



SNAPSHOT of OPPORTUNITIES in INDIA'S PULSE SECTOR

COMMODITY-BASED INFORMATION AND OPPORTUNITIES FOR
CANADIAN AGRI-FOOD BUSINESSES IN INTERNATIONAL MARKETS.

QUICK FACTS (2015)



India is the largest consumer and importer of pulses in the world

- Pulses are a primary source of protein and are widely used in daily cooking.
- Pulse ingredients such as pea protein and pea starch are increasingly used in packaged foods.
- There is a heavy reliance on pulse imports due to insufficient domestic supply.
- Population growth, growing urbanisation, and busier lives are increasing preference for easy-to-prepare nutritional products that supply protein and carbohydrates.

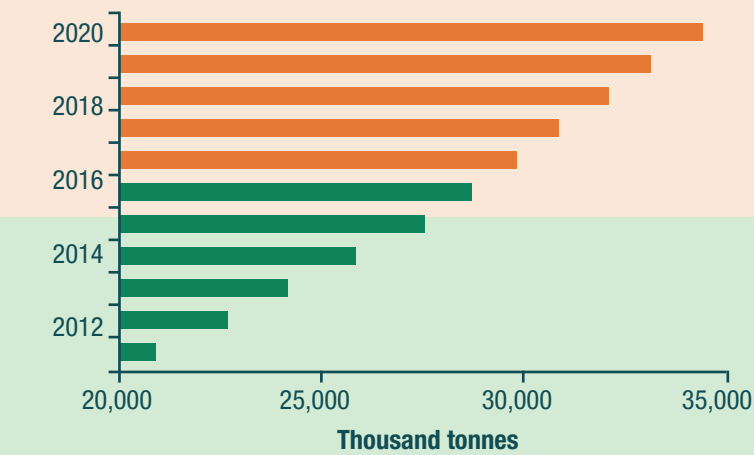


Canada is the #1 supplier of pulses to India

- Canada accounted for 38% of the market share of India's pulse imports, worth \$1.4B US.
- India's imports from Canada grew by an average annual growth of 20% from 2010 to 2015.

Source: Global Trade Tracker

PULSES IN BULK



Sales are expected to grow by a rate of 4% from 2015 to 2020

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

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 volume increased by 28.6 million tonnes from 2010 to 2015.

Source: Euromonitor

2015

Canada accounted for 9% of India's total volume sales.
India imported 2.5 million tonnes of pulses from Canada.

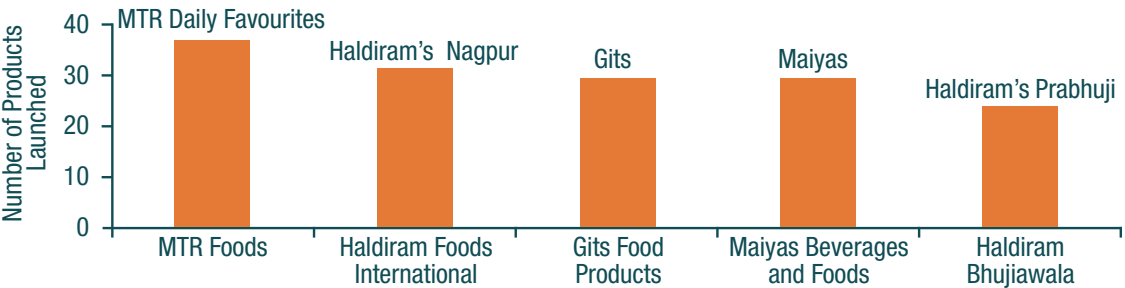
Source: Global Trade Tracker

PULSES AS AN INGREDIENT (2010-2015)

India accounted for
30% of the world's
pulse product launches.

- India launched nearly 2,000 products using pulses as an ingredient.
- Top product launch categories were **baked goods, snacks & desserts, sauces & seasoning.**

Major companies in India launched pulse products in 10 different product categories



India's top agri-food companies and their leading pulse product brands

Source: Mintel

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



HEALTH AND WELLNESS CLAIMS ARE GROWING FOR NEW PRODUCTS CONTAINING PULSES

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. Economical

Source: Mintel

Flexible packages are the leading packaging type for products containing pulses as an ingredient.

Top Packaging Types

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

Top Packaging Materials

- 1. Plastic
- 2. Metallised film
- 3. Multi laminate

Top Packaging Combinations

- 1. Plastic, Flexible
- 2. Flexible, Metallised film
- 3. Flexible sachet, Plastic

INDIA IS RATED EXCELLENT IN INNOVATIVE PULSE PRODUCTS

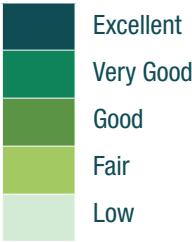
India is a world leader for pulse innovation in new product launches, re-launches, and in product line diversity.

Source: Mintel

Top Innovative Pulse Markets

Innovation Factors	India	United States	United Kingdom	Germany	Canada	Australia	France	Spain	Italy	Ireland
Re-Launches	Good	Fair	Fair	Very Good	Fair	Excellent	Fair	Good	Good	Excellent
New Launches	Very Good	Excellent	Good	Fair	Good	Fair	Excellent	Fair	Fair	Fair
Product Line Diversity	Excellent	Very Good	Fair	Good	Good	Fair	Fair	Fair	Fair	Fair
Health and Wellness Claims	Excellent	Excellent	Very Good	Fair	Fair	Very Good	Fair	Good	Fair	Fair

Product Innovation Rating Scale



FACTORS FOR CONSIDERATION

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

RECOMMENDATIONS FOR ENTRY

- Understand the market and culture
- 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 the Market Access Secretariat: at MAS-SAM@agr.gc.ca

Visit our online library of public reports for more information on this and other markets.

Learn about our programs, services and tools to support your export activities.

Exporting from Canada