

# SPICES BOARD OF INDIA



## PRESENTATION ON THE OCCASION OF

## THE ANNUAL MEETING OF THE AMERICAN SPICE TRADE ASSOCIATION 2007

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## WORLD TRADE IN SPICES 2006-07

YEAR	QTY (TONS)	VALUE (MLN US\$)
WORLD TRADE	800,000	2000
INDIA'S SHARE	350,000	750
% SHARE	44	38

## TREND IN EXPORT OF INDIAN SPICES

YEAR	QTY (TONS)	VALUE (MLN US\$)
2000-01	235,916	400.51
2001-02	243,203	407.85
2002-03	264,107	431.45
2003-04	246,566	415.14
2004-05	347,183	523.10
2005-06	345,246	589.10
2006-07	350,000	750.00



# EXPORT OF MAJOR SPICES FROM INDIA

(QTY IN TONS ; VALUE MLN US \$)

ITEM	2005 - 06		2006 - 07	
	QTY	VALUE	QTY	VALUE
MINT PRODUCTS	14544	183.49	16000	237.40
CHILLI	113175	90.93	140000	166.75
SPICE OILS & OLEORESINS	6075	114.08	6200	110.50
SEED & OTHER SPICES	127998	95.85	91380	94.34
PEPPER	17363	34.06	28500	67.35
TURMERIC	46405	34.49	50000	36.45
CURRY POWDER	9340	17.69	9650	19.21
GINGER	9411	9.69	7500	9.00
CARDAMOM(SMALL)	863	6.05	650	5.00
VANILLA	72	2.77	120	4.00
<b>TOTAL</b>	<b>345,246</b>	<b>589.10</b>	<b>350,000</b>	<b>750.00</b>

## INDIAN SPICE EXPORTS

*Adding Value to Spices ....*

YEAR	WHOLE FORM		VALUE ADDED FORM	
	VALUE (MLN US\$)	% SHARE	VALUE (MLN US\$)	% SHARE
2002-03	160	37	272	63
2003-04	166	40	251	60
2004-05	215	41	308	59
2005-06	188	32	401	68
2006-07	309	41	441	59



## EXPORT OF ORGANIC SPICES

YEAR	QTY (TONS)	VALUE (MLN US\$)
2001-02	100.25	0.57
2002-03	108.20	0.48
2003-04	225.00	1.11
2004-05	234.00	1.07
2005-06	328.00	2.02
2006-07	400.00	2.90



# EXPORT OF SPICES TO USA

(QTY IN TONS ; VALUE MLN. US \$)



ITEM	2006-2007	
	QTY	VALUE
MINT PRODUCTS	3500	55.90
SPICE OILS & OLEORESINS	2075	33.50
PEPPER	13600	31.15
CHILLI	13000	18.25
CUMIN	4000	7.08
TURMERIC	2500	3.10
VANILLA	75	2.58
CURRY POWDER	900	2.14
CELERY	2050	1.65
GINGER	450	0.81
OTHER SPICES	4350	5.10
<b>TOTAL</b>	<b>46500</b>	<b>161.26</b>
<b>% OF TOTAL EXPORT</b>	<b>13</b>	<b>22</b>



# INDIAN SPICE INDUSTRY- PROFILE

India produces over 4 Million MT of Spices

Export basket consists over 150 items including value added products

Exporting to over 130 countries

- **2350 REGISTERED EXPORTERS**
- **430 MANUFACTURER EXPORTERS**
- **100 EXPORTERS (6%) CONTRIBUTE OVER 80% OF EXPORTS**
- **98 UNITS WITH IN-HOUSE LABORATORIES**
- **23 SPICE HOUSE CERTIFICATE HOLDERS**





# INDIAN SPICE INDUSTRY

## HUGE PROCESSING CAPACITY

Sl.No.	Processing facility	Capacity (MT per Day)
1	Cleaning Facility	5000
2	Grinding	1500
3	Cryogenic Grinding	30
4	ETO Treatment	150
5	Steam Sterilization	100
6	Spice Oils & Oleoresins	150



# PROGRAMMES IMPLEMENTED TO IMPROVE CAPABILITY OF INDUSTRY

**Objective: Encourage Adoption of High Tech investments in Spice Processing**

- **Promote and Support induction of Sub and Super Critical Extraction technologies**
- **Encouraging Cool / Cryogrinding systems**
- **Promoting Steam Sterilization scale expansion for whole and ground spices**
- **Encourage and Assist setting up of in-house laboratory by the exporters to deepen quality capabilities**
- **Mandatory quality control system for chilli & chilli products and turmeric powder**
- **Liberalised Export / Import Foreign Trade Policy to encourage free flow of raw materials required by the industry**



# PROGRAMMES IMPLEMENTED TO IMPROVE CAPABILITY OF SUPPLY CHAIN

## Objective:

### Sustainable Competitive advantage for India

- Construction of Drying Yards, supply of Polythene / Silpaulin Sheets
- IPM in selected spices
- Quality improvement training programme
- Standardizing vanilla curing and supply of quality vanilla beans



## QUALITY IMPROVEMENT PROGRAMMES

SL.No	PROGRAMME	2004-05	2005-06	2006-07
1	CONSTRUCTION OF DRYING YARD (IN SQ. MTRS)	22810	51522	127570
2	SUPPLY OF POLYTHENE SHEETS (IN Nos)	7300	16080	24000
3	POST HARVEST TRAINING (NO. OF PERSONS)	11288	36000	42560
4	ORGANIC CULTIVATION OF PAPRIKA LIKE CHILLI (IN Hect.)	175	395	1000
5	IPM IN CHILLI (IN Hect.)	2591	3000	7500
6	VERMICOMPOST UNITS (NO OF Units)	950	4277	8930

## *Training Programmes on*

- 🕒 **GOOD AGRICULTURAL PRACTICES(GAP) FOR EFFECTIVE EXTENSION DELIVERY FOR YOUTH FROM AGRICULTURE BACKGROUND**
- 🕒 **POST HARVEST METHODS AND QUALITY IMPROVEMENT**
- 🕒 **INTERNAL CONTROL SYSTEM FOR ORGANIC CULTIVATION**
- 🕒 **LAB PERSONNELS OF EXPORTERS ON TESTING AND ANALYTICAL METHODS IN BOARD'S QUALITY CONTROL LAB**
- 🕒 **TRAINING CUM DEMONSTRATION UNIT FOR BIOAGENTS PRODUCTION**





# PROGRAMMES FOR CONTROLLING AFLATOXIN & PESTICIDE RESIDUE

## IMPLEMENTATION OF IPM IN CHILLI

- ❧ **ANDHRA PRADESH, KARNATAKA AND TAMIL NADU**
- ❧ **VILLAGES COVERED: 250**
- ❧ **FARMERS PARTICIPATED: 10,000**



## SOLAR DRYERS, DRYING YARDS, POLYTHENE SHEETS AND SOLAR POLY HOUSES



# RESPONSE TO FOOD SAFETY CONCERNS OF IMPORTERS

## SUDAN RED

- ⌚ CONTINUING THE MANDATORY SAMPLING AND ANALYSIS FOR SUDAN I-IV FOR CHILLI, CHILLI PRODUCTS AND TURMERIC (IRRESPECTIVE OF DESTINATION OF EXPORT)
- ⌚ SAMPLING PROCEDURES, AS RECOMMENDED BY EU, ASTA, OR ISO AS THE CASE MAY BE.
- ⌚ SAMPLES ANALYSED

	2005-06	2006-07
SUDAN	10,925	12,096
AFLATOXIN	14,982	17,949





# PESTICIDE RESIDUES

- 🕒 **REGIONAL LABORATORIES IN MAJOR SPICE GROWING/ TRADING CENTERS ARE BEING ESTABLISHED FOCUSING ON PESTICIDE RESIDUE DATA GENERATION**
- 🕒 **INDIA WILL FOLLOW THE CODEX ROUTE TO FIX MRLS FOR SPICES UNDER THE PFA ACT**



# NEW INITIATIVES PLANNED FURTHER

- Establishing Spice Parks in major spice producing states – 10 Nos.
- Setting up of Regional Laboratory cum Training Centers – 4 Nos.
- Re-planting / Rejuvenation of selected spices through a special programme
- Solar Poly Houses for aflatoxin free chillies – 5000 Nos.
- Developing infrastructure for Product Development and Research
- Focusing on Organic cultivation of Chilli, Ginger and Turmeric in North Eastern States
- Support for Bio Agent production units
- Organizing Food Festivals in major consuming countries for promoting consumption of spices.
- Promoting SHGs, NGOs and Producer Companies in Spices cultivation, processing and marketing
- Developing Contract farming practices, reduce multiple channels of distribution





# MARK OF QUALITY & INDIANNESS



**SPICE HOUSE CERTIFICATE**

**“SPICE HOUSE” CERTIFICATE HOLDERS - 23**





# PROMOTION OF INDIAN BRANDS FOR THE PREMIUM MARKET

DEVELOPING 'FLAVOURIT' IN MAINSTREAM MARKETS IN THE DEVELOPED COUNTRIES





# VANILLA

## AREA EXPANSION

TARGET 15000 HA.

5000 HA. SUPPORTED BY SPICES BOARD

## PRODUCT FEATURES

VANILLIN CONTENT UP TO 3%

FLAVOUR COMPARABLE WITH THE BEST OF BOURBON

A VANILLA GARDEN



	2003-04	2004-05	2005-06	2006-07
<b>TOTAL AREA (Hec.)</b>	<b>3543</b>	<b>5370</b>	<b>5815</b>	<b>5129</b>
<b>YIELDING AREA (Hec.)</b>	<b>1253</b>	<b>1948</b>	<b>2883</b>	<b>2913</b>
<b>PRODUCTION (TONS)</b>	<b>134</b>	<b>196</b>	<b>210</b>	<b>233</b>



# VISION FOR THE INDIAN SPICE INDUSTRY

*TO become the processing hub and premier supplier of value added spices and herbs in the industrial, retail and food service segments of the global spices market by meeting the quality requirements*

**TO ACHIEVE 1 BILLION US \$ EXPORT**

**EARNINGS BY 2010**





# SPICES BOARD

Welcomes you to



**9<sup>th</sup> World Spice Congress  
at Goa**

**28<sup>th</sup> to 30<sup>th</sup> January 2008**

**THANK YOU**

