PULSE INDIA

AN INDIA PULSES AND GRAINS ASSOCIATION PUBLICATION

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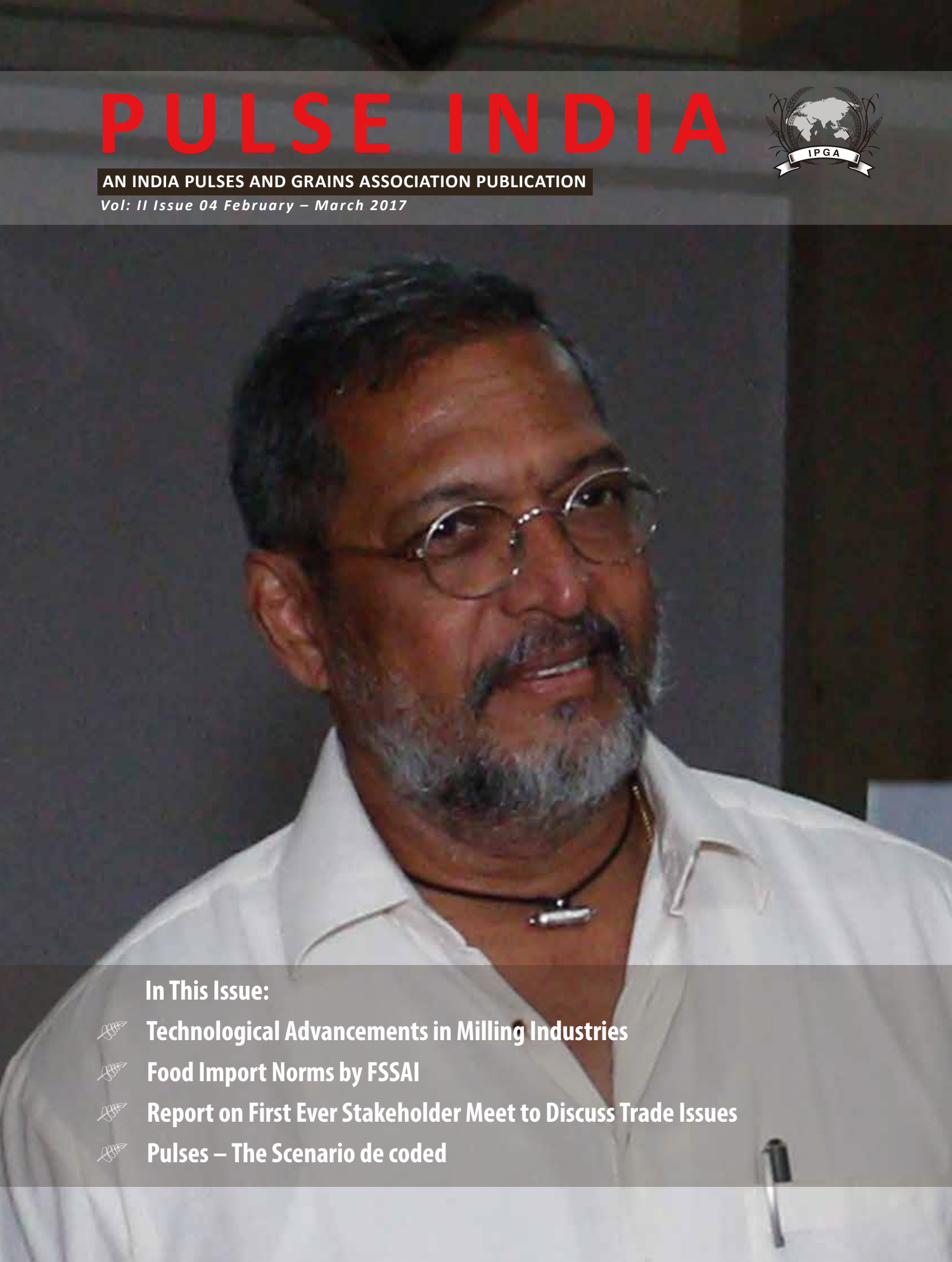

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From the Chairman's Desk

Dear friends,

It is indeed heartening to see that India is all set to break its pulses production record for all times. As per the 2nd advance estimates, the total production this year is expected to be 22.14 million tons, a huge jump of almost 5 million tons from the previous year! Apart from the production, even the land under pulses cultivation grew to 30 million hectares from the average 24 to 25 million hectares.

However, this needs to be maintained and achieved in a consistent manner in the following years if India is to achieve self-sufficiency in Pulses. The Government of India is of course putting in efforts through research in seeds, etc. but the same needs to be supported by us from the trade.

IPGA is extremely proud to announce having joined hands with NAAM Foundation led by the erstwhile and noted actor Nana Patekar to help farmers in the Marathwada region of Maharashtra.

Our cover story, an in-depth interview with Nana Patekar, showcases the work being done by Naam Foundation and how IPGA will be working with Naam Foundation to support farmers. Our efforts will not just remain limited to Maharashtra but will also spread to other pulse producing states across India.

We also would like to welcome on board the Indian Indenters Association (IIPA) formed recently under the aegis of IPGA. The key function of IIPA is to ensure that trade between overseas sellers and Indian buyers is executed in a fair and transparent manner.

As a first initiative, IIPA and IPGA held a joint meeting in Mumbai to discuss the various issues faced by the trade and this was followed up with a Buyer – Seller meeting in Dubai on the sidelines of Gulfood 2017 and was attended by over 150 stakeholders from the trade.

The meeting provided for a platform for exchanging ideas and brain storming on the various issues faced and the possible solutions. This issue of Pulse India has an article that outlines the various suggestions made by the stakeholders as well as a proposed way forward. Please take a few minutes out of your schedule and mail your suggestions to IPGA so that we can come to a consensus on the way forward.

It was our honour and privilege to be invited to a Roundtable with The Honourable Lawrence MacAulay, Minister of Agriculture and Agri-Food, Canada who visited India earlier this month. The IPGA Managing Committee members met with Hon'ble Minister and brought to his attention a few issues being faced by the importers with respect to the quality of pulses, especially, Lentils being exported from Canada.

The Hon'ble minister was accompanied by a team the Canadian Food Inspection Agency as well as the Trade Commissioner based in the High Commission at Delhi. The Minister assured the IPGA team that necessary steps will be taken to look into the quality issues.

Last but not the least; I would like to inform you that the 4th edition of our biennial event, THE PULSES CONCLAVE, will be held in New Delhi from February 14th to 16th, 2018.

Regards

Pravin Dongre
CHAIRMAN
India Pulses and Grains Association

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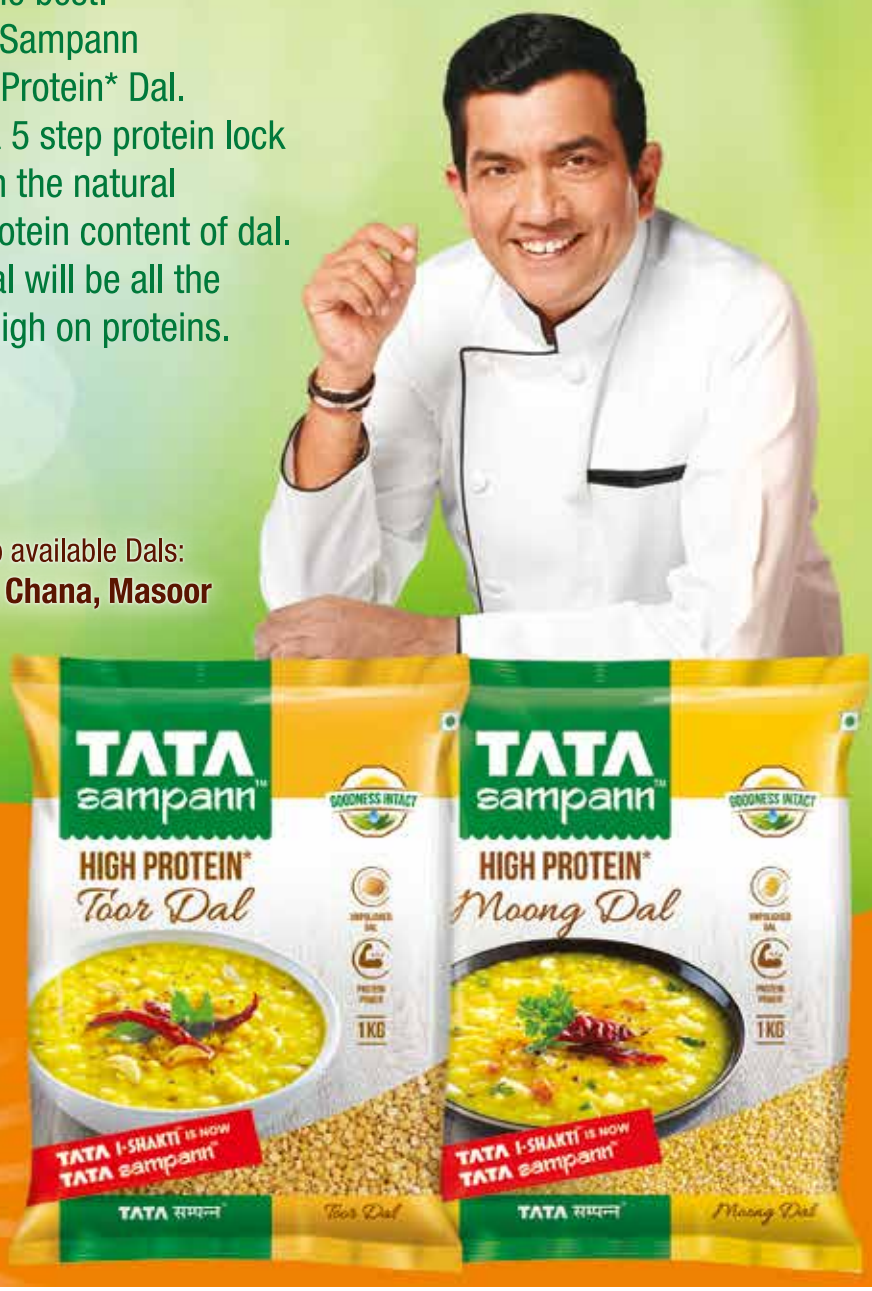

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Dubai Stakeholder Meet – A Report

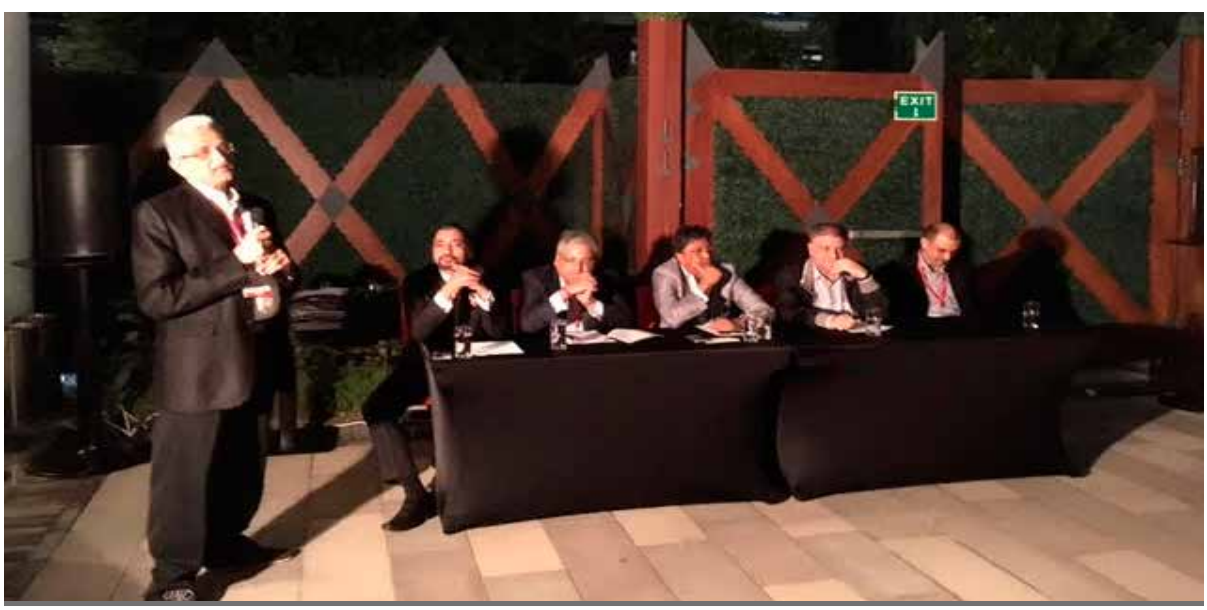
Mr. Pradeep Ghorpade

CEO, India Pulses and Grains Association

The Indian pulses trade, in the recent past, has witnessed a series of issues between buyers, sellers and indenters on various aspects involved in the execution of a contract. As a result, there have been disputes and defaults that have cropped up. In an attempt to streamline the entire process and bring in a sense of transparency, fairness and ethical work practices a majority of indenters from India have got together an formed the Indian Importers of Pulses Association (IIPA), under the aegis of India Pulses and Grains Association (IPGA).

IIPA along with IPGA, hosted a meeting in Mumbai with some of the leading buyers and discussed the issues faced by the trade. The Mumbai meeting concluded with the decision to host a Buyer-Seller meet at Dubai during the Gulfood and bring to table the various issues faced by the indenters. The aim of the meeting in Dubai was to get inputs from Buyers and Sellers so as to be able to find solutions to these issues which would be agreeable to all the stakeholders viz., Buyers, Sellers and Indenters.

The meeting in Dubai, held on February 28th, was attended by over 150 buyers, sellers and indenters. The key issues that were tabled at the meeting included Misuse of shipment tolerance by shippers, Gafta Extensions, RFS Bills of Lading, Poor product quality, Buyers getting access to cargo before having cleared payments.



Misuse of shipment tolerance:

Most container shipment contracts mention the quantity and not the number of containers which and the 10% tolerance is being misused by shippers. Depending on market conditions, the buyer can have either a positive or a negative tolerance. The indenters have asked that the tolerance be reduced to 5% and that too on the quantity but zero tolerance on the number of containers which will ensure that the buyer receives the mean quantity and no one takes undue advantage of each other.

Buyers seeking extensions under Gafta even on 60 day contracts causing a lot of discrepancies in the trade with buyers refusing to accept documents for shipments shipped after 60 days even when the contract mentions GAFTA 88, which incidentally is applicable on 31 day contracts and not 60 day contracts. IIPA has proposed that the indenters will not accept any Gafta Extensions in contracts. This will ensure that the sellers will take a proper decision in terms of his capacity to deliver as committed.

While one school of thought was that at the start of the season it is difficult for a seller to know when they are going to get the shipment and availability of equipment can also pose a problem, it was suggested by few other sellers that the indenter has all the right to refuse a contract where the seller insists on Gafta Extensions to be included. However, if he does accept the contract with Gafta Extensions clause then he is bound to honour it.

Received-for-Shipment (RFS) Bills of Lading:

RFS Bills of Lading are a recent phenomenon wherein the time between the date of B/Ls and the actual loading date of the containers was inordinately large. Indenters want to end the practice of RSF B/Ls and have suggested having clear Shipped-on-Board B/Ls.

Buyers opined that it was critical to have a precise definition with respect to RFS B/Ls. Ideally, contracts can easily be modified to say that inland RFS B/Ls are not acceptable but if it is a RFS B/L at the load port it has to be acceptable because once the container reaches the port it is out of the control of the seller.

Quality Issues:

There have been quality-related issues and if re-testing / re-grading have to be done, SGS or Intertek or any other surveyor

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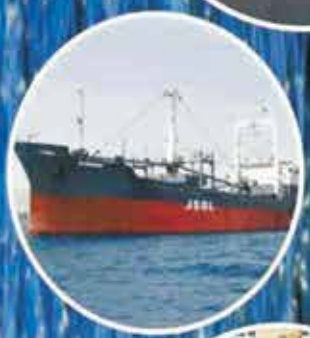

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refuse to classify the sample stating that they are not fit to issue any certificate basis CGC standards. CGC, too, is known to change their specifications for various grades every year depending on the harvest. The buyers want SGS and Intertek to set-up a labs in India that have the expertise to certify the quality of the received is as per the certificate issued at the port of origin.

It was also brought to everyone's attention that when MMTC buys for the Govt. of India they do it as per their own specifications and appoint their own surveyor. But private importers have to buy on norms like Number 2 or better.

The overall consensus was that GPC, IPGA, IIPA and Pulse Canada discuss this and together meet with the Canadian Government. As a way forward, a meeting with CGC, Canadian Government and Canadian Farmers will have to be set-up to establish model specifications so that the definitions of carious specifications and grades are understood by all stakeholders.

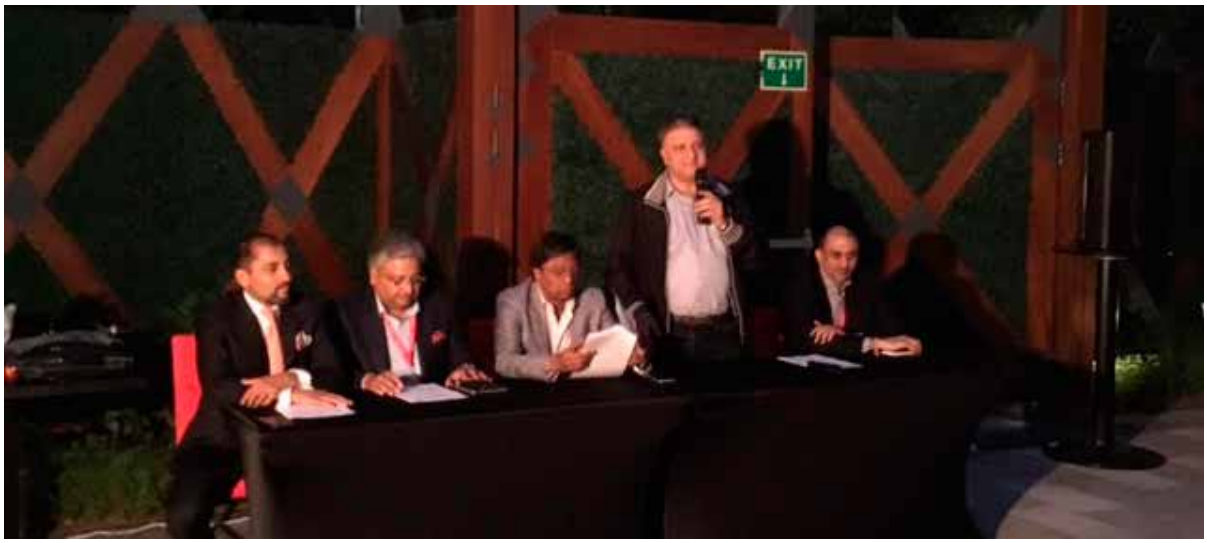
Mr. Arslan also stated that GPC would engage with the Canadian Government and Pulse Canada to bring the specifications up-to-date and to the standards of the industry. It was also suggested that either GPC or IPGA should have a representative nominated to the CGC Grading Committee.

Another observation was that if it has been sold under CGC specs, it should be re-graded under CGC specs as per their guidelines and by people licensed by CGC to do it. If the product has to be re-graded, it should be done under the terms and conditions under which the contract was made and under the terms and conditions that it was done at the origin.

Mr. Arslan also requested Mr. Pravin Dongre, Chairman – IPGA and Mr. Anurag Tulshan, Founder Member – IIPA to set-up a committee immediately and engage with Pulse Canada to plan an in-person meeting with farmers at Vancouver on the sidelines of CSCA.

Buyers getting access to containers before paying for the documents:

While FSSAI has the authority to open containers for sampling basis Xerox copies of document, importers too are getting access to these containers. This practice has caused a lot of problems to indenters and sellers.



As a solution to this issue, IPGA will send a representation to the Customs as well as other Government Agencies that the containers should be opened once the original documents have been handed over to the clearing agents and buyers do not have access to the containers without the original documents which they can get only after paying for the documents.

There have been very many instances where buyers have refused to accept a consignment for varied reasons but have also either delayed or refused to hand over a NOC so that the cargo can be sold to someone else. Mr. Dongre announced that very soon a notification will be issued by the Customs wherein the requirement of a NOC will be done away with. The Customs Department will allow a buyer holding the original documents to claim and clear the contract.

Payment Issues:

There is no standard accepted definition or norm followed in the industry with respect to CASH-AGAINST-DELIVERY (CAD) mode of payment. In most cases, it is as per the buyers whim and fancy. A demand was made to standardize the "CAD' definition with a definite time limit to it.

With respect to payments, it was also proposed that to protect the interest of buyers and sellers, a 10% advance deposit from the buyer and a Bank Guarantee from the seller should be made mandatory for each contract. This will not just ensure proper payment terms being followed but will also ensure that buyers do not over-commit their capacity.

It was also proposed that to safeguard the buyer on quality issues, can there be a mechanism by which there is retention of 5% or 10% from the payment due to the shipper to check the quality?

Contracts:

A strong recommendation came in from all stakeholders to explore the option of GPC creating a standard contract which can be followed by all trade participants and any buyer or seller breaching the contract would be banned from the trade.

Mr. Huseiyn Arslan, President – GPC, in response to this suggestion said that

issues of defaults, etc have been discussed within the GPC for the last few years but as an organisation, GPC does not have the expertise or experience to work as Arbitrators. Mr. Arslan instead recommended that we should collaborate with Gafta to change the contracts as per the industry needs.

GPC will initiate a dialogue with Gafta to develop a special Pulses Contract that will be applied for the Pulse business all over the world and all the views discussed in this meeting will be taken shared with Gafta while discussing the new contract format.

Mr. Arslan has also stated that he is going to propose to the GPC Executive Committee to ban any trade participant found to be a defaulter in a Gafta Arbitration unless they resolve the issue within a given amount of time.

Mr. Dongre, in his closing remarks said, "I think we have made a good start. This is the first time that we have had this kind of a forum where we all were able to voice our opinions. It's a good beginning and the time is right because this trade is going to grow and in the next 5 to 10 years it could go to 10 million tons of shipments only into the subcontinent.

I think we all need to be aware of this and try and make the trade as efficient as possible and in this whole supply chain, the broker plays an extremely important and responsible role and the KYC of the customers, suppliers, buyers should be done prior to the contract being done.

As the trade grows, the number of participants will grow with newer players will come in who will not understand the sanctity of a Gafta Contract. But having said that, I think we have made good progress and I would urge all stakeholders to mail in any other suggestions or thoughts, please mail them to the IPGA office on info@ipga.co.in."

The Self Sufficiency Conundrum

Mr. Brian Clancey, STAT Publishing

Production of pulses outside India is expected to decline in 2017, dropping from 55.6 million metric tons last year to almost 54 million. Most of the change reflects a return to average yields in net exporting countries, something which can change depending on weather conditions during the growing season. More importantly, because seeding has not yet begun in key exporting countries, farmers could still adjust how many pulses they plant if they fear export demand will drop.

Markets are already responding to this season's massive increases in pulse production in India and expectations of reduced demand. The world pulse price index maintained by STAT Publishing declined 11% between February of 2016 and February of 2017. During the same period, the FAO's cereal price index advanced 2%, its oilseeds price index jumped 19% and sugar 55%.

The changes are important because field crops compete with one another for land use. When the income potential of one crop rises relative to one or more crops grown in the same area, farmers have an incentive to move land from one crop to another.

Recent changes in global pulse area reflect this. Pulses under-performed other field crops in 2014, with the result area dropped from just over 71 million hectares to 69.9 million. Instead of continuing to trend lower, prices for pulses reversed direction in 2015, causing farmers to increase pulse seedings to an estimated 72 million hectares in 2016.

The relative income performance of pulses remained above average last year, suggesting global seedings could increase again this year to a record 72.5 million hectares. However, farmers in Canada, the United States and Europe still have time to adjust their seeding decisions, suggesting there is a risk land in pulses outside India will be lower if they believe demand will be reduced.

Confidence in Indian demand was shaken during the first quarter of the year because of uncertainty over whether Canada's exemption from fumigating pulses with methyl bromide prior to shipment would be extended. In February, officials in India were adamant that the exemption would not be extended. By the first week of March, their stance

softened in the face of opposition by the India Pulses and Grains Association (IPGA).

That organization asked for a one year extension and that the government become more flexible about which fumigants are used, arguing many countries use Aluminium Phosphine. They also argued that all consignments should be tested for quarantine pests on arrival, and if they are "found to be free of quarantine pests, then the NOC (notice of compliance) should be given without any further MBR (methyl bromide) fumigation."

Those arguments along with ministerial discussions between Canada and India seemed to have some effect, with government officials saying they were willing to allow other chemicals to be used as long as the exporting country submits enough data to prove their efficacy. At the same time, they expressed a willingness to allow another extension while Canada compiles the necessary data. But, they stressed that they will not continue to allow imports of untreated pulses.

By the middle of February, the threat that the exemption would expire on March 31 had a negative impact on prices offered to farmers in Canada. By the first week of March, grower bids for No 2 Canada large green and small green lentils had dropped 15% and 10% respectively from where they started the calendar year. Prices offered for red lentils were down 20% from the start of the year, while grower bids for whole yellow peas were only down 3% because of better overall demand from other destinations.

So far during the 2016-17 marketing year, potential returns from pulses have been less competitive with grains and oilseeds than was the case during the previous two marketing years. Looking at gross returns per hectare as a percentage of grains and oilseeds, pulses are near their recent three-year averages. If prospective returns from pulses continue to weaken, they could fall further below the recent average, causing growers to adjust their seeding intentions in favor of crops they think will be more profitable.

Climate is also changing the risk profile for pulses. Forecasters in several countries think El Nino will return this year. As early as it seems, these weather events occur every two to seven years. The impact depends on the strength of the event and other weather anomalies. Japanese forecasters think it will be combined with a positive Indian Ocean Dipole (IOD) phase.

While El Nino is associated with drought in India, a positive IOD generally results in more rain on the country's west coast and central regions. Even so, they believe there is a risk monsoon rains will be below normal between June and August in Chhattisgarh and Odisha in the East. European forecasters also expect below average rainfall during those months, but in north-west India, affecting Rajasthan, Punjab, west Uttar Pradesh, Himachal Pradesh, Uttarakhand and Jammu and Kashmir. By contrast, the International Research Institute of Columbia University thinks rains will be below normal between March and May in Gujarat, west Madhya Pradesh and in south-western and eastern Rajasthan.

If any of these forecasts prove correct, they will have some impact on pulse output. Yields of late sown rabi season pulses in Gujarat and Rajasthan would be hurt by drought like conditions; while below average monsoon rainfall in those regions would leave soils dry heading into next year's rabi season, suggesting next year's yields could need timely rains to be average.

Such forecasts carry with them the potential for pulses production in India to slide backward in the coming season, perhaps dropping to around 19.23 million metric tons. If realized, it would be difficult for pulse imports to fall much under four million MT at a time when many farmers in net exporting countries are re-evaluating their interest in growing pulses because of rising inventories.

Researchers suggest the frequency and severity of these major weather events will increase. In an article for The Conversation, Andrew Borrell, Associate Professor, Queensland Alliance for Agriculture and Food Innovation, The University of Queensland notes that since 1950, average global temperatures have risen by roughly 0.130C per decade. An even faster rate of roughly 0.20C of warming per decade is expected over the next few decades.

As temperatures rise, rainfall patterns change. Increased heat also leads to greater evaporation and surface drying, which further intensifies and prolongs droughts. A warmer atmosphere can also hold more water about 7% more water vapour for every 10C increase in temperature. This ultimately results in storms with more intense rainfall. A review of rainfall patterns shows changes in the amount of rainfall everywhere.

Changes in rainfall and temperature explain about 30% of the yearly variation in agricultural yields for

staple crops such as wheat, rice, maize, soybean, barley and sorghum. All six crops responded negatively to increasing temperatures most likely associated with increases in crop development rates and water stress. In particular, wheat, maize and barley show a negative response to increased temperatures. But, overall, rainfall trends had only minor effects on crop yields in these studies.

Globally, production of maize and wheat between 1980 and 2008 was 3.8% and 5.5% below what we would have expected without temperature increases. One model, which combines historical crop production and weather data, projects significant reductions in production of several key African crops. For maize, the predicted decline is as much as 22% by 2050.

"Feeding more people in these changing conditions is the challenge before us," warns Borrell. "It will require crops that are highly adapted to dry and hot environments. The so-called 'Green Revolution' of the 1960s and 1970s created plants with short stature and enhanced responsiveness to nitrogen fertilizer. Now, a new set of plant characteristics is needed to further increase crop yield, by making plants resilient to the challenges of a water-scarce planet.

"Scientists are meeting this challenge by creating a framework for adapting to climate change. We are identifying favorable combinations of crop varieties and management practices to work together in a complex system. We can mitigate the effects of some climate variations with good management practices. For example, to tackle drought, we can alter planting dates, fertilizer, irrigation, row spacing, population and cropping systems," Borrell writes.

Such thinking is at play in plant varietal development efforts in pulses. That is critical to India's goal of becoming self sufficient. Under its new five-year plan, the government wants domestic pulse production to reach 24 million metric tons by the 2020-21 marketing year. By that time, the India's population is expected to total 1,355 million, suggesting its dietary needs will range between 23.7 and 27.1 million MT.

The five-year plan seems simple. Maintain minimum support prices (MSPs) at levels which give farmers the confidence to plant pulses; encourage production in more rainfed areas; plant pulses in the same field as grains, oilseeds or commercial crops; support the MSP by buying from farmers; better varieties; and improve management skills.

One consequence of improving economic returns from pulses is consumption by the half the population still directly employed by agriculture should rise. The average monthly income of the Indian farm household was estimated to be about Rs 6,426 by the Situation Assessment Survey of Agricultural Households in its NSS 70th round. This included net receipts from cultivation, farming of animals, non-farm business and income from wages. At the same time, agricultural households spent an average Rs 6,223 on consumption needs, with the result little was spent on the farm. Minimum support prices (MSP) and other support programs will likely help improve farm incomes, but the focus will likely remain more so on consumption than farm business expenditures. That would be reflected in higher food consumption. Similarly, rising average incomes and significant growth in the number of people considered middle class also increases food consumption.

If this saw per capita pulse consumption remain around 19 kilograms per person year, India will need at least 25.7 million MT of pulses in 2020 and 26 million in 2021. If rising incomes saw pulse consumption reach the recommended standard of 20 kilograms per capita, the country would need almost 27.1 and 27.4 million MT respectively.

Given that India's pulse imports will probably average at least three million MT through 2020-21, it would not be surprising to see the country launch a new five year plan when the current one expires. If that happens, it could try to boost average annual production to between 28 and 30 million MT by 2025. By that time, India will consume between 26.5 and 28.2 million MT of pulses, suggesting the country is less than a decade away from self sufficiency if the sector continues to be supported.

Ironically, the closer India gets to being self sufficient in pulse production, the more impact production problems in the country might have on prices in both domestic and external markets.

Myanmar counts on India to take around 90% of its exportable surplus of pulses. As demand from India declines, farmers will likely turn to other crops. In the case of Australia, an average of 44% of all chickpeas and 60% of peas exported go to India. During the past five years, India took 41% of all peas and 30% of all lentils exported from Canada. Its influence in some African countries has become significant. It is growing in the United

States with the recent expansions in field pea and lentil area.

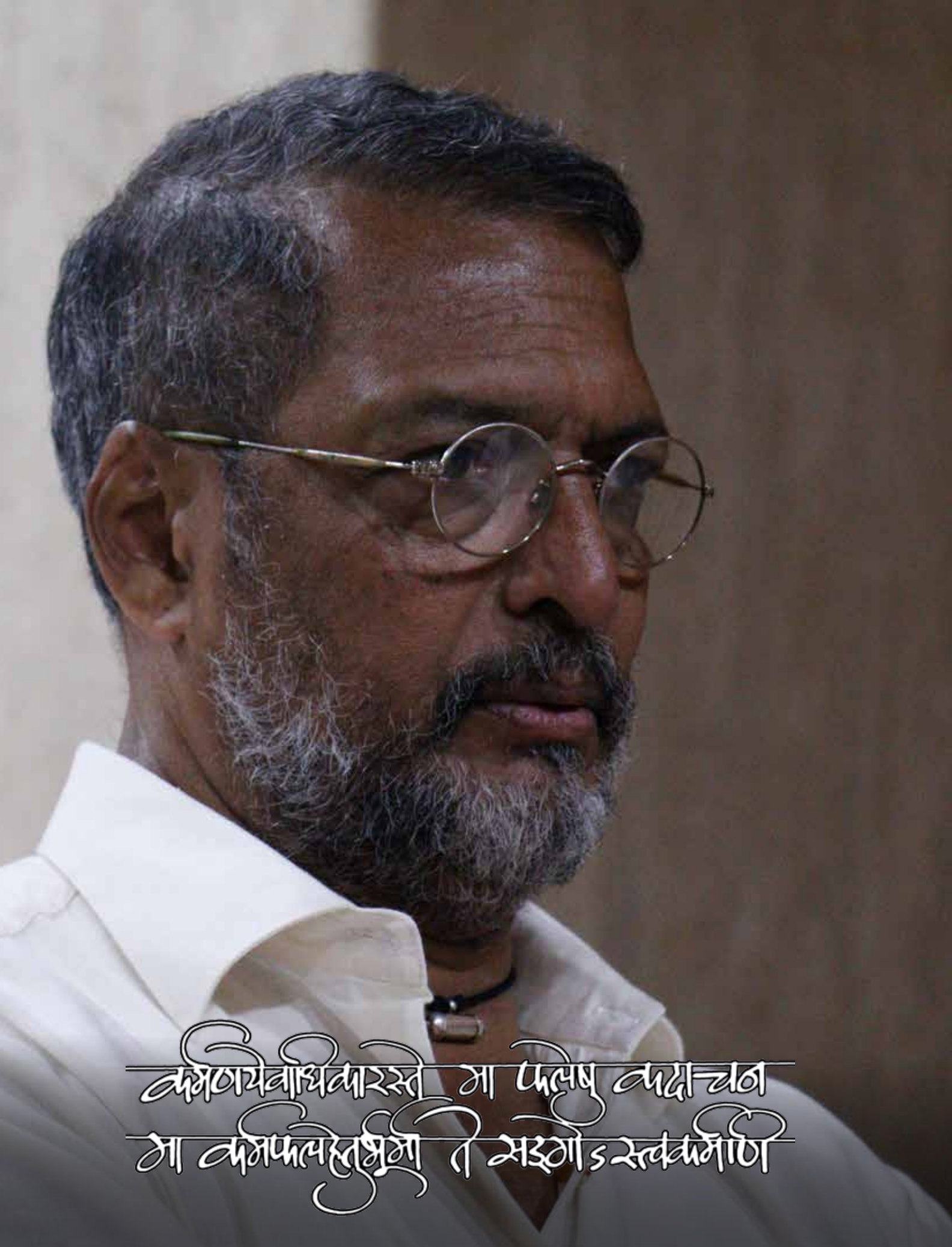
None of those countries are ignoring other markets nor forgetting to develop new outlets for pulses. The seems to be reflected in global per capita pulse availability and consumption. It has been trending up, rising from an average 9.34 kilograms per human being per year between 2001 and 2005 to 9.8 kilograms in the previous five years. But, remove India from the picture, and instead of rising, average per capita pulse consumption has slipped from 8.31 kilograms to 8.15. That fact is not obvious because global pulse production has risen 14% since 2005. However, the quantity of pulses consumed by India has jumped 40%, while usage outside India is only up 6%.

It can be inferred that if India becomes self sufficient, production in the rest of the world would decline. This increases the risk to India that production shortfalls might not be so easily covered on world markets. Moreover, an infusion of demand might have a more dramatic impact on prices than was the case in recent years. Significantly, rising average incomes in India means that prices can rise more than would have been the case five years ago they start to ration demand. That price point will likely be higher in another five years.

Using wealth instead of income as a measure, Credit Suisse reckons India's middle class totalled 26 million in 2015, while Ernst and Young think it now totals 50 million and will rise to 200 million within five years. That group is spending more money on their diet, resulting in an upward trend in per capita consumption of all foods.

It could be argued that because of the timing on India's crops, farmers in net exporting countries can respond to production problems. But, that might only happen if importers in India start buying product for deferred delivery as soon as it becomes apparent that production will drop.

Markets would not have time to react to the failure of the monsoon, though they could respond to problems with the rabi or winter crop. Rabi production problems are typically associated with increased imports in the last half of the calendar year, which fits into pulse production cycles in Australia and the northern hemisphere. In this respect, self sufficiency might increase supply risks in India, rather than cure them.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Naam Foundation…hope for the hapless

Mr. Pradeep Ghorpade

CEO, India Pulses and Grains Association

Padma Shri Vishwanath Patekar…… surely does not sound a familiar name, but say Nana Patekar and there is instant recognition. Nana, as he is fondly called, is a man who firmly believes that actions speak louder than words. He is one of the very few people who actually role-up-their-sleeves and get their hands dirty. An actor, writer and film maker, Nana has been now taken up philanthropy as his goal and is seriously passionate about it.

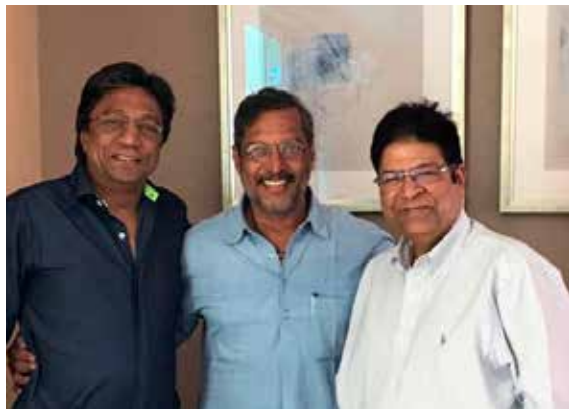
Naam Foundation, founded by him along with noted Marathi actor, Makrand Anaspure has been instrumental in doing humongous amount of work in drought hit areas of Marathwada and Vidharbha.

It all started one evening in 2015 when Nana was watching the interview of a family of a farmer who had committed suicide. "All I could see was a ghastly shadow of sorrow and helplessness on the family of the farmer. The only earning member of the family was no more, the drought was severe, all the water had dried up and all you could see was the fear of surviving the next day. It literally scared me. I realized that, if I had to keep myself alive as a human being, I had to do something. If I had just sat around shamelessly and done nothing, I would have died as a person and as an actor that day."

The decision of supporting 1000 families with Rs. 15,000/- each from Nana's personal funds was taken immediately and on the insistence of Makrand, Nana traveled to Beed to meet families of farmers who had committed suicide. "It was for the first-time in my life that I saw as many as 112 widows in one place and it was devastating. We realized that this cannot be a one-time thing and we immediately founded Naam Foundation and dedicated ourselves to this work."

Nana further added, "The fact is that it is such an easy thing to do. It is a matter of deciding to devote yourself to the work and it has helped me meet and know like-minded people like say Makrand Anaspure, who I knew as an actor, Shubha Mahajan, Rajeev Khandekar, Ujwal Nikam, and many others who immediately joined the foundation."

"I believe that I have no right to ask for any contribution from anyone if I don't contribute myself. So whenever we start a project, I put in my contribution first and then ask others," says Nana. Naam Foundation got enormous support from people in the form of donations the moment its formation was announced and today the foundation has atleast 25 success stories from across Marathwada and Vidharbha. The work done by the foundation has had an unexpected positive rub-off; it has developed a sense of unity among villagers e.g. in Pakharsangvi village near Latur after the work done by the foundation, the villagers got together and built 125 roads in the village.



Nana, candidly states, "As an actor, I am a known face, but till a point. After that what counts is the work we do and whether we deliver what we promise. The trust, goodwill and love that the villagers have for us is not just because of the work we have done but primarily because we have done this work selflessly without expecting anything in return."

"I realized that, if I had to keep myself alive as a human being, I had to do something. If I had just sat around shamelessly and done nothing, I would have died as a person and as an actor that day."

Naam Foundation's work is not just limited to Marathwada and Vidharbha. There are projects in Konkan and in western Maharashtra and will work wherever there is an opportunity. The key problem is funds. Until and unless large corporates

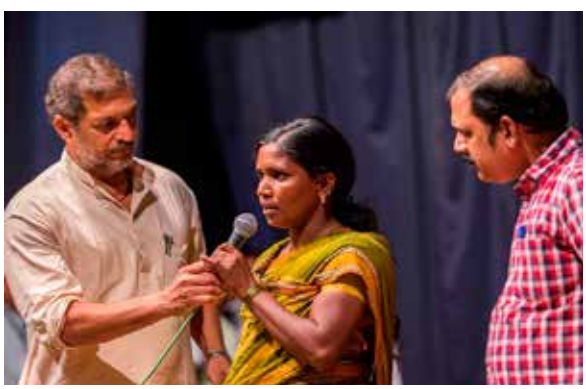
don't start diverting their CSR funds in this direction, it is difficult to have a large corpus to help execute large projects. Hundreds of people are sending in their contributions every day but they too have their limitations. Recently, when Nana was at a studio dubbing, the staff of the studio got together and contributed to the foundation.

Nana, in an extremely selfless gesture, has decided to divert most of his earnings towards the foundation. Recently, when approached by a Bank to be their brand ambassador, Nana agreed on the condition that the amount that the Bank would pay him would instead be used to waive off farmer loans worth the same amount. As Nana puts it, "That's the least I can do. As a matter of fact going forward, I plan to do

"I believe that I have no right to ask for any contribution from anyone if I don't contribute myself. So whenever we start a project, I put in my contribution first and then ask others,"

this with most of my assignments, where all my remuneration will go towards supporting Naam projects. My suggestion to the Government is to separate marginal farmers from large land-owning farmers and waive off the loans of the marginal farmers. It will bring down the waiver amount to a large extent."

Naam Foundation apart from helping farmers has a number of more initiatives adopting villages to change the face of these villages. Villagers are also working with NAAM foundation closely to bring in sea change in their lives and make it a life changing experience for them. Naam Foundation has initiated activities like Water conservation, Garbage & waste water management, Sanitary infrastructure, RO plants for drinking



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DRY PEAS

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- YELLOW
- SPLITS
- DUN

FABABEANS

CHICKPEAS

- DESI
- KABULI

LENTILS

- GREEN
- RED

MUSTARD

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- YELLOW
- BROWN
- ORIENTAL

ADDITIONAL INFORMATION

FOOD SAFETY CERTIFICATION

North American and Australian processing facilities:

- ISO 22000 : 2005 compliant
- HACCP compliant
- Viterra pulse facilities are certified to FSSC 22000, a scheme recognized by the Global Food Safety Initiative

PROCESSING CAPABILITIES

Utilizing modern equipment and the latest in cleaning and sorting technology, we provide quality pulses that meet food buyer requirements.

PACKAGING OPTIONS

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- Bulk containers
- Bagged
- Bulk Totes

MERCHANDISING CONTACTS

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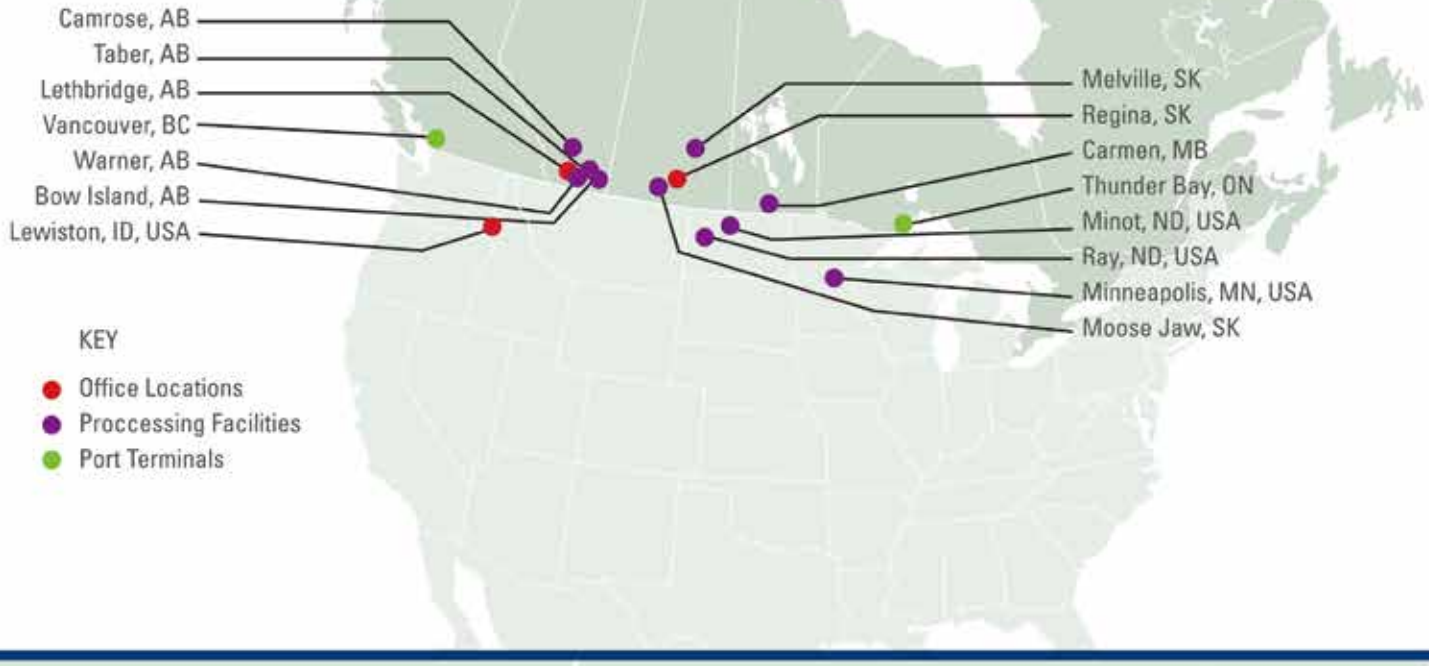
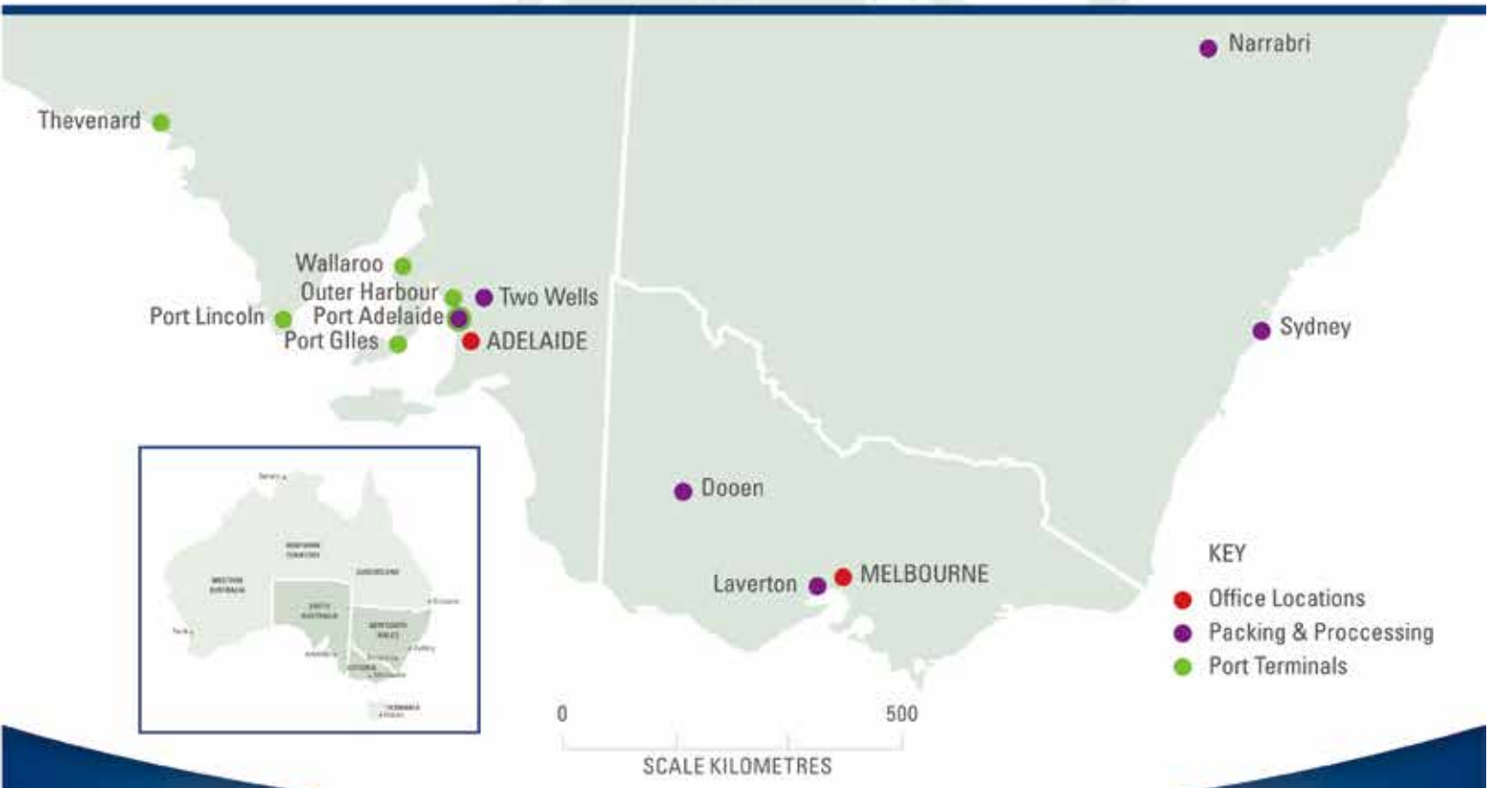
North America





Australia

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water, Houses for the people below poverty line families, Tree plantation, De-addiction programs, Community & group farming, Education and Employment Generation. The Foundation has formed women groups, gram sabha & local committees to monitor progress of the initiatives taken by NAAM.

"Both these are lifetime projects. I want people to contribute to it on a regular basis like we pay our utility bills every month. No one needs to donate in thousands but even if everyone donates Rs. 500/- every month, it will help build a huge corpus."

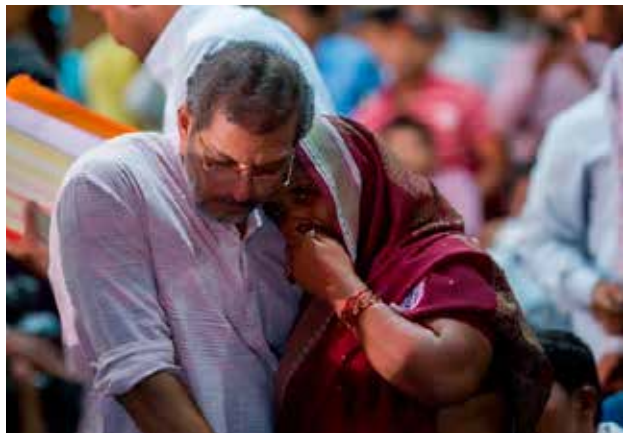
Naam Foundation has also formed clusters of women in various villages, where they would stitch products which would be then sold under the name of NAAM foundation. A total 600 Sewing machines have been distributed in Andhari, Palshi Pirola, Hatti, Beed, Zari, Watwada, Bansarola.

Naam Foundation has recently joined hands with Maharashtra State Agriculture Marketing Board (MSAMB) to help farmers get appropriate price realisation. MSAMB has a scheme under which the offer farmers storage for their grains free of cost and also give the farmers 70% of the value of the quantity stored calculated at MSP as a soft loan at 6% per annum interest. This way the farmer gets instant revenue, retains the ownership of the stock and can decide when to sell the stock and at what rate. As and when the trade needs to buy the stock, they can then buy from the MSAMB stocks and the revenue earned will be used to offset the loan that MSAMB has given the farmer. Naam Foundation's role in this initiative will be to make more and more farmers across Maharashtra aware of this facility available with MSAMB.

While the joint efforts of Naam Foundation with MSAMB will help the farmer in this season, there is also a critical need to ensure that the farmer retains his interest in cultivating pulses in the next season.

Naam Foundation and India Pulses and Grains Association (IPGA) have agreed to work together to support the farmers in the next season. As a part of this initiative, Naam

"It was for the first-time in my life that I saw as many as 112 widows in one place and it was devastating."

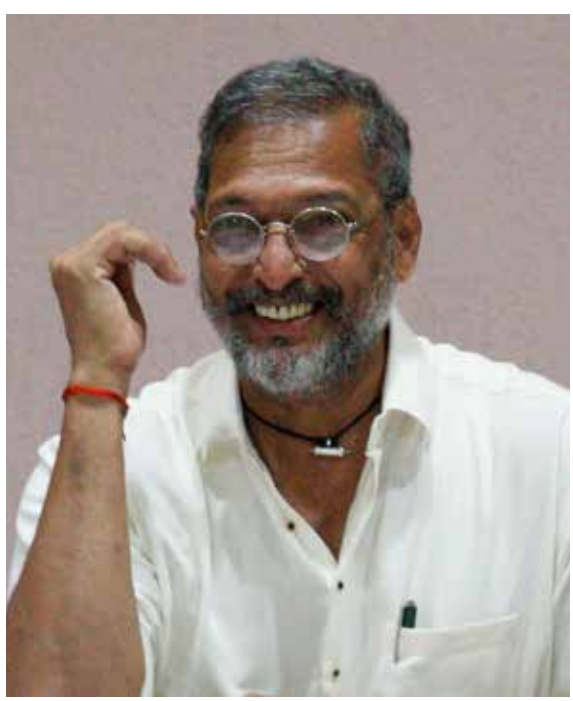


Foundation will speak to farmers across the State and try to put together land parcels of 5000 acres and above in villages. Once these clusters are ready, IPGA will step in to support the farmers with high yield seed varieties, fertilisers, fumigants as well as farm mechanization equipment which will help improve yield and production. This produce will then be bought by the trade via MSAMB thereby ensuring appropriate price realisation for the farmers.

Having set this off, Nana is now initiating work to support families of martyrs from the military and para-military forces. NAAM Foundation will now support children of BSF defense personnel who had died on the line of duty for the nation. A project to build schools for the children of army and para-military force personnel in Assam, Arunachal Pradesh, Meghalaya and Manipur has already been initiated and the foundation is in the process of generating funds for the same.

That apart, the foundation has proposed to handover Rs. 2.50 lakhs to the family of each martyr of the military and para-military forces. Nana has contributed Rs. 1 crore from his personal funds and is now in the process of generating additional contributions.

Nana, in a heartfelt appeal, said, "Both these are lifetime projects. I want people to contribute to it on a regular basis like we pay our utility bills every month. No one needs to donate in thousands but even if everyone donates Rs. 500/- every month, it will help build a huge corpus."



Pradeep Jindal,
Managing Director

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Food Safety and Standards Authority of India (FSSAI) and Food Imports

Sh. Rakesh Chandra Sharma, Director (Imports), FSSAI
Ms. Nisha Aggarwal, Technical Officer (Imports) FSSAI.

The Food Safety and Standards Authority of India (FSSAI) is established under Food Safety and Standards Act, 2006 with head office at Delhi which consolidates various acts & orders that have hitherto handled food related issues in various Ministries and Departments. It is a statutory body for laying down science based standards for articles of food and to regulate manufacture, storage, distribution, sale and import of food so as to ensure availability of safe and wholesome food for human consumption. All import of articles of food are regulated under Section 25 and Section 47 (5) of the Food Safety and Standards Act. As per FSS Act, Section 47(5) - In case of imported articles of food, the authorised officer of FSSAI shall take its sample and send to the Food Analyst of notified laboratory for analysis who shall send the report within the stipulated time period specified by authorised officer of FSSAI.

FSSAI has integrated its Food Import Clearance System (FICS) with ICEGATE system of Customs under Single Window Clearance Interface to Facilitate Trade (SWIFT) at Delhi, Mumbai, Kolkata, Chennai, Cochin and Tuticorin covering 23 locations. For Importing Food into India, the importer should have a valid FSSAI license and Import- Export Code from DGFT. The applications forwarded from SWIFT to the FICS undergo the followimg process -

a) scrutiny of application,
b) visual inspection of consignment
c) lifting of samples
d) testing of sample at lab
e) generation of NCC/NOC based on the report

To expedite the clearance process of imports, following initiatives have been taken by FSSAI:-

a) To maintain parity of testing and import clearance at all the ports where FSSAI is not present, officials of custom department have been notified as Authorised Officers on 135 locations.

b) To minimise the sampling size and time, Risk Management System (RMS) has been introduced under Single Window Interface for Facilitating Trade (SWIFT) by department of Customs on the basis of high risk and low risk food items.

c) FSSAI has increased the number of NABL accredited labs to 121 and referral labs to 16 to avoid any delay in delivery of lab report by the laboratories. The samples to the labs are referred through random selection by FICS to maintain integrity of testing procedures.

d) For agricultural products, labelling requirements at the time of imports have been minimised vide order dated 09.08.2016 wherein name and address of the importer can be verified from accompanying documents of the consignment of primary food like food grains, pulses, fruits, dry fruits, whole spices etc. imported in package. In addition to mandatory labelling requirements for primary food imported in bulk package i.e. name of food, name and complete address of the manufacturer/ packer and date of Packing/Manufacture, following may also be mentioned on the package:-

a. Net weight
b. Lot no. / Code No. /Batch No.
c. Best before or use by date or date of expiry

Around 45 % of import at FSSAI locations is from pulses in terms of quantity and value . Pulses imported into India include black mapte (urad dal), yellow peas, Green Mung, lentil, cow pea, pigeon peas (toor dal), chick peas, black beans, chana dhall, kidney beans, etc. In case of pulses, it is noted that mostly raw pulse is imported. Standards for various kind of pulses are prescribed in Food Safety and Standards (Food Product standards and Food Additives) Regulations, 2011. The standards keep on updating from time to time which are available on the official website of FSSAI i.e. www.fssai.gov.in wherein:-

- Standards of raw pulses prescribing the maximum limit of extraneous matter in Raw Pulses have been framed and notified by FSSAI on 14.09.2016 wherein the maximumnlimits for foreign matter (extraneous matter) is 3.0 percent by weight out of which max. 0.5 percent by weight shall be mineral matter and impurities of animal origin.
- Vide Ad-hoc instructions dated 20.01.2012, an opportunity is granted on the request of the importer to improve the quality of the imported food grains by removing foreign matter, mineral matter and damaged grains subject to the condition that cleaning/ sorting of the food grains will be done by the importer strictly under the supervision of the Customs in customs bonded area to make the consignment conforming to the standards prescribed under FSS (Food Product Standards and Food Additives) Regulation, 2011.
- To reduce the multiple sampling and testing of same cargo and to facilitate the import clearance, FSSAI vide orders F.No. 1-1176/FSSAI/Imports/2014 dated 12.09.2016, 10.11.2016 and 09.01.2017 allowed drawal of one homogenous sample out of the commingled cargo of pulses, other cereals and oils for multiple importers at the first port of discharge. The analysis report of the sample at the first port of discharge shall also remain valid at other ports of discharge.
- Frequently Asked Questions (FAQs) on Import Clearance are also available on FSSAI Website i.e. www.fssai.gov.in.

Feeling the pulse of pulses: Indian scenario

Dr. Sayaji Mehetre, Scientific Officer,
Nuclear Agriculture & Biotechnology Division, BARC

Report of one day theme meeting on "feeling the pulse of pulses: Indian scenario" held on 19th January 2017 on eve of International year of Pulses 2016

The 68th UN General Assembly declared 2016 as the International Year of Pulses (IYP) to enhance public awareness of the nutritional aspects of pulses as part of sustainable food production aimed towards food security and nutrition. As a part of this celebration one day theme meeting was organised by Maharashtra Academy of Sciences, Mumbai chapter in collaboration with BARC, Mumbai. The goal of the meeting was to interact with the eminent scientist in this field, to promote BARC mutant varieties for increased production of pulses and to sensitize the public about role of pulses in health, nutrition and soil fertility.

The programme started with the inauguration by Dr S. Chattopadhyay, Director, Bioscience Group, BARC, Dr N.P. Singh, Director Indian Institute of Pulses Research, Kanpur and Dr AM Bhagwat, Vice president Maharashtra Acedamy of Sciences, Mumbai Chapter were present for the function.

Dr S. Chattopadhyay gave overview of BARC's role in Pulse research and gave best wishes for success of the event. Dr N. P. Singh Director, IIPR gave key note address and gave an overview of Pulse research in India. He emphasised on challenges in the area of Pulses research in India and also highlighted the outstanding work done by Indian council of Agriculture research in the areas of Pulses. Dr Singh categorically mentioned the contribution by BARC in the development of pulses varieties which are very popular amongst farmers.

First technical session was chaired by Dr N. P. Singh. First speaker during this session was Shri Pradeep Ghorpade, CEO, IPGA. He gave overview of the trades about pulses and narrated the reasons of fluctuations in the prices of pulses. He emphasised that different combinations of pulses can be tried if either one is not available considering their nutritional content in the diet.

Second speaker was Dr K. B. Wanjari, Ex-Scientist, Dr PDKV, Akola. He explained strategic objectives and achievements in Pigeonpea breeding. He stressed that pigeonpea is the most difficult crop to work with as far as breeding work is concerned. Presently pigeonpea is being considered as a premier pulse crop which fetches higher price in the market. He gave overview of different varieties in universities as well as in BARC having important characters like short duration, Pre-rabi / Post rainy season (PRS) pigeonpea, pod borer resistance, disease resistance etc.

Second speaker was Ms Naaznin Husein from Indian Dietetic Association (Mumbai Chapter). She gave overview of role of pulses in diet. Her topic of presentation was Pulses-the traditional yet new super foods. She emphasised that nutritional value of pulses can be increased and antinutrient levels can be minimized by choosing appropriate processing technologies, which can be further enhanced by using a combination of different pulses along with cereals and millets. She concluded with the note that Pulses with their high level of protein, dietary fibres, and minerals, vitamins and phytonutrients offer many health benefits.

Dr S. E. Pawar, Ex scientist, BARC covered new area of improving production of pulses i.e. Rice fallows potential for increasing Pulse production and role of BARC varieties . BARC has developed many varieties of Pulses especially Mungbean and Uridbean have potential of growing them under Rabi condition in Rice fallow conditions. These varieties can be sown before the harvest of rice crops and they grow very well under the residual moisture conditions thus saving on irrigation as well as land preparation cost. The varieties include TM 96-2,

TARM-1, TARM-2 of Mungbean, TU94-2, TU-40 of Uridbean and TRC-77-4 variety of cowpea.

Second technical session was chaired by Dr V.P. Venugopalan, Head, Nuclear Agriculture and Biotechnology Division, BARC. First speaker for this session was Dr Geeta Ibrahim, who elaborated the nutritional significance of Pulses. She also mentioned the role phytates which bind to the minerals and make them unavailable to the body. However different methods of processing like soaking, germination, fermentation and cooking can reduce the phytate content. Different cooking techniques and methods were explained by her during the presentation.

Dr Vinod Dhole gave complete overview of Trombay pulses varieties developed through induced mutation and Dr J. Souframanien explained different molecular markers in pulses improvement. He gave example of how marker assisted breeding helped in development of Bruchid resistant variety in Mungbean at BARC. Dr. Archana Joshi Saha explained the recent trends in development of pulse varieties suitable for climate change. Climate is changing and it is our time to change and develop the varieties suitable for either for high temperature or different abiotic stresses.

Last and most important aspect i.e. the role of Pulses in improving health of soil and was covered by Dr ST Mehetre. He emphasised role of pulses in soil health improvement with special reference to soil organic carbon. Pulses help in improving organic carbon content of soil and thus enhance the fertility of soil. It is now very important to explore them for sustainability of soil for future generation.

During the meeting the food items prepared by using different combination of pulses were served to the participants. Exhibition of Trombay crop varieties was organised during the meeting where all the varieties were displayed. Total 150 participants including scientists from agriculture universities, students from different colleges participated in the meeting.

The event was listed as a part of International year of Pulses 2016 and also world Pulse day programme.

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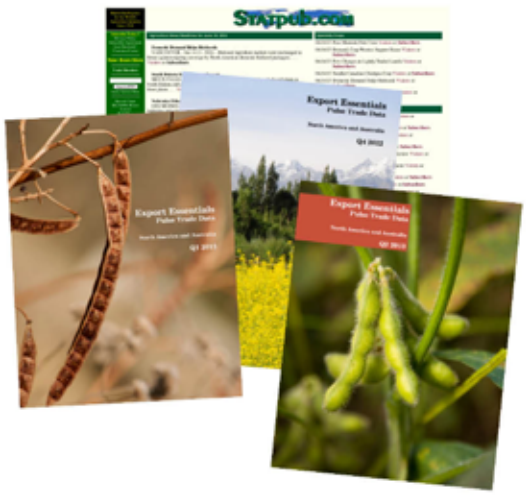

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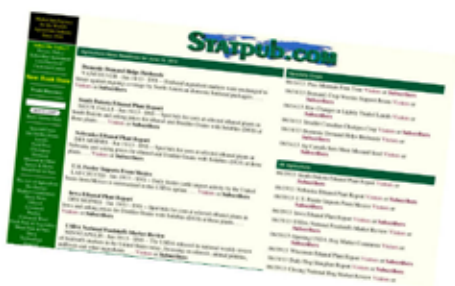

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Technological Advancement In Milling Industries

Mr. Prasad Jaripatke
Miror International Pvt ltd

The food processing sector is crucial to India's development, as it forms synergy between Industry and Agriculture that influences GDP growth of India.

Rising income, Growing population, Impact of Globalisation, Changing life style, Growing urbanisation bought lot of changes in food consumption habits in India leading to innovative ways of processing.

Food industry has huge scope for value added products which can be well supported by rapid advancement in food technology that converts farm produce to consumable food.

Lot many new technologies are developed and are getting developed in area of food/ Grain storage, food preservation ,food processing , food security and food safety supporting growing needs of nutrition and health care apart from making convenient food. Efforts are being taken in areas of biochemistry, flavour technology and sensory science showing shift from usefulness in processing to usefulness to consumer needs.

Study shows food consumption is likely to double by 2030. This is mainly due to rising income and growing population.

On other side resources like Land for agricultural production remain more or less constant.

On global level over past 50 years arable land increased is only 67 Mil Ha and it can be seen that there is increase of 107 Mil Ha of land in developing countries and reduction of 40Mil Ha in developed countries. Globalisation has great impact on competition and hence costs plays important role in production of food products.

Value added products and scalability of production are some of few factors that keep prices under check for final product. Growing market with high consumption and limited resources like land and water pushed food industry to be more innovative bringing in latest technology to support new growing demands of diets and nutrition. Thus growing demands ie both quantitative and qualitative brings in lot of changes in conventional production, processing technology with a focus on

- Reducing wastages
- Converting by products into edible form
- Improving process Efficiencies
- Innovative products / Diversity

Technologies to scale up production with minimum of footprint and infrastructure helps processor to keep cost under control. Scalability also needs to handle bulk quantities of raw material which needs storage.Care needs to be taken for possible reduction on weight loss (due to infestation) as well as quality loss during storage. Improved methods of preservation, Proper storage systems are now becoming integral part of processing centres.

A study sponsored by MOFPI in 2010 estimated that pre-harvest and post harvest Cumulative Wastage of Cereals was 3.9% to 6.0 % and Pulses was 4.3% to 6.1% in year 2009. Technologies are developed to conserve the quality of food over long term storage and protect them from possible losses.

Degradation of grains is mainly affected by five factors like Storage time, Relative humidity, Temperature, Moisture and Oxygen level. The combined effect of these factors can lead to severe losses damaging grains.Silos systems equipped with sensors and instrumentation helps controlling degradation of grain and keep grain safe for longer time preventing possible losses. Limited resources brings in trend of utilization of waste material for production of by products which boosts up high economic returns in many industries With the advent of biotechnology, attempts have increasingly been made globally to make potential use of agro-industrial residues for value addition by production of enzymes, organic acids,… etc. In pulses industry by-products like husk are sold at very low price to animal feed industry as a source of fibre as it has its own constraint for human consumption.

Recently due to technological up gradation plants are coming up with very high capacities and selling husk at very low price that affects total economics of production especially when raw material prices are very high. New technologies are now coming up to convert husk (which contains dietary fibres) into extruded products which are suitable for human consumption. This will give good value addition to By-product reducing pricing pressure on split dal. This product needs lot of marketing efforts also needs to create awareness on usability for human consumption.

In Core pulses milling there are three major categories where technical / technological advancements are made for benefit of mill which in turn benefits consumer in terms of cost.

- Pulses industries most recent development work has been centred around optimisation of machines performance based on specific application and also it was aimed at reducing footprint of mill for given capacity.
- Machine capacities are also optimised with focus on energy cost and scalability.

- Existing processing methods are improved or modified to get more yield and reduce consumables.

Lot of work is being done on de-husking of seed coat and splitting of cotyledons. New Generation de-hullers in market are able to scratch seed coat more effectively with a proper control on emery Speed , Pressure ,and Appropriate selection of emery grit size viz a viz typical pulses . New hullers are capable of handling all types of pulses with equal ease.

Efficient De-husking means removal of seed-coat with a minimum damage to cotyledon which in turn helps to increases yield.

Drying technology was another technological gap where milling industry was struggling to get food safe solution and efficient de-hulling and splitting. Dryers introduced in the pulses industry efficiently removes surface moisture and core moisture of seed. This makes seed coat scratching easy. Temperature stresses created by drying process help cotyledon to split without much force. Until not long time ago impact and shearing force were used to split dal spoiling aesthetics of dal apart from yield. Drying technology helps in getting higher yield and higher productivity. New drying technologies are helping processor to avoid sun drying process which was not food safe. Dryers with Better temperature and process controls help grain to retain its original properties.

Better temperature control also helps pulses from possible deactivation of enzymes. It is more useful when dal batters are used for fermentation. It increases overall yield of end product. All these processes can be optimised and controlled through control panel ie automation. Process optimisation refers to operate plant optimally with economic performance in terms of productivity and yields. It also avoids human errors. Scada systems are now integral part of pulses industry. Automation ultimately leads to productivity and ease of operation.

New concept of Internet of things (IoT) has a great potential to make manufacturing process smarter and predictive. The Internet of Things is also

Value Chain of Pulses

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becoming a part of food industry and it cannot be ignored as skilled/ technical workforce will be a challenge for future. IoT as such monitors system, diagnose problem and provides actionable information which in turn helps prevent problems both on Grain and Equipment side. It allows operator to identify problems before it happens and take diagnostic action. Food industry is now changing from plant control to process control or even to the extent beyond that.

Apart from traditional processing, pulses industry is looking beyond split pulses as a future market as shown in following sketch Pulses being rich source of protein can be used in value added products as an mixture.Various types of grinding / size reduction techniques are used to ground pulses like Chana,Urid, yellow peas based on specific application of end product. Ground / powder pulses can be used in making of modified flours, protein extraction, as a mixture for extruded products.

The functional properties of pulse proteins have been exploited in the preparation and development of products such as bakery products, soups, extruded products and ready to eat snacks. Pulses, especially when blended with cereal proteins, may offer a promising alternative source for nutritional and functional proteins. It is found that sensory profile of pulses improves at each stage of changing its form and becomes more acceptable to consumers.

Technological developments just not stop at processing but we need to produce food safe products. Quality assurance and food safety is another area where food sector is looking beyond just legal standards and providing whole food industry a scientific basis which ultimately leads to new approaches in technology. Food assurance and food safety standards such as ISO 9000, ISO22000, HACCP, GMP, GHP are now becoming integral part of food industry thus keeping food industry technologically abreast to global practices.

The aspect of technology advancement in Grain processing sector discussed above gives us fairly good idea on development of food industry in India on background of growing demands. Development in Machine capacities, Automation and End products are constantly changing towards betterment to cope with consumer demands.

External influence from market are driving technological changes in machines and process and still trying to keep commercial viability.

To conclude, there is still lot of scope in food sector for technological development / improvement of process as well new innovative products.

The stimulus for development is to produce high quality product at minimum of cost which can feed 9 billion people by end of 2050 across the globe.

Krishnapatnam Port –The Pulses Gateway

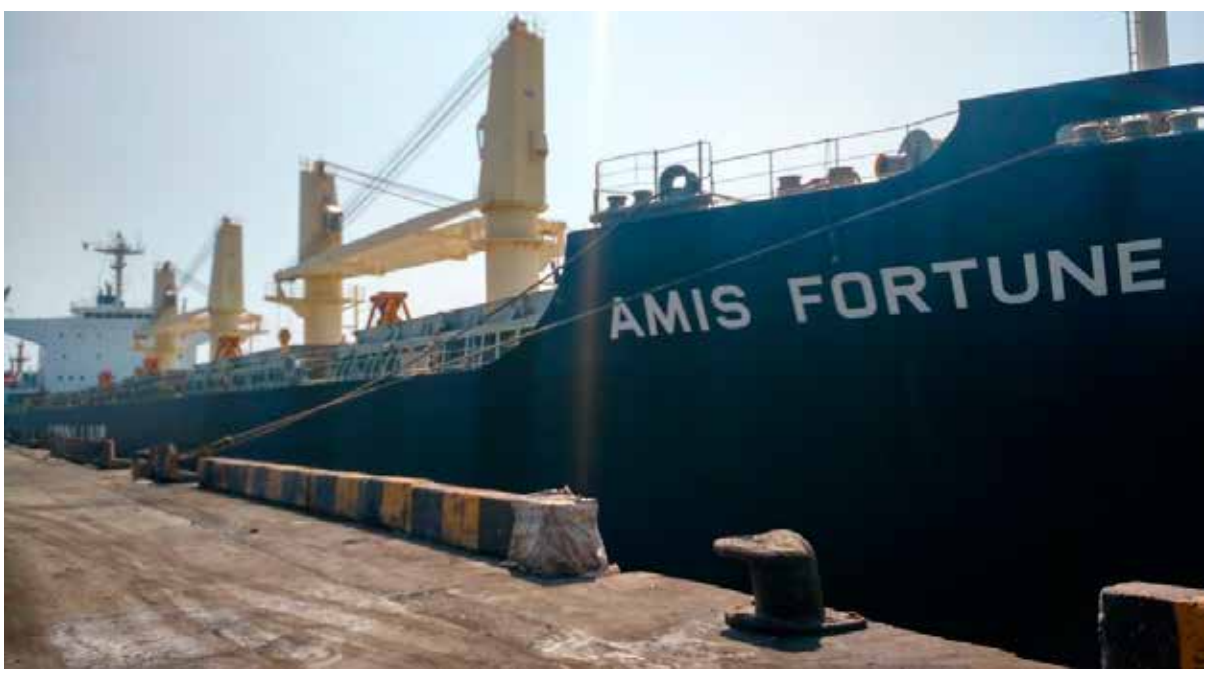
Ms. Vinita Venkatesh, Director,

Krishnapatnam Port Container Terminal Pvt Ltd

Krishnapatnam Port has been envisioned futuristically as a modern, deep water and high productive port with a view to sustain the demands of growing international trade scenario and is poised to develop into a world-class Container Terminal by optimizing necessary land and sea-side infrastructure. With 6800 acres of port area, India's deepest draft at 18.5m and state-of-the-art handling equipment, the port is well poised to provide efficient services to the trade. The exim trade has responded favourably to the port efficiency and the container throughput has grown rapidly in 4 years since commencement. The growth rate of container throughput at KPCT in 2016-17 will register more than 100 pct over the last FY.

Exim trade of agricultural commodities has been one of the major focus area of Krishnapatnam Port and among the agricultural commodities the Import of pulses at KPCT has seen a major growth in the FY 2016-17.

The geographical position of the port on the East Coast of India, just 180 kms north of Chennai is ideal for the import of pulses from Myanmar and Africa. Further, with 5 feeder vessels per week connecting KPCT with Colombo, the transhipment point for import of Canadian pulses to the east coast, KPCT is also ideally suited by way of vessel connectivity. The port provides pulses importers with the unique advantage of modern and efficient handling facilities for



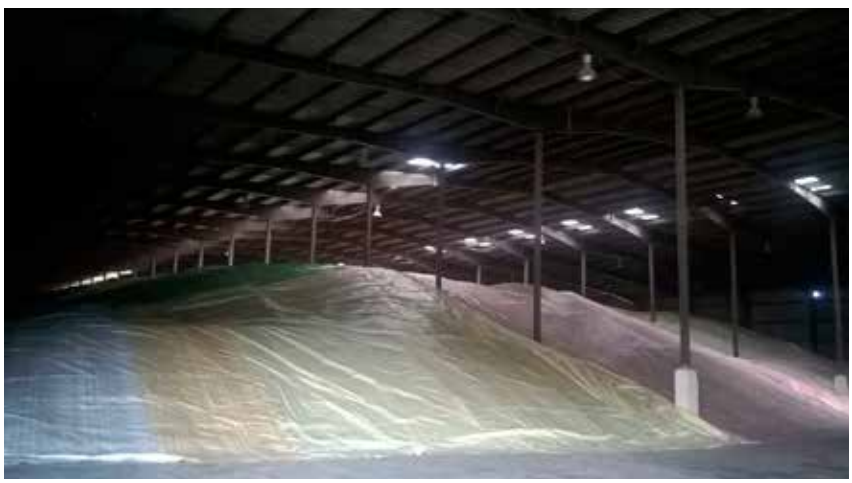
pulses both in breakbulk or container imports.

Krishnapatnam can also suitably serve the pulses trade as a hub port for imports. Large and clean warehousing facilities and speedy customs clearance facility is available for the convenience of importers. The port is excellently connected through the road (NH 5) and rail network to all consumption areas in India. Container rail facilities are available through CONCOR to ICD Bangalore and Hyderabad and a rail service to Nagpur is on the anvil. Further, a coastal shipping service operates between Krishnapatnam and Kolkatta and Haldia which facilitates distribution of pulses from Krishnapatnam to West Bengal and further on to the north eastern states.

The mission of Krishnapatnam port is to provide and facilitate all services to its customers under one roof by optimizing cost. Due to the availability of large land area, the port is able to provide all services and storage of cargo under one roof, doing away with the practice of multiple handling at ports which are unable to provide space. This reduces the customers expense significantly. To cite just one example, congested container yards of most ports have resulted in containers being pushed to CFSs and consignees can take delivery only from the CFS after paying for the charges for the movement to CFS. At Krishnapatnam, the facility of direct delivery of the container from the port container yard is available thus saving the importer the cost of the CFS movement.

MMTC, the indenting agent for pulses on behalf of Ministry of Consumer Affairs, had floated a tender for import of 45,000 MT of yellow Peas in containers and 40,000 MT of Red Lentils in break bulk . Krishnapatnam Port

was very happy and proud to be of service to the Government of India and handle this import. The MMTC imports were facilitated by providing Green Channel for all movements within the Port for MMTC shipments till delivery to their nominated CONCOR



warehouse of MMTC outside the Port. Over 1800 - 20 feet containers arrived at the Port during the period from Nov'16 – Feb'17.

Value – added services by way of bagging facilities were provided for MMTC's bulk cargo import of 38,000 Metric tons of Red lentils which arrived at Krishnapatnam port during February 2017 . After discharge and bagging , the cargo is being railed out through CONCOR wagons to Kolkata.

Apart from the ports warehousing facilities and CONCOR warehouses, several private warehousing facilities are available outside the port. There are two CFS facilities operational at the port – Seabird CFS and Gateway Distriparks CFS. About 40 kms north of KPCT, IFFCO has put up an SEZ facility which can benefit pulses importers. Further, Krishnapatnam Port holds a large land bank south of the port which is available on sale and is a promising location for the setting up of Dal processing / handling facilities. Krishnapatnam Port has a strong orientation to serve the pulses importers whether Govt, traders, importers, brokers, indenting agents etc with efficient and competitive handling facilities, transport connectivity by road, rail and sea to all corners of India and value added services as may be required by the trade. The port is keen to provide customisation of services for pulses importers and reduce the cost per MT of India's pulses imports

Pulses – The Scenario de coded

Dr. Bharat Kulkarni

Indian food is not complete without pulses. Its not only cheapest source of protein but also a preferred food ingredient. Still, the sector is exposed to numerous challenges and price volatility is one of it. The sector came under serious vigil after the record jump in prices in 2015 and 2016. This resulted into government reaction, in form of intervention. However, these interventions did not entirely mitigate the problem.

After the volatile years in 2015 and 2016, a lot of hopes, both political and business was pinned on the 2017 crop. The analyst believed that the crop in India would be massive and will fundamentally alter pulse markets in 2017. Some analyst believed that the Indian crop can be to the tune of 20 million tons, which is India's domestic consumption as well. However, the peak pulses production was in 2013-14, when the production was 19.25 million tonnes and has gone down ever since due to the factors like erratic weather conditions and other. However the hope for the 2016-17 crop was to beat the past records and surpass 20 million ton mark. This is however, coming out to be correct as the second advanced estimates in December 2016 suggest that the production of pulses in 2016-17 will be around 22.14 million tons.

In spite of a record production in India, the import of pulses is still expected to be around 4.75 million ton. The government last year has agreed to procure import 200,000 tonnes of Tur from Mozambique and has been looking for the similar type of arrangements with other African and Asian countries. This will be a government-to-government based trade, with a portion through agreement with private trade bodies.

The Normal monsoon in India along with the significant rise in the area under cultivation for pulses has led to an increased estimate of production in India. Estimate suggests that the total area for production of pulses is about 29% more that the previous year, lead to a higher volume of crop estimated. The data released by the government in February suggested that the Rabi (winter) planting of pulses has been over 16 million hectares. This is more close to 2 million hectares more than the normal or five-year average area.

The impact of the increased planting can be seen on the prices. The wholesale domestic prices of chana in December 2016 went upto 9000 rs/ qt, as against 5500 rs/qt in 2015, same time. The same has retraced to 7500 -7800 rs/ qt in

January. The expectation of increased supply this price level is expected to weaken.

The prices of tur (arhar) have also reacted sharply in the light f bumper crop this season. The major producing states like Karnataka and Andhra Pradesh have started to receive the crop. The wholesale prices have shown a serious dip , primarly due to the record production this year because of the normal south-west monsoon, coupled with increase in acreage. The price shoot up last year has trigged a reaction in the farmers, who increased the acreage significantly this year. The prices had gone below the MSP, which has been set a 5050 per quintal (including a bonus of rs 425). The area under cultivation was more than 75% more this season, leading to a bumper crop. Added to it was the anticipation of imports from Mozambique and other countries under the bilateral contracts of the government. The prices showed signes of correction in July 2016, when the prices touched aprox. 10,0000 rs/qt. Since then the prices have gone down to nearly 60% of that level between 6000 to 6500 rs/qt.

The focus of the government for the season had been on Tur, where as the major problem was in Chana. When in July the prime minister visited Mozambique and other African countries, the position for Tur was more or less clear. The government data from 27th July 2016 suggested a steep jump in the area under cultivation for the Kariff crop and specifically for the Tur. Still, idea behind signing an agreement for procurement of tur is not very clear.

Chana is a Rabi crop and the crop has been a poor performer in 2014-15 and 2015-16. Also, the actual arrivals have been much lower than the government estimates. This can be corroborated with the sharp price rise. The fact that the chana arrivals happen in march, puts a lot of pressure on chana from december. Further, the import of chana primarily happens from Australia, making the sourcing limited. There are quantities of chana that have been introduced in Africa, but will take time to be established. With a favourable climate and the increased area, the prices of chana have been checked by the supply and are expected to ease out as the arrivals pick up in march.

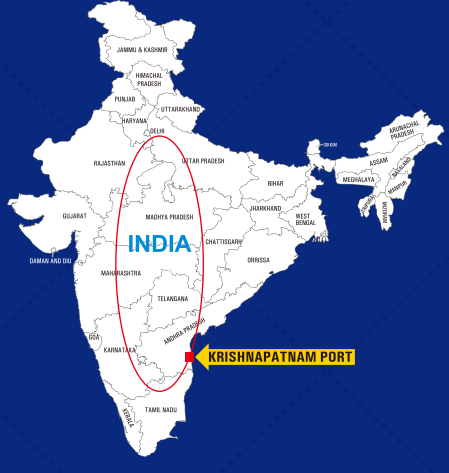
The overall trend in the market suggests a further easing of the prices of major pulses in India in the coming months. Since September 2016, the trends in most of the pulses have been softer. Further the government is thinking on re introducing the Futures trading in selected pulses, giving signal to the market that it is comfortable with the supply and price positions. With increased production in African countries and the Canadian lentils expecting a expansion in production, the prices in India are expected to be softer.

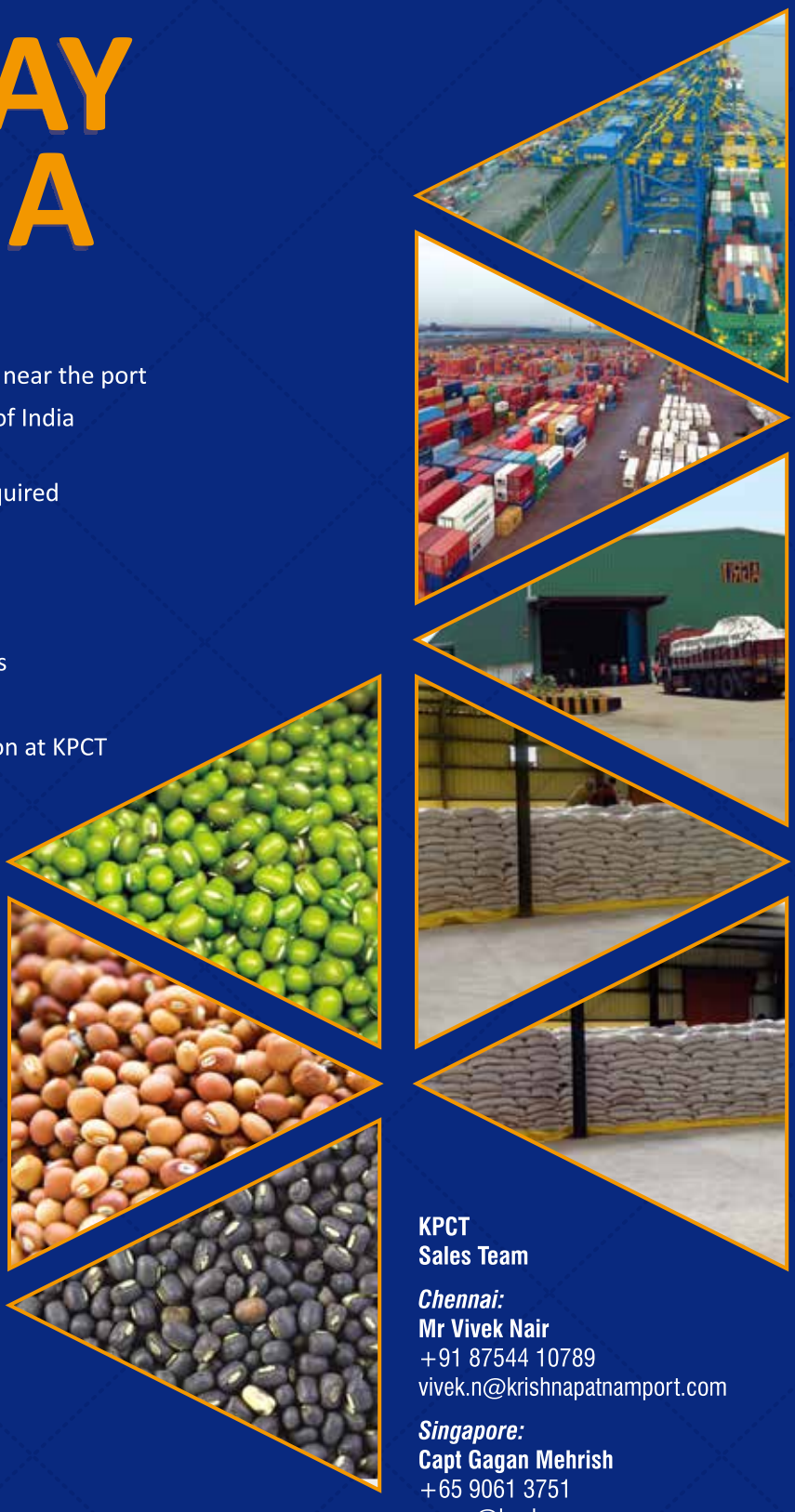
KPCT
KRISHNAPATNAM PORT
India's Largest Container Terminal on the Horizon

PULSES GATEWAY OF INDIA

Advantage KPCT

- Plant Quarantine (PQ) office available near the port
- Food Safety and Standards Authority of India – Getting certification at the earliest
- Additional movements for CFS not required
- Avoid multiple handling
- Quicker clearance at the terminal
- Most competitive handling charges
- Clean & modern warehousing facilities
- Save minimum USD 100 / 20'
- FSSAI currently at Chennai coming soon at KPCT
- Distance advantage to various Dhall Mills in Andhra Pradesh





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