



IndiaFood

FOODS, BEVERAGES & INGREDIENTS DIGEST
December 2008 / January 2009

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IndiaFood Executive Summary is published every 2 months by:

Publisher

Hindustan Studies & Services Ltd.

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In the last issue we presented an overview of Indian economy. Global financial developments have surely influenced economic fundamentals of India. However, the effect has been moderate. Indian economy's growth rate is likely to drop to around 7 per cent. This macro-economic picture is indeed rosy in today's world.

In this issue, we take a quick look at every major sector of food & beverage industry and see how the sector is likely to be influenced by the global financial tsunami and by the slower rate of growth of Indian economy.

Exports

Developed countries are primary destinations for Indian exports. So it is understandable that India's exports are likely to decline. However, the good news is that Asian and African markets are aggressively procuring relatively cheaper products from countries such as India. When buyers look for value-for-money products, glossy American and European brands lose some of their sheen. This will benefit India. Data available shows that in recent months fall in exports has been negligibly small.

Aquaculture

India's marine sector is facing the heat. With buyers defaulting on payments or asking for more discounts, exporters in the sector, are scraping the barrel just to stay alive. Leading markets like the US and Europe have cut down on consumption. Seafood export to US markets is down 17 per cent (in rupee terms) while exports to Europe witnessed a 6 per cent-decline during the April-October period of the 2008-09, when compared to that of the same period of the previous fiscal. Indian marine sector needs to redefine its markets and take some new initiatives.

Dairy

With increased milk production in Australia and a simultaneous decrease in global demand, milk powder prices have come down dramatically in just one year. The prices are expected to fall further. India has now turned buyers' market, as domestic milk powder majors do not have any big export orders. Milk powder prices in India are now hovering between Rs. 110 and 125 per kg compared to as high as Rs. 140 around the same time last year.

Dairy sector will need to focus more on domestic consumption instead of exports. Indian dairy companies with strong brands and market shares of domestic market will see healthy growth rates, while companies dependent on exports will face difficult times.

Poultry

Fresh outbreak of the dreaded bird flu disease of poultry at Hajo in Kamrup (Rural) district of Assam has hit export of poultry products. This is the fifth major outbreak of this fatal poultry disease in the country since February 2006. Fortunately, this time there is no panic among domestic consumers. Hence, demand and prices have remained stable. Poultry exports have always been insignificantly small and therefore reduction in exports will not affect the industry as a whole. Notwithstanding the developments on global financial markets, Indian poultry industry will continue to grow at a healthy pace.

(Continued on next page)

Alcoholic Beverages

United Spirits has registered a volume growth of 18 per cent in April-December 2008, despite the market slowdown. By and large, Indian liquor industry will be insulated from the financial crunch. There may, however, be some adverse effect on the sales of high-end spirits brands.

Tea

The tea industry is headed for a significant production shortfall towards the end of the season, indicating higher prices. Consumption in 2008 is pegged at 825 mio kg, exports at 200 mio kg, imports at 20 mio kg and production at 962 mio kg. The figures indicate a shortfall of around 43 mio kg. In 2007, the cumulative deficit was around 2 mio kg.

Tea exports are unlikely to be affected in any significant way by the global financial developments, though rising prices may have an adverse effect. Domestic consumption will continue to grow as before.

Coffee

In bad times, when people cannot afford to go out and have expensive wine, they remain at home and drink tea / coffee. Consumption of tea and coffee does not go down in difficult times. Exports are related to production figures, inventory levels and speculative sentiments rather than on any changes in consumption pattern.

Indian coffee seems to be immune to global financial meltdown as foreign exchange through annual coffee exports is likely to touch Rs. 24 bio for the first time in 2008. Exports during the January - December 24 period in 2008 touched Rs. 23.96 bio (USD 572.02 mio), posting an increase of 26 per cent from Rs. 18.97 bio (USD 458.89 mio) reported in the same period a year ago.

Retail

As stock markets in Mumbai and other places around the world crashed, they brought down the real estate market also. Rentals for retailers have dropped by as much as 40 per cent in key cities across the country even as mall owners are devising alternative survival strategies to beat the slowdown. Worse, rentals are expected to drop further in the next six months in key metropolises, experts say.

The fall in rentals should have been good news for Indian retail majors. But they are not seen rejoicing. Organized retail in India is suffering from overcapacity. Moreover, many new modern retail outlets were targeting employees of sectors such as IT, BPO, KPO etc, which are severely affected by global financial developments. As a result, organized retailers are also facing the heat.

Snacks / culinary items

Both these sectors are domestic-market-driven. Hence, the effect of financial developments is likely to be minimal, though some high-end products may see a slower growth.

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Sugar

India may soon be producing less sugar than it needs for domestic consumption, for the first time in four years. Current estimated output could be anywhere between 18 mio tons and 21 mio tons. The average domestic consumption of sugar in India hovers around 22-23 mio tons. India may have to import sugar to meet the shortfall. Lower prices of the commodity in global markets will help India.

Oils

India is a major importer of edible oils. India's edible oil import is likely to shoot up 73 per cent by 2020. The deficit between demand and supply in edible oils, to be bridged through imports, will surge to 8.1 mio tons from the current 4.71 mio tons.

Total export of oilmeals during April-November 2008 period registered 3.315 mio tons from 2.307 mio tons in the same period last year, posting an increase of 44 per cent. The rise was due to increase in exports of soya meal, rape oilmeal and groundnut meal. Exports of oilmeals are mainly to countries of Asia. So no change is expected on account of financial developments.

Spices & Flavors

Within the broad category of spices and flavors, some spices are viewed as essential, while some others are viewed as luxuries. This perspective also changes from country to country. It seems pepper is seen as a luxury in many developed countries. Hence, demand for pepper from the EU and the US has fallen after the global financial slowdown.



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In spite of the problems being faced by pepper exporters, spice exports from India have increased 15 per cent in rupee value and 6 per cent in quantity during April-November 2008 against the corresponding period of the last year. In dollar terms, the increase is 6 per cent. India's exports of coriander and cumin seeds, in the first nine months of 2008-09, shot up 77 per cent and 49 per cent, respectively, in value terms.

Even in case of pepper the absence of export demand has not led to a free fall in prices due to strong domestic demand.

Foodgrains

India is an exporter of rice – basmati as well as non-basmati. Faced with domestic pressures, the government has been making efforts to reduce exports. In 2008, government had imposed restrictions on rice exports. At the end of January, some of the export restrictions have been eased.

India has in the past imported wheat. It does not seem likely that India will need to import wheat in 2009. But if the need does arise, depressed commodity prices in international markets will surely be helpful to India.

India is a large importer of pulses. This will continue in the future too with imports growing steadily.

Fruits and Vegetables

India's export of fruits and vegetables is a small percentage of the country's domestic consumption. However, for some commodities exports have become significant.



This is especially true in case of onions. During 2006-07 India exported about 1.38 mio tons of onions out of a production of about 9.5 mio tons. Major importing countries are Bangladesh, Malaysia, UAE, Sri Lanka, Nepal, Singapore, Bahrain, Mauritius, Saudi Arabia, Indonesia, Kuwait, Oman, Qatar etc. There is no significant effect of financial crunch on any of these countries. Moreover, onions are seen as an essential and not a luxury in most countries. Hence, onion exports will not be affected by financial slowdown.

India's fruit exports are also primarily to Asian countries. Exports of fruits to Europe and USA are a small portion of the overall fruit exports. So, overall impact of global financial tsunami on fruit exports will be insignificant.

Anil Chawla

Food Industry Overview

- Standard & Poor's, in its latest outlook for the Asia-Pacific markets, has estimated that India's real GDP growth will moderate to 6.5-7.0 per cent in 2009 even as consumer price based inflation will thaw to 5.0-5.5 per cent.
- Nomura has cut its estimate for India's gross domestic product growth in 2008/09 to 6.8 per cent from 7.2 per cent, and expects 2009/10 GDP growth to slow to 5.3 per cent from its earlier estimate of 6.9 per cent.
- Insurance and financial services provider Allianz's economists expect India's GDP to grow at 6.5 per cent as against China at 7.5 per cent.
- India's economy would grow at a slower pace than expected earlier in fiscal 2008/09 due to the global credit crisis and a slowdown in some sectors, think tank Centre for Monitoring Indian Economy (CMIE) has said. CMIE now forecasts the economy growth at 7.5 per cent in the fiscal year ending in March, lowering it from an earlier estimate of 8.2 per cent.
- Preparing the country for a lower growth of around seven per cent in current fiscal due to the global crisis, the Mid-Year Review of the economy has said the decline in commodity prices will help bring down the inflation to "normal levels" by March 2009. "We should be prepared for growth in 2008-09 as a whole to be around seven per cent" because the crisis in industrialized countries is bound to have impact on the world economy, the review tabled in Parliament said.
- India's economy is expected to grow 7 per cent in the fiscal year to March 2009 despite the global slowdown, and will maintain a "strong pace" of expansion in coming years, the Prime Minister said.
- Indian economy may go into deflation by the second quarter of financial year 2009-10 as there are fears of inflation going below zero per cent in the face of unprecedented fall in crude and commodity prices, HDFC Bank's Deputy Head of Treasury said.
- Centre for Monitoring Indian Economy (CMIE) has revised its forecast for industrial production growth in 2008-09 from 6.3 per cent to 4.5 per cent indicating a downward trend.
- The next six months of the year are likely to see "sharper slowdown" in the country's export, which has already entered into the negative zone in the backdrop of slump in demand in developed economies, a global credit rating agency said.
- Even as India's exports decline, India-African bilateral trade is projected to grow by over nine times from USD 26 bio now to USD 150 bio by 2012, according to an estimate by a leading business chamber.
- Agricultural and Processed Food Products Export Development Authority (Apeda) feels the exports will grow in absolute terms due to higher demand from Asian and African markets that are aggressively procuring relatively cheaper products from countries such as India. This is significant at a time when other major exports are slowing down.
- Area under organic farming in the country has expanded over seven-fold in the last five years to cross the half-a-mio hectares mark in 2007-08. Exports of organically produced products, too, have surged over four-fold to touch Rs. 3 bio, up from just around Rs. 730 mio in 2003.

Aquaculture

- Gujarat Fisheries Central Cooperative Association Limited has approached several municipal corporations in the state seeking allotment of land for construction and development of 'fish malls'.
- With buyers defaulting on payments or asking for more discounts, exporters in the commodities and marine sector, which cumulatively bring in revenues of more than Rs. 140 bio per annum, are scraping the barrel just to stay alive.
- The USD2-bio seafood export industry is likely to struggle for survival as leading markets like the US and Europe have cut down on consumption. Seafood export to US markets is down 17 per cent (in rupee terms) while exports to Europe witnessed a 6 per cent-decline during the April-October period of the 2008-09, when compared to that of the same period of the previous fiscal.
- To enhance the quality of shrimp exported from India, Marine Products Export Development Authority will set up a world-class Common Pre-processing Centre at Ambalappuzha in Alappuzha district of Kerala in partnership with Seafood Exporters Association of India.
- In an important move that can be termed as positive to Indian seafood export industry, the US Customs and Border Protection, under the Department of Homeland Security has initiated action to abandon the enhanced bonding requirement on shrimp imported to that country.

Dairy, Meat & Poultry

- With increased milk production in Australia and a simultaneous decrease in global demand, milk powder prices have come down dramatically in just one year. The prices are expected to fall further. India has now turned buyers' market, as domestic milk powder majors do not have any big export orders. Milk powder prices in India are now hovering between Rs. 110 and 125 per kg compared to as high as Rs. 140 around the same time last year.
- US-based ice cream maker Snowberry USA Inc is venturing into the Indian organized ice cream market with a planned investment of USD 50 mio (about Rs. 2.50 bio) for setting up 1,000 parlours and kiosks across the country by 2010.
- Vadilal Group, one of India's oldest and largest ice cream makers, is expanding its manufacturing and marketing network to the eastern and north-eastern States. The company, having an annual turnover of about Rs. 2.50 bio, including export of frozen foods worth Rs. 350 mio, is setting up a plant with an investment of Rs. 200 mio in Kolkata.
- Chennai-based Hatsun Agro Product Ltd is doubling its ice cream output with a mio-litre-a-month factory at Salem (Tamil Nadu). Hatsun Agro produces and markets ice creams under the brand Arun Ice Creams.
- Fresh outbreak of the dreaded bird flu disease of poultry at Hajo in Kamrup (Rural) district of Assam is expected to hit export of poultry products though it may not have much impact on the domestic market, feel poultry experts. This is the fifth major outbreak of this fatal poultry disease in the country since February 2006.
- Poultry prices across the country have dropped by around 25 per cent-30 per cent in the last one month following a fresh outbreak of bird flu, this time in northeastern state of Assam. (17 Dec)
- Bhutan has banned import of poultry and its products including poultry feeds from neighbouring Assam and West Bengal in wake of outbreak of avian influenza in these states.

(Dairy, Meat & Poultry continued on next page)

Dairy, Meat & Poultry (Continued)

- Gujarat is all set to give the country its first Livestock Policy. Aiming to increase the consumption of protein from current 10 gm to 20 gm per day among Indians over a decade, the policy also intends to organize the scattered dairy, livestock and poultry sectors in the state and enhance supplementary income of rural farmers and strengthen their self-sustenance capabilities.
- Wadia group is looking to renegotiate the price of Groupe Danone's stake in Britannia Industries following market slump and credit squeeze in global markets.

Alcoholic Beverages

- Tilaknagar Industries, the spirits company known for its Mansion House brandy, is setting up a Rs. 800-mio grain-based distillery at Ahmednagar in Maharashtra. The distillery will have a capacity to produce 100,000 litres a day.
- Like Scotch whisky from Scotland, champagne from France and Tequila from Mexico, Feni will soon become India's own drink from Goa. If everything goes well, it will not be long before Feni is assigned a Geographical Indication Certificate.
- United Spirits, a group firm of Vijay Mallya's UB Group, has merged Tamil Nadu based, Rs. 5-bio Balaji Distilleries into itself in an all-stock deal to strengthen its presence in Tamil Nadu. The merger, valued around Rs. 4.20 bio, will be effective from April 1, 2009.
- France-based Belvedere Group, the world's second-largest vodka producer, is poised for India foray through the travel retail channel. The bio-dollar-plus company, with significant interests in the duty-free trade globally, is working on a deal with one of India's independent spirits and wine distribution companies, Kyndal.
- United Spirits is rolling out its new launches — Romanov Red in the premium vodka category and the recently acquired Pinky Vodka, a super premium category brand, which it bought from the US-based Liquidity Inc.
- Khoday India, a Bangalore-based liquor maker, has said it will soon undertake a capacity expansion by acquiring a bottling plant in Scotland and tying up with 18 bottling facilities in India. The Rs. 2.50-bio distiller is hoping to double its capacity to nearly 1.5 mio cases per annum from the current 0.7-0.8 mio in the next three years.
- Nashik-based brewer Valle de Vin expects to sell 1 mio bottles of its home-grown white, red and rose wines in the next five years.
- French spirits giant Pernod Ricard's second largest selling brand in India—Imperial Blue Whisky—has seen its production and sale put on hold in Andhra Pradesh after it failed compliance norms in random quality checks. The state excise department has effected a ban pending an enquiry, as a possible worker sabotage dealt a blow to the company in the country's biggest spirits market.
- Liquor major United Spirits has launched rum and whiskey in 90 and 60 ml PET single-use packs, respectively in Karnataka and Maharashtra, on a test basis.
- Radico Khaitan has commissioned its second grain-based distillery, set up with an investment of Rs. 1.36 bio, in Aurangabad, Maharashtra.

(Alcoholic Beverages continued on next page)

Alcoholic Beverages (Continued)

- European Union (EU), which lodged a complaint at the World Trade Organization (WTO) against certain fees and taxes imposed on imported liquor by Goa and Maharashtra, has now aimed its guns at Karnataka government. According to a recent consultation request filed by the EU at the WTO, Karnataka too is applying discriminatory taxes against imported wine from the EU, which need to be removed.
- The United States has decided to join the European Union in its complaint against domestic taxes and fees imposed on imported wines by the state of Karnataka at the World Trade Organization.
- Global economic slowdown and Mumbai terror attacks have adversely impacted Indian hospitality sector and year-end wine sales. As most hotels are downplaying their year-end celebrations, many winemakers are observing a drop in sales, which usually rise during this season.
- Indian liquor industry witnessed a cache of premium alcohol brand launches in the year 2008. The brands vary from wines to single malt whiskies, and are priced up to Rs. 250,000.
- Indian liquor industry, which claimed to be insulated from the financial crunch, seems to have developed pessimism over their sales in the year 2009. Though companies are planning a number of launches in 2009, they are doubtful whether they can achieve as much sales in 2009 as they did in 2008 due to the global economic slowdown which has reflected in the sales of high-end spirits brands.
- Bacardi Ltd, the name synonymous with white spirits, is setting its eye on Indian whisky market with launch of its high-end renowned single malt Scotch whisky brands such as Dewars and Aberfeldy. Single malt whisky consumption in India is expected to reach 34,000 cases in 2008 from 25,000 cases sold in 2007.
- Beer major InBev is planning to set up a greenfield facility in North India and is also working on making its brands available in more states, including Maharashtra, by June. The new unit (for producing beer) will either come up in Haryana or Rajasthan, with an investment of around Rs. 700-800 mio excluding land costs.
- After its entry-level Zinzi wine, United Spirits' wine subsidiary Four Seasons Wines Limited will launch mid-priced and premium ranges of wine in 2009.
- United Spirits, the world's third-largest spirits company, has registered a volume growth of 18 per cent in April-December 2008, despite the market slowdown. It sold 73 mio cases during the financial year ending March 2008.
- Vijay Mallya-promoted United Spirits has begun bottling of Scottish whisky Whyte & Mackay Special in India.
- Champagne Indage, the country's oldest wine maker, is now Indage Vinters, severing the last of its French connection. The name change was affected last month following the promoter family acceding to the demand of the Champagne Appellate Authority, which protects the name.
- Indage Vinters, formerly Champagne Indage, has signed a three-year contract with Foster's to bottle the latter's wine brands at the Indage-owned winery in Britain.
- The GBP 200 mio valuation of the UK-based Cobra Beer, which is up for sale, may deter suitors like United Breweries from making a strong bid for the company.
- Cobra Beer founder Lord Karan Billimoria is scouting for a partner to steer the Indian arm of the brewing enterprise out of losses.

(Alcoholic Beverages continued on next page)

Alcoholic Beverages (Continued)

- Beam Global Spirits & Wine Inc, the fourth-largest premium spirits company in the world, is bringing its renowned brands, such as Laphroaig, Jim Beam, Ardmores and Sauza, to retail outlets in India. The company's Indian arm, which has gained a lion's share of its revenues from Teacher's whisky, is extending focus to the newly launched brands in India.
- Domestic wine industry is facing problems of protectionist taxation by the two big manufacturing and consuming states, Maharashtra and Karnataka. Karnataka has followed Maharashtra's lead and hiked duties on non-locally produced wines to 300 per cent per bulk litre.
- Lalit Khaitan family has approached global drinks giants who are keen on a big stake in their flagship Radico Khaitan. India's second-largest spirits company, makers of 8PM whisky and Magic Moments vodka, could attract early interest from Bacardi and Pernod Ricard, as it seeks a strategic partner to take the business forward.
- Rajasthan government is contemplating to close around 3000 liquor shops across the state.

Non-alcoholic Beverages

- Aujan Industries, a privately-owned independent soft drink and confectionery manufacturer in West Asia, has launched a juice drink Rani in India. The drink will be available in four flavors — orange, peach, pineapple and mango.
- Tata Group, the nation's second-biggest business group, said it is scouting for acquisition in the beverage and retail sectors to grow their respective businesses.
- Ravi Jaipuria-promoted RKJ Group, one of the largest soft drink bottlers in the country, is in talks with Japanese major Toyo Seikan Kaisha to form a joint venture (JV) to manufacture cans for soft drinks and beer. The Japanese partner, who will hold the majority stake in the 74:26 JV, will invest around USD 50-60 mio, said a merchant banker with direct knowledge of the proposed deal.
- Rasna Private Ltd is going to launch around 40 big and 100 small Devil's Workshop retail outlets in each of Delhi and Mumbai. To begin with, the company will enter these two cities, and next in line would be Bangalore and Hyderabad followed by others.
- Beverage major Coca-Cola India is readying an extensive roll-out of products for this year. The exercise will kick off next month with a fortified low-priced powder drink Vitingo (an orange-flavored beverage powder with micronutrients), which will be followed by a phased launch of global energy drink Burn in the next quarter. The company is also working on introducing a lemonade later in the year.
- PepsiCo India is all set to launch its own branded offering of the humble *nimbupani* (lemonade).

Tea

- Tata Tea's branded tea shop Chai Unchai's expansion plans will be delayed by 6-8 months following the economic turbulence and slump in the real estate sector. Chai Unchai's tea shops were launched in Bangalore in January 2008.
- Tea production has increased by 3.7 per cent and tea exports have gone up by 10 per cent during the January-October period when compared to the figures of the same period in the previous year.

(Tea continued on next page)

Tea (Continued)

- The tea industry is headed for a significant production shortfall towards the end of the season, indicating higher prices. According to a status paper released by Indian Tea Association, consumption in 2008 is pegged at 825 mio kg, exports at 200 mio kg, imports at 20 mio kg and production at 962 mio kg. The figures indicate a shortfall of around 43 mio kg. In 2007, the cumulative deficit was around 2 mio kg.
- Tea exports in 2009 are likely to hover around 200 mio kg, registering a marginal increase over last year's export of 189 mio kg.
- Sapat International, a Mumbai-based tea company, is understood to be talking with EPIC, a private equity firm in the UK, to buy out its stake in Whittard, an upmarket tea and coffee retailer in the UK, according to investment banking officials.
- Duncans Tea, the flagship division of the Rs. 20 bio Duncan–Goenka Group, is foraying in the super premium packaged tea category of Darjeeling Tea with two brands. With the two new brands, Duncans Darjeeling Tea and Indian Treasure, the company is aiming for 5 per cent market share in the premium category over the next one year.

Coffee

- Since the beginning of the world economic crisis in September, the monthly average of the International Coffee Organization (ICO) composite indicator price declined by almost 15 per cent. The monthly average of ICO composite indicator price touched record high at 138.82 cents per lb in February 2008 but it tumbled to 108.31 cents per lb in October, a 14-month low, due to the ongoing economic crisis.
- Indian coffee seems to be immune to global financial meltdown as foreign exchange through annual coffee exports is likely to touch Rs. 24 bio for the first time in 2008. According to statistics available with state-owned Coffee Board, exports during the January - December 24 period in 2008 touched Rs. 23.96 bio (USD 572.02 mio), posting an increase of 26 per cent from Rs. 18.97 bio (USD 458.89 mio) reported in the same period a year ago.
- Exports of Arabica coffee rose 16 per cent to 46,598 ton during the January-November period, while Robusta exports remained almost steady at 104,255 tons. Arabica is mainly used in premium coffees, while Robusta is typically blended with Arabica beans as a lower-cost option for brewed coffee, or processed into instant coffee.
- Export price of Indian coffee has shot up 26 per cent in the past 11 months to Rs. 109,000 a ton against Rs. 86,707 a year ago.
- Coffee cultivation in non-traditional areas has expanded by 8 per cent to cross 50,000 hectares in 2008-09 compared to previous year's levels. In India, the non-traditional coffee growing areas are in Visakhapatnam and east Godavari districts in Andhra Pradesh, southern districts in Orissa (bordering Andhra Pradesh) and north-eastern states.
- TATA Coffee, India's largest green coffee producer, has handed over marketing and distribution functions of its instant coffee brands to group company Tata Tea. The move will see the coffee brands, Mr. Bean and Coorg Pure, ride on the back of Tata Tea's formidable distribution network.
- Cafe Coffee Day, part of the Bangalore-based Amalgamated Bean Coffee Trading Company Limited, is planning to spend Rs. 1.20-1.50 bio for expansion during next year to take its number of cafes to around 1,000 from the current 700.

Food Service & Retailing

- Rentals for retailers have dropped by as much as 40 per cent in key cities across the country even as mall owners are devising alternative survival strategies to beat the slowdown. Worse, rentals are expected to drop further in the next six months in key metropolises, experts say.
- Retail majors are charting out new expansion plans in metros for January 2009 onwards, following the 20-25 per cent drop in retail rentals.
- New York-based global pizza chain Famous Famiglia is all set to enter the multi-mio dollar Indian quick service restaurant market with a chain of outlets under the franchise model. The company would be opening its first outlet at the Bangalore Airport this fiscal and is planning to target transit locations, besides major metros during the initial phase.
- Food and beverages company JSM Corp, which owns the exclusive franchise for the Hard Rock Cafe chain in India besides hi-end restaurants such as Shiros and IndoChine, is planning to expand its presence in the metros and introduce new formats and cuisines.
- Metro Cash & Carry, the German wholesale major, said it plans to invest Rs. 9 bio in Punjab to set up six distribution centres.
- Mumbai-based food and grocery retailer Wadhawan Food Retail Private Ltd is planning to expand its footprint. The company, which owns three food and grocery retail chains including Spinach, Sabka Bazaar and Smart, and a home decor and lifestyle chain, The Home Store, has 200 stores across India at present. The plan is to take the number of stores up to 800 in the next couple of years.
- RPG group company Spencer's Retail plans to scale up its hypermarts chain to 400 and is targeting a turnover of Rs. 12.5 bio by March-end. The company also said it would continue to pursue its existing expansion plans and that the global economic meltdown would not impact it significantly. In FY'08, Spencer's clocked a turnover of Rs. 8.20 bio.
- Spencer's Retail Limited is renewing its focus on hyper format stores this fiscal as a part of its expansion strategy, as it feels that segment has been less affected by the current economic downturn.
- Lite Bite Foods is looking to set up food courts on highways, under its high street food court brand Food Union Clix! It has already started setting up food courts of 5,000 sq. ft offering six brands on 'high streets'. Now, it is headed to the highways. The company is promoted jointly by Dabur's Mr. Amit Burman and Mr. Rohit Aggarwal and Mr. Tejpavan Gandhok.
- DLF Brands, the retail management subsidiary of real estate firm DLF, is planning a major expansion with an aim to have 600 stores and bring around 15 international labels in the country by 2012-13, which could entail an investment of Rs. 7.50 bio.
- Big Bazaar, the major retail chain of hypermarkets from the Kishore Biyani-promoted Future Group, has plans to open 48 new hypermarkets in Maharashtra in the next two years.
- Subhiksha Trading Services, a food and grocery chain, said it plans to raise debt to run its existing operations and expand business amid speculation of troubled times. The Chennai-based retail chain's decision to raise funds comes amid reports of defaults on payments to suppliers and also failure to pay salaries to employees, which Subhiksha has denied.
- Hit by the economic downturn, Subhiksha Trading Services said it would renegotiate rentals with real estate players, amid allegations, by some property owners, of default in rent payment by the retailer. The retail major is also considering relocation of some of its stores from the 1,600-odd total, across the country due to low sales volume and high rentals.

Snacks

- Wadia group's plans to buy out its joint venture partner Groupe Danone's stake in Britannia Industries has been put on hold because of its inability to raise resources to fund the deal, according to informed sources.
- ITC has launched two new variants of its finger food snack, Bingo — *Hatke Jhatke Funky Masala* and *Hatke Jhatke Tomato Twist*. While the former is a mixture of exotic Indian spices and the later is a combination of juicy tomatoes with spices and sprinkling of chilies.
- In a bid to take on its archrival ITC Foods, Frito-Lay India has opted for an Indianized branding strategy by launching 'Desi Beats', as part of its flagship snack brand Kurkure's brand portfolio. With this move, PepsiCo is now directly competing with ITC Bingo's Mad Angles. In appearance, Pepsi's new brand 'Desi Beats' is an exact replica of Bingo's Mad Angle.
- A bitter legal battle between two branches of the Chauhan family-controlled Parle Group shows no signs of abating after one faction threatened to challenge a court ruling that allowed its rival to use the Parle trademark for its businesses.
- The Rs. 14-bio Delhi-based Shakti Bhog Food plans to enter the biscuit and chips market with an investment of Rs. 700 mio.

Culinary Items

- The EUR 7.7-bio Oetker Group, one of the largest family-owned firms in Germany, is going to acquire Fun Foods and VRB Foods, makers of pizza toppings and mayonnaise, for Rs. 1.10 bio. The acquisition would be routed through the German group's Indian arm.
- Kohinoor Foods Ltd, leading ready-to-eat food product manufacturer, has tied up with a US-based retail chain Target Corporation for marketing authentic Indian food products in America.
- Dabur India has announced the extension of its Hajmola digestive range with the launch of a new variant – Hajmola Pudina. The new Pudina variant comes after the success of Hajmola's regular, *imli* (tamarind) and the recently-introduced *nimbu* (lime) flavors.
- Nestle's Maggi instant noodles may soon be advertised as a healthy food for the entire family. Nestle India is learnt to be creating a new image for its iconic noodle brand. This is to fulfill a pledge of advertising only foods with clear diet benefits to kids below 12 years from January 1, 2009.
- Arecanut farmers across major growing areas in Karnataka and Kerala are in distress following fall in prices of the commodity in wholesale markets in both states. Prices of red arecanut have fallen 26 per cent to Rs. 85 per kg and white arecanut has seen a drop of around 18-20 per cent to Rs. 65 per kg towards the end of December 2008 and early January 2009 compared to the same period last year.

Sugar

- Sugar mills in Maharashtra, India's biggest producer, plan to import at least 1 mio tons of raw sugar as a reduction in crop area cuts sugar cane output. Mills have sought government permission to buy raw sugar from countries including Brazil.
- Maharashtra's sugar production this year is expected to drop by nearly half over its production of last year. Cane shortages have forced several mills to stay shut so the season is also expected to be shorter and mills are expected to finish crushing by mid-March.

(Sugar continued on next page)

Sugar (Continued)

- Confidence Petroleum on Monday said it has acquired 80 per cent equity stake in Garg Distilleries, an unlisted, closely-held ethanol manufacturing unit, for an undisclosed amount. Confidence also said it has acquired Laxmi Nirmal Petrochemicals situated near Pune, and which is also engaged in the manufacturing of ethanol, with an installed capacity of 21,600 kilo litres.
- India may soon be producing less sugar than it needs for domestic consumption, for the first time in four years. Government sources said current estimated output could be anywhere between 18 mio tons and 21 mio tons. The average domestic consumption of sugar in India hovers around 22-23 mio tons.
- Uttar Pradesh, India's second largest sugar producer, is planning to privatise or completely sell-off 33 state-owned sugar mills in an effort to reduce the burden of the loss-making units.
- Sugar manufacturer Bajaj Hindusthan Ltd hopes to break even if average prices hold above Rs. 20 a kg in 2008-09, a senior official said. India's biggest sugar miller posted a net loss of Rs. 501.7 mio in the year to September 2008 on weak sugar prices due to a supply glut in India, but expectations of a lower crop in 2009 boosted hopes of firm prices in the period.
- State-run Hindustan Petroleum Corporation Limited has signed an agreement with the Bihar government to buy two sick sugar mills.

Oils

- India's rapeseed crop for 2009 may surge by two-thirds to a record as farmers plant more to cash in on higher prices, a trade official said. Rapeseed output was expected to jump to 7.0 mio tons in 2008-09 against 4.2 mio tons a year ago.
- Sowing area under edible oilseeds rose 9 per cent in the current Rabi (harvesting in February-April) season on account of extended monsoon rainfall, the latest estimates from the apex body representing the oil industry.
- Edible oils supply in the country from domestic production is tipped to rise 3 per cent in the current year, which has just started off a month ago.
- India's edible oil import may decline by about 300,000 tons in the current season because the Government is expected to raise customs duties. The import of edible oil is estimated to be 6.005 mio tons in 2008-09 compared with 6.3 mio tons in the previous season, said Godrej International Director Dorab E Mistry.
- India's edible oil import is likely to shoot up 73 per cent by 2020 and may rise further if the current growth of production is not maintained. According to a report by industry body Assocham, the deficit between demand and supply in edible oils, to be bridged through imports, will surge to 8.1 mio tons from the current 4.71 mio tons.
- Import of edible oils increased sharply by nearly 80 per cent to 2.024 mio tons during October-December 2008 compared to 1.125 mio tons in the same period last year, thanks to sharp drop in international prices and anticipation of levy of import duty by the government.
- After Indonesia blacklisted 30 Indian vegetable oil importers last month, it is now India's turn to react to Indonesian, Korean and Vietnamese oilmeal importers who have failed to open letters of credit (LCs) with local banks even after reaching consignments to their respective local ports.

(Oils continued on next page)

Oils (Continued)

- Imports of vegetable oil, which surged abnormally in the last quarter-ending December, are likely to decline by the end of February when harvesting of *rabi* oilseed crop begins.
- Total export of oilmeals during April-November 2008 period registered 3.315 mio tons from 2.307 mio tons in the same period last year, posting an increase of 44 per cent. The rise in export was due to an increase in exports of soya meal, rape oilmeal and groundnut meal.
- India's soymeal exports rose sharply by more than 53 per cent during the first three quarters of 2008-09, Soyabean Processors Association (SOPA) said. Exports of soymeal during April - December 2008 went up to more than 3 mio tons against more than 2 mio tons recorded during the same period in 2007.
- In the wake of removal of ban on soybean oil futures trading, Rajkot commodity exchange has moved a fresh application to Forward Market commission to start soybean oil future contract.
- Groundnut oil production in Andhra Pradesh has halved this year due to erratic climatic conditions and competitive prices of other oils. It will source supplies from Gujarat, the largest producer of groundnut oil in India.
- The finance ministry will shortly issue a clarification, stating that olive oil imports will not attract any import duty.
- Higher domestic prices of sesame seed, coupled with the ongoing economic crisis, are likely to hit exports of the commodity. Exporters estimate that sesame seed exports may plummet around 50 per cent during March-April 2008-09.

Food Additives

- Cocoa prices are firming up in the domestic market due to a global shortage of the commodity. Global demand for cocoa is on the rise and renowned chocolate manufacturers are showing more interest in Indian cocoa. Prices of processed cocoa have increased by 20-30 per cent to touch Rs. 102-104 per kg. Organically grown cocoa commands a premium of 10-20 per cent with respect to ordinary cocoa.
- Switzerland-based chocolate manufacturer Chocolate Stella SA signed an agreement with Kerala-based Indian Organic Farmers Company and Kerala Agriculture Development Society for buying 23 tons of cocoa per month.

Spices & Flavors

- A sharp drop in production due to disease and neglect has helped in firming up vanilla prices by almost 100 per cent, traders said. Procurement price of green vanilla beans touched Rs. 135 per kg during November as various institutions replenished their stocks. During the last harvest season, green beans were procured at Rs. 65-Rs 70 per kg. Vanilla prices were languishing below Rs. 35 per kg for long before various farmers' organizations took the initiative to procure, process and market the beans.
- Serious supply crunch coupled with a rise in demand have helped start a bull phase in nutmeg and mace market. Price of nutmeg has appreciated Rs. 20-40 per kg on an average and best quality unshelled nutmeg quoted Rs. 230-240 a kg. Shelled nutmeg is tagged in a range of Rs. 130-140. Best quality mace is fetching a price of Rs. 430-450 a kg.

(Spices & Flavors continued on next page)

Spices & Flavors (Continued)

- Kohinoor Foods has launched a wide variety of spices.
- Spice exports from the country have increased 15 per cent in rupee value and 6 per cent in quantity during April-November this year against the corresponding period of the last financial year. In dollar terms, the increase is 6 per cent.
- Spices exports from the country have shown an increase of 15 per cent to touch Rs. 38.1095 bio during the April-December period this fiscal. The quantity of exports increased by 3 per cent to 334,150 tons during the time as compared to the same period last year.
- Spurred by rising demand, India's exports of coriander and cumin seeds, in the first nine months of 2008-09, shot up 77 per cent and 49 per cent, respectively, in value terms.
- India's seed spice exports skyrocketed by 95 per cent to Rs. 1.168 bio in the first seven months of this fiscal on better price realization and strong demand in the global markets. The demand for Indian seeds soared due to short supply from other producing countries like Syria, Turkey and Iran where production of spice seeds dipped due to crop failure.
- India's black pepper exports have fallen during April-October period of current financial year according to the latest estimates of the Spices Board. A drop of 35.5 per cent had been registered in volume during the period as total exports came down to 14,750 tons from 22,800 tons in the same period of 2007-08. The export earnings registered a drop of 25.5 per cent at Rs. 2.467 bio against Rs. 3.3037 bio in the same period last year.
- A serious slowdown in pepper purchases made by EU and US importers has aggravated a crisis-like situation in the global market. This has resulted in sharp fall in prices. However, demand from northern India has stopped free fall in prices as overseas demand is almost nil. All pepper-producing nations are currently quoting prices below USD 3,000 a ton, but are unable to attract much of the overseas demand.
- Pepper farmers who turned green and took efforts to obtain organic certification are now benefiting from the global economic downturn. Realization from organic pepper is 40 per cent- 50 per cent above the spot market rate for ordinary pepper and combined with the nominal farming cost, farmers are better equipped to deal with the slowdown in demand, traders said.
- India's turmeric output is likely to decline 12-15 per cent this year on extended monsoon rainfall and consequent high moisture content in the fields throughout Maharashtra, Andhra Pradesh and Tamil Nadu. The total output this year is likely to fall to 4.2 mio bags of 80 kg each as against 4.8 mio bags last year. But, the consumption has remained stagnant at 5 mio bags for the last 6-7 years.
- Output of cardamom for 2008-09 is likely to cross 12,000 tons, thanks to late harvest which was aided by favorable climatic conditions, traders said. The harvest may even post a record crop and cross 13,000 tons, if the favorable climatic conditions prevail for more days in the crop-specific regions.
- Spices Board is on course to build spices parks across the country. While the first phase of creating infrastructure for spices parks is almost complete at Chhindwara (MP), Guntur (AP) and Puttady (Kerala), an effort is on to complete the land procurement process for setting up spice parks at Sivagangai (Tamil Nadu), Mehsana (Ahmedabad) and Jhalawar (Rajasthan). All these parks will be set up in public-private partnership with an eye on providing world class facilities for quality upgrade of seed spices and processed spices.

(Spices & Flavors continued on next page)

Spices & Flavors (Continued)

- Crop survey conducted by the directorate of cocoa, arecanut and spices development has forecast that output of pepper during 2008-09 will fall by 10 per cent over the previous year due to erratic weather conditions and disease.
- Diversified business conglomerate ITC is looking to spice up its spices business in a big way. The company is planning to set up modernized processing infrastructure in Rajasthan for grading, sorting and cleaning of seed spices like cumin, coriander and pepper.
- ITC plans to introduce organic spices in the overseas market, in a move to expand the segment in order to garner Rs. 3 bio in the next two years from the division.

Foodgrains

- Wheat acreage in the country, the largest foodgrain grown during the Rabi (sowing in November-December) sowing season, is all tipped to rise by 3 per cent-4 per cent in 2009 due to a good monsoon and remunerative prices. Officials said that if the pace of sowing continued in the coming few weeks, the total area under wheat could be as high as 29.3 mio hectares, up from last year's actual acreage of 28.19 mio hectares.
- India is likely to clock last year's record wheat production of 78.4 mio ton this year too, cashing in on better yield owing to conducive climate.
- Agricultural and Processed Food Products' Export Development Authority (Apeda) has moved the Sindh High Court in Pakistan against the trademark right given by the Registrar of Trademark, Karachi, to Basmati Growers' Association, Lahore, for basmati rice. The registrar, in fact, has allowed only the growers to use the trademark.
- Hit by a lack of export orders, the basmati rice industry has not been able to pay paddy growers, and have arrears to the tune of Rs. 50 bio.
- Government has scrapped its export tax on basmati rice and cut the floor price for overseas shipments from USD 1,200 to USD 1,100 per ton.
- Millions of people in West Bengal and Bangladesh consume toxic arsenic every day not only through potable drinking water, but also by eating staple food rice. Some varieties of rice are swift in sucking arsenic from the soil and thereby creating health problems. The apex research body in the country, Council of Scientific and Industrial Research has done little to fight this menace, its director-general admitted while addressing mediapersons.
- PepsiCo India is planning to sell its decade old basmati brand Season's Harvest to LT Overseas, which has brands like Daawat under its fold, by the end of this year. However, it plans to continue with its contract farming of basmati rice.
- Frozen food exporting firm Temptation Foods has hiked its stake in Kohinoor Foods to about 12 per cent through open market purchase.
- General Mills India has launched a multi-grain wheat flour variety in its Pillsbury *Atta* segment. The *Atta* is a blend of wheat, soy, oats, maize, *raagi*, *channa dal* and barley. The product is currently available in Tamil Nadu and Karnataka.
- India has assured Canada to speedily resolve the issues relating to import of pulses from the North American country, a senior commerce ministry official said. Canada is the largest importing destination of pulses for India. Indian plant quarantine regulations mandate that all consignments entering the country be treated with methyl bromide to eliminate risk of stem and round worms while Canada uses different chemicals for fumigation.

Fruits & Vegetables

- Nashik, the largest grape-growing region in the country, is expected to export 30,000 tons of grapes in the current (December-March) grape season, reflecting a rise of 8.5 per cent over the exports in the previous season.
- National Agricultural Cooperative Marketing Federation (Nafed) has raised the minimum export price (MEP) of onion for December for most destinations by USD25 a ton. A rise in domestic prices of onion in the wake of robust export demand is the key reason for the recent rise in MEP. The MEP for December has been pegged at an average of USD 305-310 per ton.
- The government has let the ban on futures trading in four commodities — potato, soyoil, chana and rubber — to lapse. This development comes after inflation eased to single-digit levels. A four-month ban was imposed on May 6 on futures trading of the four commodities, which was later extended till November 30.
- There is good news for mango growers of Malihabad in Uttar Pradesh! National Horticulture Board will take steps to commercialize the world-famous mangoes of the place with their new geographical indicators (GI) status.
- For farmers in the country's strawberry belt of Mahabaleshwar (Maharashtra) the season has begun well, with an export order for 1,000 tons of 'industrial' grade berry. Industrial strawberries refers to the smaller fruit which is used for making jams, crushes, jellies etc and supply usually begins towards the end of the season, by January end to February.
- Shimla-based Central Potato Research Institute has developed GM potato varieties with the Ama1 gene acclaimed for improved nutritional efficiency, that with RB gene for late blight resistance, and also with the Bt potato for insect resistance. The institute has also developed transgenic potatoes for reduction of cold-induced sweetening. All these GM potato varieties are in advanced stages and ready for limited field trials under the Review Committee on Genetic Manipulation.
- Regional Food Research & Analysis Centre, Lucknow, is gearing up to certify dussehri mango exporters in Malihabad region of Uttar Pradesh. Recently, National Horticulture Board has registered dussehri mango under the Geographic Indication (GI) Act for better marketing and visibility in international market.
- Punjab Agricultural University (PAU) has released a new variety each of cucumber, pumpkin, coriander, turmeric and cauliflower. It also introduced new sowing technology. Among new varieties released are Punjab Samrat (pumpkin), Punjab Sugandh (coriander), Punjab Haldi (turmeric), Punjab Naveen (cucumber) and Punjab Katki (cauliflower). The new variety of cucumber is rich in Vitamin C and is of a better quality. While, the new pumpkin variant would mature early and would be rich in vitamin A. It would also be moderately resistant to mosaic virus, yielding 165 quintals per acre.
- India's potato output is estimated to rise 15.38 per cent in 2008 owing to favorable climatic conditions. The total output of the vegetable is likely to rise to over 30 mio tons in 2008 compared to over 26 mio tons in 2007.
- Despite a slight fall in quantity, cashew export revenue has registered a 40.2 per cent increase and stood at Rs. 20.619 bio in April-November period of the current fiscal. The quantity of exports registered a 2.3 per cent fall to touch 74,773 tons during the April-November period of the current fiscal.

(Fruits & Vegetables continued on next page)

Fruits & Vegetables (Continued)

- Jain Irrigation Systems Ltd has bagged the largest single order for its dehydrated onion and vegetables division to the value of Rs. 270 mio from one of its European customers. The order is for supply of dehydrated white onion in the calendar year 2009.
- Having faced sourcing issues for potato in 2008, PepsiCo is planning to ensure supply by introducing farming equipment and technology and new potato seed varieties to decrease chances of crop loss. It also aims to increase the acreage under contract farming by entering new states across the country.
- With the outbreak of downy mildew being confirmed in both the grape growing states of Maharashtra & Karnataka, domestic consumers should be prepared to shell out at least 20-25 per cent extra for the popular variety of table grapes like Thomson Seedless when the crop hits the market during March-April.
- Bharti Del Monte India Pvt. Ltd, a joint venture between Bharti Enterprises and DMPL India Ltd. (a subsidiary of Del Monte Pacific Ltd.) has become the country's largest exporter of fresh baby corn. The company's total baby corn exports currently exceed 200 tons, all from Punjab.
- Oceanic Edibles International proposes to go in for contract farming (fruits and vegetables) in a big way with 1,000 acres initially during the current calendar year. Last year, as a pilot project, it grew okra (lady's finger), potato, tomato, pumpkin and mango in 50 acres under contract farming and procured them at pre-determined prices.
- The tension between India and Pakistan after the Mumbai terror attacks notwithstanding, potato exports to the neighbouring country has witnessed a significant jump in the last one month. Up to 90 trucks of 15 tons each are crossing the border everyday compared to 10-20 during 2007-08 season. (8 Jan)
- Potato growers in India are staring at a glut in the market and rock bottom prices after Pakistan imposed an import tax that has virtually stopped exports to the neighbouring country, traders said today. Pakistan this week imposed a 25 per cent tax on the import of Indian potatoes in order to help local farmers to get better prices. (19 Jan)
- Potato farmers in the country are suffering huge losses as a bumper crop has sent prices crashing by nearly 50 per cent in major producing states since December last year. Potato production in 2007-08 is estimated at 30.44 mio tons, up 12.65 per cent from 2006-07.

Biotech

- Environment ministry might be planning to bring genetically modified (GM) crops like Bt Brinjal to your plate but Health Minister Anbumani Ramadoss has promised to "continue to oppose" GM foods.
- An independent analysis of Maharashtra Hybrid Seed Company's (Mahyco) Bt brinjal (egg plant) bio-safety data revealed that it was unsafe for human consumption. The study was submitted by a team headed by Gilles-Eric Séralini of France-based Committee for Independent Research and Information on Genetic Engineering (CRIIGEN) which concluded that Bt brinjal might be a serious risk to human and animal health.

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