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Canada

External Affairs and International Trade Canada

Affaires extérieures et Commerce extérieur Canada

CANADIAN PEAS AND LENTIL MISSION TO INDIA AND PAKISTAN MARCH, 1993

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EXECUTIVE SUMMARY

Without doubt, the potential to increase Canadian pulse exports exists in both India and Pakistan. A move to more liberal fiscal policies in both countries will foster, from a Canadian viewpoint, a better environment in which to conduct business, particularly in India.

India and Pakistan are major consumers of pulse crops. Both countries need to import significant quantities of pulses to offset insufficient domestic production. In 1990/91 India imported some $US 260 million worth of pulses while Pakistan's pulse imports were approximately $US 30 million. Canada's share of these markets has been traditionally low (eg. less than 1% in India from 1987-91). While India has adopted a policy of self-sufficiency for pulses, demand will continue to exceed domestic production for the foreseeable future. In Pakistan, the existing gap between domestic supply and demand should widen as more emphasis is placed on crops which can be sold on the export market (eg. cotton).

The most important determining factor in Canada's ability to supply either India or Pakistan is price. The largest area of demand in both countries remains the high volume-low price product, with bulk shipments offering significant cost advantages. However, a growing middle class in India is increasing demand for a higher quality product.

Branding of higher quality product is very evident in the markets of India and should be considered by Canadian companies as a marketing option. Branding was much less apparent in Pakistan and does not appear to be worth pursuing at present.

A concerted market development effort that demonstrates the Canadian industry's ability to consistently supply a good quality product is justified, although neither country could be considered a top priority for Canada. A coordinated market development strategy should consist of a number of elements such as in-Canada training for importers, rapid response to trade enquiries and active promotion of Canadian pulses in India and Pakistan (eg. serving dishes featuring Canadian pulses at functions hosted by Canada). The seminar approach used on the mission to deliver information on a number of topics is an effective tool and should be used by industry on other missions.

MISSION SUMMARY

INTRODUCTION

Opportunities for Canadian pulses and the need for increased marketing efforts were identified by the Canadian High Commissions in New Delhi, India and Islamabad, Pakistan in the 92/93 post planning exercise. Both identified the need for a more proactive approach by Canada in capitalizing on market opportunities. As a result, a technical mission to India and Pakistan to promote Canadian peas and lentils was initiated and funded by the Asia Pacific South Division (PST) of External Affairs and International Trade Canada. The PST project officer for the mission was Mr. George Jung (613-996-7256).

The mission was developed in consultation with the Canadian Special Crops Association and the Western Canada Pulse Growers' Association who had identified a mission to India as a priority in their joint market development strategy. At industry's request the mission was technical in nature and featured a seminar approach to deliver information on a range of topics (supply, production, grading and research) and to stimulate discussion.

The mission departed Canada on March 12, 1993 and included meetings in New Delhi and Bombay, India and Karachi, Pakistan. The mission left Karachi enroute to Canada on March 22, 1993. The following details the mission's findings.

OBJECTIVES

The objectives of the mission were to:

- promote Canadian peas, lentils and pulses in general;
- reinforce the image of Canada as a quality supplier;
- develop a greater understanding of the pea and lentil markets in India and Pakistan;
- identify market opportunities and potential importers;
- follow-up and build on contacts established during an incoming pulses mission to Canada in 1991;
- identify possible candidates for future Canadian International Grains Institute (CIGI) courses.

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.

13. In India, policy and support price is determined by the Finance Department with input from Agriculture and other players.

14. The letter of credit problems in India have been largely solved, because of rupee devaluation and convertibility.

15. The reputation of the broker or importer is an important consideration in doing business in both India and Pakistan.

16. Pakistan is reportedly moving to devalue its rupee in June 1993.

17. India pulse production is geared to self-sufficiency through improved varieties and practices. Pakistan is more likely to see declining pulse production due to competition from crops grown for export.

18. Little product is sold through supermarket-type stores in India but this marketing avenue is growing in Pakistan.

19. In India, whole lentils, dehulled lentils and split lentils are in fact considered to be separate market classes with independent price structures. The daily newspapers carry pricing information for all classes of pulses.

20. India requires import contracts to be registered with the National Agricultural Cooperative Marketing Federation of India Limited (NAFED), but Indian traders do not view this as a problem. No other requirements were discovered in either country but exporters would be wise to verify with External Affairs staff in the market before shipping product.

21. There is limited scope for the introduction of new premium products in either India or Pakistan.

22. A CIGI-type course for Canadian exporters may be beneficial. In addition, many firms in India and Pakistan were identified who would benefit from in-Canada buyer training through CIGI. If and when training programs are developed, contacts made on the mission would be prime candidates. The posts in India and Pakistan should be consulted before participants are finalized.

23. There may be an avenue to improving market service by upgrading the packaging systems in Pakistan.

24. Future promotion material should be more product oriented as opposed to being research and production oriented.

25. In Pakistan there is a possible trend, among the middle class at least, toward diet consciousness. This opens a possibility for premium quality pulses through the supermarket system.

26. Pakistan offers the possibility of moving products through the Khyber Pass into Afghanistan, Uzbekistan, Tadhzikistan and Kazakhstan - a natural trade route.

RECOMMENDATIONS

1. Both the Indian and Pakistan markets should be explored at the same time. Any Canadian company visiting the region should plan visits to both Bombay and Karachi. (2 hours flying time between the two cities) (Follow-up CSCA/EAITC)

2. A targeted newsletter should be developed to inform potential customers of Canadian supply/quality situation. (Follow-up CSCA)

3. Canadian companies interested in the market should follow-up with potential clients to benefit from mission. (Follow-up CSCA/EAITC)

4. Develop a "Guidelines For Pulse Exporters to India and Pakistan". (Follow-up CSCA/EAITC)

5. Develop a liaison with Importers Association in Bombay. (Follow-up CSCA)

6. Future missions should consider using a seminar approach. Seminars should be flexible in design (modules) to be able to target a specific audience eg. importers vs researchers. (Follow-up CSCA/WCPGA)

7. Utilize Canadian pulses in future promotion/trade events (eg. luncheons and receptions) for all sectors. Pulses to be supplied by industry. (Follow-up EAITC/CSCA/WCPGA)

8. Develop an action plan to ensure appropriate follow-up and identify future marketing initiatives in India and Pakistan. (Follow-up CSCA/WCPGA/EAITC)

9. The possibility of developing brands should be considered by companies wishing to differentiate their product in the Indian market. (Follow CSCA)

10. All contacts made should be sent a follow-up letter, and where appropriate, a copy of the new "Pulses from Canada" bubble pack. (Follow-up CSCA/WCPGA/EAITC)

11. A short article to be prepared for CanadaExport to report on mission. (Follow-up EAITC)

12. Promote the development of suitable varieties of chickpeas and agronomic practices to enable Canada to produce exportable quantities. (Follow-up WCPGA)

MISSION MEMBERS

Members were selected to reflect all facets of the pea and lentil industry in Canada and included:

Marketing

Mr. Frank Labelle - Representing the Canadian Special Crops Association (Special Crops Manager, Continental Grain, Carmen, Man.
ph 204-745-6711
fax 204-745-6608

Production/Processing

Mr. Vince Walker - Representing the Western Pulse Growers Association (Director, Saskatchewan Pulse Crop Development Director Board, producer/processor - Walker Seeds, Star City, Sask.)
ph 306-863-4444
fax 306-863-4447

Research

Dr. Bert Vandenberg - Representing the Crop Development Centre, Saskatoon, Sask. (plant breeder/researcher)
ph 306-966-8786
fax 306-966-5015

Government - Quality Control/Grading

Mr. Phil Collette - Representing the Canadian Grain Commission, Winnipeg, Man. (Manager Inspection Projects)
ph 204-983-8759
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Government - Trade Development

Mr. Maurice Egan - Representing External Affairs and International Trade Ottawa, Ont. (Trade Commissioner)
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MISSION REPORT

A number of questions to be answered/researched were developed in advance of the mission by the mission members, association representatives and EAITC officials. The questions and the mission's findings are as follows:

Determine level of foreign government involvement eg., barriers to trade, finances, duties, regulations, etc?

Indian government (Dept of Finance) imposes a 10 % duty on imported pulses. Import contracts must be registered with the National Agricultural Cooperative Marketing Federation of India (NAFED) - this was not viewed as an impediment by traders. Pakistan imposes no duty on pulses.

Both countries are going to full convertibility of the rupee on the trade account. Pakistan appears to be benefitting from liberalization of trade and India is pursuing similar policy. Income distribution is highly skewed, but middle class is growing in India (150 million and growing to 250 million by the year 2000) and Pakistan. In India a support price is set annually for lentils with cost of production a major factor in determination. Prices are currently 210-230 $US per tonne. When prices decline further, NAFED is instructed to buy. In India, policy and support price is determined by the Finance Department with input from Agriculture and other players.

Outline status of economy of India and Pakistan?

The Indian economy is booming in some areas, particularly Bombay. Multinational investment is increasing in both India and Pakistan. India has eliminated the dual exchange rate and moved to full convertibility of the rupee. (The rupee has remained relatively stable and is predicted to remain around 30 R/1 US $.) Indian exports are expected to rise as the single exchange rate provides an incentive to exporters.

The Indian budget of February 27, 1993 focused on reform and liberalization. This move to liberalization is positive but it may take several years to have a significant impact. The Indian economy is predicted to grow by 5% to 6% (maybe 7%). Major focus is on improving the Indian infrastructure. Agriculture accounts for one third of the GDP and two thirds of the population depend upon it for their livelihood.

What problems are evident regarding financing /payment?

The foreign exchange crisis in India in the early 1990's caused problems. Only half of any sales contract could be fixed. This is no longer a problem in India, but the premium on dollar trading is a risk factor. The letter of credit problems in India have been largely solved, because of rupee devaluation and convertibility. Reputation of the broker or importer is an important consideration in doing business in both India and Pakistan. Pakistan is reportedly moving to devalue its rupee in June 1993.

What is domestic production and outlook?

The production of pulses in Pakistan was approximately 768,000 tonnes in 1989-90. Production has been static over the last five years. The deficit between production and demand must be imported. In 1991-92 Pakistan imported 140,000 tonnes of pulses.

Estimated Indian pulse production in 1991-92 is 13,600,000 tonnes. A decline from 14,100,000 tonnes in 1990-91. From 1987-88 to 1990-91 pulse imports ranged from 718,000 tonnes to 792,000 tonnes. Pulses are grown on marginal land, residual moisture, largely rain fed, generally declining yield. India production is geared to self-sufficiency through improved varieties and practices. Pakistan is more likely to see declining production due to export crop competition.

In India pulses are now part of the Technology Mission on Oilseeds and Pulses. Over the past 5 years oilseed production doubled with only a 45 % acreage increase. Production practice improvements accounted for 55 %. As a result, imports declined substantially. Pulses are the next target for this program and its success may impact on future market prospects in India.

Pakistan appears to be following a different policy with regards to pulse production. While a deficit situation occurs for pulse crop production, particularly chickpea (most important), both desi splits and kabulis pulses are not being given a priority. Other (exportable) crops such as cotton and sugarcane are higher priorities. Research on plant breeding for pulses is underway, however it would seem Pakistan will remain in a pulse deficit position for the foreseeable future.

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.

What is the pricing mechanism?

In India at the wholesale level, there is very little competition. At the importer level, prices fluctuate dramatically, but not at wholesale level. Wholesale competition is on quality, not price. High level of buyer loyalty at the wholesale level. Retail pricing has a spread based on type of retail outlet. Price separation on quality for pea at retail level.

In India, whole lentil, dehulled lentils and split lentils are in fact considered to be separate market classes with independent price structures.

The pulse processing sector in India reportedly has a 65 % splitting efficiency, adding 40 % to the market price.

How does the grading system compare to Canada's?

No comparison with Canada's system. Neither country employ grading standards other than fair, average quality (FAQ).

What are the phytosanitary requirements/problems?

No problems with Canadian pulses were noted in either India or Pakistan.

Are there other import requirements?

India requires import contracts to be registered with NAFED, but Indian traders do not view this as a problem. No other requirements were discovered in either country but exporters would be wise to verify with External Affairs staff in the market before shipping product.

What can we supply (realistically)?

If prices are low:

Red lentil to Pakistan.
Green and yellow pea to India.
Desi and kabuli chickpea in future.
Red kidney and cranberry beans in both markets.

Who is the competition and what are they supplying?

Myanmar - chickpea, beans
China - lentil, beans
Australia - chickpea, dun peas
Turkey - chickpea, red lentil
Iran - chickpea
Hungary - green pea
USA - green pea
New Zealand - green pea

What is the competition doing better?

USA - branding, better at supplying information (supply and disposition etc.) The American Dry Pea and Lentil Assoc has an office in New Delhi.

Turkey - price, not quality or reputation

Australia - price, shipping advantage, market responsiveness

Hungary - price, foreign exchange drive

China - price, not quality

Myanmar - price, shipping advantage

New Zealand - shipping advantage only

What new products might Canada be able to develop?

Chickpea - both kabuli and desi hold promise. There is limited scope for the introduction of new premium products. Red lentil splits and wholes to Pakistan.

What innovations would make us more competitive?

In India, in the higher quality pea market branding appears to offer an advantage. Variety marketing e.g. "Tyson" chickpea might be advantageous.

Consumer/brand loyalty?

Importer loyalty is nil. However, in India loyalty of purchaser to wholesale seller is high.

What follow-up needs to be done?

Tailored newsletters to importers to maintain knowledge of potential of Canadian supply is a good idea. Everywhere we went importers seemed interested but always, wanted to be kept informed on supply, prices, etc.

Follow-up by Canadian companies to build on any benefits from the mission eg. Canadian firms interested in the India/Pakistan market should use contacts made during the mission.

Liaison with the importers association in Bombay (eg. trade rules) should be established.

Mistakes to avoid?

Be cautious and pay attention to detail on contracts eg. delivery dates, quality, etc. India and Pakistan are experienced trading countries

ACKNOWLEDGEMENTS

The efforts of many people were required to organize the mission and its itinerary. The mission members wish to mention in articular the following:

The Canadian Special Crops Association, the Western Canada Pulse Growers Association and Ms. Dorothy Long, Food Focus, Saskatoon, for arranging for sample packs, banner and the ingredients for the Bombay luncheon.

Mr. George Jung, Asia Pacific South Trade Development Division, Ottawa, for overseeing the complete itinerary and the travel arrangements.

Mr. Robert Vanderloo, Commercial Counsellor, Mr. Brian Mckay, Commercial Counsellor and Mr. Ram Gupta, Commercial Officer, for organizing the program in New Delhi and for the extra effort required to accommodate an unforeseen change in plans.

Ms. Susan Cartwright, Consul and Trade Commissioner and
Mr. Ram Narain, Commercial Officer for organizing the Bombay portion of the mission.

Mr. Waheed Khan, Commercial Officer, Islamabad and Mr. Azhar Kirmani, Commercial Officer, Karachi for organizing the program in Karachi.

ANNEX I

MISSION DIARY

INDIA

DAY 1 - MONDAY MARCH 14

1. DAHL MILL, outside of New Delhi.

Chickpea recleaning from Turkish and Iranian origin, 900 bags per day. Mung bean, 300 bags per day. Own 2 trucks but also use rented trucks. Samples taken to market and shipped to market/direct. Ship 500 bags per day.

Mung bean splitting mill. Mustard seed oil used to soften skin in bulk steel bin which is heated. After, the product is wetted down before decorticating and splitting. Then, product is wetted to about 18% before decorticating. Product is then dried and polished with cold water. Small stone decorticating disks are used. Chickpeas were sized and destined. Canadian and American origin green pea were in storage. Bigger size preferred. Grading system looks at uniformity of size and colour, also consistency of same-year product.

Low operating costs, no safety regulations, poor electrical hook-up. High security. Forty to forty-five employees. Two are technical for operating equipment. Wages 32 Rs. per day ($1 US/day). Entire family is employed. Operates 7 days per week, 8-9 hours per day.

Rodent control in storage was aluminum phosphate scattered on bags.

2. AMIRA TRADING CORPORATION, New Delhi

Rice was biggest commodity.

No longer importing pulses from Canada. Competition from Hungary, U.S. and New Zealand. Relatively big player, never backs out of contracts. Quality a concern from all sources. Quality of USA pulses > NZ > Canada. Order reversed by other buyer. Did not like golf balling, dents.

Local lentil prices between $200-250 US/tonne, almost all sourced locally. Largest item was kabuli chickpea. Strong interest in red kidneys. No market for green splits. Exporting split greens to Japan. Handles 100,000 tonnes. Liked larger peas 6-7 mm.

3. RAJESH AGARWALLA, New Delhi

Not interested in yellow peas. Preferred US peas because Canadian greens were "denser" than US peas. US peas take up water quicker. Sold into reconstituted green market. May need some research into variety/location effects. Price $730 U.S. ??? US Rumba and Heart brands recognized.

Liked long cranberry beans, white kidneys. Local yellows were plentiful. Brands popular, sell at price or market share premium.

Sourcing some product in Iran because of Rupee payment possibility. New changes in Rupee convertibility affect the buying procedure. Currency changes a major problem with letter of credit arrangements. Need to find out more about the performance bond and credit letter situation. Could start with 10 containers per month?? U.S. $200/tonne for local lentils. Blended off yellow lentil into pigeon pea.

No brand loyalty, buys strictly on price.

Quality is probably the major factor. Consistency of product from the same year is a concern.

Red peas would be useful if cheap and same size as lentil so that blending is possible. Chickpea reaction is positive. New lentil products - mixed reactions. Interest from women in new products.

4. Reception at Mr. Vanderloo's - Canadian Commercial Counsellor, New Delhi

a) Potash fertilizer dealer at reception (K. Jacob John) felt fertilizer use in India would rise. Opposite opinion from Dr. S.K. Saxena (Fertilizer Association of India). Dr. G. Dev felt that it would rise - works for Potash and Phosphate Institute (PPI) of Canada through Western Diversification. (Mission members thought the possibility of the PPI office handling pulse affairs should be explored.)

b) Dr. B.M. Sharma (Pulses Directorate - Indian Government) is involved in setting sectoral policy. Suggested that pulse production would be the target of future policy efforts.

c) Leanne Hogie of the USDA is an economist/trade analyst (agricultural attache). She noted that statistics are unreliable, that research is delinked from extension, and that pulse production is erratic with a flat trend. Dr. Sharma suggested that the production is an upward trend.

d) Ram Dass of Bishan Sarup Ram Kishan is a large importer, largely kidney beans, cranberries, mung bean and desi chickpea from Myanmar (Burma). Concentrated in rice trade with large plants that operate by hand grading with a workforce of 8-10,000 people to grade 500 tonnes per hour. Used to source from China. Felt that Canada was not competitive because of freight. His older partner had imported from Canada and had no quality problems. This company had a reputation of honouring contracts and being very reputable.

e) Mr. B. Nath, advocate, expressed interest in doing associated legal work with importers/exporters.

f) Dr. B.K. Singh of B K Importex is not now importing peas. Had trouble dealing with Hungary a few years ago. Not located in Naya Bazar because it is too congested. Has a warehouse (in New Delhi) but tries not to use it. Suggested that split yellow pea could be blended into besan (chickpea flour) to 30% before the taste becomes a negative factor. Amount of blending is dependent on relative price of two dhals. Split yellow lentils from Turkey a few years ago were blended into arhar (pigeon pea) dhal. Discussed that the Gulf War caused a currency crisis, creating problems with import procedures. Felt that no problem existed now, especially since the rupee was convertible. Felt that rupee would settle at 35 to the US dollar. He talked about the possibility of setting up a dhal mill in Western Canada for domestic markets and exports to Europe. Dr. Singh is very knowledgable and had obvious international experience in education and lifestyle. He said that he had a standing order of 300 MT of besan in the Persian Gulf but that he was not able to supply due to export restrictions.

g) Mr. S.S. Pasrich, director of Canadian Executive Services Overseas (CESO) in India, might be a possible contact for liaison with Indian business community.

h) Mr. Lajpat Rai (Amira Trading) is Anil Chanana's partner. Hungarian imports were a disaster in the past. Heavy losses occurred due to quality problems. Potential high volume, spot market contact. Pulse specialist in the firm. Also associated with Commodity International, also in Naya Bazar.

Current situation is 10% duty on import of pulses plus registration of the contract with NAFED.

DAY 2

1. Indian Agriculture Research Institute (IARI), New Delhi

We met with Joint Director, IARI, Dr. Tiwari, and some assistants (entomologist and plant pathologist) plus Dr. Balram Singht (Head, Division of Genetics, IARI) and Dr. S.S. Yadav (Chickpea Breeder, IARI). Dr. Tiwari explained the history, staff structure (22 departments, 800 scientists, 5000 employees), land base (1200 acres) and functions of the IARI. The mandate is research, training and extension. The School of Crop Improvement (a division within IARI) is focused on plant breeding and introduction of new cropping practices.

Variety introduction involves 4 years of testing in the All-India Coordinated Trials before seed multiplication begins. Beyond the breeder seed level, seed multiplication is handled by the National Seed Corporation which distributes certified seed. About 250 acres at IARI is devoted to breeder seed multiplication. Entries into the trial may be from IARI sources, private companies, CGIAR centres, etc. Most foreign varieties under test are hybrids. India is considering entering the international plant breeders rights (intellectual property) system, and is thinking about how to bring revenue from breeding back into the public system.

At present, variety registration is not a requirement. Any variety may be sold. They are working toward a system of mandatory entry into trials. Farmers are becoming aware of the benefits of new varieties. Estimates from Dr. Tyagi (lentil breeder) were 15 % use of new varieties, and substantially higher for chickpea.

The group was very interested in the Canadian systems for variety release, farm production practices, and the relationship between farmer sales and brokers purchases. The opinion was expressed that in the Indian system, the farmer was at a definite disadvantage in relationship to the trading system.

The meeting was followed by a field visit to the chickpea breeding project, the lathyrus breeding project and the lentil and pea breeding projects. All field trials were in excellent condition. Arrangements were made to test IARI chickpea lines, and possibly "custom crossing" of chickpea. The major focus was on improved plant type, wilt resistance. Some advanced lines were ascochyta resistant. Nematode resistant lines were also under development. The lathyrus plots were described, including the problems of maintaining low neurotoxin lines.

The pea breeding program focuses on improved plant habit (shorter stature, semi-leafless type) and powdery mildew. Only powdery mildew resistant lines are entered into the trials, thereby eliminating most European germplasm. The program only covers yellow cotyledon peas. "Green peas" refer to vegetable type only. The lentil program is divided into small (16-20 mg), medium (30-32 mg) and "bold" (large > 35 mg). The small size is largely split, while the large is used for decorticating.

2. We visited National Agricultural Cooperative Marketing Federation of India Limited (NAFED) in the afternoon. This is the organization that registers import contracts. Members of NAFED include State cooperatives, district cooperatives and municipal cooperatives. Total membership is 400+. NAFED also enters the market to drive prices up if they fall below the support price. NAFED is interested in both exporting and importing. The organization deals with numerous fruits, grains, spices etc. and is involved in processing facilities for canned fruits, juices, vegetables, and other processed products.

DAY 3 New delhi

Day 3 of the program was cancelled due to security concerns in New Delhi.

DAY 4 New Delhi

1. Newspapers quote daily wholesale and retail prices of all pulse products, whole grain and dhal.

We visited retail establishments that sell pulses in dry packs of 1 kg and other processed pulses. Prices at the Khendriya Bazar (chain market outlet for government employees) were:

Decorticated red lentil	9.6 rupees per kilo
American dry green peas	16.7
Split pigeon pea	13.6
Whole red lentil	9.2
Split desi chickpea	12.1
Whole desi chickpea	11.5
Whole kabuli chickpea	14.1

Super Bazar

American dry green peas	19.65 (poorer quality than Khendriya)
Split desi chickpea	13.45
Decorticated red lentil	10.85
Fresh green chickpeas	22.00
Fresh frozen green peas	22.50

At Super Bazar, canned white kidney beans in tomato sauce, canned "fresh" green peas (?) were available as well as a variety of pulse based snack foods. Pakoras (deep fried pulse based fritters) were sold as street snacks all over Delhi. At the hotel, the menu featured the "Old Time Favourite" , a lentil burger which was a deep fried patty filled with lentil, potato, onion and spices. Delicious.

2. Secretary of Agriculture, Mr. M.S. Dayal, New Delhi

In the afternoon, we had a formal meeting with M.T. Dayal, Special Secretary, Ministry of Agriculture, Dr. B.M. Sharma, Joint Commissioner (Pulses), Ministry of Agriculture, and Dr. K.R. Rao, Senior Processing Technologist, Technology Mission on Oilseeds and Pulses.

Total pulse production estimated at 14 million tonnes of which 5 million tonnes are chickpeas (40%) and 2.8 million (25%) tonnes of pigeon peas. Other major crops include lentils and peas. The total pulse production is expected to be approximately 14 million tonnes this year.

Indian production is divided into rabi (winter) and kharirf (summer). Production is primarily on the poorer non-irrigated land. Average yields are 600 kg/hectare. Pulses are not given a high priority. Officials are expecting a bumper pulse crop this year. Expectations were for a large rabi crop this year.

The national pulse program includes the IARI, the Pulses Directorate at Kanpur, extension and financial assistance to promote production. Input cost subsidization may go up to Rs 6 or 7 per kg of seed with priority placed on marginal farms of very small size. Pulses are largely non-irrigated, on marginal lands, are given lowest priority and produce on average 600 kg/ha.

Exports are not restricted but a license is required (in fact this would likely relate to a restriction if exports were threatening domestic supply). The Finance Ministry sets the import duty. The Ministry of Agriculture determines support prices. India is moving toward a more liberalized import system. A 10% duty was considered negligible.

Support price for pulses is 6700 Rs/ or approximately $US 210 per tonne. If prices go below this, NAFED steps in to support price. The Ministry of Finance sets the support price on an annual basis. Support price is set annually with cost of production a major factor in determination.

Whole lentil (30-32 mg class), dehulled (35 mg +) and split (< 25 mg) are considered to be separate market classes with independent price structures.

Dr. Rao had expertise in the processing end, reporting a 65 % splitting efficiency, adding 40 % to the market price. Currently, large mills were reported to be lying idle due to high taxes at the state level. Small millers were able to avoid taxes.

Pulses are now part of the Technology Mission on Oilseeds and Pulses which is a government initiative to encourage domestic crop production. Over the past 5 years oilseed production doubled (from 10 million tonnes to 22 million tonnes) with only a 45 % acreage increase. Production practice improvements accounted for 55 %. As a result, imports declines substantially. Pulses are the next target for this program.

The Secretary reported that "green peas" were reputedly a source of constipation.

No grading system is in place other than F.A.Q. (fair, average quality).

Pulses are sold at the farm level to village scale merchants, brokers, or occasionally to millers or wholesalers at daily markets known as "mundis". In some cases, larger millers or wholesalers may in fact have storage facilities in order to accumulate larger quantities. Some merchants act as financiers of inputs, storage etc. Product is brought to market in bulk, auctioned, and then bagged by the buyer.

3. Ram Gupta, one of the Canadian High Commission's locally engaged commercial officers, mentioned they normally do not become involved in trade disputes. Their role is one of encouraging export of Canadian products by informing both Indian and Canadian traders of the necessary procedures. Several comments were made with traders that some small Canadian companies do not understand the trading system regarding letters of credit. A CIGI course for Canadian exporters may be beneficial.

DAY 5 - Bombay

1. Presentations were made to a reception held for 40 importers in Bombay. One attendee was president of the Pulse Importers Association. They would like to receive a set of the CSCA trade rules. The group included direct buyers and brokers. Most were younger, aggressive traders with an excellent command of the market, English and knowledge of Canadian potential. This visit gave maximum exposure of Canadian potential to the most influential group of buyers.

Presentations in future could be targeted to specific groups based on their technical background and interest.

2. The meeting was followed by a private reception and dinner with Tri-Une Agencies (the Trivedi family), prominent brokers of many products including pulses, and lumber. Bharat Trivedi felt that it was not necessary to place a person in India for Canadian pulse promotion. His proposed scenario was that pricing was the only key, and that information flow on prices and production through the Canadian Consulate would be sufficient.

DAY 6 - Bombay

1. We visited the bulk unloading berths at Jawaharlal Nehru Port Facility. Minimum unload is 15-25,000 MT. Container port is reportedly 90 % in use, bulk at 40 %. Ten bagging lines were in place to service 4 large belt delivery bulk storage sheds. Capacity for bagging was very large. Most is directed to fertilizer business, and will have limited impact on pulse business.

Most pulses arrive at Bombay Port (old facility) where product is handled manually. It is bagged on ship, pulled out by net, moved to warehouses, and wholesaled. Minimum breakage occurs.

2. The afternoon visits were to an old style pigeon pea splitting facility. Labour costs are so low that pigeon pea can be tempered, dehulled, dried outdoors, oiled, split, and redried. Tempering was done in mini-bulks. The entire system is a batch type with an approximately 15 day cycle. When the monsoon season starts the operation refocusses on indoor packaging and milling.

3. The wholesale market for pulses consisted of approximately 250 vendors in approximately 28 large buildings (nominal cost). Stalls are rented from the Bombay Port Trust. We visited one building that stocked all available pulse products, including minor products like black bean, local Austrian winter pea, green cotyledon chickpea, numerous sizes of desi and kabuli chickpeas. Some handled more items, including wheat, rice and other grains. Sales volume was highly variable. Buyer loyalty was common.

Prices (rupees):

US Rumba wholesale	13,500 per MT
semi-wholesale	14,000 per MT (less than 10 bags)
Canadians greens	12,750
semi-wholesale	12,250
Hungarian greens	500 rupee differential

Canadian pea was a poor to average No. 2. US Rumba was No. 1.

Samples were collected for numerous pulse types.

DAY 7 - Karachi, Pakistan

Mr. Waheed Khan, Commercial Officer, Canadian High Commission in Islamabad, gave a briefing as to what to expect, and who we would meet over the next day and a half. He moved to Islamabad in March and his position in Karachi at the Canadian Commercial Office is now filled by Mr. Azhar Kirmani.

1. Our first visit was to the new Secretary of Agriculture for Sindh Province, Mr. Salik Nazir Ahmad. A deficit situation occurs for pulse crop production, particularly chickpea (most important), both desi splits and kabulis. Research on plant breeding is underway. Interest was expressed in soybean production. Consumption per capita was estimated at 6.3 kg (all pulses). Pulses are grown on marginal land, production is static. Low priority is given to pulses because growers receive better returns from cotton, wheat and other export crops. Seed multiplication system is poor, with no system for pulses. Hybrid varieties are under development by Pioneer and Cargill for some grains and oilseeds.

Salinity is an increasing problem and efforts are being made to develop drainage projects. Concern centres on the influence of chloride on existing salinity problems. The use of potash is banned at present because it is believed to contribute to the salinity problem. PPI of Canada is running demos for KCl (muriate of potash in local acronym) with various crops, the trials will attempt to prove that the use of potash is safe. This is a two-year project run by the federal Pakistan Research Corporation.

Marketing is coordinated by individual growers. The government establishes a minimum price for crops. Chickpea support price is about $200 U.S. per MT - other pulses may be higher. Lentil is considered the "malikha" or queen of pulses. Green pea consumption refers to vegetables. Consumption varies according to price. Pulses are considered to be the poor man's food in a country where meat consumption is preferred.

2. The next meeting was with Mr. Kaloodi, a large importer of pulses and other commodities.

Pakistan imports some 100,000 tonnes of chickpeas. (Produced a contract signed with an Australian company for 500 tonnes at $240 US/tonne. Kaloodi is a major importer who supplies to the army, the Utility Store (government run grocery store) and local market.

Major lentil imports are from Burma/Myanmar. Tyson chickpea from Australia. Quality is not good from Turkey (variable size, mix sizes), deemed to be an unreliable supplier.

Imports on own account. Has storage in Karachi, product is brought in bulk to port and bagged before shipment to market/storage.

An import license is required but is deemed a formality. No import duty is applied to pulses.

Wants to have a sample of Canadian products sent to him (Frank Labelle for follow-up).

3. Mr. Mapara & Co.

This firm is a broker (indentor) of numerous commodities. Claimed to have sole rights to import of chickpea from Iran. Sources are mainly Turkey, also from Nepal and Burma (Myanmar). Australia was also mentioned. Estimated imports at 3000 MT per month. Turkey was regarded as an unreliable supplier for delivery and quality.

Import 2000 MT per month of red split lentil and 400 MT per month of yellow splits (China). Green pea requirements in Karachi were estimated at 1000 MT per annum, in conflict with other reports of up to 5000 MT per annum from an importer who had already brought in 2500 MT green peas.

Price for red splits would be attractive at $500 MT in Karachi. This would work if Canadian growers were paid 13 cents per lb and shipping occurred in bulk. About 10 % of lentil imports were in whole form.

Chickpea size was discussed. Preference for 8 mm kabulis. Desi chickpea from Australia was considered to have adequate colour and size for market. At the moment the firm is heavily invested in the export textile business. Rose lentil considered to be similar to Syrian lentil in size and colour of splits, Turkish considered to be darker red. Imports from China of 500-700 MT of red kidney beans per month.

Main interest in green pea shipments would be in November-December time frame. Felt that kabuli chickpea should be as large as possible.

4. We visited a Utility Stores market. This is a chain store that started in 1975 and has grown to 600 outlets country wide. It sells approximately 10 % now of the processed food/supermarket sales. Packaging and branding is done centrally by the organization. Importers may bid for tenders on bulk purchases. Quality and layout of product was good, much better than anything we saw in India. The stores were initially set up by the government to provide competition in the marketplace. We saw small yellow lentil from China on the shelf. Canned green peas (Mitchell and one other brand) were stocked. All product was in 1 kilo bags of poor quality plastic. (This might be an avenue to improving market service by upgrading packaging system).

5. Evening Reception

In the evening, 2 brothers in the indentor trade (Bilal and Anis Majeed), were quite interested in both Rose and Lairds. They had brought in Hungarian green pea, and some U.S. and Canadian greens also (total 2500 MT). They owned one pulse mill in Karachi, and acted as both indentors and sellers.

We also watched the Western Canada Pulse Growers' Association video. In future emphasis could be more product oriented as opposed to being research and production oriented. Attendance was less than anticipated but very good considering the timing of the mission at the tail end of Ramadan. We had a round table discussion with Waheed and Azhar. Waheed expressed the opinion that in a land of meat eaters, there is a possible trend, among the middle class at least, toward diet consciousness. This opens a possibility for premium quality pulses through the supermarket system.

The economy in Pakistan appears to be very dynamic. We also discussed the possibility of moving products through the Khyber Pass into Afghanistan, Uzbekistan, Tadhzikistan and Kazakhstan. This is a natural trade route.

Waheed also discussed the possibility of developing a "brand name" canola marketing strategy in Pakistan. He expressed frustration with the canola industry in Canada on this point. The Canadian industry does not seem to want to focus on the Pakistani oil market. We agreed to follow up on this point later. Consumer surveys in Pakistan were very favourable toward canola. (This survey involved Henning Muendel of Lethbridge Agriculture Research Station.)

DAY 8 - Karachi

1. We visited Haroon Dada of Haji Ahmad Bros. Limited. He provided statistics on production and imports of pulses, supplied by USDA and others. He maintains newsletters on sugar and other commodities that can be brokered. Waheed said that this company is highly information oriented and maintains computer databases for record keeping of supply/demands, imports, production etc. They were one of the first companies to start using computers. Places emphasis on reliable suppliers and contacts.

2. We then visited a Haji Hasham Group that is capable of importing large quantities F.O.B. They have diversified interests in finance, textiles, sugar, tobacco, rice, industrial alcohol, molasses. They have a London office. Price is the key. Also involved in Pakistan trade in central Asia.

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TELEX: 1184116 PALM, 1185942 PALM

MANGESH TRADING PVT LTD
CLAUDE GABRIEL
403, EMCA HOUSE
289, SHEDID BHAGATAINGH ROAD
BOMBAY -400 001
INDIA
TEL: 261 00 07, 261 00 50, 261 271
FAX: 022-2618868

TRI-UNE PRODUCE BROKERS
PRAGNESH R. TRIVEDI
49 MITTAL CHAMBERS
NARIMAN POINT
BOMBAY -400 021
INDIA
TEL: 202 5677
FAX: 202 2102
TELEX: 118 5942

VIJAYKUMAR & CO
ANNA BHAVAN, 4TH FLOOR
87/C BROACH STREET, DANA BUNDER
BOMBAY -400 009
INDIA
TEL: 022-4071857, 022-4076369

TELEX: 011-73048 PRI IN

ANNEX IV CONTACTS - KARACHI

ABDULLAH (PRIVATE) LTD.
SHEIKH AKHTAR HUSSAIN
IV-C-2, NAZIMABAD
KARACHI
PAKISTAN
TEL: 625748, 621974, 628219

ABDULO WAHID ABDUL MAJID (PVT) LTD.
ABDUL WAHID HAJI MAHOMMED
DIRECTOR
AKHUND A REHMAN STREET
SHARIF MANZIL JODIA BAZAR
KARACHI -74000
PAKISTAN
TEL: (92-21) 2414782, 241557
FAX: (92-21) 2416853
TELEX: 21106 AWAM PK

AGRICULTURE RESEARCH SINDH
DR. I.M. BHATTI
HYDERABAD
PAKISTAN
TEL: 26843, 25602

BILAL MAJEED
BOMBI IMPEX/MAJEED SONS
PULSES INDENTORS/PROCESSORS
NO. 11-12 HM CENTRE MURAD KHAN ROAD
JODIA BAZAR, KARACHI -74000
PAKISTAN
TEL: 2432417, 2420736
FAX: 92-21-2410824
TELEX: 20894 SIDIO PK

CANADIAN HIGH COMMISSION
WAHEED KNAN
COMMERCIAL OFFICER
DIPLOMATIC ENCLAVE,
ISAMABAD,
PAKISTAN
TEL: 211101
FAX: (92-51) 211541
TELEX: 5700 DOCAN PK

CANADIAN HIGH COMMISSION
AZHAR KIRMANI
COMMERCIAL OFFICER
SUITE 136, BEACH LUZURY HOTEL,
M.T. KHAN ROAD,
KARACHI
PAKISTAN
TEL: 552211
FAX: (92-21) 551175
TELEX:

GOV'T OF PAKISTAN, MINISTRY OF AGRI.
MUHAMMAD ANWER MALIK
DIRECTOR FOOD
BLOCK 66,
PAKISTAN SECRETARIAT,
KARACHI
PAKISTAN
TEL: 5686116

TELEX: 20111 MINFA PK

GOV'T OF SINDH
SALIK NAZIR AHMAD
SECRETARY, AGRICULTURE AND WILDLIFE
PAKISTAN
TEL: 2630977, 2635742
FAX: 2634760

HAJI AKMAD BROTHERS (PRIVATE) LTD.
HAROON DADA
MANAGING DIRECTOR
21 B.S.C.H. SOCIETY
KARACHI -74400
PAKISTAN
TEL: 441674-6, 441683, 441685
FAX: 92-21-438288

KALOODI INTERNATIONAL (PVT) LTD
ABDULLAH KALOODI
MANAGING DIRECTOR
IST FLOOR, AMIR MANZI RAMPART ROW
KARACHI
PAKISTAN
TEL: 2419279, 2433192, 2432623-4
FAX: 2417098

MAPARA AND SONS (PVT) LTD
ABDUR REHMAN M. MAPARA
DIRECTOR
CPO BOX 6267
3/27 ARKAY SQUARE, SHAHRA-E-LIAQUAT
KARACHI
PAKISTAN
TEL: 2422671-74
FAX: 92-21-241-9580
TELEX: 21128 MAPRA PK

MAPARA ENTERPRISES (PVT) LTD,
PAKISTAN TRADE PROMOTERS
ASAN SHAFIQ BARI
DIRECTOR
MANDVIWALA BUILDING,
SERAI ROAD
KARACHI
PAKISTAN
TEL: 2422671-74, 239843
FAX: 92-21-241-9580
TELEX: 21128 MAPRA PK

RASUL
MIAN MAHMOOD HASAN
MANAGING DIRECTOR
ALTAF HUSSAIN ROAD, NEW CHALLI
KARACHI
PAKISTAN
TEL: 2415121, 2419869, 2422963
FAX: 021-2431635

ANNEX V OTHER INFORMATION SOURCES

1. India - Pulses. A report prepared by the Canadian High Commission, New Delhi, India. Available from Asia Pacific South Trade Development Division, External Affairs and International Trade Canada (EAITC). (613) 996-0917

2. Import of pulses and lentils in Pakistan. A report prepared by the Canadian High Commission, Islamabad, Pakistan. Available from Asia Pacific South Trade Development Division, External Affairs and International Trade Canada (EAITC). (613) 996-0917

3. General information on India's economy, political situation, importing procedures, etc. is available from Asia Pacific South Trade Development Division, External Affairs and International Trade Canada (EAITC). (613) 996-0917

4. The Agri-Food, Fisheries and Resources Division of External Affairs and International Trade Canada (EAITC) (613) 995-1712 is familiar with the Canadian crop production and supply situation and acts as a liaison between industry and the External Affairs and International Trade Canada and its Embassies and High commissions abroad.

5. The International Programs Directorate, Agriculture Canada (613) 993-6671 can provide information and statistics on Canada's exports to India and Pakistan.

6. Canada India Business Council can provide information on doing business in India - ph (613) 238-4000 fax (613) 238-7643.

7. Canada Pakistan Business Council can provide information on doing business in Pakistan - ph and fax (514) 488-3979.

8. For visas contact the High Commission for India ph (613) 744-3751 or fax (613) 567-3213 and the High Commission for Pakistan ph (613) 238-7881 or fax (613) 238-7296.

India (Republic of)

New Delhi

Canadian High Commission

Street Address:
7/8 Shantipath,
Chanakyapuri,
New Delhi 110 021,
Republic of India

Mailing Address:
P.O. Box 5208,
New Delhi, Republic of India

Cable: CANADIAN NEW DELHI
Tel: **(011-91-11) 687-6500**
Telex: (Destination code 81)
031-72363 (031-72363 DMCN IN)
Fax: (011-91-11) 687-6579

Territory: India, Bhutan, Nepal

Office Hours: Mon-Thurs: 0830-1730;
Fri: 0830-1300

Major Holidays: (1992/93) Oct 5,
Oct 12, Dec 25-28; Jan 1, Jan 26,
Apr 9-12, Sept 6, Oct 5, Oct 11,
Dec 27-28

Time Difference (E.S.T.): +10 1/2

Mr. John L. Paynter
High Commissioner

Mr. Robert Vanderloo
Counsellor (Commercial)

Mr. Michael Dungate
Second Secretary (Commercial)

Mr. Ramesh C. Kamo
Senior Commercial Officer

Mr. Ram Gupta
Commercial Officer (Agriculture)

Mr. Viney Gupta
Commercial Officer

Mr. Ashwani Nanda
Commercial Officer

Bombay

Consulate of Canada

Street Address:
41/42, Maker Chambers VI,
Jamnalal Bajaj Marg,
Nariman Point,
Bombay 400 021,
Republic of India

Mailing Address: (same as above)

Tel: **(011-91-22) 287-5479/287-6027**
Telex: 11-85122 (COC IN)
Fax: (011-91-22) 287-5514

Territory: States of Karnataka,
Maharashtra, Gujarat, and Goa

Office Hours: Mon-Fri: 0900-1730

Major Holidays: (1992/93) Dec 25-28;
Jan 1, Mar 19, Apr 9-12, May 24,
July 1, Sept 6, Oct 5, Dec 27-28

Time Difference (E.S.T.): +10 1/2

Mr. David Dix
Consul and Trade Commissioner

Mr. D.P. Vittal Nath
Commercial Officer

Mr. Ram Narain
Commercial Officer (Agriculture)

res. (011-91-11) 379-3475

res. (011-91-11) 367-2506

res. (011-91-11) 367-2728

Pakistan (Islamic Republic of)

Islamabad

Canadian High Commission

Street Address:
Diplomatic Enclave,
Sector G-5,
Islamabad,
Islamic Republic of Pakistan

Mailing Address:
G.P.O. Box 1042,
Islamabad,
Islamic Republic of Pakistan

Cable: DOMCAN ISLAMABAD
Tel: (011-92-51) 211-101-4
Telex: (Destination code 82) 5700
(5700 DOCAN PK)
Fax: (011-92-51) 211-540

Territory: Pakistan, Afghanistan

Office Hours: Sun-Thurs: 0800-1600

Major Holidays: (1992/93) Dec 27-28; Mar 23, Apr 5, Apr 19-20, July 1, July 12, Sept 27, Dec 27-28

Time Difference (E.S.T.): +10

Mr. Louis A. Delvoie
High Commissioner

Mr. Brian McKay
Counsellor (Commercial)
res. (011-92-51)213-041

Mr. Ahsan ul Haq
Commercial Officer

Mr. Waheed Kahn (Agriculture)
Commercial Officer

Karachi

Canadian Commercial Office

Street Address:
Beach Luxury Hotel, 3rd Floor,
M.T. Khan Road, Karachi, Pakistan

Mailing Address: (same as above)

Tel: (011-92-21) 552211
Telex: 23899 AVARI PK
Fax: (011-92-21) 551175

Mr. Azhar Kirmani
Commercial Officer