





Indian spices: Potential

A Detail about Indian Spices and our Prospects

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Sr. no.	Spices	States of India
1	Pepper	Kerala, Karnataka, Tamil Nadu.
2	Cardamom (Small)	Kerala, Karnataka, Tamil Nadu.
3	Cardamom (Large)	Sikkim, West Bengal.
4	Ginger	Andhra Pradesh, Karnataka, Kerala, Madhya Pradesh, Meghalaya, Orissa, Arunachal Pradesh, West Bengal, Mizoram, Sikkim, Himachal Pradesh, Tamil Nadu, Uttaranchal, Chattisgarh, Jharkhand.
5	Turmeric	Andhra Pradesh, Karnataka, Orissa, Tamil Nadu, West Bengal, Maharashtra, Kerala, Assam, Bihar, Meghalaya, Tripura, Uttar Pradesh, Arunachal Pradesh,
6	Chilli	Andhra Pradesh, Gujarat, Karnataka, Maharashtra, Orissa, Rajasthan, Tamil Nadu, Uttar Pradesh, West Bengal, Madhya Pradesh, Uttaranchal.
7	Coriander	Rajasthan, Uttar Pradesh, Uttaranchal.
8	Cumin	Rajasthan, Gujarat, Uttar Pradesh
9	Fennel	Gujarat, Rajasthan, Uttar Pradesh
10	Fenugreek	Rajasthan, Uttar Pradesh, Gujarat,
11	Celery	Uttar Pradesh, Punjab
12	Clove	Kerala, Tamil Nadu, Karnataka.
13	Nutmeg & Mace	Kerala, Tamil Nadu, Karnataka.
14	Cinnamon & Cassia	Kerala, Tamil Nadu.
15	Saffron	Jammu & Kashmir
16	Aniseed	Punjab, Uttar Pradesh, Assam, Uttaranchal.
17	Vanilla	Kerala, Karnataka, Tamil Nadu.
18	Garlic	Haryana, Madhya Pradesh, Maharashtra, Orissa, Uttar Pradesh, Gujarat, Karnataka, Rajasthan, Chattisgarh, Bihar.
19	Ajowan	Bihar, Jammu & Kashmir.
20	Dill Seed	Gujarat, Rajasthan.
21	Kokam	Karnataka.
22	Mustard	Uttar Pradesh, Bihar, Andhra Pradesh.
23	Tejpat	Arunachal Pradesh, Sikkim.
24	Pomegranate seed	Maharashtra, Tamil Nadu.
25	Mustard Seed	Tamil Nadu



Indian spices: Potential



- **Rising Income: GDP Growth of 7.5% over last five years**
- **GDP for Indian spices sector recording significant growth**
Competitive

- India produces a wide range of spices and holds a prominent position in world spice production. Because of the varying climates - from tropical to sub-tropical to temperate-almost all spices grow splendidly in India. In reality almost all the states and union territories of India grow one or the other spices. Under the act of Parliament, a total of 52 spices are brought under the purview of Spices Board. However 109 spices are notified in the ISO list.





Indian spices Sector in India

- Indian spices has emerged as one of the most important economic growth levers in the agriculture sector in India, which targets to address:
 - Low farmer price realization
 - Surplus production
 - Significant wastages
- AND
- To capitalize on growing domestic food market currently estimated at US\$ 182 Billion, expanding at a CAGR of 4.1%.



India Advantage: Natural resources

➤ Richly endowed agricultural nation:

- One tenth of world's arable land: 158 million hec.
- One fifth of world's irrigated land: 61 million hec.
- Vast Coastline (7,517 Km) & Freshwater reservoirs (15 million hec.)
- All major Climates of the world.
- 20 agro-climatic regions and nearly 46 out of 60 soil types in the country.
- Sunshine hours and day length are ideally suited for round the year cultivation



Production of Indian Spices

SPICE WISE AREA & PRODUCTION										
Spices	<i>(Area in Hec, Production in Tonnes)</i>									
	2012-13		2013-14		2014-15 (P)		2015-16 (P)		2016-17 (Est)	
	Area	Prodn.	Area	Prodn.	Area	Prodn.	Area	Prodn.	Area	Prodn.
Pepper	122500	65000	122400	37000	123900	70000	131790	48500	131230	55500
Cardamom(Small)	69870	14000	69970	16000	69970	18000	70080	23890	70080	19625
Cardamom(Large)	26060	4145	26060	4465	26387	4850	26387	5315	26787	5623
Chilli	787530	1378400	791930	1376400	766620	1621480	742950	1497440	830770	1872010
Ginger	134430	669350	138200	683160	153100	795820	156910	1025110	164850	1081430
Turmeric	194330	986690	207570	1092630	178470	846250	183480	967060	193390	1051160
Coriander	531070	503240	516070	496240	604090	546800	624780	572990	662350	609350
Cumin	593980	394330	690080	445030	701560	372290	808230	503260	760130	485480
Celery	4070	5510	4070	5510	4070	5510	4010	5510	4010	5510
Fennel	99610	142940	94070	135930	46760	78570	76000	129350	74660	124610
Fenugreek	93110	112870	90500	110530	124710	134100	227960	248350	218430	220160
Ajwan	39690	26620	39260	26610	24010	17180	26600	16010	24230	13820
Garlic	247430	1260210	238760	1221380	261510	1424860	295600	1603500	274550	1271220
Tamarind	58300	189980	58720	191750	54120	200390	47660	190780	49020	190700
Clove	2060	1060	2060	1060	2380	1260	2340	1200	2350	1220
Nutmeg	18730	12730	18730	12730	21110	14400	22360	15170	23080	15460
Grand total including others	3172468	5801114	3145610	5833870	3192640	6169900	3457000	6901780	3529200	7075500
GRAND TOTAL IN MLN TONNES		5.80		5.83		6.17		6.9		7.08

Source: State Agri/Hort. Departments/DASD Kozhikkode

Cardamom: Estimate by Spices Board

Cardamom(large) : Sikkim and West Bengal only





Export of Indian Spices

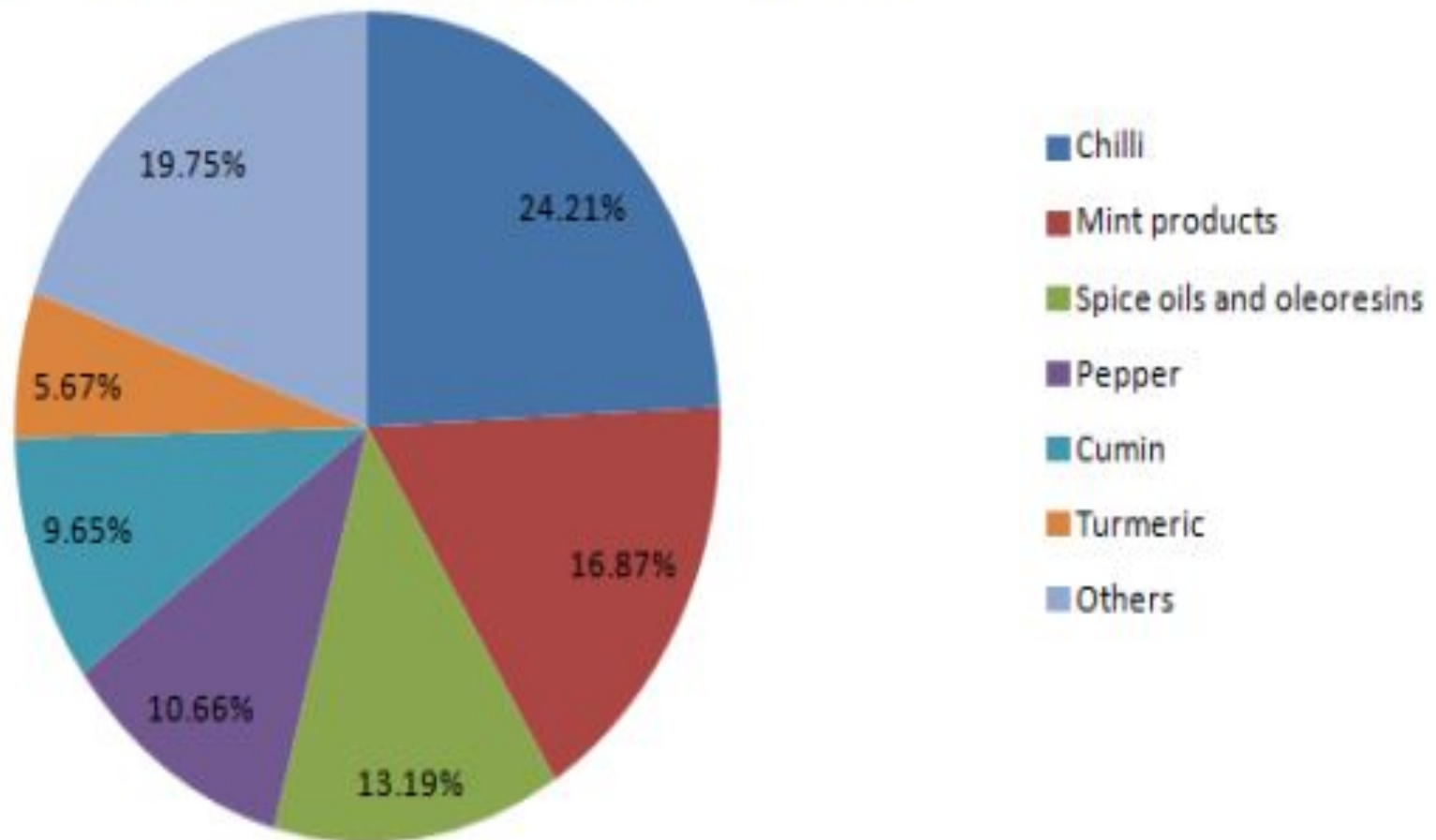
MAJOR COUNTRY-WISE EXPORT OF TOTAL SPICES FROM INDIA								
	2012-13		2013-14(P)		2014-15(EST)		2015-16(EST)	
COUNTRY	QTY (MT)	VALUE (LAKHS)	QTY (MT)	VALUE (LAKHS)	QTY (MT)	VALUE (LAKHS)	QTY (MT)	VALUE (LAKHS)
U.S.A	71087	211572.3	71038	235237.87	80919	270463.98	77950	289325.00
CHINA	25751	201791.56	21571	162896.85	20635	147442.85	13165	105523.00
VIETNAM	60908	63595.26	84214	106805.69	107452	128142.17	90929	136287.02
U.A.E	57238	47713.42	58932	58007.78	68193	73823.41	49932	60083.41
INDONESIA	22237	18331.33	73267	72699.34	71187	72104.24	80317	96892.69
MALAYSIA	64947	49387.73	62796	62951.67	62555	69089.60	62089	74555.23
U.K	22101	46650.93	23249	55449.39	25324	56354.45	27599	67830.27
SRI LANKA	48528	28743.88	58428	39140.34	60112	47157.38	61285	63891.46
SAUDI ARABIA	22351	35594.83	25812	35637.61	26177	45290.27	24400	51204.62
GERMANY	7125	39575.25	8148	40372.16	9529	44959.52	10452	49755.00
SINGAPORE	7927	36673.94	8362	24576.20	10477	29233.14	10045	32175.00
JAPAN	6628	17772.7	6754	21289.80	8198	28216.42	7255	29222.00
NETHERLANDS	6586	29694.38	7778	32957.83	7766	26964.98	8370	34932.00
SPAIN	11031	17328.58	12756	22918.41	14209	23645.55	11735	23925.75
MEXICO	15383	22226.93	12602	18742.84	15256	21850.57	12749	21997.28
OTHERS	276785	344622.78	281543	383855.45	305931	405228.99	294982	486222.86
TOTAL	726613	1211275.8	817250	1373539.25	893920	1489967.53	843255	1623822.60

(P) Provisional (E): Estimate

Source : DGCI&S Kolkata/Exporters returns/DLE from customs

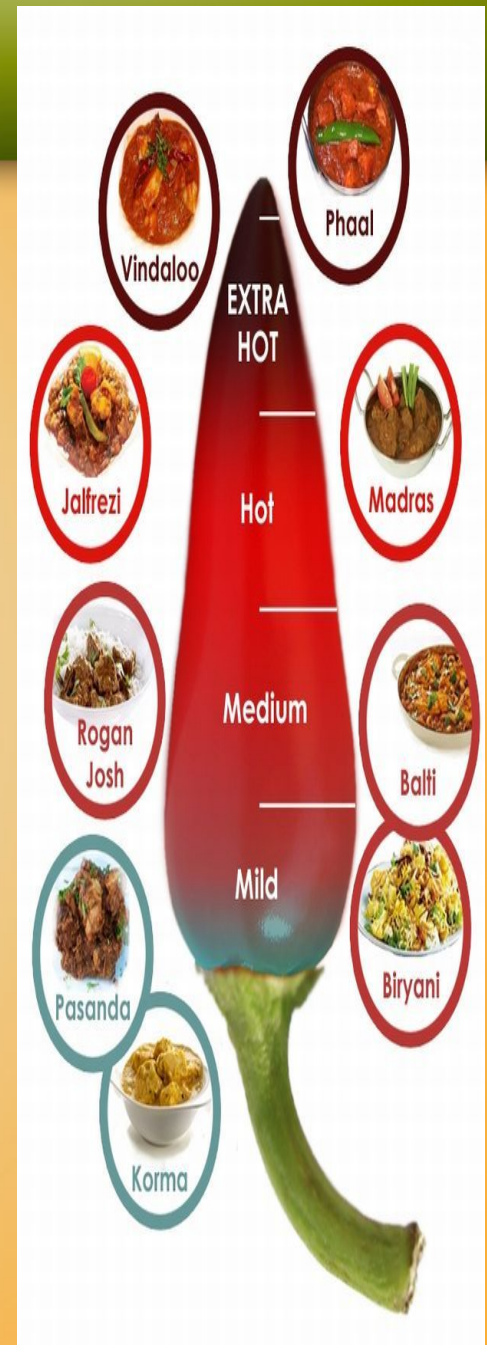
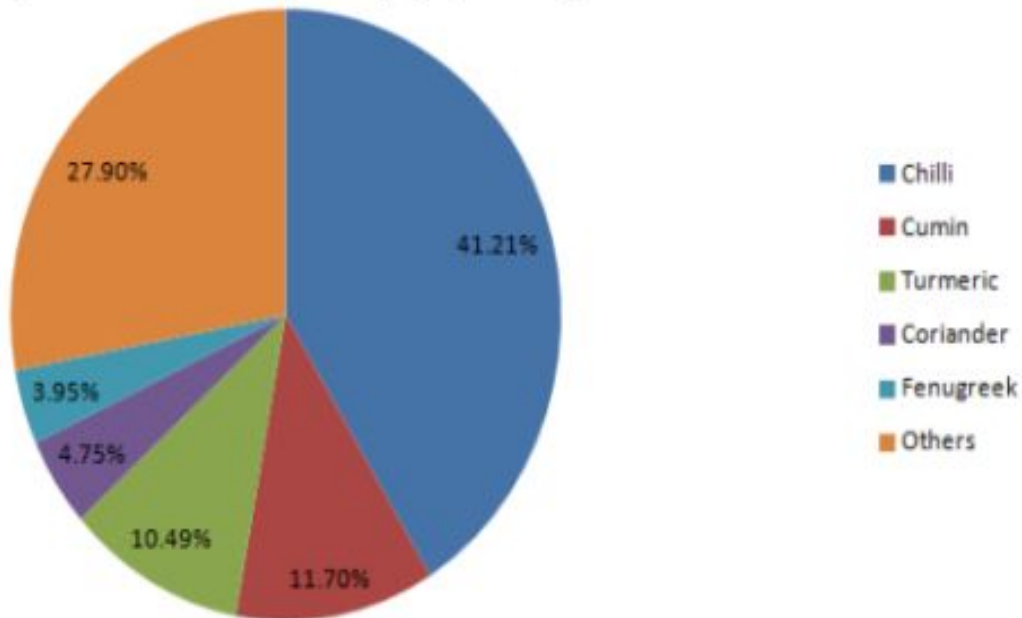


Share of major spices in India's exports (by value), 2015-16





Share of major spices in India's exports (by quantity) for 2015-16





Raw materials: Spices

- More than 50 types of spices with annual production of 3.2 million tons.
- Major spices produced are black pepper, cardamom (small & large), ginger, garlic, turmeric, chili, etc.
- India is the largest producer, consumer and exporter of spices.
- India is a treasure house of medicinal aromatic plant species.
- 9500 species of medicinal and aromatic plants classified and documented.



Advantage India: Fiscal Incentives

- Automatic approval to Foreign Direct Investment up to 100% equity in FPI sector excluding alcoholic beverages and a few reserved items;
- 51% foreign direct investment permitted in multi-brand retail: Likely to generate a wave of foreign investments in Indian spices sector
- Indian spices industry is declared a priority sector: New Trade Policy places greater thrust on Agro-based industries;
- Most capital goods can be imported without requirement of any license/permission;
- Customs duty rates have been substantially reduced on plant and equipment as well as on raw materials and intermediates especially for export production;
- Institutional & credit support: Priority sector lending to SSI units



Proactive steps taken by Government of India

- Dedicated Ministry at Union Government level started.
- Paradigm shift in Government Strategy:
 - Regulatory & proactive support
- Focus on catalyzing private investment: Financial Support for:
 - ✓ Mega Food Park
 - ✓ Cold Chain
 - ✓ Abattoir
 - ✓ Skill Development
 - SEZs & Agri Processing Zones
- Enacted Integrated Food Law:
 - ✓ One law & one regulator



Snapshot of:

Our Strength and Potentiality at
India for Success of Orient Overseas



International participation

Financial Strength

- Presently we have corpus of 0.5 Million USD
- For future we can arrange more financial assistance if required
-

Infra Strength

- Well established offices in India.
- Head office at Gandhidham and along with branch offices at other part of Gujarat as well as in Rajasthan.

Experience Strength

- Having vast experience in field of Export of Spices and other Agro Products.
- Along with that we are our own sister concern for Logistic and clearing of import export cargo.



International participation

Management Strength

- Qualified and experienced Management Team having Chartered Accountant and Company Secretaries and MBA's for better business management and compliances of all indigenous and international laws

Licenses and Compliances Strength

- We have all kind of required Licenses , Certifications and other compliances which meet to international parameters for international business

Deep and Better Subordinates Team Strength

- To help management and to expanding the business we have good manpower in hand at second level of management approx. 18 person are working at Gujarat and 11 persons are at Rajasthan office



Areas of possible collaboration :

- Opportunities for investments in India:-
 - i) Indian food retail chain,
 - ii) Mega Food Park, Cold Chain & Abattoirs Infrastructure.
- Procurement and Storing cost is much cheapest in India in comparative with other Agro-based industries, so export is much easier from India
- Singapore is having core strength in area of the Agro Market and as well as other international trade and finance could be a major area of collaboration.
- Boosting of two-way trade in food sector by promoting business to business contact through BSM/participation in Fairs.



THANK
YOU

