



**Jabs International Pvt. Ltd.**



# Cumin





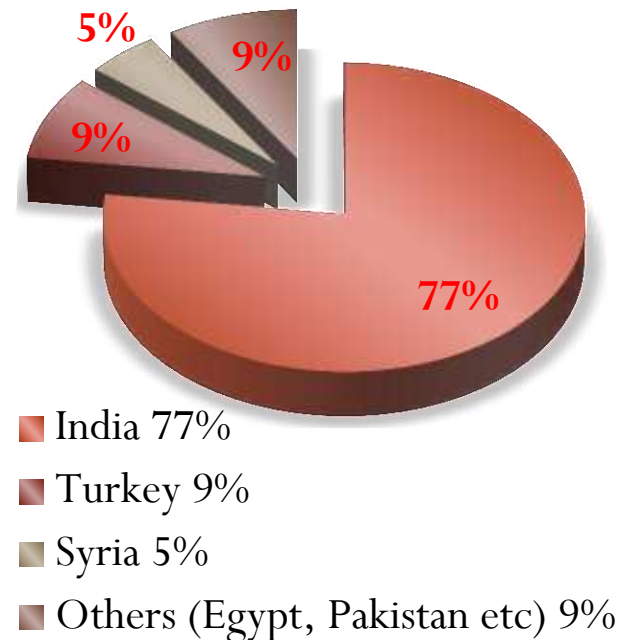
# Global Cumin Production



## Cumin's

- Global Cumin Seed production is around 200-215 thousand tons.
- India is the leading in terms of cumin seed production and consumption.
- India, Syria and Turkey contributing more than 90% of world production.
- India's production is likely to be around 185 to 200 thousand tons appx. Turkey Syria and China & others produces around 30 thousand tons.

## Global Cumin Producer



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- In Syria, the second largest producer, production has fallen from high of 40 thousand tons to 20 thousand tons over 7 years.
- India consumption is likely to be 110,000 tons.

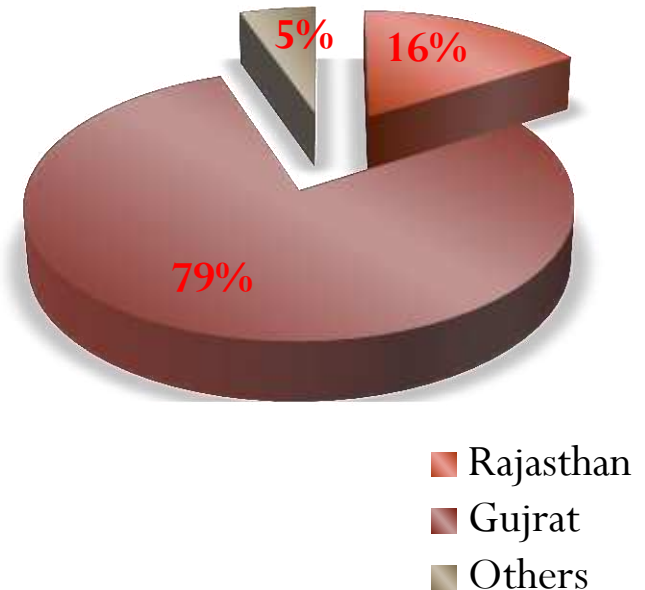


# Cumin Seed Production in India



- India is the world's largest producer and consumer of cumin seed.
- India contributes around 77% in the total world production.
- In India, Gujrat and Rajasthan are the major producer they contribute 79% and 12% respectively.
- Cumin plant is grown as Rabi Crop.

## Production





# Cumin Crop Calendar

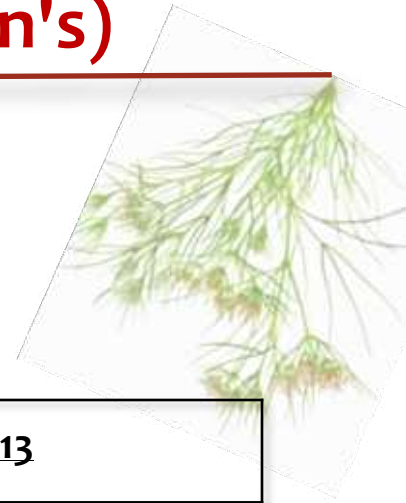


		Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
India	→		Harvest									Sowing	
Syria	→		Sowing				Harvest						
Turkey	→				Sowing				Harvest				



# OVERVIEW – (Cumin's)

## An Estimate



<u>Crop year</u>	<u>Mar 12-Feb13</u>
	<b>000 Tons</b>
<b>Opening stock</b>	30.00
<b>Domestic Production</b>	225.00
<b>Total Supply</b>	<b>255.00</b>
Domestic Consumption	110.00
Export	50.00
<b>Total Consumption</b>	<b>160.00</b>
Carry forward	95.00

Source :

- Jabs Research Team headed by Paresh Pabaria



**Jabs International Pvt. Ltd.**

An ISO 9001:2008, 22000:2005, HACCP Certified & Govt. Recognised Trading House

# Current Market Situation



## Cumin's

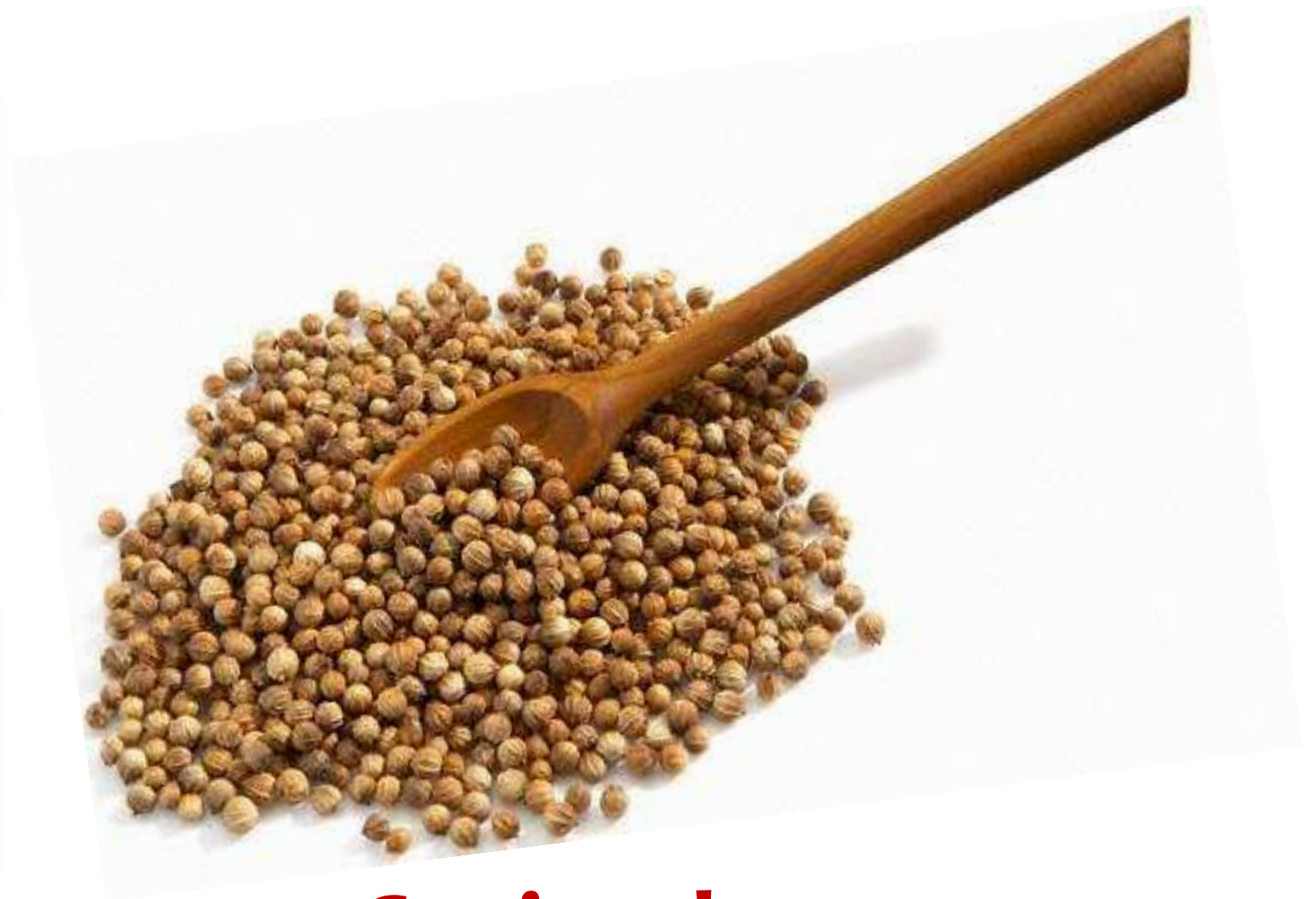
- Declining trend seen in exports since last one year, is set for reversal with easing prices & improved demand. Export demand likely to be up in coming months.
- With crop prospects looking good, the prices may remain weak & rebound in exports likely. Exports have been lower until September, 2011.
- One expects around 30,000 tones to be exported doing Oct 2011 –March 2012, so taking the total export to around 50,000 tons. In 2010-2011, Indian export had plunged to 32500 tons due to high prices.
- India is world largest exporter, other counties being Syria, Turkey & China.







- It is mainly exported to US, South America, West Asia, Europe & neighboring countries like Pakistan, Bangladesh & Sri Lanka.
- Crop in Syria is much lower than expected & likely crop failure is Turkey & China. China on the contrary – imported 3,000 tons from India during July-Aug 2011. This is 1st time in last four years. China have just started Imports again mainly for seeding purpose.
- Currently India's export price in about \$3050/Ton FOB compared to \$ 3200, \$3300 two months ago. However the export prices is likely to decline further to around \$2700 a ton in near future as output increases.



# Coriander



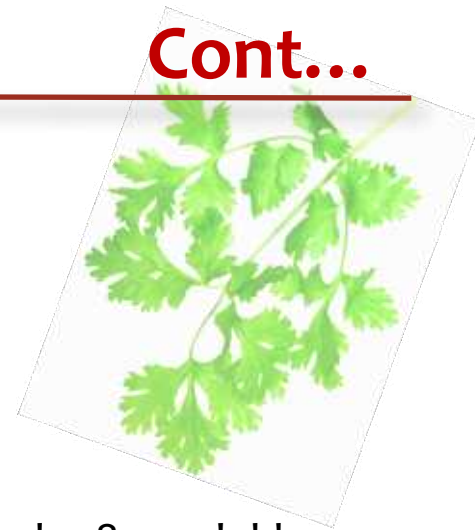


# Global Coriander Production Scenario



- The global production of coriander seed is estimated to be around 5-6 lakh tons.
- However, official estimates are rarely available for this crop in most producing countries. Additionally, coriander is widely grown in home gardens on a small scale, which is never included in official statistics.
- The major global producers are India, Morocco, Canada, Romania, Russia and Ukraine.
- The other producers are Iran, Turkey, Israel, Egypt, China, US, Argentina and Mexico.

Cont...



- The global trade in coriander is estimated to be around 0.85 – 1 lakh tons a year. While, India, Turkey, Egypt, Romania, Morocco, Iran and China are the major exporters. Middle East,. South-east Asia, USA, UK, Germany etc are the major importers.
- India domestic consumption estimate : 4,00,000 M.tons

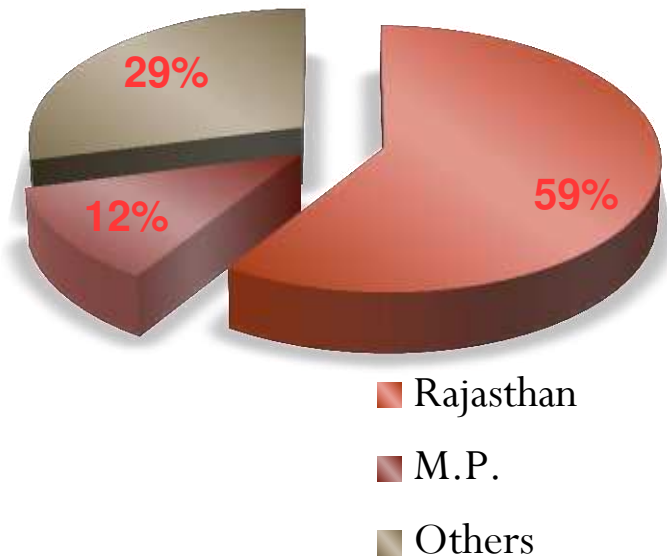


# Coriander Seed Production in India



- India is the world's largest producer and consumer of Coriander.
- India contributes around 50-60% in the total world production.
- In India, Rajasthan, Madhya Pradesh are the major producer they contribute 59% and 12% respectively.
- Coriander plant is grown as Rabi Crop.

**Production**



# Coriander Crop Calendar

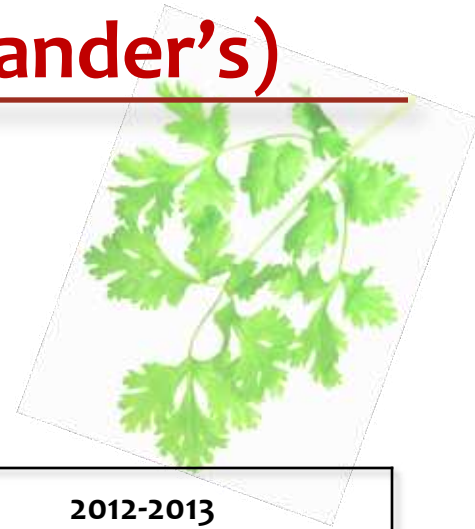


		Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
India	→		Harvest								Sowing		



# OVERVIEW – (Coriander's)

## An Estimate



	2012-2013
<b>Crop year</b>	<b>000 Tons</b>
Opening stock	100.00
Domestic Production	492.00
<b>Total Supply</b>	<b>592.00</b>
Domestic Consumption	404.00
Export	45.00
<b>Total Consumption</b>	<b>449.00</b>
Carry forward	143.00

Source :

- Jobs Research Team headed by Paresh Pabaria



# Current Market Situation



## Coriander's

- Global major produces are India, Morocco, Bulgaria, Canada, Romania, Russia & Ukraine. The other producers are Iran, Turkey, Israel, Egypt, China, US, Argentina & Mexico.
- Major Exporters are India, Bulgaria, Turkey, Egypt, Russia, Morocco, Iran & China.
- Major importers are USA, UK, Germany, Middle East & South-East Asia.
- Demand from India is likely to remain subdued as Bulgaria is selling at a cheaper rate than India. Bulgaria is selling at around \$550-\$600 Tons FOB compared to India of \$850 - \$900 FOB.

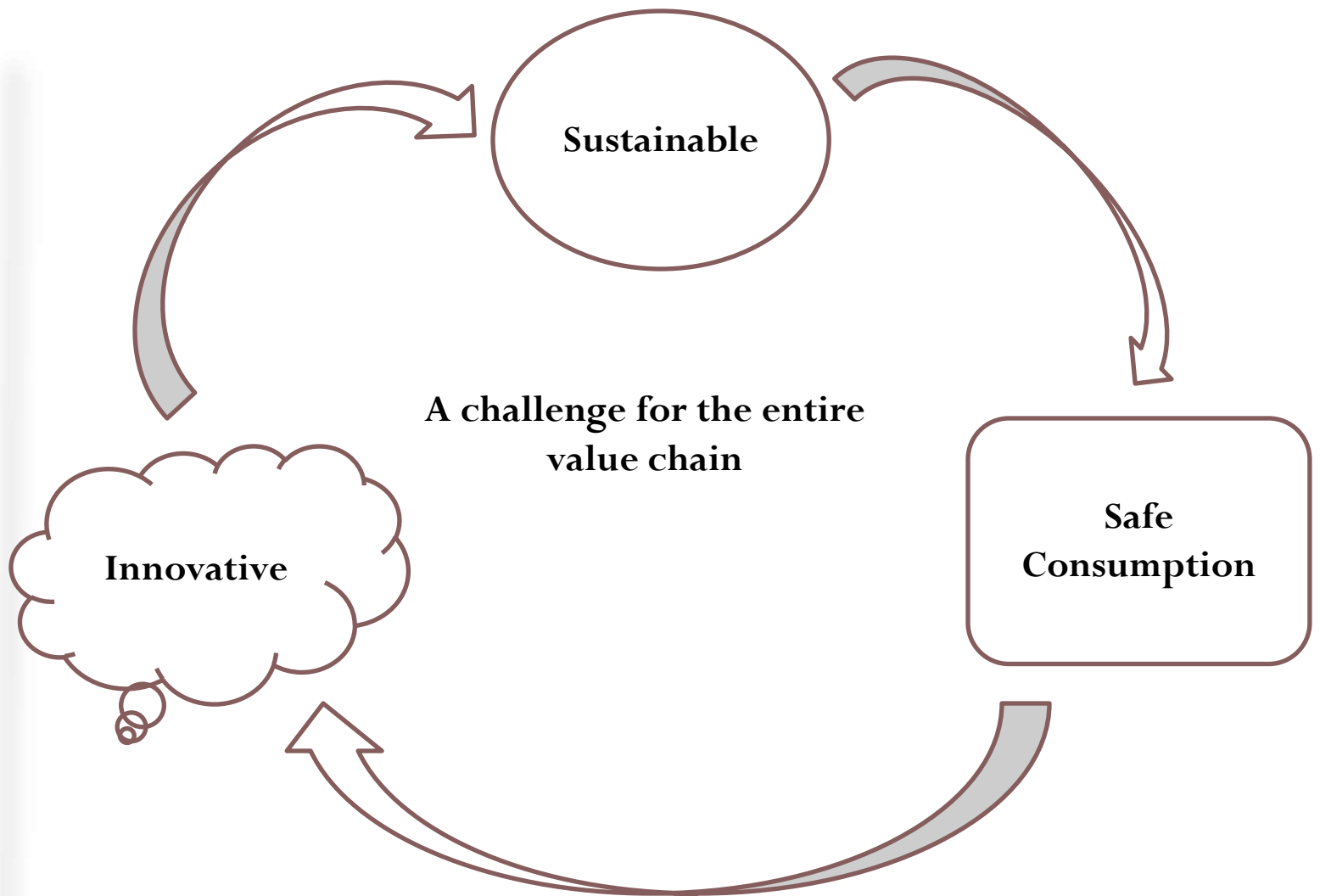




## Caution Note

- All estimates, calculations can go totally in unanticipated directions, if Crop failure takes place due to natural circumstances such as unwarranted rains, extreme cold etc. Manipulations takes place in market due to speculations.
- Non-availability of required & correct statistical datas.
- Foreign Exchange fluctuations.





# Innovative, Sustainable & Safe Consumption

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How can the discrepancy between a growing population, increasing consumption, and rising life expectancy on the one hand, and decreasing availability of resources on the other, be overcome ?



# Why Sustainability ?

- Sustainability of Resources
- Competitive and Supply Chain Press
- Regulation and Risk
- Global Market Forces
- The Ethical Imperative





# FOCUS ON FOCAL AREAS

Now lets look at “**HOW**” we achieve it ?

- Water and wastewater, health and safety, social progress, materials and waste, and energy and climate.
- These focal areas have to be systematically **anchored in innovation processes.**
- Three Main dimensions of human existence – Economy, Ecology & Social responsibility



# 3 - P Model



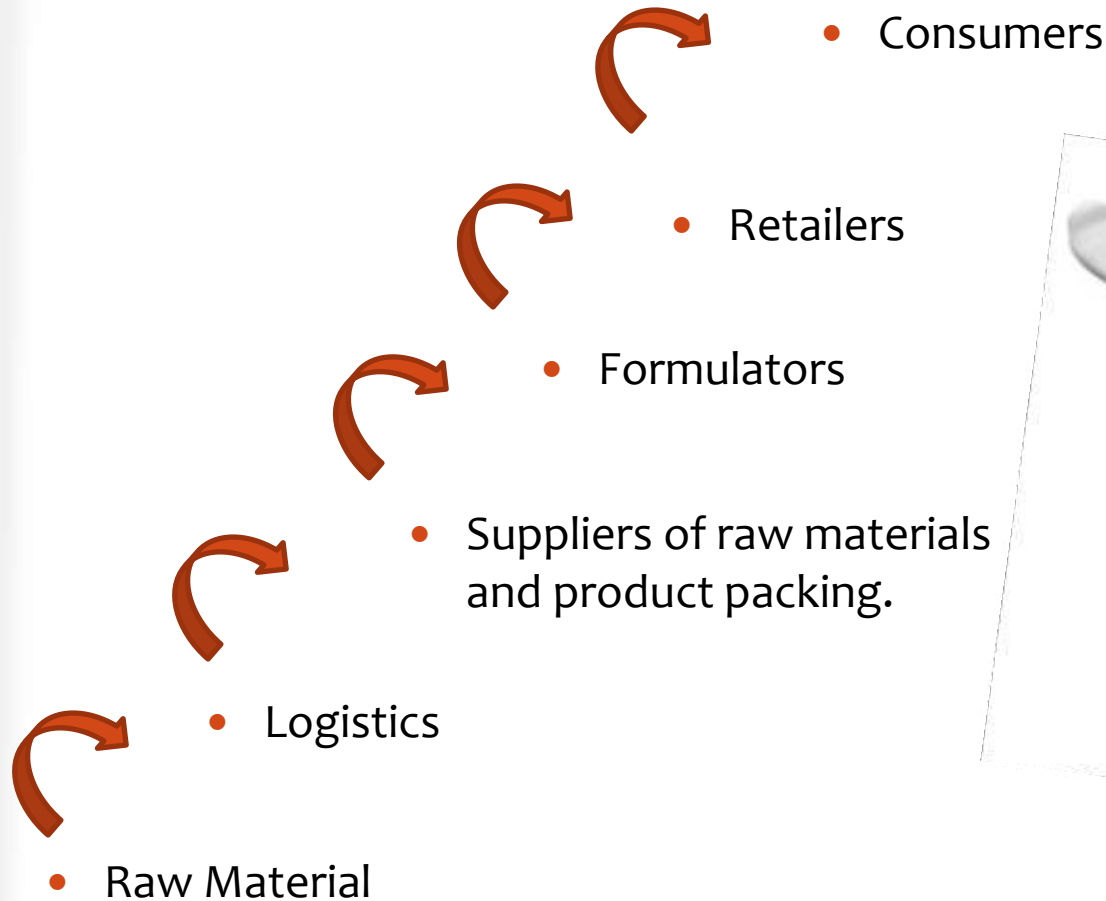
# Sustainability

- Sustainability is not a fashion trend. It is not about quick wins or opportunistic goals, but rather a long term process of building knowledge, trust and understanding.
- Sustainability is not a one-man show
- One need to have the courage to allow innovation to drive progress
- Only by taking entire value chain into consideration can a true picture of the causes, effects and potential improvements be painted.





# Partnership for improvement along the entire value chain



# AGROECOLOGY

- Agroecology is the logical extension of sustainable food production.
- The term itself is an amalgam of the word Agriculture and Ecology.
- It focuses on natural rhythms of the environment to produce ecosystems on the farm, obviously employing the organic options but even further than “organic” labeling.



# Food Safety

Various governments are taking a very serious view to the threat of adulteration and contamination in food products & are planning a slew of measures to shore up food safety.

## USA Government :

- Food Safety Modernization Act (FSMA)

## INDIAN Government :

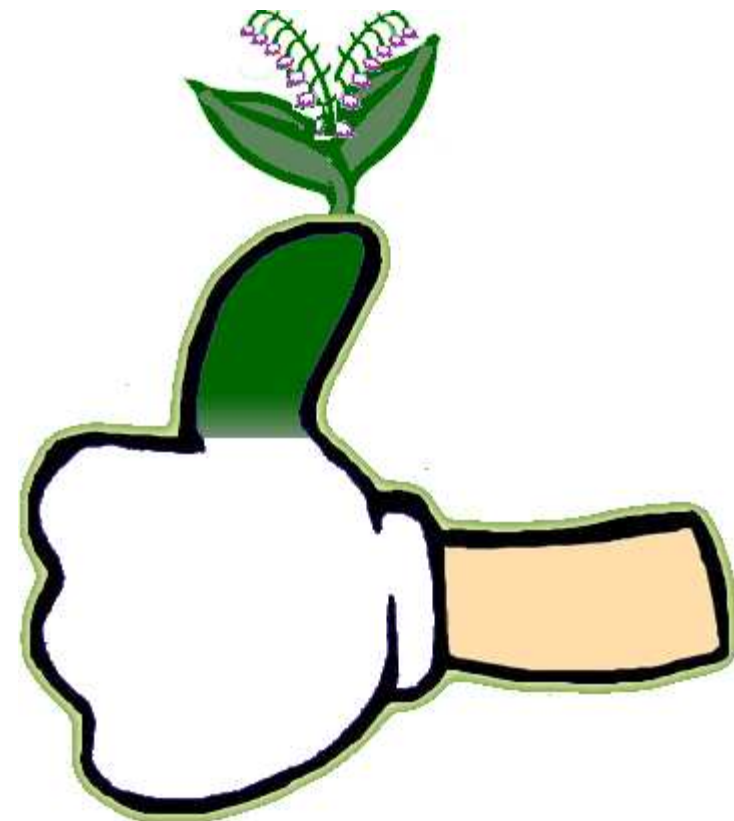
- Plans to set up cluster laboratories of accredited standards
- Under the ambitious plan, the government will spend around \$ 1.2 billion on food safety measures during the 12th Five Year Plan (2012-17) that include strengthening of Food Safety and Standards Authority of India (FSSAI).





# Conclusion & Call for action

With joint efforts put in place by all stake holders, making truly innovative, safe & sustainable consumption a reality within a reasonable time frame, lets generate values for the industry, the consumer, society & ultimately also for our planet.



**NOW WE MUST DARE TO TAKE THE NEXT**

**STEP**

**&**

**Start  
Action**

