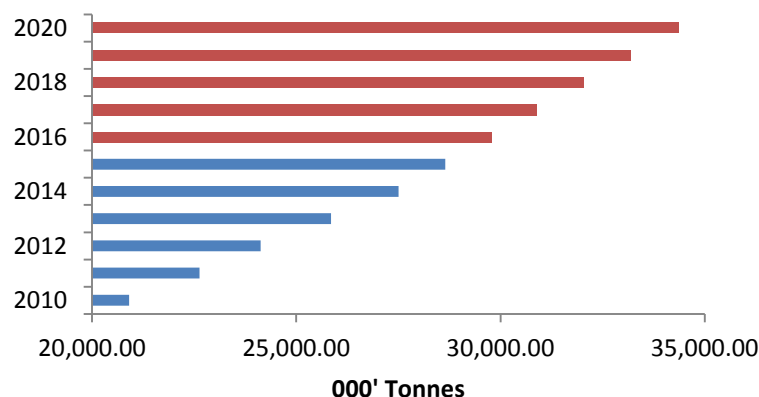


**SNAPSHOT OF OPPORTUNITIES IN INDIA'S PULSE SECTOR**

<b>INDIA IS THE LARGEST CONSUMER AND IMPORTER OF PULSES IN THE WORLD</b>	<ul style="list-style-type: none"> <li>Pulses are a primary source of protein and are widely used in daily cooking</li> <li>Pulse ingredients (pea protein and pea starch) are increasingly used in packaged foods</li> <li>There is a heavy reliance on pulse imports due to insufficient domestic supply</li> <li>Population growth, growing urbanisation, and busier lives are increasing preference for easy-to-prepare nutritional products that supply protein &amp; carbohydrates.</li> </ul>
<b>CANADA IS THE #1 SUPPLIER OF PULSES IN INDIA</b>	<ul style="list-style-type: none"> <li>Canada accounted for <b>38%</b> market share of India's pulse imports, worth <b>US\$1.4B</b></li> <li>India's import from Canada had an average annual growth of <b>20%</b> from 2010 to 2015</li> </ul>

**PULSE IN BULK****VOLUME SALES INCREASED BY 28.6 MILLION TONNES****TOTAL VOLUME SALES GREW BY 4% IN 2015**

- Pulses were widely sold unpackaged
- Traditional retailers accounted for **77%** of the total volume sales, while Foodservices accounted for **23%**.

**SALES ARE EXPECTED TO GROW BY A RATE OF 3.7% FROM 2015 TO 2020**

- Peas, lentils and other pulses are expected to perform the strongest with volume sales forecasted to grow at an average rate of 4%.

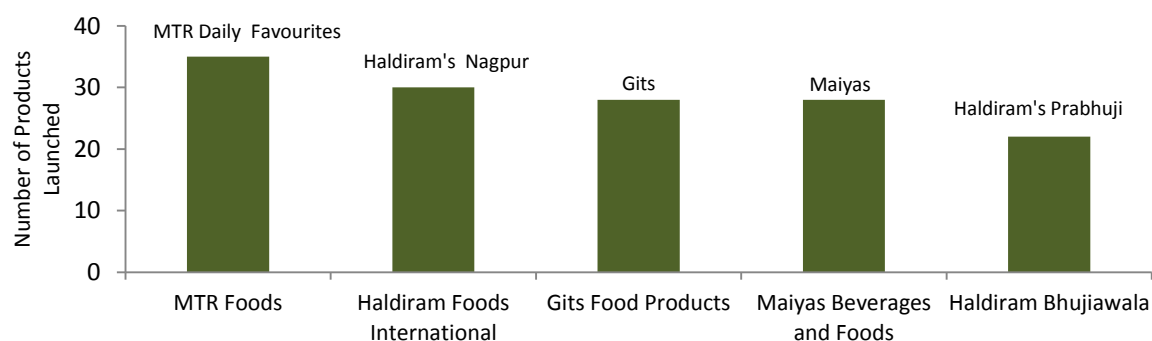
**CANADA ACCOUNTED FOR 9% OF INDIA'S TOTAL VOLUME SALES**

- India imported 2.5 million tonnes of pulses from Canada

**PULSE AS AN INGREDIENT****INDIA LAUNCHED THE MOST PULSE PRODUCTS WORLDWIDE**

- From 2010 to 2015, 1,919 products using pulses as ingredient were launched
- Launched the most pulse products in 17 different product lines
- Top product launch categories were **Bakery, Snacks & Desserts, Sauces & Seasoning**

Accounted for **30%** of the world's pulse product launches

**INDIA'S MAJOR COMPANIES LAUNCHED PULSE PRODUCTS IN 10 DIFFERENT PRODUCT CATEGORIES***India's Top Companies and their leading pulse brands*

**MRT Foods launched the most pulse products under its MRT Daily Favourites brand.**



**HEALTH AND WELLNESS ARE GROWING CLAIMS FOR NEW PRODUCTS CONTAINING PULSE****TOP CLAIMS**

1. Vegetarian
2. Low/No/Reduced Cholesterol
3. Premium
4. No Additives/Preservatives
5. Low/No/Reduced Transfat

**TOP 5 GROWING CLAIMS**

1. Low/No/Reduced Fat
2. Convenient Packaging
3. Low/No/Reduced Calorie
4. Premium
5. Ethical - Charity

**DECLINING CLAIMS**

1. Vegan
2. No Animal Ingredients
3. Low/No/Reduced Lactose
4. High/Added Fiber
5. Economy

**FLEXIBLE PACKAGES ARE THE LEADING PACKAGING TYPE FOR PRODUCTS CONTAINING PULSE AS AN INGREDIENT****TOP PACKAGING TYPES**

1. Flexible
2. Flexible sachet
3. Flexible stand-up pouch

**TOP PACKAGING MATERIALS**

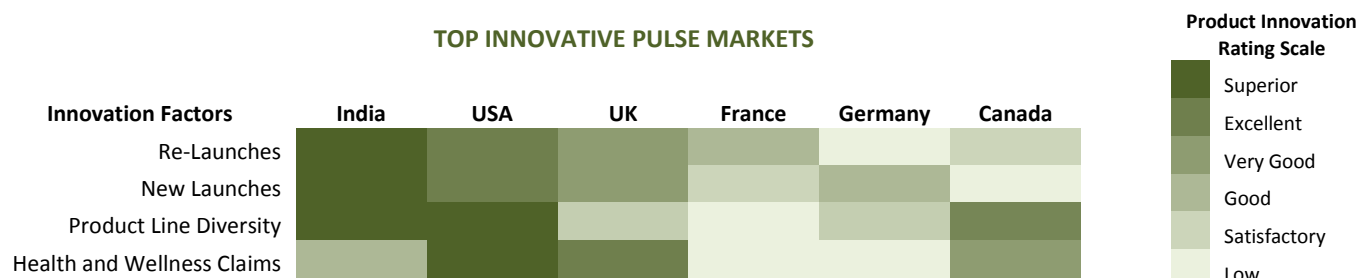
1. Plastic unspecified
2. Metallised Film
3. Multi laminate

**TOP PACKAGING COMBINATIONS**

1. Flexible, Plastic unspecified
2. Flexible, Metallised Film
3. Flexible sachet, Plastic unspecified

**INDIA IS RATED SUPERIOR IN INNOVATIVE PULSE PRODUCTS**

- World's leader for pulse innovation in new product launches, re-launches, and in product line diversity

**TOP INNOVATIVE PULSE MARKETS****FACTORS FOR CONSIDERATION**

- Mature pulse trade between Canada & India
- Established relationships & numerous players exist
- Bulk trade is the norm
- Food safety regulations
- High difficulty for new entrants in the raw pulse trade
- High retail margins & listing fees for direct retail products
- Price volatility is high leading to risks in trade

**RECOMMENDATIONS FOR ENTRY**

- Develop a market and culture understanding
- Understand the industry and players
- Participate in Trade Shows
- Find an import partner

**HOW WE CAN HELP**

We offer multiple [programs and services](#) to help you achieve your international business goals, such as the Agri-Food Trade Service, AgriMarketing Program, and Canada Brand.

[International Trade Commissioners](#) are also an excellent point of contact for export advice and can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions, and local business contacts.

**HAVE WE PIQUED YOUR INTEREST?**

For more information on opportunities in India or to join our distribution list, make suggestions, or request more information, contact Single Window at [MAS-SAM@agr.gc.ca](mailto:MAS-SAM@agr.gc.ca)



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