

Who/What is the market?

There are basically two pulse markets in India. The low price market (very large) is intended to feed the masses. The high quality/low volume market is growing in India. The high quality market is undeveloped in Pakistan. The lentil market potential is low in India but high in Pakistan. India is in a position to export split lentil. 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. Yellow pea blending into besan (chickpea flour) is a factor and may influence import potential. In Pakistan, consumption per capita was estimated at 6.3 kg for all pulses. (Current population of 117 million in Pakistan, in India the population is 843 million.)

What is the size of the market?

In India there is a large market for chickpea, some for pea, variable for lentil but all are price sensitive and opportunistic depending on annual production. The market in Pakistan is large for chickpea and lentil but limited for pea. Pakistan is also very price sensitive.

What is the handling process at port and warehouse?

All conventional unloading at traditional ports except for containers. There is potential in India for large volume unloads. Bagging in ship at the rate of 3000 MT is possible in both Bombay and Karachi. Very little storage capability exists at ports. In both countries, bulk shipment is essential to be competitive in price.

Currently, large processing mills were reported to be lying idle in India due to high taxes at the state level. Small millers were able to avoid taxes.

What is the distribution process?

Traditional wholesale/retail distribution in 100 kg jute bags. Product is moved by truck in bags to wholesalers, warehouses or directly inland. Little product is sold through supermarket-type stores in India, but this is growing in Pakistan. Packaged in kilo bags or sold by weight. Branding is well established in India while in Pakistan very little branding occurs.

Internal highway and distribution infrastructure is a problem in both countries.