilst some evidence (Kolenda 1989) points to the changes as being influenced by state-led egalitarian and positive action policies and programmes which force structural changes (at least theoretically), recent political events have demonstrated that demands for segregation of certain groups are becoming increasingly vocal.

Certainly in a huge, crowded urban environment such as Bombay, it is almost impossible to practice physical segregation as is sometimes feasible in the rural areas (it is quite common in villages, for instance, to have separate water wells for lower and upper-castes). In Bombay, however, sharing of public transport systems, congested housing situations, and so forth makes the idea of 'pollution' through physical contact meaningless. Physical separation through endogamous marriages is also experiencing changes in the urban environment. It is only in the matter of food consumption that the individual can exercise enough control to convince him/herself regarding its 'purity' or 'pollution', no matter how sub-consciously.

Here again, the changing nature of raw-material production, processing, transportation, access, etc (which includes many stages of handling) allows the individual to exercise control only up to a point. In order to come to terms with what is required by religion and how this can be realistically met in an industrial world, the individual therefore has to find some way of convincing him/herself and others that he/she is doing their best to avoid pollution in food matters despite the many constraints. Subjective interpretations and circumstances therefore work together to

classics in providing an 'insight' into food preparation and consumption attitudes at the time. Other studies have followed (O'Malley 1932) and the subject continues to be of concern in most anthropological studies, but the focus remains on rural, rather than urban food-habits (which are perhaps more difficult to investigate?)

¹⁶ There is again a vast literature on endogamous marriages, segregated housing, and so forth, but often this is for rural environments. Conlon (1977) shows the continuity and changes in an urban situation by tracing the settlement of the 'Chitrapur Saraswat Brahmins' in Bombay (from the beginning of the eighteenth to the twentieth century).

adjust the meaning of 'pollution' and one of the ways this is done is by (a) considering the level or stages at which food is processed or preparation is carried out; and by (b) carrying out 'purifying' rituals on food considered to be 'polluted'. I will discuss such adjustments and rationalisations next.

Consumer demand and caste interference

Although there are indications that caste influences demand, there is a strong possibility that consumers may not even acknowledge this. This is partly because caste is highly internalised. But, it is also because individuals may find it easier to justify their choice as being influenced by variables other than caste (which is considered a 'closed' and distasteful subject by many upper and middle-income groups, although, of course, the recent rise of Hindu fundamentalism has made this a 'respectable' topic once again).

It is therefore difficult to isolate and quantify the number of individuals or groups whose attitudes towards processed and ready-prepared foods are shaped by caste alone. Thus Mira Savara names this group as 'cautious buyers' and argues that:

'there is a significant section [although she does not here indicate how significant] cutting across middle and upper income households....This group would be extremely cautious and would prefer to make its own food products since they can be sure under what conditions it was made; often they are attitudinally against processed food'

(Savara 1986 p123).

However, as stated earlier, a busy urban lifestyle nevertheless ultimately requires some adjustments, particularly for those middle-income groups whose female members are participating more and more in paid work outside of the home (see Bapat and Crook 1988). Such adjustments are, then, made taking into account the actual level at which food is handled. Thus, certain (primary level) processed food items such as ground spices, prepared flours may be acceptable.¹⁷ Here, the rationalisation is that during preparation, such foodstuffs will be 'purified' by ghee

¹⁷ Taking the level of handling required both on the part of the consumer and the supplier, foodstuffs can be roughly categorised as being at a (a) primary level: where food-stuffs although retailed as fully processed, cannot be directly consumed but act as basic ingredients to further food preparation, such as spices, oil, clarified butter (ghee); (b) secondary level: which retail as unfinished, semi-prepared products where the most laborious part of the preparation is already dealt with, and requires minimal labour input from the consumer, such as papadoms, ready-mixes for baking preparations and so forth; and (c) final level: where the food is retailed as a ready-to-eat snack or meal.

and by 'fire' (cooking).¹⁸ Working on this basis therefore, this group will reject semi-prepared or completely-prepared foodstuffs as there is little room for 'purification' here.

Studies have also shown that sometimes even if adjustment to caste norms is forthcoming in the urban environment (and ready-prepared food is consumed in places such as canteens and cafes where people from all castes eat together), it is so because the individual is immediately away from those who will recognise him. However, such an individual may revert back to physical segregation in matters of food once they return to their native village or rural environment (Holmstrom 1972 p770; Dandekar 1986).

For the commercial sector caste invariably poses a real problem, even if this is not openly acknowledged. On the one hand, the necessity to be cost effective means that they have to hire labour from lower-caste groups. On the other, there is a need to be aware of the 'cautious' buyer. Therefore, in a similar rationalisation about the 'purifying' quality of certain ingredients and rituals, large-scale factories too will divide the workforce so that a handful of upper-caste Hindus will carry out the end process and final cooking of the product.¹⁹

To end therefore, caste interference is a powerful factor in determining consumer choice of processed and ready-prepared foodstuffs.

5.4 Social Attitudes: the Ideal of 'Annapurna' ²⁰and Consumer Resistance from Women

As mentioned earlier, next to caste, the other most important variable (and equally difficult to quantify) which influences consumer demand is the social attitude that idealises women's homemaking role, especially that in the kitchen.

In a paper on the construction of gender and socialisation, Leela Dube (1988) argues that whilst singular characteristics of tasks within the household may vary across regions and social groupings, there is however a national pattern which defines certain tasks as being 'naturally' feminine. Thus, 'kitchen work', cooking, serving, and

¹⁸ For the importance attached to 'purity' giving qualities of certain products (such as those obtained from the cow), see O'Malley 1932 p120-21.

¹⁹ Gender division of labour in large-scale modern units is equally affected by the idea of 'pollution' and 'purity'. Women are considered 'impure', especially during menstruation. I was told in personal conversation with the factory manager of Badekar's Pickles, Bombay (an export-quality product) that whilst they employ women to clean and cube fruit, they employed only men to add spices to the pickle and do any necessary cooking in order to avoid 'polluting' the product in case any of the women were in an 'impure' state (see also Jetley 1982 p8).

²⁰ Annapurna is the much worshipped mother Goddess who supplies food to the whole world.

distribution of food is considered to be an essentially female task throughout India. Such a definition cuts across class boundaries and women from all income and social backgrounds are expected to carry out food preparation and related tasks, whether this is through direct participation or through allocation and supervision.

Yet, definition of 'kitchen work' as a woman's task also commonly applies to many other parts of the world and as such is not exactly new information. What is more informative is to attempt to answer the question 'why, in India, does such a definition interfere with consumer demand of foodstuffs processed/prepared outside of the home?'

In an attempt to answer this, I will look at two central ideological notions (that of 'sewa' or service to others and 'responsibility') that operate together to interpret meanings of 'kitchen work' both to the woman herself, and to wider society. Here, 'sewa' and 'responsibility' help to transfer the meaning of 'kitchen work' from being seen as an allocated *task*, to that of being an integral and *desirable feature* of femininity and the female role, both within and outside of the household.

As Dube (*ibid*) indicates, the notion of 'sewa' is learnt from childhood. In order to serve others unquestionably and without protest, the woman is socialised and trained to exercise self-control and self-restraint in all matters - in other words, to put others and all else before her own needs. A woman's worth and value is thus measured on her ability to show that she can, through her self-control, adjust to any life circumstances. This quality is considered so important that in negotiations over an arranged marriage, a high value is put on this characteristic of the woman's personality.

Here, it is in the kitchen that young girls are primarily socialised in learning how to serve the needs of others. Rituals and practices associated with food emphasise the hierarchical structure of the household. Girls are taught to serve food to their brothers and fathers first. Even this has to be done 'thoughtfully' and specific examples are used to reinforce this practice. Dube (*ibid.*, p17) cites examples of rice, where men are allocated portions from the top of the pan, rather than the bottom as the latter may be burnt and contain impurities; or the first '*dosa*' (rice pancake) which risks breaking up if the pan is not hot enough, and so is not served to the men. Girls are taught to restrain from complaining about any amounts or quality of food that is left over for their own consumption. Such self-denial is considered fit training for the reality a young woman may have to face at her future husband's household. Therefore, no matter what her father's class or income-grouping, the justification given is that she is being prepared to expect the worst.

At the same time, such daily kitchen rituals help to legitimise the argument that self-restraint is a feminine quality. It is something that each woman must herself desire if she wishes to gain value and respect from others. In matters of food, this is well brought out. As Dube (*ibid*, p17) puts it:

'The cooking, serving and distribution of food are important constituents of a prestigious and valued role for Hindu women. This role contributes to women's self-esteem, offers them a genuine sense of fulfilment and is central to the definition of many female kinship roles. The ideal of 'Annapurna', the unflinching supplier of food is accepted across different regions of India. This ideal which has an aesthetic appeal and sets out privation and sacrifice as defining characteristics of feminine moral character, generates a set of dispositions where a woman has to think of others before oneself and ought not to care about what is being left for her.'

Alongside '*sewa*' is the notion of 'responsibility' as used by Sharma (1980 p93) who explains this by quoting from Oakley (1974 p159):

'if men in England help their wives wash up, this has scarcely eroded the wife's burden of responsibility for seeing that such tasks actually get done, since to wash up is still seen as 'helping the wife.'

Sharma uses feminist arguments to show how cooking is an essentially female responsibility, even if both men and women know how to cook. This sense of responsibility for cooking works in a number of ways. As Sharma shows through illustrations gathered from her study of a Himachal village, this sense of responsibility brings about shame and lowering of self-esteem if a man has to take over 'kitchen work', especially if women are available. Therefore, it may be acceptable for a single urban male migrant to cook if he lacks female associations, but this is not the same for a married man whose wife may be ill. Then, it would be her responsibility to find a substitute.

If the principle of responsibility is explored further, this will be seen to hold different meanings for women from different class and income background. For a woman from an extremely poor background, responsibility means the burden of finding the next meal for her children and her family; for the wife of an urban migrant, the responsibility of feeding her family will mean stretching her food budget to accommodate any new arrivals from her native village, no matter how distant the relationship; and for the middle class urban housewife who has access to gadgets and

servants, the responsibility will shift to educating herself about nutrition, and providing new recipes and variation in dishes.

For all women, however, this sense of responsibility also includes efficient kitchen management, and best value for the money available. Except for the low income groups (who probably do not know where the next meal is coming from) most women from lower middle, middle, and upper income groups will spend considerable time arranging cyclical supplies for the household. Depending on the season, they will buy, sort, and store grains, grind spices, clean fruit, pickle it, and so forth. This work continues throughout the year and it is the woman's responsibility to ensure seasonal best buys, storage, and adequate supply throughout the year.

Cooking is therefore more than a familial task for most Indian women. It is a measure of their self-esteem and ability. Furthermore, cooking and food management are also considered as reflecting on family prestige. (This is also of course true of other societies as well, where the ability to prepare food is seen as central in determining family prestige and the self-worth of women. See for instance Simpson-Herbert 1982 on Iranian food rituals). It is of little wonder then, that as Mirnal Pandey (1989, p14), a woman's activist, comments:

'Women are in a race to be 'Annapurnas'.....Women have been brought up to believe that they are not proper mothers unless they serve three hot meals a day'.

Both societal as well as women's own perceptions of themselves as idealised homemakers (especially those from middle-income groups who the commercial food-industry hopes to capture), makes for an important obstruction to processed and ready-prepared foods entering the family kitchen. Here, it is not just a matter of the higher price for such products (although this too manifests guilt in that it is considered a waste of money and bad management). Rather, purchasing short-cuts or 'outside' food means that the woman has not bothered to make enough effort to find the best for her family. In turn this will affect her own perception of her talents and capabilities.²¹

Thus one of the most important factors affecting consumer demand for commercially prepared foodstuffs lies in the very resistance to it from women (who, arguably, might

²¹ In other parts of the world, including Europe, the use of convenience foods is also regarded as a measure of lesser commitment towards familiar care. In India, the pressure to maintain images of commitment to members of the joint family perhaps adds to this resistance.

benefit the most), and at the very heart of this lies the ideal of the 'Annapurna' that women aim to achieve.

5.5 Consumer Demand: Other Reservations

Apart from the two major non-quantifiable factors I have outlined in the preceding section, there are numerous other factors that interfere with acceptance of commercially processed and prepared food products. As Savara (1986 p123) indicates, these include concerns over pricing, quality (which does not match either fresh or home-prepared produce), quantity (which is usually too limited for normally large households), and lack of nutritional and calorie content (a prime consideration for those who cannot afford enough meals in a day). Additionally, as in the West, concern is expressed over tempering of food-products with additives, colouring, and preservatives. There are also well-founded doubts about shelf-life, recycled rusty packaging materials, and so forth.

However, the distinction between such reservations and the ones discussed in the previous section are that the former are more readily quantifiable and identifiable. These are reservations that the consumer is very much aware of (in comparison with caste and social ideologies, for instance). In other words, it is only with the former, readily identifiable factors that there is the possibility of gathering quick information and perhaps reasonably accurate knowledge of consumer tastes and reservations through market research and data collection.

Whilst such knowledge may allow for related changes or adjustments, the very nature of commercial enterprise limits this to specific products only. It is not viable (in terms of profit) or possible (especially in terms of technology which is often geared to particular product types) to consider numerous tastes or the diversity of so many reservations, particularly when they are so complex that it is problematic even to identify them. The commercial sector will therefore, be interested in only those markets that will maximise returns on specific product types.

The informal sector on the other hand is able to cater to all sectors of the market, especially the lower-middle and the lower-income groups. Because of its capacity for diversity, mobility, quick product changes, undercutting, and so forth, historically the informal sector has been able to supply and meet the exacting needs of massive urban populations, right across caste, income, and gender boundaries. Here, unlike the formal sector, the informal sector has been able to develop well-established systems which take into account both quantifiable and un-quantifiable consumer reservations. How the informal sector is able to do this is detailed in the section that follows.

6 The 'Informal' Sector: More Attuned to Local/Mass Needs?

Informal sector activities are vast and varied. Thus, in order to narrow these down I will focus on only those categories of food I have described as being at the 'final level' of handling (see footnote 17). This includes the 'convenience' and 'fast-food' markets, the intended definition of which was discussed in section 3.1.

An analysis of consumer demands for 'fast' and 'convenience' foods in an urban environment is provided in Table 1 below, under broad headings of consumer types in accordance to their incomes.²²

6.1 *Elite and Upper-income Groups*

The elite and upper-income groups consist of politically and socially influential people, usually made up of upper-caste Hindus (often with inherited wealth and extensive business interests) and to a lesser extent richer Muslim and other minority groups.

These groups thus have the most spending power and therefore, as discussed previously, are the identified target for commercial sector food-processing, specifically westernised products. For instance, in a city such as Bombay where many earn as little as Rs5-10 on days that income can be generated, in 1986 these groups were reported at spending an average of Rs250 per month on commercially-prepared westernised products alone (Savara 1986 p120).

Further, access to both national and international travel has exposed these groups to a variety of foods, and has made them more open towards westernised tastes and products. Along with this, in an attempt to be considered 'modern' and 'fashionable', upper income groups have adopted westernised food-products as status symbols making these desirable components of social food rituals and entertainment.

However, whilst there may be a certain level of acceptance as far as commercially-processed westernised products are concerned, there are also many contradictions. As Savara (1986 p123) suggests, this group places a great deal of emphasis on home-cooked products.

An immediate reason for such a preference is apparent in the abundant supply of domestic help, cooks, modern kitchens, and gadgets. The underlying reasons, however, are more complicated. Here, whilst caste influence cannot be completely

²² Although I am aware that even within these categories there is much differentiation between income, castes, and so forth, it is not possible to detail these in a short paper.

be ruled out (since this group is mainly composed of upper-caste Hindus), it is perhaps the role of women within such households that acts as the prime determinant in preference for home-cooking. Whilst women in elitist and upper-income households may have paid or unpaid work outside of the home, they are still responsible for supervising domestic servants and arranging menus. In fact, this consists of a major role within such families and women spend considerable time finding new recipes and introducing new varieties in meals. As Standing (1985 p32) argues:

'higher consumption standards tend to go with higher expectations about food preparation, home comforts etc....whilst in poorer households domestic labour is, of necessity, cut to a minimum by working women, this will be greatly elaborated in those households showing higher incomes'.

Whilst this group may therefore accept commercially-prepared products that they are not capable of producing themselves, their comparatively high standards of requirements influence them to reject others. (Savara (1986 p120) argues that westernised products are only bought because there is a lack of know-how in preparing these items at home).

So, does this group have a demand for 'convenience' and 'fast-foods' (in the Indian sense of the terms) and if so, how is this met and where does the 'informal' sector come into it? In section (a) of Table 1 I have tried to analyse this by indicating a breakdown of demands for foods required outside of the home.

Table 1 Convenience and Fast-foods: Understanding Urban Demand

	LOWER		MIDDLE & LOWER MIDDLE		ELITE/UPPER	
	Male	Female	Male	Female	Male	Female
TYPE OF CONSUMER	migrant factory labour (married or single, living in shared accommodation) casual-labourers, 'self-employed' & those finding work on a day-to-day basis, living on footpaths squatters	migrant (single or married to migrant male worker, living with own family or with relatives) migrant (single, living as domestic servants) mobile traders, usually setting up camps in groups on footpaths squatters	commuters (married & single) students (living in student accommodation) students (living at home) migrant office/service workers (single or married, often in shared accommodation, or as 'house guests')	commuters (married & single) students (living in student accommodation) migrant office/service workers (single or married, living with relatives or as 'house guests') single women living in working women's hostels	business people professionals politicians	'housewives' voluntary/charity work professionals politicians
DEMAND	complete meals tea, very occasionally snacks		snacks lunch evening meal		lunch entertainment (business & social) social obligations	
SHAPE OF FOOD REQUIRED	traditional meals quantity conventional tastes		home cooking traditional meals variety not so much in meals but in snacks westernised products but only for the top section of the income group, occasional		westernised products home cooking variety novelties status giving	
COOKING FACILITIES AND ASSETS	rarely any access to cooking facilities	rarely any access to cooking facilities but ability to improvise	dependant on living accommodation, but with the exception of married commuters, those living at home, little or no cooking facilities	dependant on living accommodation, but most with access to some cooking facility, even if minimal or improvised	kitchen spaces servants gadgets transport exposure through travel	
CONCERNS	hygiene price access to credit consistency and regularity in food provision availability of place to consume food work things	hygiene price quantity (has to feed herself and family) access to credit small amounts	hygiene religion social attitudes conservative tastes price quantity	hygiene restrictions on mobility and social etiquette religion conservative tastes price quantity	hygiene social attitude religion	
HOW DEMAND IS SATISFIED	khannawalli* cheap 'hotels' that provide tea and breakfast snack roadside and railway tea stalls very occasionally snack stalls mobile but regular food vendors	will cook own food mostly, but will also rely on mobile, but regular food vendors packed meals from own cooking tea stalls, roadside and railway snacks, railway carriages occasionally leftovers from richers households	occasionally restaurants cafes more 'exclusive' roadside vendors tiffins packed by own household or khannawallis, transported by tiffinwallahs to work premises canteens	packed lunches brought from home tiffins delivered to living rather than workplaces cafes, roadside vendors (but only in certain circumstances) hostels canteens railway carriages	restaurants tiffins packed at home and transported by personal servants specialised outlets, both commercial and informal sector	

* See Section 6.3 for clarification of term

In cases of complete meal requirements, both men and women²³ will use restaurants to entertain socially and for business purposes during lunch times, and sometimes during the evenings. However, if food is required at work premises (whether this is for business people, professionals, or politicians), a 'tiffin' will be packed with food cooked from home and will be transported by a personal driver or servant.

In cases where snacks, cakes, and sweetmeats are required, specialist, high-quality commercial outlets are used. Thus, at first glance it would appear that there is very little room left for the 'informal' sector. But, a closer look confirms that here too the 'informal' sector has been successful in establishing a supply line for upper-income groups, although somewhat 'behind the scenes'.

Firstly, an indirect contribution comes through the 'specialist' outlets (such as those mentioned above) which often supply both factory-produced products, as well as those produced by informal sector suppliers. These suppliers will work from home and will usually be 'contracted' to the outlet so that they can supply whatever is ordered.

Secondly, there are those informal sector suppliers who have been associated with a particular family over a long period of time (sometimes through generations). These suppliers may have originally been 'chosen' for their caste status, paternalistic relationships stretching back to pre-migration feudal links in rural areas, and so forth. Nevertheless, they are 'specialists' in their own way, supplying high quality products to specific families through having established a reputation for their services. Such suppliers will regularly bring their wares (such as snacks, pickles, etc.) to the house itself and will often be a part of the domestic cycle. Such 'specialists' will also be called upon when the family will require extra help in catering, for example supplying sweetmeats at festive gatherings.

In comparison with other income-groups however, whilst this group utilises the services of the informal sector, it does so indirectly and in a rather limited way.

6.2 Middle and Lower-middle Income Groups

This group consists of a massive number of people, from various backgrounds, doing a variety of paid jobs. A complete breakdown of income-levels and statistics showing

²³ There are many contradictions regulating desirable social and moral behaviour of women from elitist and upper-income backgrounds. On the one hand, travel, education, etc have brought with them a 'modern' attitude which gives an appearance of equality and independence for women. Thus women are allowed the 'freedoms' that women from other groups are denied (such as visiting restaurants on their own). However, in some senses they are under extra pressure to retain high moral standards in order to keep the family's reputation 'more respectable than the average'.

the type of work they are involved with is not only a difficult task, but also perhaps not a directly relevant exercise in understanding the immediate question as to how their current needs for 'convenience' and 'fast foods' are being met.

In order to narrow this down, I have therefore used three indicators which I see as affecting the shape of daily requirements for such foods (I also use similar indicators for the next group, lower-income earners). These are (a) gender (b) accommodation, and (c) distance from workplace.

Interrelated social and economic factors which give meaning to men and women's activities are crucial in determining where each person lives, what type of paid work they are able to obtain, what is socially acceptable behaviour, and so forth. Thus, as section (b) of Table 1 shows, whilst men and women may have the same pattern in 'convenience' food requirements, the demand (and how this is satisfied) for each varies.

To take the men first, it is difficult not to notice the thousands of commuters on Bombay's trains and buses. These commuters (married or single) are (a) either office or service workers usually living in accommodation shared by other family members or relatives in the suburbs of Bombay; or (b) students living at home or in student accommodation; or (c) migrant workers usually living as 'house guests' or in shared 'bachelor' accommodation. They will need to leave home early in the morning and return late in the evening. Therefore, those who have access to cooking facilities will usually eat an early morning breakfast before they leave, consisting of tea, chappatis, or savoury snacks (such as '*idli*', a common breakfast of rice and lentil dumpling). Those who do not have access to cooking facilities will have tea and breakfast in cheap cafes and railway stations, or will wait until they reach canteens at their workplaces.

A lunch time meal is therefore essential, but what is noticeable is that men crowding the railway carriages will hardly ever carry any packed lunch or '*tiffins*' with them. This is because true to the Indian meaning of 'convenience' food, *tiffins* containing home-made, freshly cooked foods are often delivered to the men's workplace by a very efficient but complicated system developed by another group of informal sector suppliers, ie the '*tiffinwallahs*'.

For a minimal sum (approx 10-15 Rs a week), contracted men²⁴ will collect *tiffins* prepared by wives and mothers or other suppliers (such as the *khannawallis* discussed

²⁴ In a personal interview with the General Secretary of the 'Bombay Tiffin Box Supplier's Association' (which functions as a co-operative and a trades union co-ordinating body) informed

in the next section) from each individual's household. Each *tiffinwallah* will collect numbers of *tiffins* (could even be up to 75 if he has access to a wooden cart or up to 30 if a bicycle is used) and these will be brought to and accumulated at a central railway station (Dadar). Most of the *tiffinwallahs* are illiterate, or have a low-level of literacy, and will use various colour codes to decipher the destination of each *tiffins*. Huge wooden boxes, holding numerous *tiffins* are then loaded onto a noisy, crowded railway carriage, and miraculously reach the correct owner by lunch time. They are then collected and returned in the same way. There is therefore, little need for men to carry packed lunches. In fact, the tiffin system has become so legendary to Bombay that even tourist guides make a special reference to it (see Figures 1, 2 and 3).

Tiffins are thus preferred over other eating venues such as canteens and cafes. Firstly, it is expensive to eat at these venues, particularly if these are utilised for complete meals. Also, food here is often of lesser quality and quantity to that received from home. But there is also an overwhelming fear that the food might not be hygienic, because illness results in loss of crucial earnings. And, there might also be irregularities concerning caste or religious norms, particularly those affecting vegetarianism. 'Outside' food is therefore eaten, but only occasionally and usually for snacks.

For women, things are slightly different. Firstly, it is rare to see women eating alone in public places, particularly cafes, canteens, and dining rooms. Even if they are in groups, what becomes immediately apparent to an outside observer is that men and women will have their own, segregated spaces (see also Savara 1982 p19). Women will, therefore, seek alternative venues. Ironically one of the most frequently used venues is the 'ladies only' railway compartments, where thousands of commuting women buy snacks and hot foods from the informal suppliers who jump on and off the trains at every station. From what I saw, these compartments were like 'food bazaars' selling numerous varieties of convenience foods.

Another crucial factor affecting demand is the woman's ability to cook. As with the men, some women may also have access to minimal cooking facility, but they are more likely to have the ability to improvise facilities (most women in working women's hostel and student accommodation will own a kerosene stove or an electric ring, depending on the regulations). And, if they are in some kind of shared or family accommodation, women will probably be involved in cooking in any case.

me that no woman has ever been taken on to do this work. The justification was that travelling across Bombay was not considered a safe or fit work for a woman.

What is noticeable, therefore, is that commuting women, unlike men, will not always rely on *tiffins* to be transported to their workplaces. Instead they will carry a comparatively modest lunch box (consisting of a single rather than an average four-boxed *tiffin*) with them on their journey to work. The lunch will usually consist of a snack, a single part of a meal or leftovers either prepared by themselves or other women in the household.

This is perhaps because unlike the men, women do not often have someone else cooking for them or packing *tiffins* for them. Also they may not have time or spaces in which to consume elaborate three course meals at work. Some women do not consider it necessary to eat large meals and in fact this might be considered immodest.

This does not, however, mean that they do not utilise the tiffin service altogether. Some women, particularly students may have a similar contract with those women who will supply them regularly with cooked meals. The crucial difference is that they will have the *tiffins* delivered to their places of abode, where they can 'eat in peace' rather than places of work.

This discussion, shows that both men and women from middle and lower-middle group rely extensively (although differently) on the variety of intriguing services provided by the informal sector, such as by the *tiffinwallahs* or the *kannawallis*²⁵ and their daily real needs are little satisfied by commercially-prepared food products. In the next section I will show how the latter completely fails to reach lower-income groups who solely and heavily rely on the informal sector to satisfy a large proportion of their needs.

6.3 Lower-income Groups

It is difficult to be accurate about what is meant by low-income here, but if any guidelines are required, then these groups will be on the border of or well below the poverty line, and will be in debt to varying degrees (sometimes to rural landlords, sometimes to urban moneylenders, and usually to both). They will have little stability and security of paid work or material possessions and will make a living in whatever way they can. Often, people in this group will not know where their next meal is coming from, if at all it is!

²⁵ Although both these suppliers have recently organised themselves in trade unions, these are similar to SEWA (Self-Employed Women's Association), the famous organisation of informal sector workers in Ahmedabad. These groups therefore remain very much in the informal sector.

In common with the middle- and lower-middle income groups, I will take gender and place of abode as important criteria in determining food demands. However I feel that, in this case, irregular and spasmodic paid work patterns affect the demand type more than the distance to work, for instance. (Often low-income groups do not travel long distances to work as they cannot afford the fares, or the time, and will tend to live closer to areas where they work).

Lower-income groups in Bombay are mostly composed of migrant and uprooted people. In fact, Bombay has historically relied on single, seasonal male migrants from neighbouring areas to meet its labour requirements, particularly for its engineering, port and textile industries. Migrants are, therefore, nothing new. However, migration to Bombay has recently changed and there is a trend towards increasing family and female migration (for more detail on this and the first half of this section, see Abbott 1993 Ch.3). In fact, the daily arrival of numerous landless migrants has caused serious problems in an already congested city bursting at its seams. Whilst the housing situation for the poor has always been bad, it is now appalling, to a point of being non-existent. Thus several thousands are forced to live on the streets.

This situation creates a demand that is totally different from that of higher and middle-income groups. Those who migrate with their families will still rely on the women to cook for them, and it is common to see women preparing food on footpaths. Usually this group will be too poor to afford ready-cooked food from any other source.

Single men, however, rely heavily on the informal sector for their daily food needs. And, in Bombay, these men form a significant portion of the lower-income group. In fact, there are so many single men that Bombay has always had an unequal male/female ratio with the number of men continuing to outweigh those of women. The demand from this group is primarily for a regular supply of complete cooked meals, and this is created partly because of the heavy and exhausting nature of the work the group is involved in, and partly from the fact that this group has nowhere to cook.

Some, usually upper-caste migrants whose villages have traditionally supplied Bombay with seasonal labour, have been able to establish strong systems over a period of time. For instance, the Hindu Marathas have been able to purchase communal rooms (known as '*kholis*') to house migrants belonging to their caste. The *kholis* are let out to anything up to 40 men who share sleeping space according to their shift and work times (see Figures 4 and 5). These rooms are thus highly

congested and there is barely space for personal clothing and a sleeping mat, and certainly none for cooking.

For those thousands who have been unable to establish such systems (e.g. the scheduled, lower-castes) there is little choice except to sleep on footpaths.²⁶

Both these groups have a number of sources from which they can get cooked food. There are, for instance, the cheap cafes (known as 'hotels') that supply the men with an '*idli*' (rice and lentil dumpling) breakfast. For those in state, factory or similar employment there may also be a subsidised canteen. Additionally, there are numerous roadside vendors offering mouth-watering snacks.

These sources are sometimes utilised, but for the poor, there are also important reasons for avoiding them. For instance, 'hotels' are expensive, canteens are not always satisfactory, and the hygienic conditions under which roadside vendors operate are a serious worry to those who cannot afford to be ill.

What these men require, then, is a meal which is hot and filling, with the quantity often being more important than the quality. Also, coming from rural backgrounds and lacking cash, migrants from low-income groups have generally had little exposure to the variety of food offered in urban areas. Thus, they also require a meal that is 'traditional', consisting of chappatis, rice, lentils, vegetables, and the occasional meat and fish, and a meal that reflects their regional variation and taste.

Another crucial factor for the lower-income groups is credit availability. Although food is needed everyday, cash is not always available. The supplier, therefore, has to be someone who can take all these factors into account.

In Bombay, this supplier is known as the '*khannawalli*'. A *khannawalli* is a woman, herself from a low-income background, who will cook meals in her home for a number of these men (clients). She will usually supply two cooked meals a day (lunch and evening meal) for an agreed fortnightly/monthly payment. These meals can be consumed at the *khannawalli*'s home if the client wishes, or she will pack a '*tiffin*' to be delivered at his workplace or his place of abode. In addition, she may supply those who have nowhere to live, facilities for personal washing, address, and occasionally sleeping (see Figures 6 and 7). In fact, without these essential services that the *khannawallis* supply, arguably Bombay would come to a halt because its thousands of labourers simply would not get fed!

²⁶ Scheduled castes and tribes are those groups which are identified as underprivileged by the President of India by public notification under articles 34(i) and 34(ii) of the Indian Constitution.

Studies have shown that there may be deeper psychological factors at play. Often migrants will seek out eating places where others from similar backgrounds will accumulate, because these places in turn will act as a base for informal network support systems (Singh 1976 cites examples of cafes in New Delhi which are solely used by South Indian migrants). In Bombay, as my study (Abbott 1993) shows, migrants will gravitate towards those *khannawallis* who originate from the same region/village as themselves and belong to the same caste (see also Dandekar 1986). Furthermore, despite assumptions that people living on footpaths or in congested surroundings are not concerned with food hygiene, my own interviews showed a real worry about food taken from irregular suppliers (such as roadside vendors) because illness and the resulting inability to earn income can cause a major crisis for those who rely on earnings on a daily basis. The regularity of food from a single source is therefore important.

The *khannawalli* is also able to more carefully take into account her customer's personal circumstances by the very fact that each is dependent on the other, she for her own need to generate income and he for a regular supply of food. Therefore, they often allow credit to those who have not been able to raise immediate cash. Clearly, therefore there are many more factors than price (identified as the main obstacle by the commercial sector) at play. Table 2 details the possible sources of food available to this group and their reasons for choosing to eat with the *khannawalli*. It also gives a comparison of food-costs. What becomes clear is that the *khannawalli*, as an informal sector food supplier provides the cheapest and most efficient service for thousands of poor in Bombay.

Table 2 Single Male Migrants: Sources of Cooked Food Supply

INCOME BAND & JOB TYPE		GENERAL COMMENTS FROM BOTH GROUPS
Rs 1,200-1,500 per month Permanent textile or other industrial work	Rs 500-800 per month Casual textile workers; labourers; sweepers	
KHANNAWALLIS	Charges per month for 2 daily meals: Rs 300 (plus 10-15 per meat dish) Rs 250 (plus 8-10 per meat dish) Rs 200 (plus 8-10 per meat dish)	Rs 125 (Plus 5-8 per meat dish) Lowest Rs 120
CANTEENS	Subsidised Rs 2/3 per plate or portion	as for permanent workers, if available
'HOTELS'	Rs 10-12 per day on tea and breakfast	Rs 5-8 per day on tea and breakfast
ROADSIDE AND OTHER SUPPLIERS	Occasional Rs 3-5 per portion	Occasional Rs 3-5 per portion

* Most clients associate hygiene with regular suppliers, rather than the strict sense of the word

The majority of the *khannawallis*' customers are, however, men and the women will hardly ever utilise this service. There are several reasons for this. Firstly, even for those who have settled in Bombay and found regular employment (such as with the textile mills), they will either be obliged to cook for their families before they leave for paid work or will have some other woman member of the household doing this. Like the middle-income women, these women will therefore carry packed lunches with them.

Studies also show that women prefer to take their own food and do not like eating in canteens. If, for some reason they are forced to buy canteen food, they will eat this near their machines (despite the noise and pollution) rather than the canteen because:

'there are too many men there. We get pushed around. They laugh at us a lot and there is a lot of teasing'

(Savara 1982 p19).

For those women who migrate, they do so to join their husbands or other family members. If they migrate singly or are deserted, they will try to live with friends and relatives, or obtain employment where they have to live in. If in cases where they

have to live on footpaths (as with single parent migrants who may find difficulty in obtaining live-in employment or alternative accommodation), such women will tend to form groups for protection. In fact, single-room *kholi* establishments (available to men) do not exist for 'respectable' women (for women, *kholi* type accommodation is associated with prostitution). But, wherever they live, women will tend to cook for themselves even if circumstances are difficult. Cooking facilities will be improvised on footpaths, building sites (where many migrant women find employment), squatter colonies, and so on. Part of the reason for this is that unlike single male migrants, women will often be responsible for feeding the children as well as themselves.

In cases where a woman has to be away for long hours, she will require additional food to that packed from home. In this case, she may also use roadside 'tea and *idli*' stalls (probably the same stall where she is recognised, or railway stalls, and railway carriages). For those whose mobility is restricted (such as with footpath vendors who have to guard their patch and are worried about losing trade if they take time off to eat), other mobile vendors selling hot meals will bring food to them (again on a more or less regular basis).

Finally, whilst both men and women may share concerns over food hygiene, their concerns over price and quantity are at variance. Men will usually judge the price by the quality and quantity of the final product. But women will think about how much cheaper the product would be if they made it themselves! Furthermore, women's perception of price and quantity will include the need to feed the whole family, not just herself.

The above argument, illustrates that whilst the informal sector is heavily active in meeting the needs of low-income groups in a variety of ways, perhaps the men are more dependent on one particular service, namely that of the *khannawallis*. The food that the *khannawalli* provides is a convenient, fast-food product for numerous men, who like their suppliers are very poor themselves.

7 Conclusions

By looking at the direction in which the formal food-processing industry is heading, and by re-defining the meaning of 'convenience' food in the context of an urban Indian market, this paper has argued that the formal sector, in this case, may only reach certain types of consumers. On the whole, however, it remains alienated from the needs of the majority.

On the other hand, the suppliers in the informal sector are able to recognise and meet the needs of various groups, and it is likely that they will continue to do so for some

time. This is particularly so in the case of thousands of urban poor who rely heavily on the informal sector for their daily food needs. Yet the informal sector is not officially recognised for the contribution it makes. The *khannawallis*, for instance, struggle daily to acquire even the most basic raw materials such as grains, cooking oil and cooking fuel from heavily controlled government shops.²⁷ They are subject to all kinds of rules and regulations which do not allow for the fact that these women are cooking for several people and therefore need far more allowances than those given on individual ration cards. Access to credit is also limited or altogether unavailable because these women are simply not seen as economically productive.

Despite repeated demands from the *khannawallis* and other self-employed women like themselves for improved access to raw materials, credit, and so on, there have been no changes. Many poor women who make a living from food-processing activities are thus completely excluded from any policies that might benefit them or the thousands who rely on them. Thus whilst those who feed the poor are left out, the Government continues to pour money and energy into developing a food-processing industry for the rich.

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²⁷ The Essential Commodities Act (ECA 1955) gives each State the power to purchase and control any commodity that is likely to be scarce. This is then distributed through Government Fair Price Shops. These commodities can only be purchased with ration cards. Both the ECA and the Public Distribution System has drawn a lot of criticism as it is usually seen as ineffective and inefficient.

Poor people will often have no choice but to use Government shops as private shops and black-markets charge very heavily for what is deemed as an essential commodity. For a detailed discussion see Abbott (1993) and Mooij (1995).

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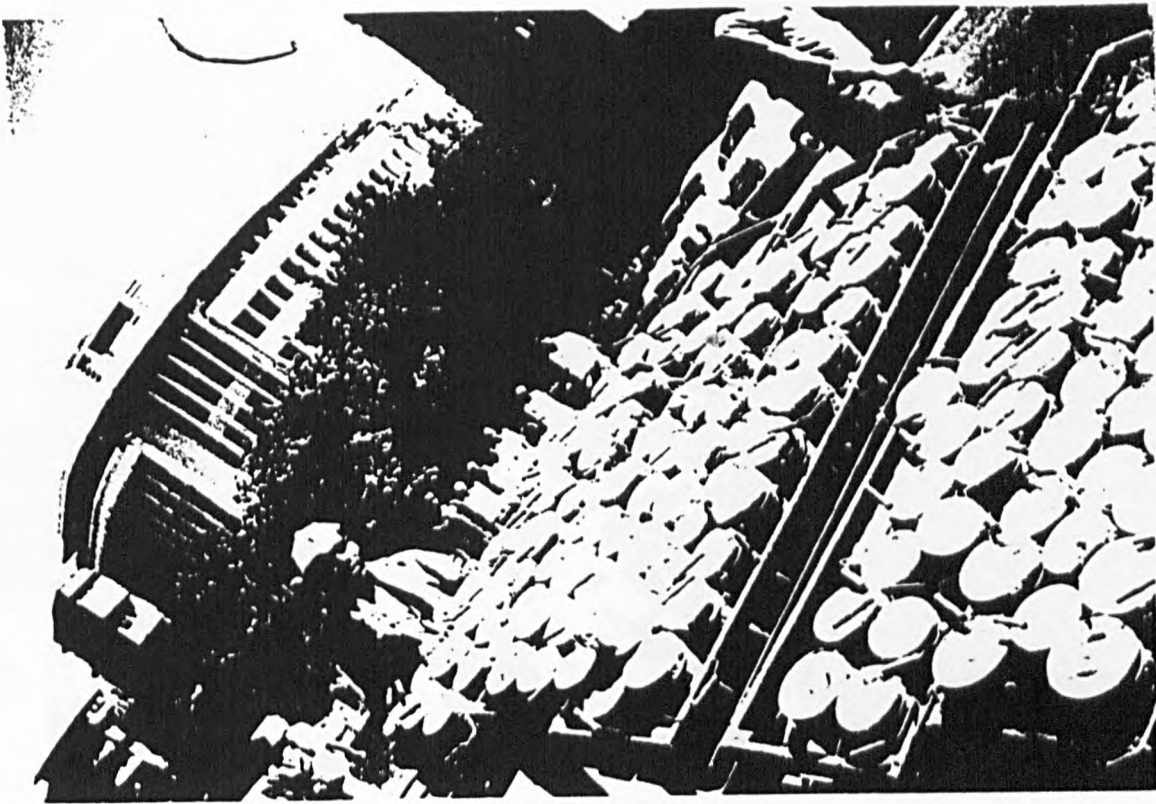


Figure 1 Tiffins arriving at Nariman Point, Bombay's exclusive office development

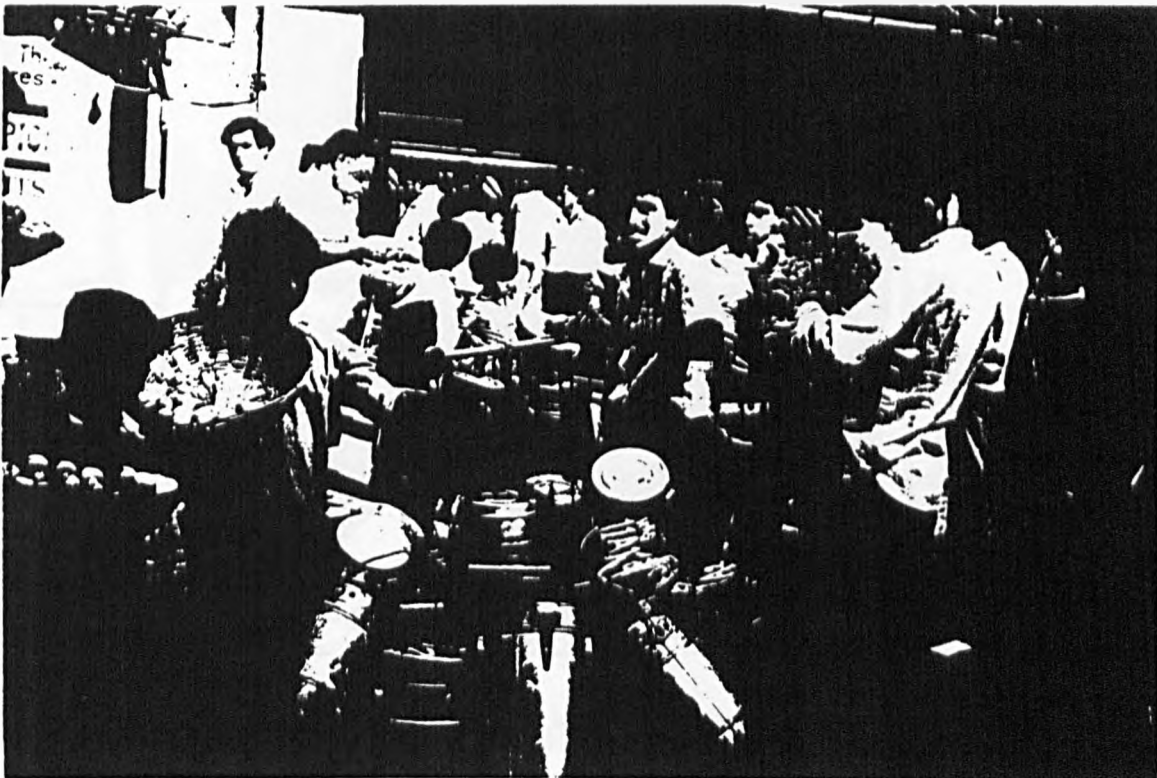


Figure 2 Bicycle boys transporting tiffins to local factory workers

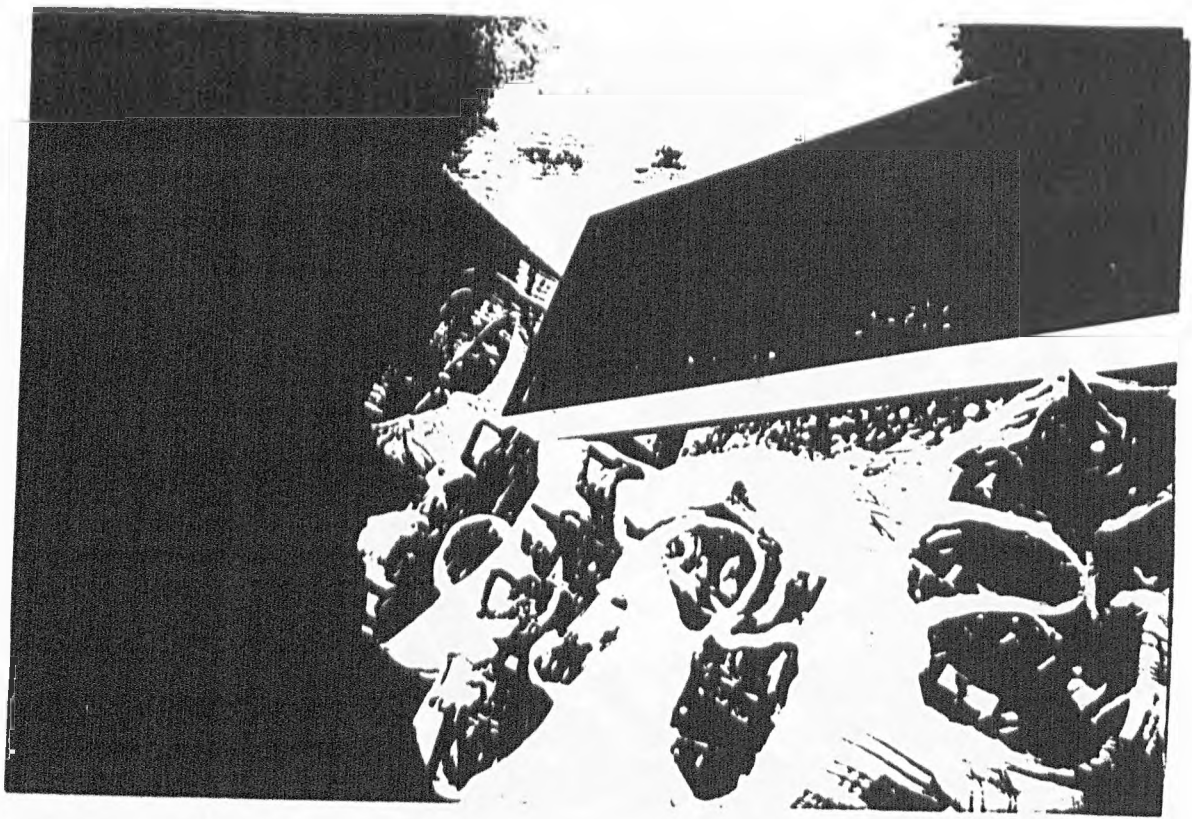


Figure 3 Tiffins awaiting transportation to college students



Figure 4 A typical kholi room housing Hindu migrants from neighbouring Ratnagiri



Figure 5 Shift workers take it in turns to share floor space



Figure 6 Some men 'board' with khannawallis



Figure 7 Extra space is created by wooden platforms, men live/sleep over or under these platforms

DEVELOPMENT POLICY AND PRACTICE

The Development Policy and Practice Research Group was set up in the Open University towards the end of 1984 to promote research on development issues. Its members have a wide range of disciplinary backgrounds (engineering, sociology, economics, education, geography and anthropology). At present, research is focused in four areas:

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