



The International Organization of Spice Trade Associations

IOSTA Panel

Moderated by Sushama Srikanth
AVT McCormick Ingredients, Pvt., Ltd.

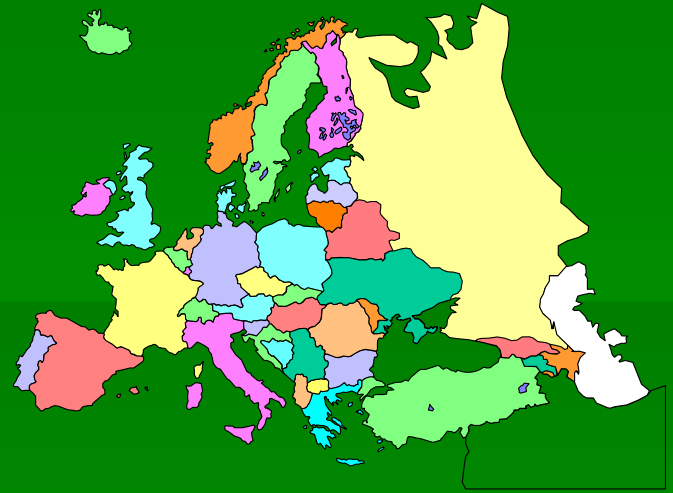
Canadian Spice Trade Association (CSA)

Holly Buchanan



CANADIAN SPICE ASSOCIATION

Roger Clarke



esa

europaean
spice
association

The logo for the European Spice Association (ESA) features the letters 'esa' in a bold, green, lowercase font. The letter 's' is stylized, with a circular inset showing a close-up of various spices, including what appears to be black pepper and other seeds.

european
spice
association



- The European Spice Association (ESA) is a body of National Spice Trade Associations.
- In addition non European associations and individual European companies can be 'Associate' members of ESA.
- The Association was founded in 1984

The 'New' EU



- Austria
- Belgium
- Bulgaria
- Cyprus
- Czech Rep.
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slavonia
- Spain
- Sweden
- United Kingdom

EU Candidate members – Croatia, Macedonia, Turkey



European
Spice
Association

- ESA has a professional secretariat service based in Bonn - Germany

Gerhard Weber

European Spice Association

Reuterstrasse 155

53113 Bonn

Germany

Email: esa@verbacndebuero.de

Website - <http://www.esa-spices.org/>



European
Spice
Association

Full members

- Austria
- Belgium
- Finland
- France
- Germany
- Italy
- Netherlands
- Spain
- Sweden
- Switzerland
- Turkey
- United Kingdom



European
Spice
Association

Associate members

- All Indian Spices Board
- All India Spice Exporters Forum
- Grenada Nutmeg Cooperative
- Sri Lanka Spice Council
- Bulgaria
- Denmark
- Slovakia



The Spice Council



europa
spice
association

Liaison

- American Spice Trade Association
- IOSTA
- World Spice Congress
- International Pepper Community
- International Trade Centre (UN)



esa

european
spice
association

Structure

- President (2 years rotational)
- Vice President
- Technical Chairman
- Vice Chairman
- Working groups
 - Product Information Sheet
 - ESA Futures group
 - Marketing group

The logo for the European Spice Association (ESA) features the lowercase letters 'esa' in a bold, green, sans-serif font. The letter 's' is stylized with a circular inset showing a close-up of various spices, including what appears to be a whole nut and some dried herbs.

european
spice
association

Structure

- Executive Committee
- Technical Committee
- General Assembly



European
Spice
Association

Current topics

- Pesticide Regulation – 1st September 2008
- Ochratoxin
- Biologically Active Principles
- ESA quality minima standard
- Customer information
- Oleoresin paprika
- ESA's ability to be more proactive, influential and quicker to respond.



esa

european
spice
association

Overview

- We recognise that as an 'Association' of 'Associations' that we need to make changes to handle all of future technical, political and legislative issues that come our way on a day to day basis.
- Look forward to your questions – I think!

Spices Board of India



***The Annual Meeting of
The American Spice Trade Association : 2008***

***S Kannan, Director(Mktg)
Ministry of Commerce & Industry, Govt of India***

Target Set

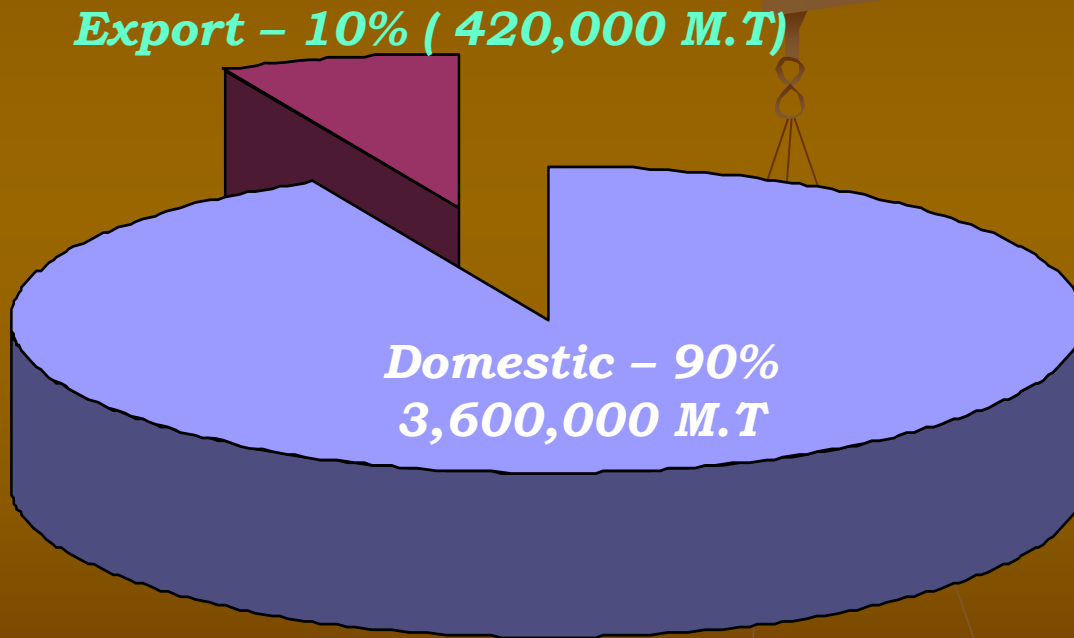
**To Achieve 1 BILLION US \$
Export Earning BY 2010**

Achievement

**Exceeded 1 BILLION US \$
Export Earning BY 2007-08**



Indian Spices Production Vs Exports



Indian Spice Industry

- 
- **Producing over 4 Million M.T of Spices**
 - **Exporting around 170 Spices / Spice Products**
 - **Exporting Spices to over 150 Countries**
 - **3000 Registered Exporters**
 - **515 Manufacturer Exporters**
 - **100 Exporters (4%) Contribute Over 75% of Exports**
 - **98 Units have In-house Laboratories**
 - **20 Spice House Certificate Holders**

Trend in Export of Indian Spices



YEAR	QTY (TONS)	VALUE (MLN US\$)
2003-04	246566	415
2004-05	348524	524
2005-06	350363	593
2006-07	373750	793
2007-08	420000	1070

Export of Major Spices from India

(QTY IN M.T; VALUE MLN US\$)

ITEM	2007 – 08	
	QTY	VALUE
PEPPER	35000	128.63
CARDAMOM(S)	400	4.78
CARDAMOM(L)	1400	3.85
CHILLI	190000	253.56
GINGER	7000	7.12
TURMERIC	48000	37.14
SEED SPICES	78250	121.58
VANILLA	210	4.50
CURRY POWDER	11500	27.76
MINT PRODUCTS	20500	315.53
OILS & OLEORESINS	6400	136.05
TOTAL (Including Others)	420000	1070.00

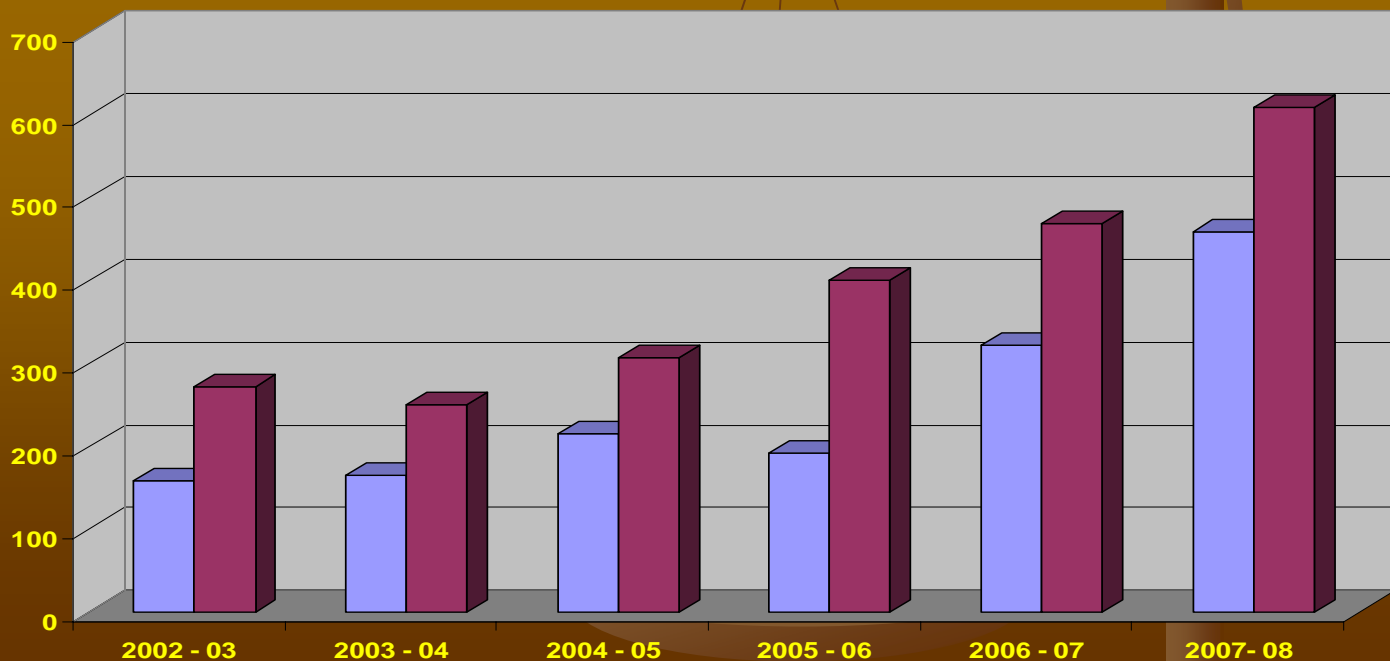


Export of Value Added Spices

Adding Value to Spices.....

Value in Mln US\$

Year	Whole Form	Value Added form
2003-04	165	251
2004-05	216	308
2005-06	192	401
2006-07	323	470
2007-08	460	610



Export of Spices from India to USA

(QTY IN M.T; VALUE MLN US\$)

ITEM	2007 – 08(E)	
	QTY	VALUE
PEPPER	15295	55.70
CHILLI	20330	33.15
GINGER	350	0.64
TURMERIC	2502	2.80
SEED SPICES	6810	12.63
VANILLA	83	1.45
CURRY POWDER	975	2.74
MINT PRODUCTS	3975	67.88
OILS & OLEORESINS	1950	37.30
TOTAL (Including Others)	54000	215.50
% of Total Export	13	20

(E) : Estimates

Growing Destinations

<i>Export Destination</i>	<i>Qty (M.T) 2007 - 08</i>	<i>% Growth in Volume over 2006-07</i>
<i>U S A</i>	<i>54000</i>	<i>14</i>
<i>Bangladesh</i>	<i>47059</i>	<i>12</i>
<i>U A E</i>	<i>34757</i>	<i>12</i>
<i>Sri Lanka</i>	<i>32943</i>	<i>19</i>
<i>Singapore</i>	<i>11048</i>	<i>54</i>
<i>Pakistan</i>	<i>10080</i>	<i>121</i>
<i>Indonesia</i>	<i>9995</i>	<i>34</i>
<i>South Africa</i>	<i>9092</i>	<i>32</i>
<i>Saudi Arabia</i>	<i>8703</i>	<i>20</i>
<i>Germany</i>	<i>7042</i>	<i>13</i>
<i>China</i>	<i>6653</i>	<i>15</i>
<i>Japan</i>	<i>6610</i>	<i>8</i>
<i>Netherlands</i>	<i>5684</i>	<i>17</i>



Current Focus

- *Establish Common Infrastructure*
- *Develop Capability of the Industry*
- *Improve Quality, Consistency & Traceability*





Mr. Michael O Leavitt, Secretary, US department of Health & Human Services and Mr. Andrew, Commissioner, FDA visited a Spice Processing unit at Cochin, India on 9th Jan, 2008





New Initiatives of Spices Board

I. Regional Quality Testing/ Control Laboratories

Proposed at

- *Mumbai*
- *Guntur*
- *Chennai*
- *Delhi*
- *Chhindwara*
- *Kolkata*



New Initiatives of Spices Board

2. Research & Development

- 
- ***Encouraging Research & Development for new technology/products by***
 - (a) Spices Board***
 - (b) Private Exporters***
 - ***Setting up a Centre for Value Addition to Spices***
 - ***Starting Research activities to validate the Medicinal properties of Spices, Clinical trials & Patenting***

New Initiatives of Spices Board

3. Development of Organic Cultivation

- ***Support for Organic Cultivation & certification***
- ***Prepare the North eastern part of the Country as the production hub of Organic Spices viz***

- 1. Pepper***
- 2. Large Cardamom***
- 3. Turmeric***
- 4. Ginger***
- 5. Vanilla***
- 6. High heat/colour Chilli***





New Initiatives of Spices Board

4. Spices Park

It provides infrastructure facilities like

- ***Minimal Processing Centres in Spice growing centres***
- ***Common Cleaning, Grading, Processing, Powdering, Extraction, Sterilization, Packing and Quality testing***
- ***Scientific Storage***
- ***Uninterrupted and adequate power and water supply***
- ***Training on GAP, GMP and quality requirements of Spices to Farmers, Traders, Processors and Exporters***





Investment Opportunity in Spice Parks

- ***Land on long lease***
- ***Duty free import of Capital goods and raw materials***
- ***Import of technology for high end value addition in Spices***
- ***Financial Assistance up to 33% on Capital Goods***
- ***100% foreign direct investment***
- ***Repatriation of Profits***
- ***Technical supports for contract farming / Scientific cultivation of Spices***
- ***Scope for promoting ethnic Indian cuisines in overseas markets***
- ***Facilitate to develop country specific Spice blends, private labeling etc. for export***



New Initiatives of Spices Board

Proposed Locations & Major Crops Covered



<i>Sl No</i>	<i>Place</i>	<i>Crops Covered</i>
<i>1</i>	<i>Chhindwara, Madhya Pradesh</i>	<i>Garlic & Green chilli Extraction</i>
<i>2</i>	<i>Guntur, Andhra Pradesh</i>	<i>Chillies & Turmeric</i>
<i>3</i>	<i>Sivaganga, Tamil Nadu</i>	<i>Turmeric</i>
<i>4</i>	<i>Unjha, Gujarat</i>	<i>Cumin & Fennel</i>
<i>5</i>	<i>Jhalawar, Rajasthan</i>	<i>Coriander & Fenugreek</i>
<i>6</i>	<i>Idukki, Kerala</i>	<i>Cardamom & Pepper</i>



Vision of the Indian Spice Industry

To become the International processing hub and premier supplier of clean and value added Spices and Herbs to the Industrial, Retail and Food service segments of the Global Spices market by meeting the quality requirements

**Achieve 10 Billion US\$ Export
By 2017**



THANK YOU



Vietnam Pepper Association

Mr. Do Ha Nam

Chairman





Vietnam Pepper Association (VPA)





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An overview on Vietnam Pepper Industry

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IPC's meeting



1.About Vietnam Pepper Association.



VPA is a non-government organization established on Dec. 20, 2001.

With 70 members including leading exporters, foreign joint-ventures, service enterprises and scientists.



2. An overview on Vietnam Pepper Industry

1

Production

2

Export figures

3

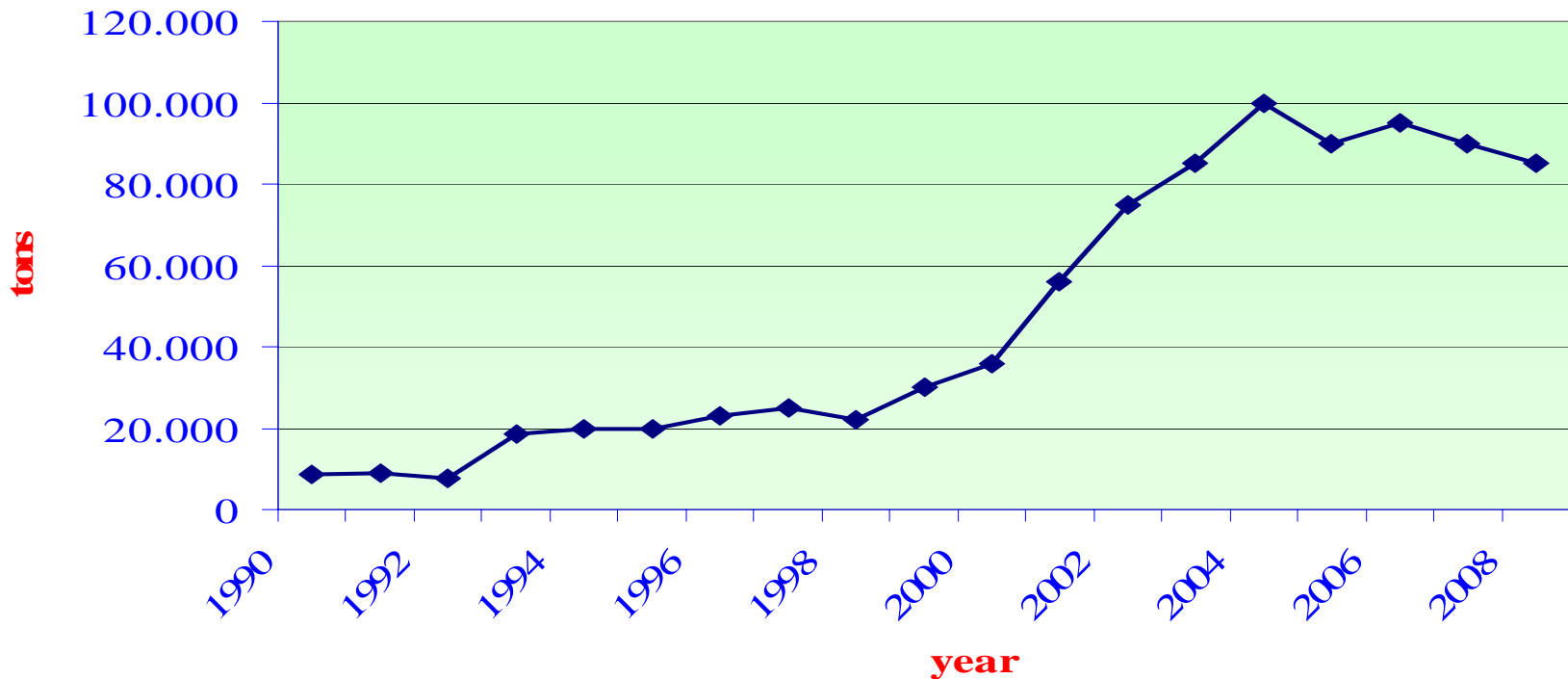
Key export
markets



2.1. Production

Pepper cultivation area was 48.000 hectares in the year 2006, 49.000 hectares in 2007 and is expected at 47.000 hectares in 2008. The average yield of pepper in the whole country is 3-5 tons per hectare.

Production





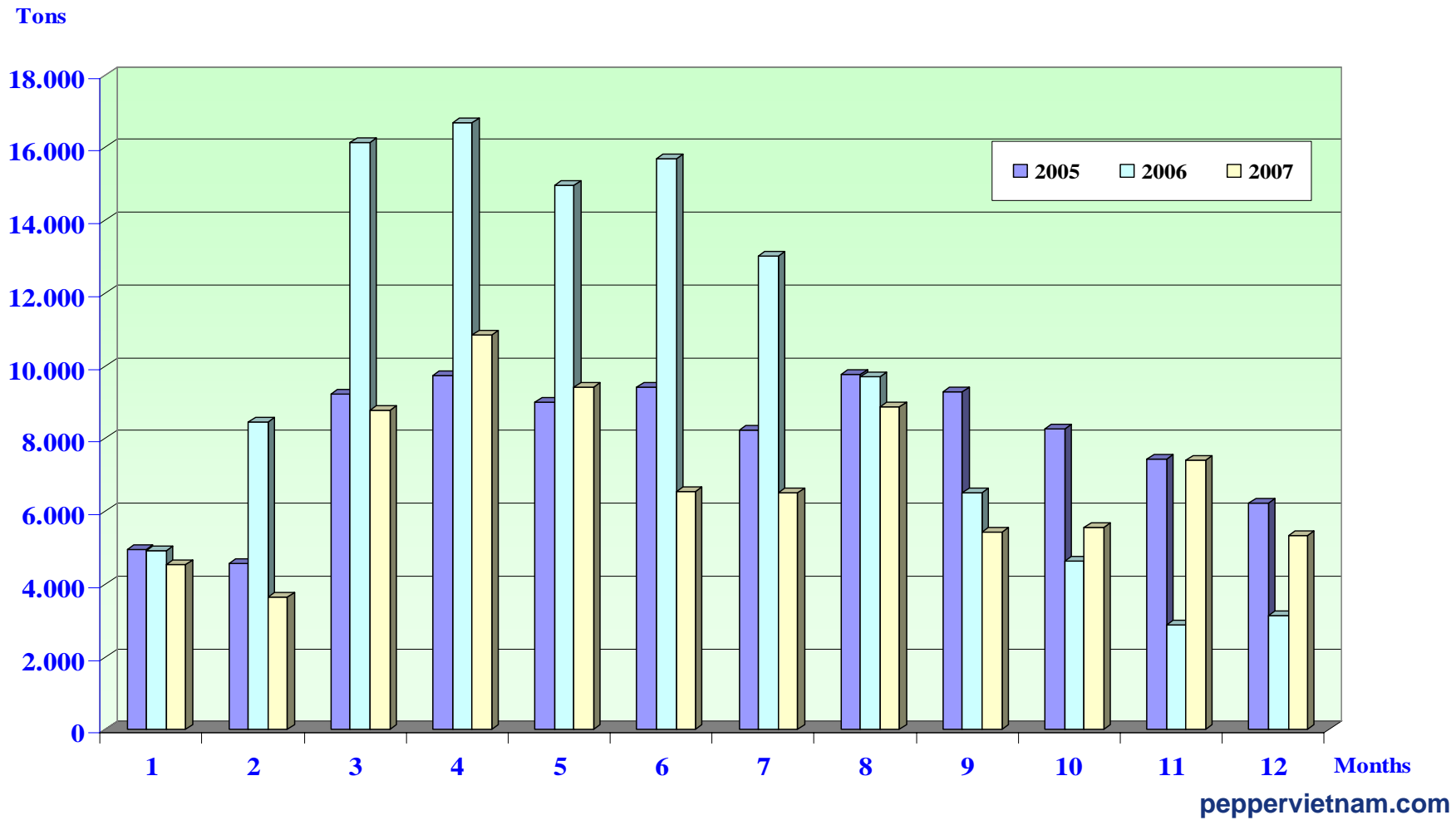
2.2. Export figures through years

EXPORT FIGURES IN THE YEARS 2005 - 2006 - 2007									
Year	2005			2006			2007		
Month	Black pepper	White pepper	Total	Black pepper	White pepper	Total	Black pepper	White pepper	Total
1	4,509	431	4,940	4,296	618	4,914	3,688	697	4,385
2	4,257	299	4,556	7,393	1,050	8,443	2,880	724	3,604
3	8,330	907	9,237	14,516	1,573	16,089	7,445	1,399	8,844
4	8,623	1,111	9,734	14,464	2,216	16,680	9,135	950	10,085
5	8,071	941	9,012	12,592	2,354	14,946	8,439	779	9,218
6	8,248	1,181	9,429	13,343	2,343	15,686	8,267	548	8,815
7	7,493	751	8,244	11,035	1,967	13,002	5,486	289	5,775
8	8,942	837	9,779	7,468	2,230	9,698	8,025	576	8,601
9	8,308	976	9,284	5,331	1,191	6,522	3,841	1,136	4,977
10	7,262	1,012	8,274	3,772	848	4,620	3,952	1,315	5,267
11	6,546	903	7,449	2,127	767	2,894	5,900	1,407	7,307
12	5,644	597	6,241	2,461	715	3,176	4,136	1,070	5,206
Total	86,233	9,946	96,179	98,798	17,872	116,670	71,194	10,890	82,084



2.2. Export figures through years

VIET NAM PEPPER EXPORT THROUGH MONTHS

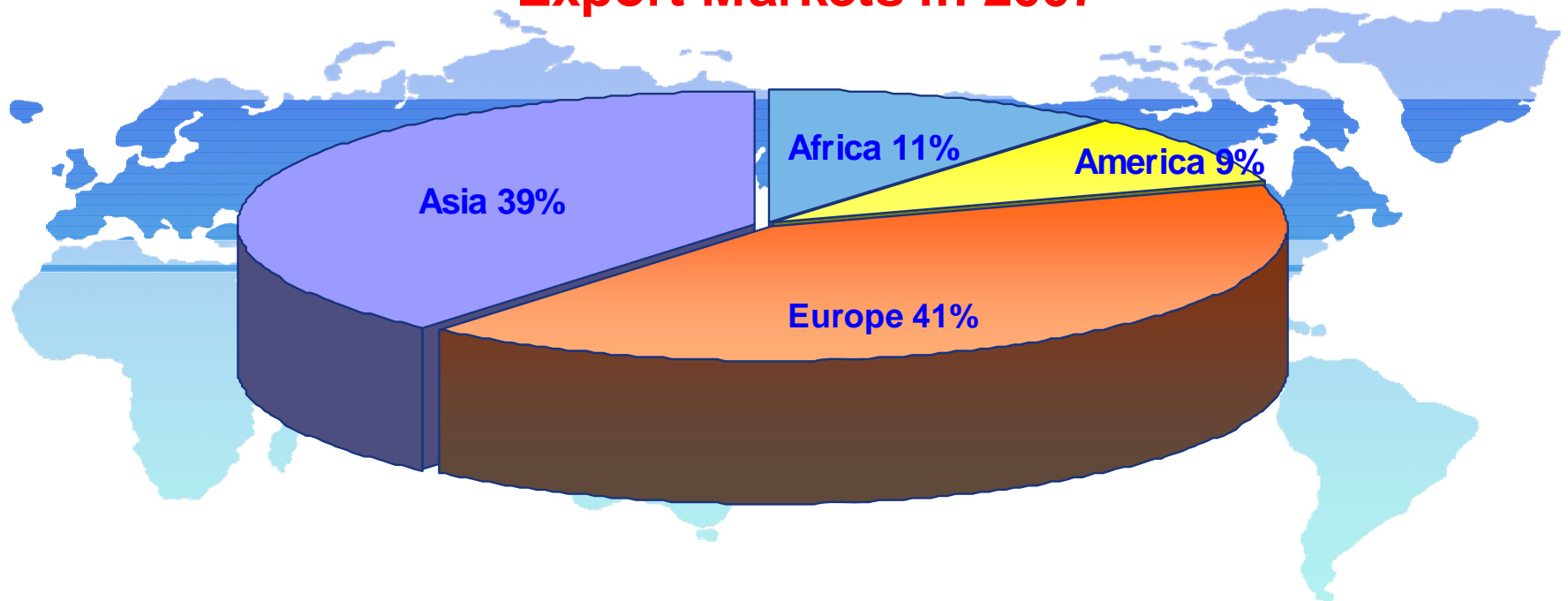




2.3. Key export markets

Vietnam has exported to some 73 countries and regions all over the world.

Export Markets in 2007

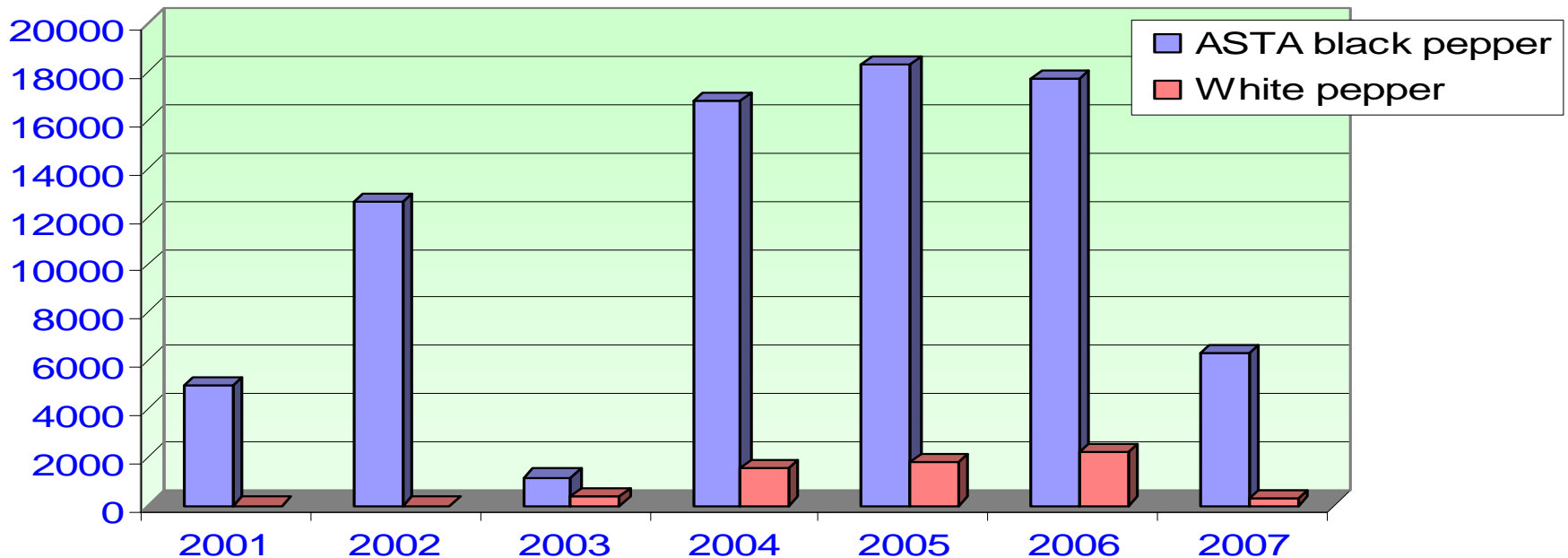




3. Export to the U.S: potentiality and prospects

There are some 15 ASTA pepper processing factories in Vietnam including 100% foreign capital ones. These investors come from Japan, The Netherlands and India. Raw black pepper material is abundant and rich to process and export ASTA pepper to meet the demand of the U.S market. The potentiality and prospects of this item as well as white pepper are very good.

Export figures of ASTA and white pepper through years





3. Export to the U.S: potentiality and prospects

How to boost up the pepper business between Vietnam and the U.S.A

Improving the quality of Vietnam pepper.

Creating good conditions and opportunities for traders from both countries to understand each other better.

Creating a stable and competitive market for exporters and importers as well as assuring the benefit of the farmers.

Co-operating with U.S. investors to set up joint-venture or 100% America companies in pepper industry like Japan, India and the Netherlands.



4. Orientation of development of Vietnam Pepper Industry

Maintain the plantation area around 50,000 hectares and the total production of 100,000 tons annually.

Develop sustainable organic pepper gardens.



5. What to see in November 2008?

36th section and other meetings of IPC taking place in Hochiminh City in November 2008.

Participants are exporters, farmers, spice and pepper associations from producing countries and international importers.

IPC's meeting Exhibition of spice industry

Open tour to plantation area.

Please visit our website at www.peppervietnam.com or www.ipcnet.org for your information.

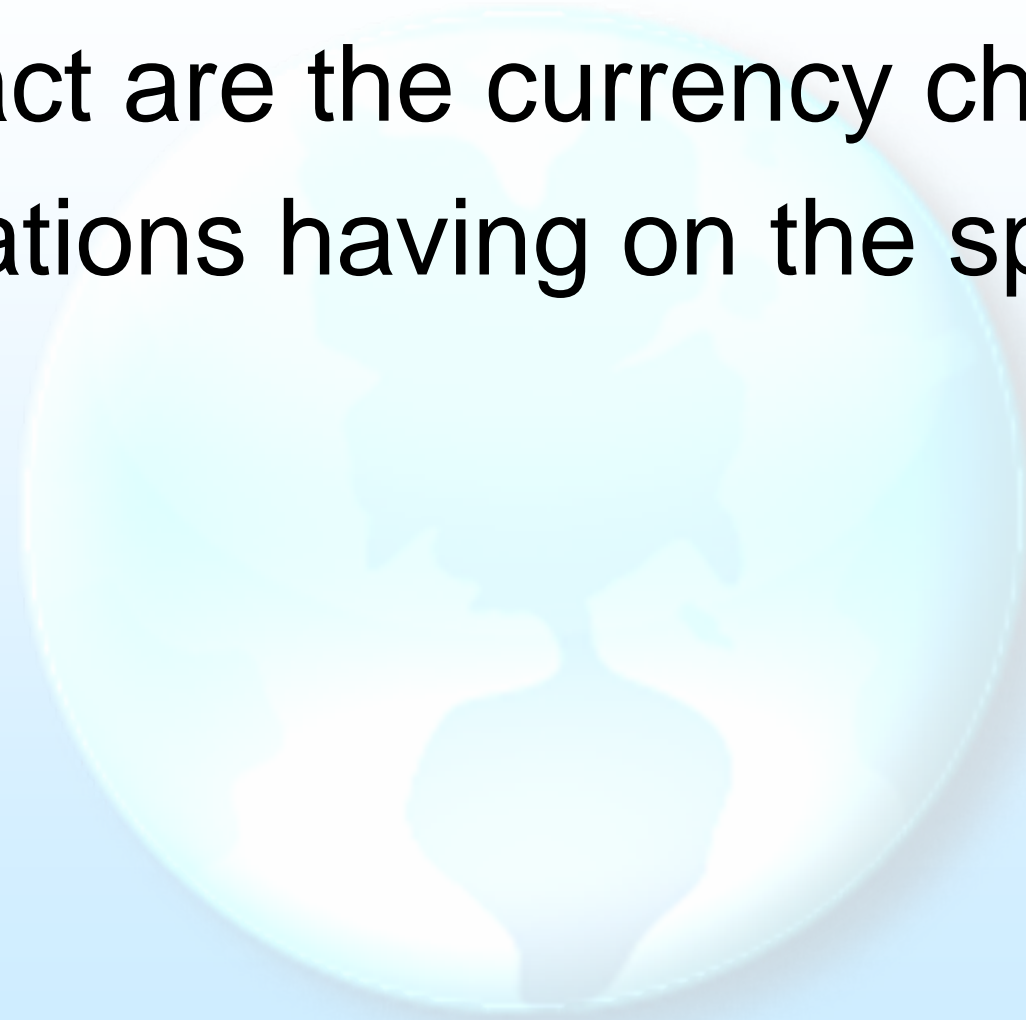


peppervietnam.com

Thank you!

Question to the panel

What impact are the currency changes and fluctuations having on the spice market?

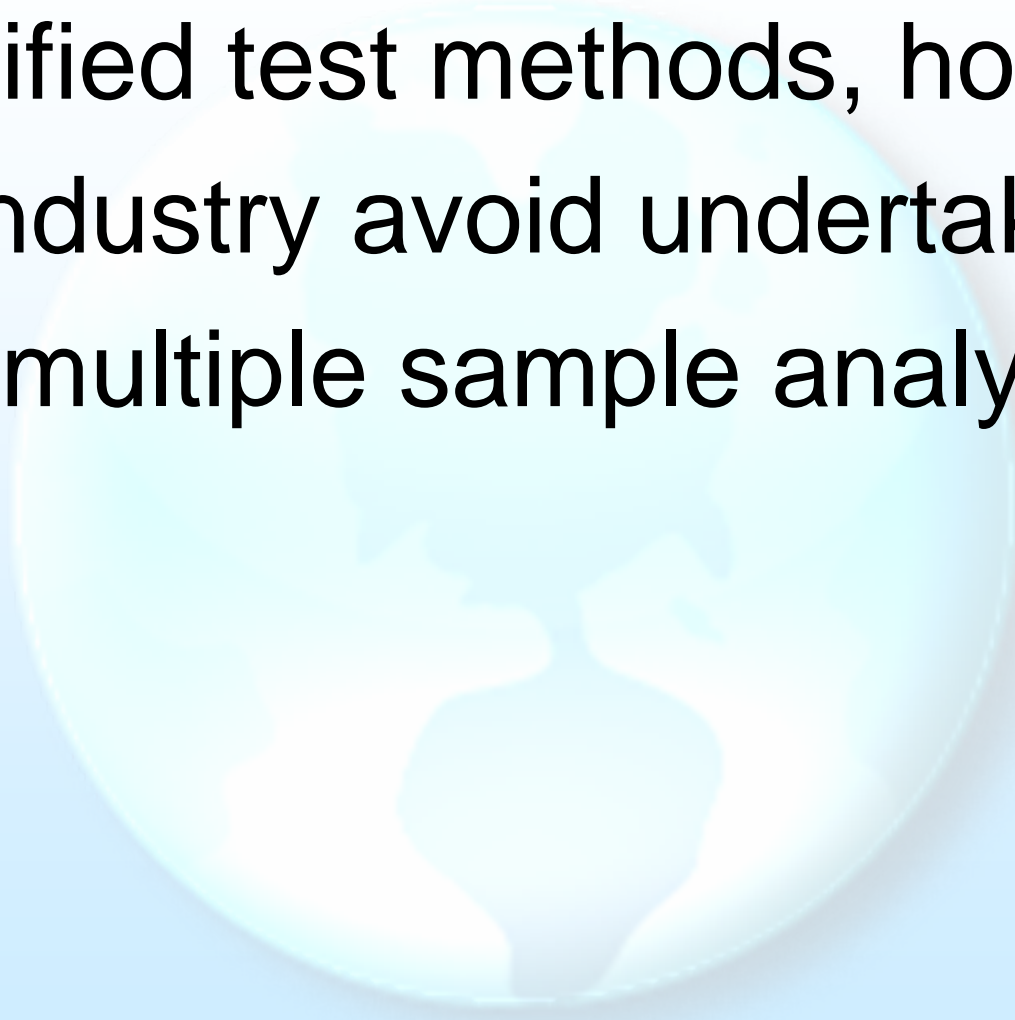


Question to the panel

How does an industry that is dealing with minority crops, afford the time and money to ensure that scientific developments that occur on a monthly, if not weekly basis, are managed correctly at the farm level?

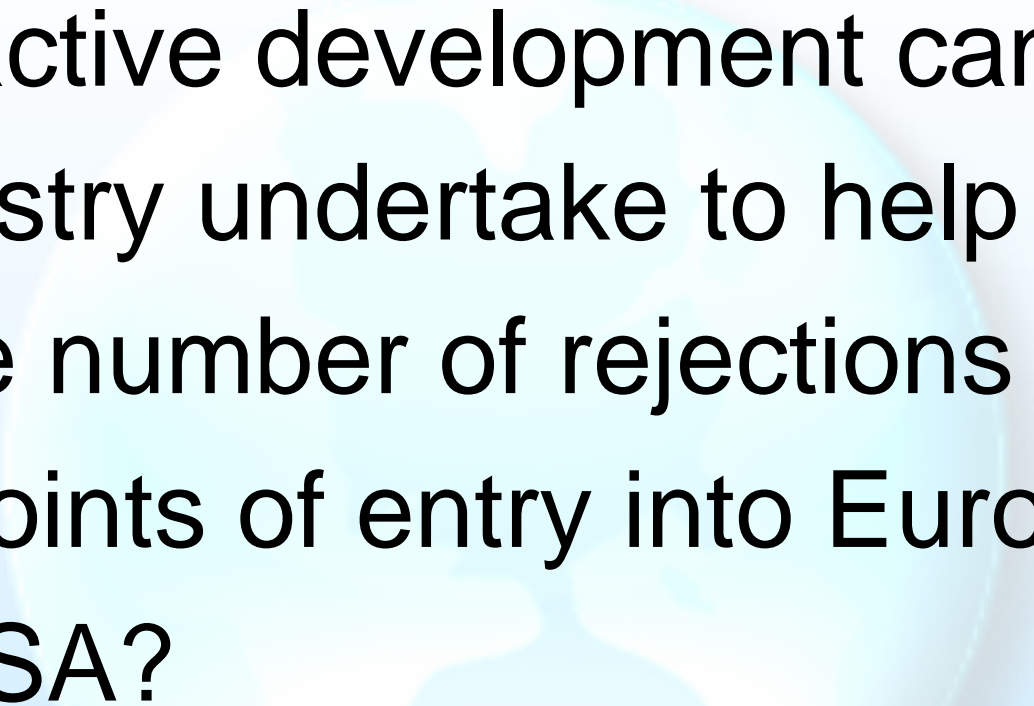
Question to the panel

Without unified test methods, how do we as an industry avoid undertaking costly and multiple sample analysis?



Question to the panel

What proactive development can the spice industry undertake to help reduce the number of rejections that occur at points of entry into Europe and the USA?



Question to the panel

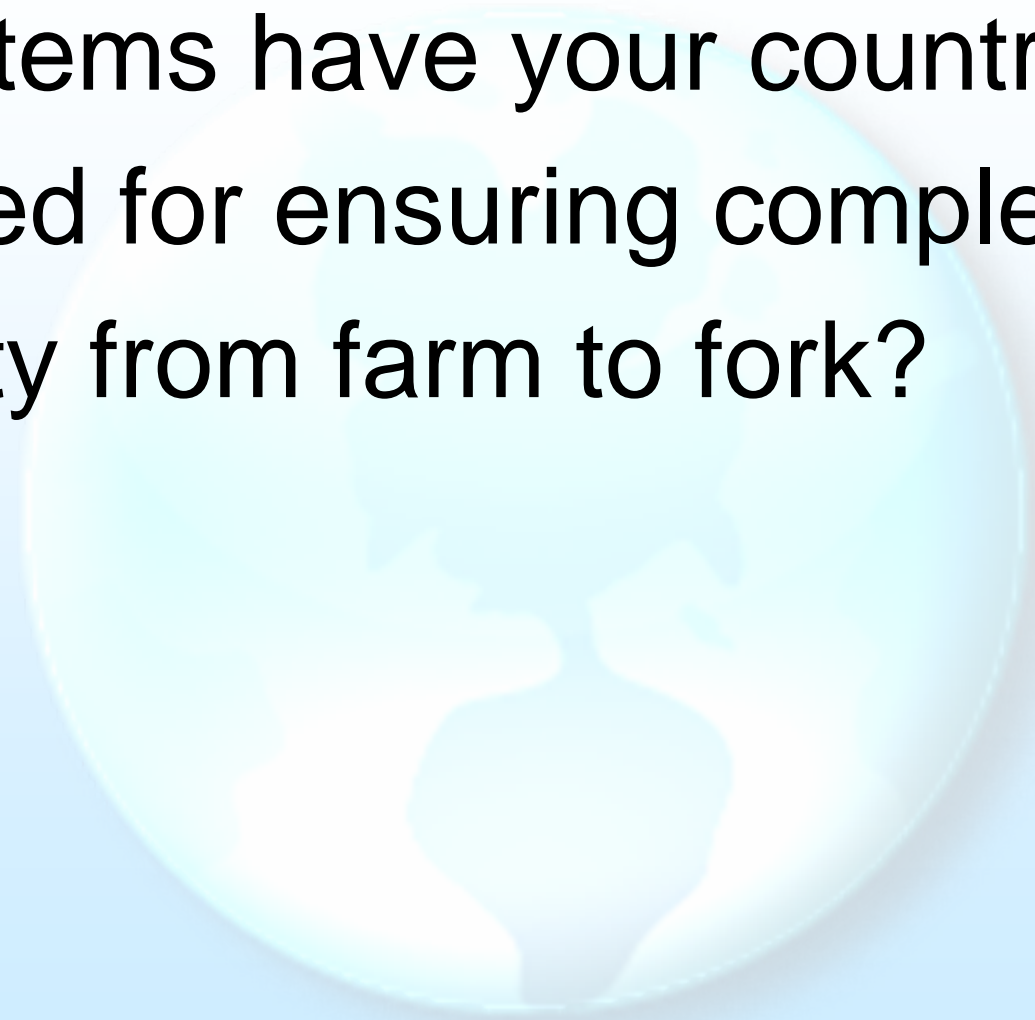
Retail packs of spices and herbs do not appear to be price sensitive items with the consumer. Is it possible for the spice industry to develop a program that can have significant benefit to the farmers?

Question to the panel

With questions being raised about adulteration, such as Sudan and Melamine, along with concerns that importers and processors knowingly misbrand and/or adulterate, what steps are being taken in your importing/processing countries to monitor this situation?

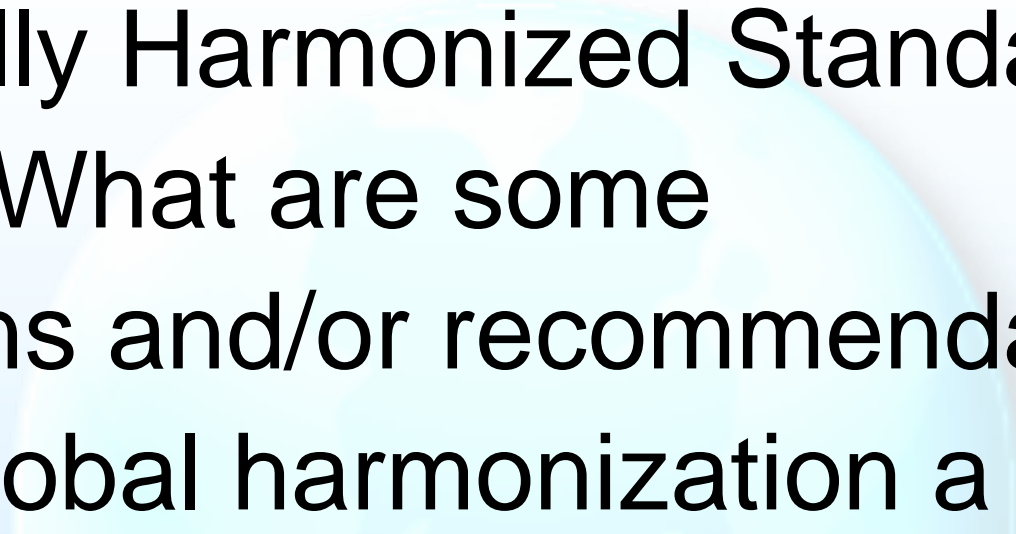
Question to the panel

What systems have your countries established for ensuring complete traceability from farm to fork?



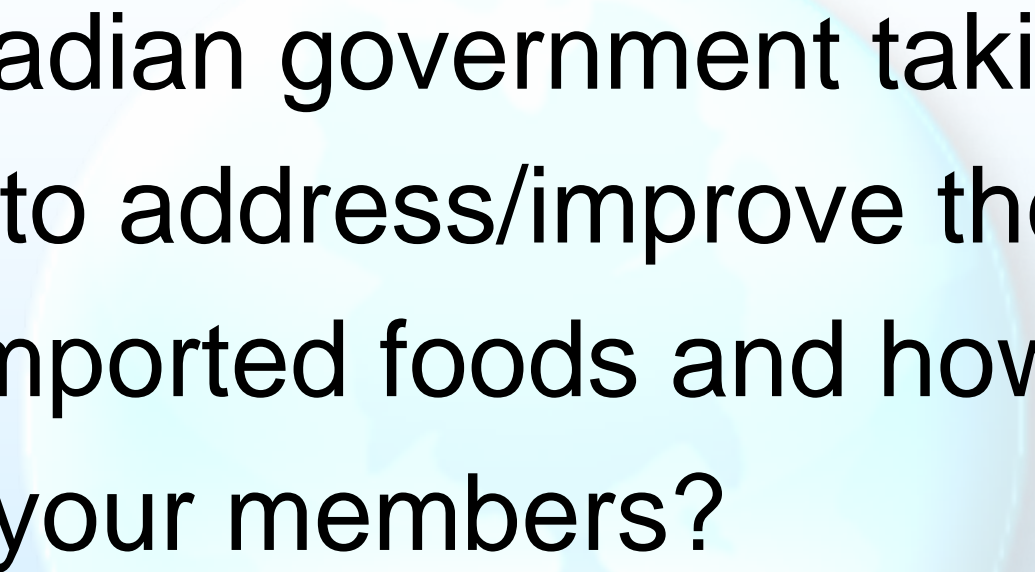
Question to the panel

Are Globally Harmonized Standards possible? What are some suggestions and/or recommendations to make global harmonization a reality?



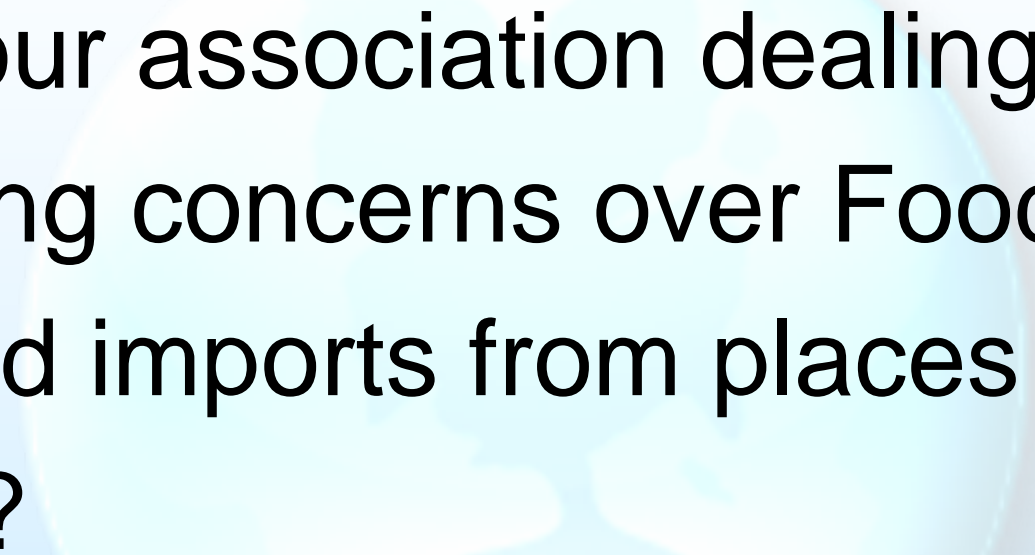
Canadian Spice Association (CSA)

Is the Canadian government taking measures to address/improve the safety of imported foods and how will this affect your members?



Canadian Spice Association (CSA) & European Spice Association (ESA)

How is your association dealing with the growing concerns over Food Safety and imports from places such as China?



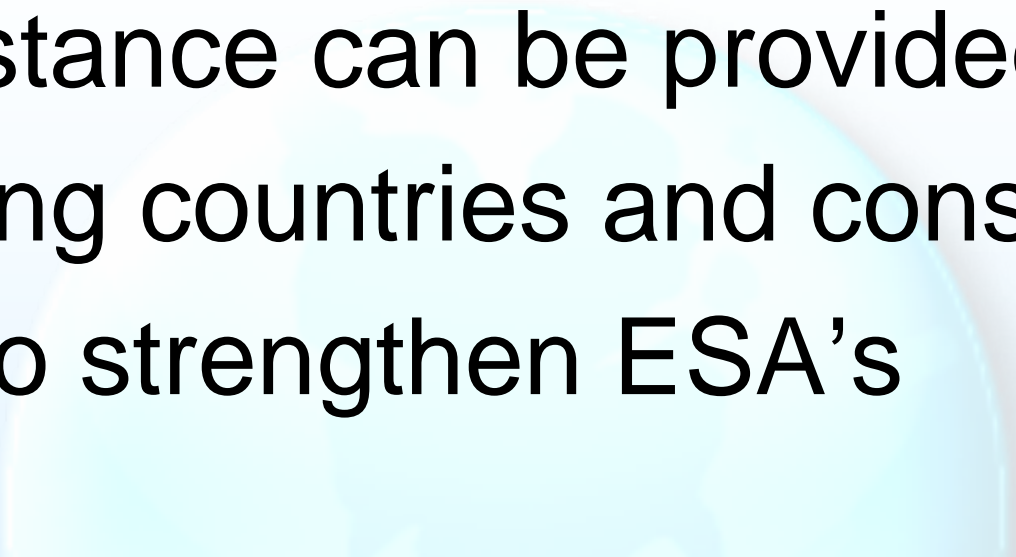
European Spice Association (ESA)

Can ESA initiate proactive steps to sensitize EU on the need to have pesticide residue limits set based on:

1. Average Daily Intake?
2. Dehydration Factors

European Spice Association (ESA)

What assistance can be provided by producing countries and consuming countries to strengthen ESA's initiatives?



European Spice Association (ESA)

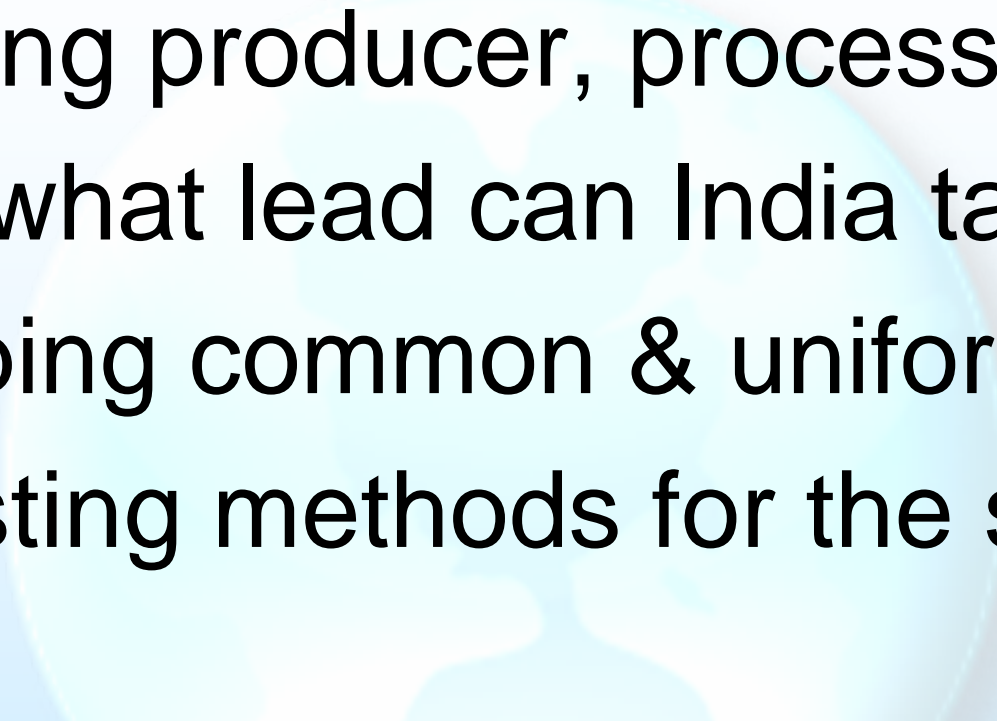
How will the Quality Minima Document being developed by ESA help to standardize specifications and assist in reducing misbranding?

Spices Board

India has touched \$1 billion export turnover this year. What are three proactive steps Indian Spices Board and Exporters have taken to ensure food safety?

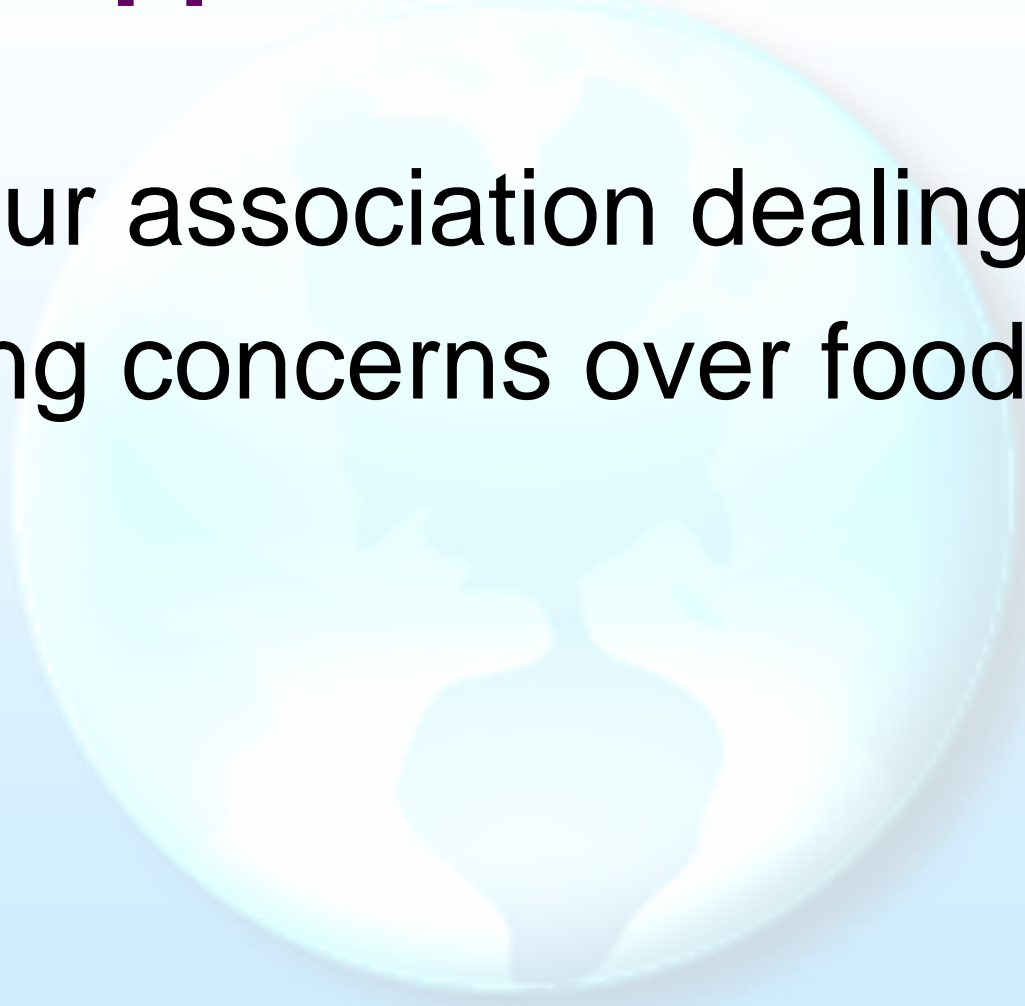
Spice Board

As a leading producer, processor, and exporter, what lead can India take in developing common & uniform quality testing methods for the spice industry?



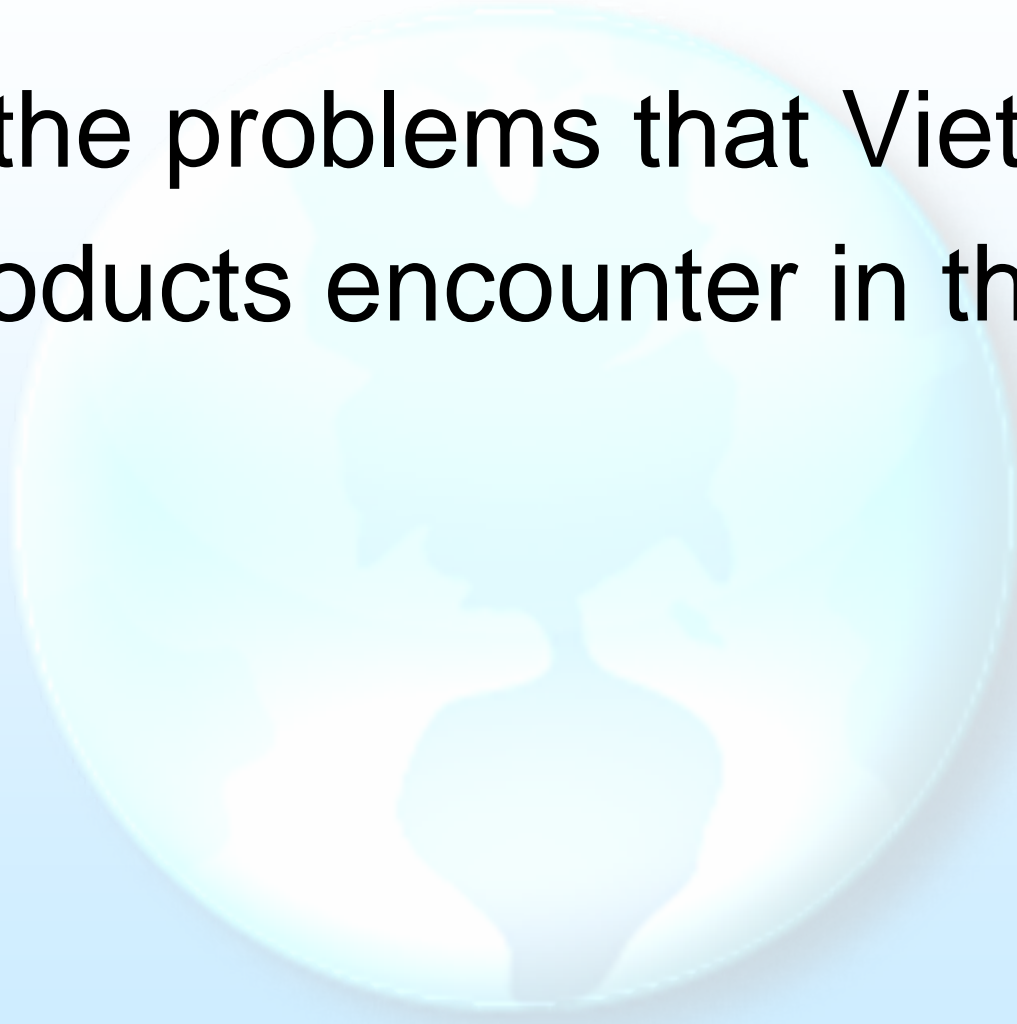
Spices Board & Vietnam Pepper Association (VPA)

How is your association dealing with the growing concerns over food safety?



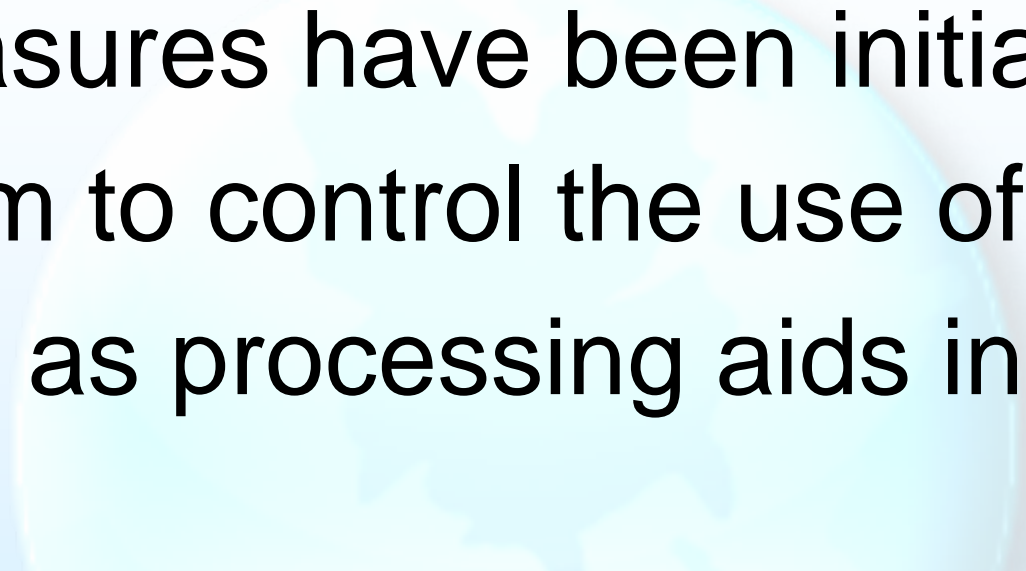
Vietnam Pepper Association (VPA)

What are the problems that Vietnam pepper products encounter in the U.S market?



Vietnam Pepper Association (VPA)

What measures have been initiated by Vietnam to control the use of chemicals as processing aids in pepper?





Audience Q & A



Thank you