CONCLUSIONS/OBSERVATIONS

1. Under the right price conditions, India and Pakistan are both good markets for Canadian pulses - interest in both the product and in Canada was evident. Chickpeas appear to offer a significant development opportunity for Canada.

2. A significant high quality/low volume pea market exists in India. However, India is primarily a low price high volume market. The high quality market is undeveloped in Pakistan.

3. The lentil market potential is low in India but high in Pakistan. India is in a position to export split lentils. The potential of the green pea market is better in India than in Pakistan. Both India and Pakistan markets are driven by the supply and demand of chickpea, both desi and kabuli types. Yellow pea blending into besan (chickpea flour) is a factor and may influence import potential.

4. Branding of product in India is a useful marketing tool to differentiate product and develop buyer loyalty at the retail level. In Pakistan, some branding was evident but does not appear to have the same potential as in India.

5. Pakistan/Karachi is interested in volume sales and price of existing products only (eg. lentils).

6. Bulk shipments provide a significant cost advantage in landed price to both India and Pakistan. Very little storage capability exists at ports.

7. The Bombay market is the most willing to develop new product markets (eg. branded products).

8. Processing in both countries is extremely labour intensive with labourers earning the equivalent of $1 US per day.

9. Letters of Credit should be used on all transactions.

10. The seminar format used during the mission to deliver information to prospective customers is very effective.

11. The use of Canadian pulses in dishes served at functions hosted by Canadian officials is an excellent promotional tool.

12. Companies visiting India and Pakistan should utilize Canadian Trade Commissioners stationed there to help organize meetings/promotions.