



CHANA (Gram) OUTLOOK

-IGRAIN INDIA

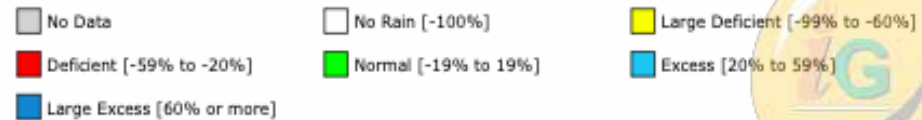
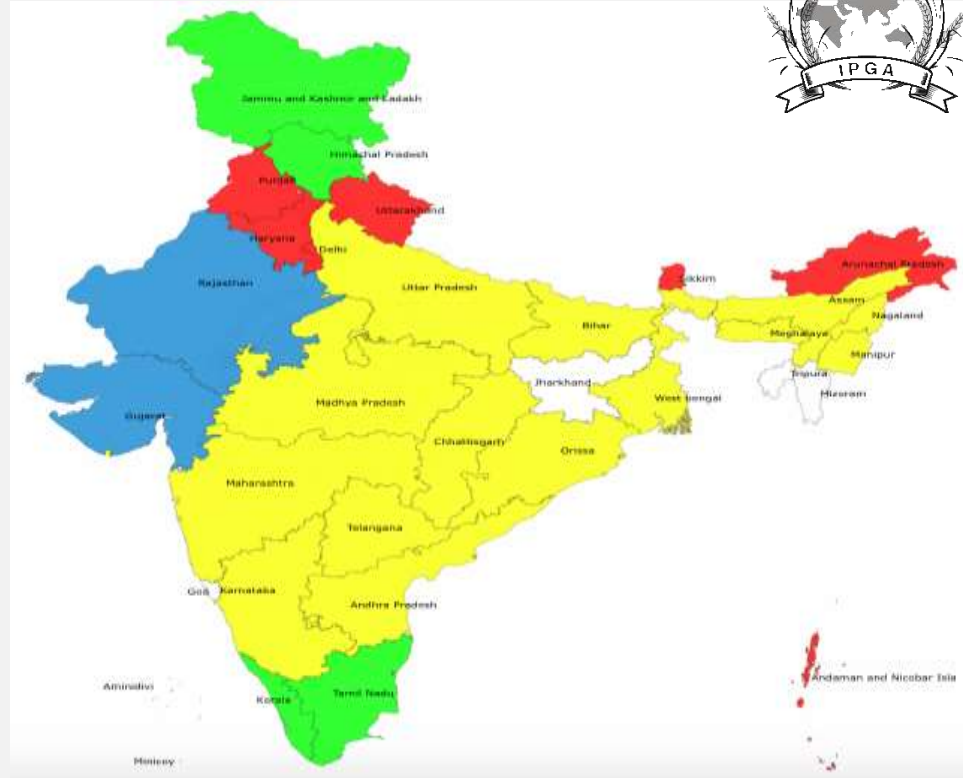


SOWING & RAIN (in Jan-14 Feb) Source IMD & Agriculture department



CHANA FINAL SOWING VS LAST YEAR (IN LK HECT)				
STATES	2022-23	2021-22	2021-22	Normal Area (DES)
MAH	29.16	26.60	2.56	19.80
MP	22.08	24.84	(2.76)	28.00
RAJ	21.43	20.42	1.02	18.59
KAR	11.84	11.03	0.81	9.95
GUJ	7.65	11.01	(3.37)	3.70
UP	6.24	5.95	0.29	5.73
CHG	3.84	3.85	(0.01)	3.26
AP	3.41	4.17	(0.76)	4.65
JHA	2.35	2.58	(0.23)	2.26
OTH	4.01	3.73	0.28	2.92
TOTAL	112.01	114.18	(2.16)	98.86

- Total sowing lesser than LY and more than Normal Area
- Area reduced in MP but increased in Maharashtra
- MP farmers moved to Wheat, Mustard & Lentil
- mainly
- Gujarat area increased from CY 2019 to 22 but in 2023 reduced
- Rainfall large deficit in MP, Mah, Kar but excess in Raj & Guj



CROP CONDITION: SOURCE- FARMERS/ TRADERS & IGRAIN TEAM

KARNATAKA

Bidar

- Crop not good, damage seen due to water logging in farms.
- Sowing lesser than 10-20% wrt LY
- Productivity 2/4 bags vs 3/6 LY

Gadag

- Crop condition same as Bidar
- Sowing 15-20% less
- Productivity 3/5 bags vs 6/7 LY

Talikot

- Sowing equal to LY
- Crop condition good
- Productivity 4/8 bags

Raichur

- Sowing 25-20% less but crop condition good

Gulbarga

- Crop condition good, Sowing same as LY
- Productivity 4/6 bags vs 3/5 LY

MAHARASHTRA

Latur

- Area improved by 10-15%
- Productivity 7/8 bags vs 9/10 LY

Amravati

- Sowing same
- Productivity 5/7bags vs 7/8 LY

Daryapur

- Sowing same; Crop condition good
- Productivity 5/7 bags same as LY

Dudhni

- Area improved 10-20%
- Pod having less seed
- Productivity 4/5 bags vs 5/7 LY

Ahmednagar

- Sowing same
- Arrivals in market weak

Barshi

- Sowing same
- No arrival pressure
- Pod having less seed (earlier 3 not 1 or 2 seed)

Akkalkot

- Sowing +10-20%
- Crop condition good
- Pod having less seed
- **Productivity 7/8 bags vs 5/6 LY**

Udgir

- Sowing +20-25%, crop good
- **Productivity 4/5 bags vs 3/4 LY**

RAJASTHAN (Crop condition excellent)

- Jodhpur
- Sowing -20/25%
- Crop in excellent condition

Kishangarh

- Sowing same
- Crop condition excellent

Bikaner

- Sowing -20/25%
- Crop condition excellent

Merta City Belt

- Area -35/40%
- Crop condition excellent

Kota

- Sowing -20/25%

Nagaur

- Sowing same

Kekri Line

- Sowing -20/25

Sumerpur Belt

- Sowing same

- **Crop near international border affected due to frost**



CROP CONDITION

MADHYA PRADESH

Ganjbasoda

- Sowing less 30-35%
- Crop condition good

Jabalpur

- Chana sowing less 35-40%
- Crop condition good

Kareli

- Sowing same
- Crop condition good

Bina

- Sowing less 15%
- Crop condition good

Damoh

- Sowing less 35-40%
- Crop condition good

Sagar

- Sowing 25-30% less
- Crop condition good

Ashoknagar

- Sowing 50/60% less
- Crop condition good

Pipariya

- Sowing less nearly 25/30%
- Crop condition good

UTTAR PRADESH

Bundelkhand belt

- Sowing of Chana drastically fell as farmers preferred Wheat, Mustard & Lentil
- Many farmers who haven't sown mustard in life time have shown interest in mustard
- Pulses dedicated area of Chana completely converted Lentils

GUJARAT

- Sowing lesser than last 2 years as farmers preferred other crops
- Overall condition of chana is good

Other sates

- Sowing is affected
- Crop quality is satisfactory

IMPORT

FY 22-23	QTY	FY 21-22	QTY	FY 20-21	QTY	FY 19-20	QTY
Apr-22	2,348	Apr-21	888	APR 20- MAR 21	1,40,991	APR 19- MAR 20	1,17,839
May-22	0	May-21	5,712				
Jun-22	2,544	Jun-21	5,258				
Jul-22	0	Jul-21	2,208				
Aug-22	189	Aug-21	888				
Sep-22	8,692	Sep-21	10,062				
Oct-22	16,667	Oct-21	28,577				
Nov-22	21,749	Nov-21	45,081				
Dec-22	5,419	Dec-21	21,091				
Jan-23		Jan-22	12,873				
Feb-23		Feb-22	5,188				
Mar-23		Mar-22	2,661				
TOTAL	57,608	TOTAL	1,40,487	TOTAL	1,40,991	TOTAL	1,17,839



EXPORT

FY 22-23	QTY (MT)	FY 21-22	QTY (MT)	FY 20-21	QTY (MT)
Apr-22	8,045	Apr-21	5,446	Apr-20	7,386
May-22	9,709	May-21	2,222	May-20	13,504
Jun-22	25,749	Jun-21	3,098	Jun-20	5,614
Jul-22	7,227	Jul-21	2,783	Jul-20	5,472
Aug-22	4,440	Aug-21	3,355	Aug-20	3,351
Sep-22	2,795	Sep-21	7,609	Sep-20	2,898
Oct-22	2,055	Oct-21	2,325	Oct-20	1,829
Nov-22	3,695	Nov-21	1,892	Nov-20	1,639
Dec-22	6,092	Dec-21	3,558	Dec-20	2,397
Jan-23		Jan-22	5,280	Jan-21	3,441
Feb-23		Feb-22	5,373	Feb-21	3,948
Mar-23		Mar-22	7,831	Mar-21	4,011
TOTAL	69,808	TOTAL	50,773	TOTAL	55,490
SAME PERIOD	69,808		32,288		44,091

SUPPLY AND DEMAND



PSD CHANA	2021	2022	2023*
OPENING	15	20.87	29.77
PRODUCTION	105	110	105
IMPORTS (Comm)	1.41	1.4	0.7
SUPPLY	121.41	132.27	135.47
EXPORT (Comm)	0.54	0.5	0.75
CONSUMPTION	100	102	105
TOTAL USAGE	100.54	102.5	105.75
ENDING STOCK	20.87	29.77	29.72

HIGH & LOW LIGHTS

- Consumption increasing after Pea import ban.
- Opening stock, Production & Ending stock increasing yearly.
- Prices under stress due to high availability.



PROCUREMENT & ITS IMPACT



CHANA- SEASON WISE PROCUREMENT IN TONS		
SEASON	MSP	QTY
R 2019	4,620	7,76,360
R 2020	4,875	21,38,416
R 2021	5,100	6,28,826
R 2022	5,230	25,92,000
FCI	PROCUREMENT	SOLD
RABI 2022	73,650	41,650

CHANA TENDER PRICE RANGE RABI 2022 RS./ QUINTAL	
STATE	RANGE
MP	4580-4651
RAJ	4855-4944
GUJ	4607-4627
MAH	4601-4705
TEL	4551

PROCUREMENT TARGET R 23 (MT)	
TEL	44,328
AP	1,22,933
GUJ	3,88,000
KAR	1,17,000

- Procurement directly depends on prices during arrivals.
- In R19 & R21 since the prices were nearly more than MSP, Procurement was less and visa-versa in R20 and R22
- R 22 out of 25 lakh tons, 15 tons allocated to different states for creating own buffer stocks at discount of Rs 8/KG. Allocated qty 88,600 MT chana already allocated to Himachal Pradesh, Gujarat, Uttar Pradesh and Tamil Nadu.
- Good steps taken by GOI for control prices by increasing availability to consumers. But Farmer's interest should also considered. New mechanism needed for beneficial to both farmers and consumers.
- Procurement may increase if prices are 2Rs. 150 lower than MSP



PRICE TREND IN RS./QUINTAL



DELHI RAJ	4,300	4,200	4,650	4,675	5,100	5,125	5,075	4,850	5,225	5,150
MUMBAI TANZANIA	4,100	4,000	4,300	4,250	4,800	4,650	4,650	4,400	4,625	4,600
INDORE	4,100	4,150	4,200	4,200	5,050	4,950	4,900	4,740	5,200	5,000
BIKANER	4,080	4,100	4,425	4,500	4,975	4,700	4,850	4,700	5,000	5,000

PAST & CURRENT TREND



MSP Vs. Actual (Rs./Quintal)

○ Rabi 2020

MSP 4,875 . Full season prices were below MSP

○ RABI 2021

MSP 5,100 Delhi Raj traded above but local Mandy below

○ RABI 2022

MSP 5,230 June traded below MSP but Dec near MSP

○ RABI 2023

MSP 5,335

Prices on 15.02.23

Delhi Raj 5,075/5100

Indore 4,950/5,000

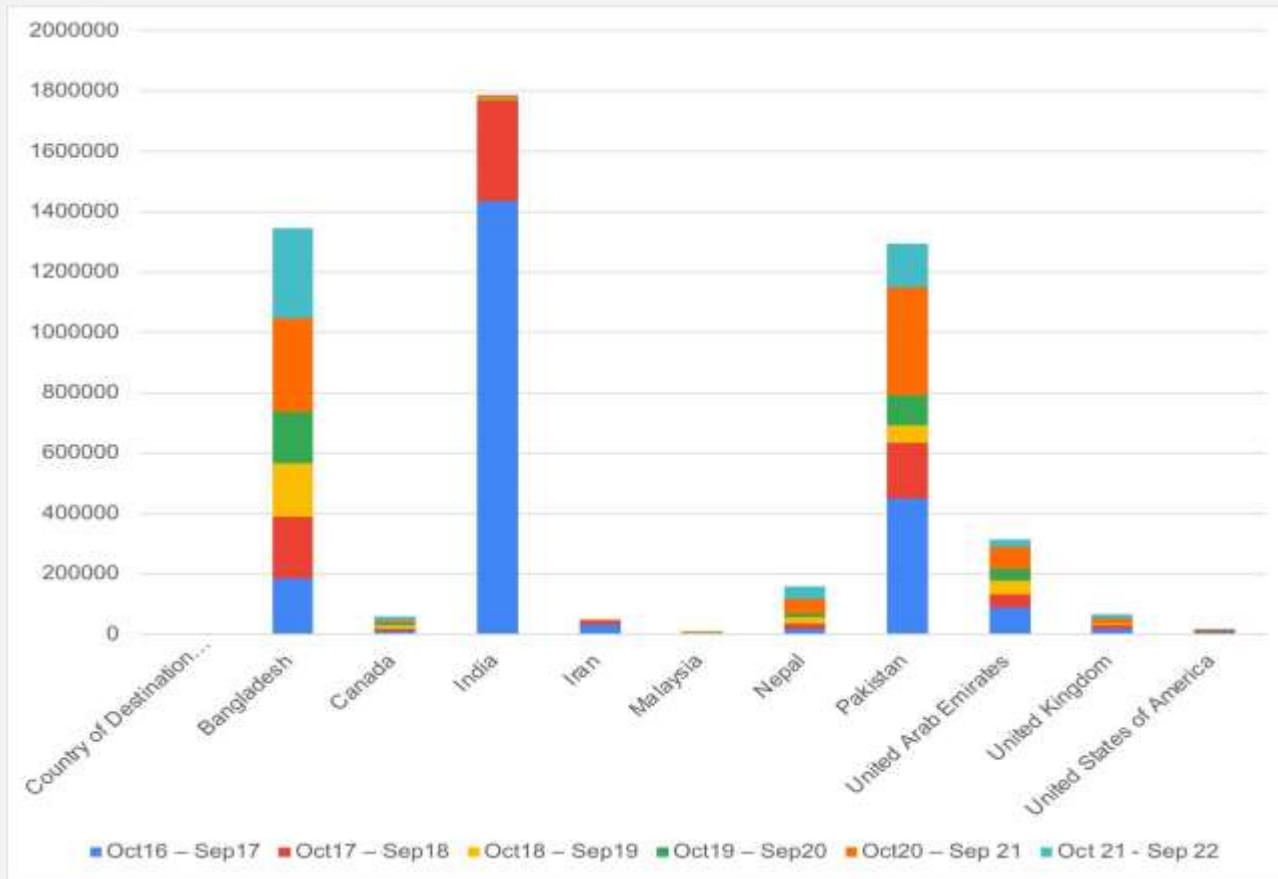
Bikaner 5,000

SHORT AND LONG PROSPECT

- Short- During New Arrivals prices may trend near MSP supported by govt procurement & increase in consumption due to low Pea production. Due to Increase in MSP prices may also get support (March Delhi Chana can touch 5,300)
- Long prospect depends on upcoming procurement figures+ allocation of buffer stocks to different states.



AUSTRALIA MARKET UPDATE- EXPORTS



AUSTRALIA MARKET UPDATE- SnD



	2020-2021	2021-2022	2022-2023	2023-2024 (F)
Planted (1000 Ha)	550	650	400	350
Harvested (1000 Ha)	550	550	330	300
Yield (MT/Ha)	1.73	1.8	1.6	1.6
Production (1000 MT)	950	990	528	480
Est. Carry-In Stocks (Excluding Seed)	123	125	500	488
Imports (1000 MT)	0	0		
Total Available Supplies	1073	1115	1028	968
Exports (1000 MT)	900	575	500	500
Domestic Use (1000 MT)	20	20	20	20
Seed, Waste and Feed Use	28	20	20	20
Current Available Stocks				
Est. Ending Stocks (Next Year's Carry-In)	125	500	488	428



A Presentation on

African - Desi Chana

By
Mr. Jahid Nagarwala



17-02-2023





We are Alfa Group – Agrox Gulf Holding
– One of the leading Grass root level
processor and exporter of African
Pulses and Peanut - Sesame and other
Agriculture origin Commodities. Our
Head office in Dubai and Ground
operations in:

- Mozambique
- Sudan
- Tanzania
- Togo
- Benin



African Desi Chana

- Desi Chana (Chickpea) in Africa mainly grows in Tanzania and Ethiopia

● Tanzania

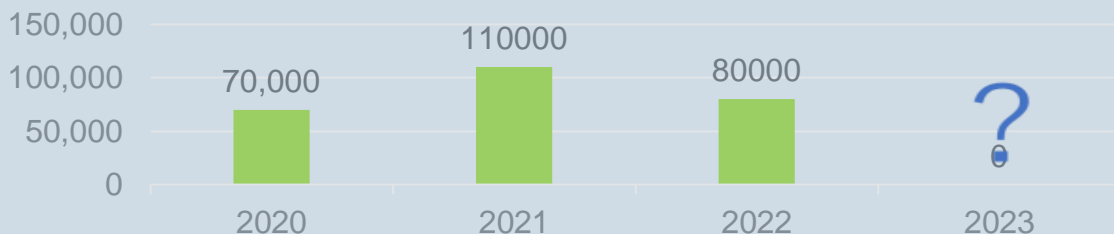
● Ethiopia





- Season : August to November
- Crop Size: Average Crop Size 70.000 to 80.000 Tone but it seems Huge Rise and Fall from 50.000 to 150,000 in Production due to Weather.
- Last Year 2022 was average Crop of near 80.000 Tone
- Year 2021 there was Bumper Crop of near 100.000 to 110.000
- For 2023 it is early to Say Production date as still long time to go.
- India is the Main Buyer for Tanzania Chana but Last year India Was not in much Buying Interest and Most of Cargo was Booked to Pakistan on Average Price range between \$500 to 550 cnf Level
- Beside India and Pakistan Dubai also Importing Good Quality of Tanzania Chana

Desi Chana Production in MT



Ethiopia : Desi Chana (Chickpea)



- Season : Start in February/ March onward
- Crop Size: 80.000 to 100.000 Tone
- But more then 70% of Crop are Used for Local Consumption few stock Remain for Export.
- Ethiopia Small Size Desi have good demand in Iran most cargo going to Iran on Premium in Price via Jebal Ali Specially Small Size near 3 to 5 mm
- Some Cargo also Exporting to Dubai Local Market

Desi Chana Production in MT



African Desi Chana Market Scenario :

- Ethiopia have Good Crop Volume but most of Their cargo used in Local Consumption. it does not effect much on India or World market
- Current Ethiopia Arrival price are expensive near \$660 to 720 FOB level
- only Tanzania remain good Supply Source of African Desi Chana to India Market.
- Pakistan also seems Strong buyer and last year they bou good stock but due to current year Forex Crisis in Pakistan Most Shipper and Seller are not in Mood to Book any cargo to Pakistan.
- if Pakistan Forex situation not improving before Tanzani new Crop then may India will have good Cheaper Option to



01-03-2023



Q & A



Mr. Jahid Nagarwala

+258 82 5402624 / +971 507403905

www.alfagroup.in

