



INTERNATIONAL PEPPER COMMUNITY
JAKARTA - INDONESIA

REPORT OF THE
25TH PEPPER EXIM MEETING

1st November 2017
Kandy, Sri Lanka

INTERNATIONAL PEPPER COMMUNITY

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REPORT OF THE 25TH PEPPER EXIM MEETING

1st November 2017, Kandy, Sri Lanka

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INTERNATIONAL PEPPER COMMUNITY

REPORT OF THE 25TH PEPPER-EXIM MEETING 1st November 2017, Earl's Regency Kandy, Sri Lanka

Introduction

1. The 25th Pepper-Exim (Pepper Exporters and Importers) Meeting of the IPC was held on 1st November 2017 in Kandy, Sri Lanka, in conjunction with the 45th Session of IPC. The Meeting was hosted by the Ministry of Primary Industries of the Government of Sri Lanka and jointly organized by the Ministry of Primary Industries, Department of Export Agriculture of Sri Lanka and the International Pepper Community.

2. The 25th Pepper-Exim Meeting was attended by officials, producers/farmers associations, exporters from the IPC member countries and non-member countries and trade representatives from the pepper consuming countries from EU, Middle East, Asia Pacific, North and South America as well as Africa. The list of the participants is given in **Annex 01**.

Agenda item 1: Welcome Address by Executive Director of the IPC

3. The Executive Director of the IPC, Mrs. Hoang Thi Lien welcomes all the delegates and wished all the delegates to have fruitful discussion and deliberation during the Meeting.

Agenda item 2: Election of Chairman, Co-Chairman/Vice-chairman and members of Drafting Committee.

4. Mr. Sarada de Silva of Sri Lanka was elected as Chairman and Dr. Harry Entebang of Malaysia was as the Vice-Chairman of the 25th Pepper-Exim Meeting.

Agenda item 3: Adoption of Agenda

5. The Meeting adopted the proposed agenda as given in **Annex 02**.

Agenda item 4: Review of the progress made on the decisions and recommendations of the 24th Pepper-Exim Meeting

6. Mrs. Hoang Thi Lien, Executive Director of the IPC briefly presented the action taken and status of the recommendations and decisions made by the 24th Pepper-Exim Meeting held in 2017 in Jakarta. The meeting took note of the action sheet statement which is given in **Annex 03**.

Agenda item 5: Paper on Pepper Market Outlook, an Industry Perspective by Mr. Jasvinder Singh Sethi, Namagro Viet Nam

7. Mr. Jasvinder Singh Sethi of Namagro, Viet Nam presented his detailed data and information on current world pepper demand, supply and price situation. According to him imports of pepper by the major pepper consuming countries, particularly the ground pepper has been rising the past decade. It was also informed that the per capita consumption of pepper in the developed countries is close to 3 times than the developing countries, as

consumers in the developed countries take high protein and consume more meat and this lead to the use of more pepper.

8. Mr. Jasvinder presented a historical chart of the world global pepper production of over 50 years, from 1961 till 2017. He stated that pepper production has doubled in the past 20 years and quadrupled in the past 50 years and in 2017 he estimated that global production will be at 450,000 MT, an increase of 12.50 on yearly basis. In case of white pepper, he also estimated that Indonesia, the major white pepper producing country is estimated to produce around 40,000 MT in 2017 where the world demand is estimated at 44,000 MT. Other white pepper producing countries include Viet Nam. He also informed about the supply of pepper from non-Asia countries such as from South America and Africa.

9. He further mentioned that with the estimated supply situation from the pepper producing countries, he predicted that the increasing supply will affect the prices. He concluded that the global demand will remain strong with the growth in the developing countries may reach 10,000 MT per annum due to increase of income and weather condition would be the main factors for the buyers to make purchase decision. Good news was that the demand is strong and would continue to grow. His paper is given in **Annex 04.**

Agenda item 6: Paper on 2017 Brazil Crop & 2018 Outlook by Mr. Parsram Dhirani, Managing Director Royal Golden General Trading LLC, the UAE

10. A paper on 2017 Brazil Crop & 2018 Outlook was presented by Mr. Parsram Dhirani, Managing Director of Royal Golden General Trading LLC, UAE. Mr. Parsram informed the meeting that the State of Espirito Santo now becomes another important pepper growing state in Brazil with the production is estimated to reach 25,000 MT in 2017 and 30,000 MT in 2018. He informed that average yield in Espirito Santo is about 2-3kg per tree and will reach 5-7 kg, if sprinkle irrigation system is used. Pepper produced from Espirito Santo has heavy density up to 560-650 gram per litter. The main harvesting month is January – February (about 60%) and two catch crops during March-April and May-June with the estimates production share of 20% on each catch crop respectively.

11. His full paper is given in **Annex 05.**

Agenda item 7: Paper on Development of a Practical Procedure Suitable to Determine the Geographical Origin and Authenticity of Spices with relevant Market by means of 1H-NMR-Analytics (HAGen) by M. Sc. Iris Cordero – NMR Project Manager, arotop food and environment GmbH

12. Ms. Iris Cordero, NMR Project Manager of arotop food and environment GmbH in her presentation informed on the food fraud and economically motivated adulteration are emerging risks, as global supply chains continue to grow in complexity and competition. She further mentioned that to protect consumers at all levels from health risks and economic losses, the German Government has taken further measures against food fraud. Practicable food quality assurance, however, is always associated with the availability of fast and economic tools which successfully increase the detection rate of even "smart" food adulterations.

13. She mentioned that Bruker BioSpin has developed and released a food-profiling methodology applied to fruit juice, wine and honey so far, based on ¹H-NMR spectroscopy combined with multivariate statistical chemo metrics. All applications have been ISO-17025

accredited in 2015. The profiling applications are fully automated, easy-to-use push-button solutions. No NMR or expert knowledge in statistics is required, and even the data interpretation is performed automatically, delivering a descriptive report about the result for every sample.

14. The goal of this project now is to add a spice-screening application to this profiling portfolio, based on the well-established methodology described, but also to go beyond it by incorporating an extraction step into the sample preparation. In a first instance, the project focuses on the development of models to probe geographical origin and authenticity of some market-relevant spices, i.e. pepper, paprika, and saffron. All these statistical models require a database in the background, which contains a representative number of authentic samples for each type of spice, as well as for each geographical origin of each type of spice. Any subsequent sample analysis and any detection of non-conformities will be successful and reliable only if they are backed by a high-quality database. Besides the development of constantly reproducible spice extraction standard procedures, authentic sample collection is the most challenging task within this project.

15. All in all, this project is intended to support the spice industry as well as the German retail chains and buying centres to better protect final consumers and other sectors of the food industry from fraud. Together with the experience in working with spices and herbs of arotop food & environment and the expertise of Bruker BioSpin in NMR-Spectroscopy, therefore, the successful result of the project is of great expectation.

16. Her full paper is given in **Annex 06**

Agenda item 9: Paper on Trends in Consumption of Black & White pepper by Mr. Giridhar Rao, Director – Sustainable Sourced Spices & Herbs, Griffith Foods Asia and Middle East, Bangalore, India

17. In the presentation, Mr. Giridhar Rao gave charts data on world pepper exports and export share of the producing countries as well as the world's imports of pepper and pepper products and unit realization of exports. It was stated that unit price has gone up in all the pepper products with the whole pepper prices was found to be more expensive than crushed / ground during 2016. The USA, Germany, UK, UAE and the Netherlands were the key importers importing black and white pepper mainly from Viet Nam, Indonesia, Brazil and India as the major suppliers. According to Mr. Giridhar, while share of Brazil to EU is on increasing trend, he said that there is no reason that Europe has reduced imports of pepper from Viet Nam for 2012-2016. As for the Pepper Oleoresin, around 70% shipped to USA, Germany and Netherlands during 2012-2016 and he predicted that the trend will continue. Mr. Giridhar also stated that imports of pepper by producing countries will continue to rise, while imports by trading countries like Singapore and UAE are projected to decline.

18. Mr. Giridhar further informed the use of black and white pepper on different segments, whereby Sauces and Seasoning is the largest user of Pepper (27%) and this trend is expected to continue. Other segments use pepper include Meals and Meal centers (22%), processed meat and fish (17%) and other segments (16%). It would be an opportunity for the exporters who offer value added, ready to use pepper products to earn premium, he added. New products of ingredients launched during 2016 where black and pepper are as ingredients have shown increasing trend. Mr. Gridhar also gave detailed information on the Spice and Hearbs profile in the two-world major market namely EU, USA. He concluded his presentation by giving conclusion on the changing needs of consumers. His full paper is given in **Annex 07.**

Agenda item 10: Paper on Pepper production & trade in Madagascar - a trader's perspective by Mr. Girish Kumar, Business Head, ETS FLOWERINE, 501 Toamasina, Madagascar.

19. Mr. Girish Kumar presented pepper industry of Madagascar which provides information about production and trade. He found that at present Madagascar was not potential producer which only reached about 3,000 MT in 2016 but in the next 7 to 10 years, it would be a major producer of safe black pepper. It was interestingly noted that Madagascar has applied a good agricultural practice which is no use of fastest chemical or fertilizer technology. Its main markets were India and followed by UAE and Saudi Arabia.

20. His full paper is given in Annex 08

Agenda item 11: Consideration and adoption of report of the 25th Meeting of Pepper-Exim

21. The report of the 25th Meeting of Pepper-Exim was considered and adopted.

Agenda item 12: Token of Appreciation

22. On behalf of the IPC, Mrs. Hoang Thi Lien, Executive Director expressed her sincere thanks to the resource speakers for their great effort for delivering presentations at the meeting. By providing information about the market scenario and new trends in the pepper industry recently, the meeting was given a picture of the market and its movement so as the farmers and other relevant stakeholders of the members countries would have more accurate information of the market in order to plan its pepper development in the long run.

Agenda item 13: Vote of Thanks

23. Mr. Sarada de Silva, Chairman addressed his gratitude to the strong support of the distinguished delegates in the meeting who actively contributed in providing comments and discussion and interaction with the speakers. The delegates also extended their appreciation to the excellent chairing of Mr. Sarada de Silva for his hard working and dedicated effort to the success of the meeting.

Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 01

List of Delegates

Report of the 25TH Pepper Exim Meeting of IPC1ST November 2017, Kandy, Sri Lanka**LIST OF DELEGATES**

<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
1.	Jonghyeon Yoon	Welt Bio	Cambodia
2.	Kim rann	Farmer	Cambodia
3.	Leang Lem Teng	Amret Rungroeung Group Co., LTD	Cambodia
4.	Moa Chhayheang	Ministry of Commerce	Cambodia
5.	Nir Sela	Sela Pepper Co., Ltd.	Cambodia
6.	Saya Linda	Dy-Annan Co. Ltd.	Cambodia
7.	Soeng Sopha	Sela Pepper Co., Ltd.	Cambodia
8.	Song Saran	Amret Rungroeung Group Co., LTD	Cambodia
9.	Yong-phil Park	Welt Bio	Cambodia
10.	Zuoyi Zhang	E & E Investment Company	Cambodia
11.	Chen Jiantuan	Hainan Dongping Food Co. Ltd.	China PR
12.	Chen Kebo	Qionghai Hengda Industry Co. Ltd.	China PR
13.	Chen Litao	Qionghai Yeguang Industry Co. Ltd.	China PR
14.	Chuande Liu	Shanghai McCormick Foods Co.,Ltd	China PR
15.	Jason Tower	E & E Investment Company	China PR
16.	Li Jiawen	Qionghai Yeguang Industry Co. Ltd.	China PR
17.	Li Yiwei	Qionghai Yeguang Industry Co., Ltd.	China PR
18.	Li Zhaochao	Qionghai Yeguang Industry Co., Ltd.	China PR
19.	Liang Xiaoyang	Hainan HNA Aviation Imp.& Exp. Co., Ltd.	China PR
20.	Liao Qiusui	Hainan Hengda Industry Co. Ltd	China PR
21.	Shulei Lu	Shanghai McCormick Foods Co.,Ltd	China PR
22.	Ahmed Sharaf	Mediterraneo Egypt	Egypt
23.	Seif Eddine Kergoat	Mediterraneo	Egypt
24.	Dirk Haucap	Fuchs Gewürze GmbH	Germany
25.	Iris Arcelia Cordero	arotop food & environment	Germany
26.	Feyzullah Ayan	Eurosa Pacific Limited	Hong Kong
27.	Abishek Kumar Lohiya	Bishan Dayal Vinod Kumar	India
28.	Aditya Agarwal	Gupta Trading Co.	India
29.	Aditya Vikram Poddar	Nani Agro Foods (P) Llted.	India
30.	Allwyn Raja A	DS Traders	India
31.	Anand Kishor Kuruwa	Kuruwa Enterprises	India
32.	Anilkumar Kannan	AB Mauri India Pvt. Ltd.	India
33.	Anita Karn	Department of Commerce	India
34.	Ankegowda S J	Indian Institute of Spices Research	India
35.	Apurva Narain	Marubeni India Pvt Ltd.	India
36.	Aravind, B.C.	Hasiru Organics	India
37.	Arvind J Shah	Spice Culture	India

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
38.	Azeem Abdul Rehman	Legend Exim	India
39.	Balu Maliakel	Akay Flavours & Aromatics Pvt. Ltd.	India
40.	Bhaves N. Ved	ACE Agencies	India
41.	Bhaves N. Vijaysinh	Vijaysinh & Co.	India
42.	Bibin	Corbel business Applications	India
43.	Biharilal Ghura	Radha. V. Company	India
44.	Bijo Varghese	Kancor Mane	India
45.	Charan Bir Singh	Chanchal Singh Pardhan Singh & Co.,	India
46.	Dennis Verghese	Corbel business Applications	India
47.	Deval Sachde	Vijaysinh & Co.	India
48.	Dhruv Desai	Nani Agro Foods (P) Ltd.	India
49.	Dinesh, M.J.	Krushika Magazine	India
50.	Gagan Gupta	Roop trading Company	India
51.	Gagandeep singh	Gobind Machinery Works	India
52.	Ganapathy K.D	Tata Coffee Limited	India
53.	Ganesh Ahuja	Komal Exotic Spices Pvt. Ltd.	India
54.	Geetadevi M. Puttegowda		India
55.	George Kurian K	Tata Coffee Ltd	India
56.	Giby Mathew	Commodity Online India Ltd.	India
57.	Giridhar Rao	Griffith laboratories Pvt. Ltd.	India
58.	Gowthavalli Mallegowda		India
59.	Gulshan John	Nedspice Processing India Pvt. Ltd.	India
60.	Heman Kishor	Hemanand Spices	India
61.	Homey Cheriyan	Directorate of Arecanut & Spices Development	India
62.	Jafar Sidik SA	Universal Food Products	India
63.	Jayakrishnan Nair	AVT McCormick Ingredients Pvt. Ltd.	India
64.	Jayamma M. S Gowda		India
65.	Jos van Gulick	Nedspice Processing India Pvt. Ltd.	India
66.	K.P. Thomas	Kancor Ingredients Ltd.	India
67.	Kanwarbir Singh	Hemkunt Agro Care P Ltd	India
68.	Keshava Kenjige Ramegowda	Hosathota Estate	India
69.	Ketan Mehta	Spices N Cents	India
70.	Krishna Kumar	CropIn Technologies	India
71.	Krishnakumar Menon	Griffith Foods	India
72.	Krishnegowda Hottegowda		India

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
73.	Lakshamana Gowda Gowthavali		India
74.	Leonard Thomas Dsouza		India
75.	M.P. Ramu		India
76.	M.T. Joy	Joyees Consultancy & Sourcing of Spice	India
77.	Mariamanna Antony	Spices Board	India
78.	Masood Hussein Saifudeen	M. A. M. Trading Corporation	India
79.	Mihir Mehta	SpicExim	India
80.	Mitesh	Nani Agri Foods (P) Ltd.	India
81.	Mohamed Hanifa		India
82.	Munir Sait	Global Reach-Sourcing Consultants	India
83.	Ninan Philip M	Herbal Isolates (P) Ltd	India
84.	Nipulal Arumughom	Corbel business Applications	India
85.	Pali Viveka	Vijayashree Plantation	India
86.	Pramod Nair	Suminter India Organics	India
87.	Prathima, G.R.	Hosathota Estate	India
88.	Praveen Rajkumar	AVT McCormick Ingredients Pvt. Ltd.	India
89.	Rajashekara		India
90.	Rajeev Mittal	Suminter India Organics	India
91.	Rajiv C Palicha	Synthite Industries	India
92.	Rajshree Ravindra Kukkadwal	Sbc Impex Studio LLP	India
93.	Ramachandran Madhu	Kancor Ingredients Ltd.,	India
94.	Rishal Mathew George	Synthite Industries Ltd	India
95.	S. Ilavarasu	Kolli Hills Planters Association	India
96.	Sahithya Aravind	Black Gold League-India	India
97.	Sameer V. Mehra	Suminter India Organics Pvt Ltd	India
98.	Selvakumar Anbazhagan	DS Traders	India
99.	Shafeeq	Namazco Intl Trades & Exports.	India
100.	Shantha Devi Megalamakki		India
101.	Shyam Mohan	Griffith Foods Pvt Ltd	India
102.	Siddaramappa S.	Spices Board of India	India
103.	Sreekanta B H	Vijayashree Plantation	India
104.	Sreekumar. T	Akay Flavours & Aromatics Pvt Ltd	India
105.	Subramanian Kannan	Cashew Export Promotional Council	India
106.	Sudeep Ramachandra Kalale		India
107.	Sumod Babu	Givaudan (India) Pvt Ltd,	India

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
108.	Sumuk Menasukodige		India
109.	Sunil D. Tamgale	Scientific Agro Technologies	India
110.	Sunil Kumar Jain	D.S.SONS	India
111.	Sushama Srikandath	AVT McCormick Ingredients Pvt. Ltd.	India
112.	Tharanath Vidyasagar	South India Produce Co	India
113.	Thomas Kurian	Synthite Industries Ltd	India
114.	Umashankar Mahanthappa		India
115.	Vijay Kumar	CropIn Technologies Ltd	India
116.	Viju Jacob	Synthite Industries Limited	India
117.	Vishal Gupta	Rakesh Kumar Rajesh Kumar	India
118.	Vivek, B.S.	Black Gold League-India	India
119.	Yogesh Mehta	SpicExim	India
120.	Zoheb Azeem	Legend Exim	India
121.	Abdul Aziz	Ministry of Agriculture	Indonesia
122.	Abdul Somad	Ministry of Trade	Indonesia
123.	Amarillis Rahmita	Ministry of Trade	Indonesia
124.	Andryanus Simarmata	Sarimakmur Tunggal Mandiri, PT	Indonesia
125.	Ani Tanjaya	Cahaya Pelita Surya, CV	Indonesia
126.	Imaniyyah	Halidin Pacific Semesta, PT	Indonesia
127.	Kelvin	Tani Terang	Indonesia
128.	Kurniawan Triwibowo	Ministry of Trade	Indonesia
129.	Lusiana Haryanto	Perum Pondok Duta II	Indonesia
130.	Naasa Riandji	Halidin Pacific Semesta, PT	Indonesia
131.	Nurlianie Bernawie	Ministry of Agriculture	Indonesia
132.	S.Krishnan	Supa Surya Niaga, PT	Indonesia
133.	Sari Handini Murti	Ministry of Trade	Indonesia
134.	Selvieana Aprilia	Aman Jaya Perdana, PT	Indonesia
135.	Siti Wahyuningrum	Coordinating Ministry for Economic Affairs	Indonesia
136.	Soumen Mahanty	Mahalaya Agri Corp, PT	Indonesia
137.	Sukardi, SE, M.M., M.H.	Coordinating Ministry for Economic Affairs	Indonesia
138.	Sumita	Putera Nusantara, CV	Indonesia
139.	Supradi Rustam	Bangka Alam Sejahtera, PT	Indonesia
140.	Tan Kok Sin	Makro Jaya Lestari, PT	Indonesia
141.	Tejo Supradi	Bangka Alam Sejahtera, PT	Indonesia
142.	Wiryawan Prah Utomo	Embassy of the Republic of Indonesia	Indonesia
143.	Wisnu Perdana	International Pepper Community	Indonesia
144.	Yanto	Ministry of Trade	Indonesia

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145.	Yuliani Widjaja	AELI/AIPE	Indonesia
146.	Keizo Hirose	Vox Trading	Japan
147.	Minamide Hiroya	Marubeni	Japan
148.	Nobuaki Tsuge	All Nippon Spice Association	Japan
149.	Donglion Kim	Kyungnong Corporation	Korea South
150.	Andrianarija	Blackspicy	Madagascar
151.	Girish Kumar	ETS FLOWERINE	Madagascar
152.	John Mohn	Black Spice Ltd	Madagascar
153.	Andi Anak Ampok	Pepper Farmer	Malaysia
154.	Esther See Eyeang Peng	Gaban Spice Manufacturing S/B	Malaysia
155.	Francis Lim Long Fuat	GMP Foods Industries Sdn. Bhd.	Malaysia
156.	Harry Entebang	Malaysian Pepper Board	Malaysia
157.	Jennifer Jong Sze Wa	Borneo Capital Land Sdn Bhd	Malaysia
158.	Joanna Jong Sze Chiao	Borneo Capital Land Sdn Bhd	Malaysia
159.	Lai Kui Fong	Department of Agriculture, Sarawak	Malaysia
160.	Lai Pei Sing	Malaysian Pepper Board	Malaysia
161.	Lim Kok Heng	Aladdin Spice Sdn. Bhd.	Malaysia
162.	Ling Jing Jing	Malaysian Pepper Board	Malaysia
163.	Lloyd Tayan Salang		Malaysia
164.	Lo Chow Chan	Borneo Capital Land Sdn Bhd	Malaysia
165.	Lo Kim Fung	Borneo Capital Land Sdn Bhd	Malaysia
166.	Lucy Chee Nyuk Lan	Borneo Capital Land Sdn Bhd	Malaysia
167.	Mariam Ilias	Min. of Plantation Industries and Commodities	Malaysia
168.	Mohd. Ehsan bin Ahmad Zaidi Adrice	Borneo Capital Land Sdn Bhd	Malaysia
169.	Oscar Yii	Sh Jati Trading Sdn Bhd	Malaysia
170.	Paulus Amin Det	Department of Agriculture, Sarawak	Malaysia
171.	Rhys Salang		Malaysia
172.	Seow Chee Seong	Kedai Ubat Chung Shin	Malaysia
173.	Siew Teck Ban	Novelty Harvest Sdn. Bhd.	Malaysia
174.	Fco Javier Lozano Magaña	Lozano Magaña S.A de CV	Mexico
175.	Virendra M. Verma	College of Micronesia	Micronesia
176.	Evert-Jan Verschuren	Verstegen Spices & Sauces BV	Netherlands
177.	Lukas Veldmeijer	Ventilex B.V.	Netherlands
178.	Mirza Khan	Diamond Trading Co.	Pakistan
179.	Umar Din	Zaib International Traders	Pakistan

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180.	Givel M Mamaril	Province of Davao Occidental	Philippines
181.	Glenda E Molino	Province of Davao Occidental	Philippines
182.	Mary Joy M. Balunan	PVCASI	Philippines
183.	Rodgie S. Casiano	PVCASI	Philippines
184.	Banda Okrin	Al Jameel International Trading Co.Ltd	Saudi Arabia
185.	Mutaqeen Kapasi	Arabian Trading Corporation - ATRACO	Saudi Arabia
186.	Wahid H Monehar	Thamarat Awtan Trading Est	Saudi Arabia
187.	Hanif Moez Nomanbhoy	Nomanbhoy & Sons Pte Ltd	Singapore
188.	Jafar Sidik SA	Universal Food Products	Singapore
189.	Ng Wee Meng	Swee Choon Co. (Pte) Ltd	Singapore
190.	Daniel Galvan Granado	Daniel Galvan SL	Spain
191.	Anil Yapa Bandara	Bio Foods (Pvt.) Ltd.	Sri Lanka
192.	A Sunil	Premawardane Export (Pvt) Ltd.	Sri Lanka
193.	A. I. Karunarathna	Department of Export Agriculture	Sri Lanka
194.	A.D.D. Roshika	Department of Export Agriculture	Sri Lanka
195.	A.D.N. Amukutuwa	Department of Export Agriculture	Sri Lanka
196.	A.J.M.L.R. Jayasekara	Department of Export Agriculture	Sri Lanka
197.	A.K.D.I. Rukmal	Kahawatta Plantations	Sri Lanka
198.	A.L.S.Dharmaparakrama	Department of Export Agriculture	Sri Lanka
199.	A.M. Piyasoma Upali	Kurunegala Plantations Limited	Sri Lanka
200.	A.P.P. Disna	Department of Export Agriculture	Sri Lanka
201.	A.R.M. Aslam	Central Spice Export	Sri Lanka
202.	Ali Sabry Ahamed Lebbe	Green Land Commercial Consultant	Sri Lanka
203.	Amaan Miflal	Lanka Commodity Trading (Pvt) Ltd	Sri Lanka
204.	Amarawansa E.A.G.S.	Department of Export Agriculture	Sri Lanka
205.	Anandan Deshabandu	Adamjee Lukmanjee & Sons	Sri Lanka
206.	Anjana Lakshamana	Anjana Lakshamana And Co.	Sri Lanka
207.	Anushka De Silva	G. P. De Silva & Sons International (Pvt) Ltd	Sri Lanka
208.	Aruna Parakrama Heenkende	Department of Export Agriculture	Sri Lanka
209.	Azeer Mukthar	Lanka Guardian Commodities	Sri Lanka
210.	Azhar Preena	Expo Commodities DMCC	Sri Lanka
211.	B.L.A.J. Dharmakeerthi	Ministry of Plantation Industries	Sri Lanka
212.	B.M.R.R.K. Basnayake	Department of Export Agriculture	Sri Lanka
213.	B.M.T.T.K. Piyatissa	Department of Export Agriculture	Sri Lanka
214.	Bandula Wickramaarachchi	International Pepper Community	Sri Lanka
215.	Bughary	Bughary Bio Spices	Sri Lanka

Report of the 25TH Pepper Exim Meeting of IPC1ST November 2017, Kandy, Sri Lanka**LIST OF DELEGATES**

<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
216.	Bughary Rikaz	Bughary Bio Spices	Sri Lanka
217.	Bughary Shabeeb	Bughary Bio Spices	Sri Lanka
218.	C.I.M Attanayake	Department of Export Agriculture	Sri Lanka
219.	C.L.Thilakarathne	Department of Export Agriculture	Sri Lanka
220.	C.U Widanapathirana	Department of Export Agriculture	Sri Lanka
221.	Chandani P. Darmadasa	Department of Export Agriculture	Sri Lanka
222.	Chandani Rajika	Department of Export Agriculture	Sri Lanka
223.	Chathura Abeyratne	Joint Agri Products Ceylon	Sri Lanka
224.	Chopadithya Edirisinghe	Sanasa International (Pvt) Ltd	Sri Lanka
225.	Christopher Fernando	Spices Allied product producers & Traders Association	Sri Lanka
226.	D. J. V. Abeyratne	Orient Trading Company (Pvt) Ltd	Sri Lanka
227.	D. N. Samaraweera	Department of Export Agriculture	Sri Lanka
228.	D.A Perera	EOAS Organics Pvt. Ltd.	Sri Lanka
229.	D.B.R Swarnathilaka	Dept of Export Agriculture	Sri Lanka
230.	D.C.A Perera	EOAS Organics Pvt. Ltd.	Sri Lanka
231.	D.G.I.Sampath Ariyatilaka	Department of Export Agriculture	Sri Lanka
232.	D.M.C.K. Dissanayaka	Department of Export Agriculture	Sri Lanka
233.	D.M.P.V. Dissanayaka	Department of Export Agriculture	Sri Lanka
234.	D.P.M.N. Pathirana	Kurunegala Plantation Ltd	Sri Lanka
235.	D.R.J Perera	EOAS Organics Pvt. Ltd.	Sri Lanka
236.	Damitha Perera	Forbes & Walker Commodity Brokers (Pvt) Ltd	Sri Lanka
237.	Danush Dilanka Runage	Rathna Producers Cinnamon Exports (Pvt) Ltd	Sri Lanka
238.	de Rooij	Joint Agri Products Ceylon (pvt) Ltd	Sri Lanka
239.	Devi Deivanayagam	Devi Trading Company	Sri Lanka
240.	Dhammika Gunasekara	The Spice Council, Sri Lanka	Sri Lanka
241.	Duraisamy Sandrasegarampillai	Department of Export Agriculture	Sri Lanka
242.	E D E G N Dharmakeerthi	Department of Export Agriculture	Sri Lanka
243.	E K Naveen Yasintha	Kellys	Sri Lanka
244.	E.D.Keerthi Edirisinghe	Department of Export Agriculture	Sri Lanka
245.	Ejaz Chatoor	Saboor Chatoor (Pvt) Ltd.	Sri Lanka
246.	Emiel Bakker	Joint Agri Products Ceylon (pvt) Ltd	Sri Lanka
247.	Erandi Randeniya	Department of Export Agriculture	Sri Lanka
248.	Faheem Ziard	BTF Premier (Private) Limited	Sri Lanka
249.	Fazal Mushin	Greenfield Bio Plantations (Pvt) Ltd.	Sri Lanka

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
250.	G Ahuja	Balaji Ventures Pvt Ltd	Sri Lanka
251.	G. E. Lal De Silva	G. P. De Silva & Sons International (Pvt) Ltd	Sri Lanka
252.	G.E.M.A.K.Dissanayake	Department of Export Agriculture	Sri Lanka
253.	G.K.B. Degaldoruwa	Department of Export Agriculture	Sri Lanka
254.	G.T.O. Viren Ruberu	SAPPTA	Sri Lanka
255.	Gaurav Bakshi	Expo DMCC Lanka	Sri Lanka
256.	Gayan Karunaratne	L.B. Spices Traing Pvt.Ltd.	Sri Lanka
257.	Gehan De Silva	HDDES Extracts (Pvt) Ltd.	Sri Lanka
258.	Gihan Himansu	Kellys	Sri Lanka
259.	Gihan Welagedara	Hela Exports	Sri Lanka
260.	Giri Kadurugamuwa	Alliance for Sustainable Landscape Management	Sri Lanka
261.	Gulamhusein.S.Chatoor	Saboor Chatoor (Pvt) Ltd	Sri Lanka
262.	H D A K Gunaratne	Department of Export Agriculture	Sri Lanka
263.	H..M.R.. Hennayake	Department of Export Agriculture	Sri Lanka
264.	H.D.De Silva	HDDES Extracts (Pvt) Ltd.	Sri Lanka
265.	H.M. Lasantha Abeyrathna	Department of Export Agriculture	Sri Lanka
266.	H.M.P.A. Subasinghe	Department of Export Agriculture	Sri Lanka
267.	Hassan Kassim	EXPO COMMODITIES DMCC	Sri Lanka
268.	I. Sujatha Kumari	Department of Export Agriculture	Sri Lanka
269.	I.G.M.Rajapakse	Department of Export Agriculture	Sri Lanka
270.	I.L.M.Najeem	Ecowave(Guarantee) Limited	Sri Lanka
271.	I.V.A.D C. Sampath Induruwa	Department of Export Agriculture	Sri Lanka
272.	Ijaz Munzeer	Mahir Brothers	Sri Lanka
273.	Inoka Deniyapahala	Department of Export Agriculture	Sri Lanka
274.	Irfan Izadeen	Euro West Export (Pvt) ltd	Sri Lanka
275.	Irshad Inayathullah	Sano Impex	Sri Lanka
276.	J.L.Keerthi Weeralal	Department of Export Agriculture	Sri Lanka
277.	J.M. Seneviratne	Department of Export Agriculture	Sri Lanka
278.	J.N.D. Adhikaram	Department of Export Agriculture	Sri Lanka
279.	Jalaldeen Mohammed Riswan	Ashik Traders	Sri Lanka
280.	Jaliya Wickramasurendra	PTC Agro (Pvt) Ltf	Sri Lanka
281.	Janak Ahmer	G. P. De Silva & Sons International (Pvt) Ltd	Sri Lanka
282.	JATP Gunawardena		Sri Lanka
283.	Jayawardena	Plant Lipids Lanka (Pvt) Ltd	Sri Lanka

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
284.	Jehan De Silva	HDDES Extracts Pvt. Ltd.	Sri Lanka
285.	Jude Fernando	The Spice Council	Sri Lanka
286.	K R Dayananda	Silvermill Holdings Ltd.	Sri Lanka
287.	K. Ananda Kularatna	Citro Essential Oils (Pvt) Ltd	Sri Lanka
288.	K. Upali Ranawaka	Department of Export Agriculture	Sri Lanka
289.	K.A.S. Anjalee Rupasinghe	Export Agriculture Department	Sri Lanka
290.	K.D.N.Priyadarshani	Department of Export Agriculture	Sri Lanka
291.	K.G.D.N. Gunathilaka	Department of Export Agriculture	Sri Lanka
292.	K.G.G. Wijesinghe	Department of Export Agriculture	Sri Lanka
293.	K.G.P. Shantha	Department of Export Agriculture	Sri Lanka
294.	K.L. Karunaratne	L.B. Spices Trading (Pvt) Ltd.	Sri Lanka
295.	K.M.C.B. Karunarathne	Department of Export Agriculture	Sri Lanka
296.	K.S.P. Piyathissa	Department of Export Agriculture	Sri Lanka
297.	Kolitha Prasanna Weerakoon	Imperial Spices (Pvt) Ltd	Sri Lanka
298.	Krishanth Loganathan	DLK Spice Exports	Sri Lanka
299.	Kumudini Gunasekare	Ministry of Primary Industries	Sri Lanka
300.	L.M.J.K. Lindara	Department of Export Agriculture	Sri Lanka
301.	M I Ilham Mohamed	Ishana Exports Pvt. Ltd.	Sri Lanka
302.	M I Inshaf Ahamed	Ishana Exports Pvt. Ltd.	Sri Lanka
303.	M Y M Ibrahim	Ishana Exports Pvt. Ltd.	Sri Lanka
304.	M. Nadarajah	C.C.S. Bio Extracts	Sri Lanka
305.	M. Rajendra	Star Trading Export International	Sri Lanka
306.	M.A.C.M Ajmal	Mahagedara Spice Export	Sri Lanka
307.	M.A.P.K. Seneviratne	Department of Export Agriculture	Sri Lanka
308.	M.C.M. Zarook	Gamwasama Estate Ltd	Sri Lanka
309.	M.G.D.B Samarakoon	Department of Export Agriculture	Sri Lanka
310.	M.H.M. Fawmy	Ceylon Spice Exports	Sri Lanka
311.	M.H.S.S.Jayarathne	Premawardane Export	Sri Lanka
312.	M.K.S.R.D.Samarasinghe	Department of Export Agriculture	Sri Lanka
313.	M.P. Shiromi	Department of Export Agriculture	Sri Lanka
314.	M.T.M Shafee	Mahagedara Spice Export	Sri Lanka
315.	M.W. Tiron Premajith	Rathna Producers Cinnamon Exports (Pvt) Ltd	Sri Lanka
316.	M.Z.M. Zakir Husain	Ceylon Spice Exports	Sri Lanka
317.	Mario Roshan De Zoysa	Imperial Spices (Pvt) Ltd	Sri Lanka
318.	Meanu Amarasinghe	Department of Export Agriculture	Sri Lanka

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
319.	Mevan De Silva	HDDES Extracts (Pvt) Ltd.	Sri Lanka
320.	Murtaza Lukmanjee	Adamjee Lukmanjee & Sons	Sri Lanka
321.	Nadia Ouriemchi	EF ECS Sri Lanka	Sri Lanka
322.	Nalani Dharmakeerthi	Department of Export Agriculture	Sri Lanka
323.	Nanda B. Kohona	International Commodity Exports Pvt Ltd	Sri Lanka
324.	Nandani Gamage	Department of Export Agriculture	Sri Lanka
325.	Nilmini Wanasinghe	Export Development Board	Sri Lanka
326.	Nimantha Epa	Kellys	Sri Lanka
327.	Nuwanthi Rathnayake	Department of Export Agriculture	Sri Lanka
328.	O.m.Rinoshan	RU.Trading company	Sri Lanka
329.	P. Damith Madusanka	Spice producer & Essential Oil maker	Sri Lanka
330.	P. R. Idamekorala	Department of Export Agriculture	Sri Lanka
331.	P.G.A.L.Kumara	Department of Export Agriculture	Sri Lanka
332.	P.H.M. Senevirathna Banda	Department of Export Agriculture	Sri Lanka
333.	Prasan		Sri Lanka
334.	Priyadarshini Halpe	G. P. De Silva & Sons International (Pvt) Ltd	Sri Lanka
335.	Priyadarshinie Karunaratne	Nestle Lanka PLC	Sri Lanka
336.	R A D R A Ranasinghe	Dept of Export Agriculture	Sri Lanka
337.	R. A. A. K. Ranawaka	Department of Export Agriculture	Sri Lanka
338.	R.D.Kodithuwakku	Department of Export Agriculture	Sri Lanka
339.	R.Lingeskumar	Subiksha Impex	Sri Lanka
340.	R.M.D.S.S. Rathnayake	Department of Export Agriculture	Sri Lanka
341.	R.M.K.U.Bandara	Agriculture Sector Modernization Project, MIP	Sri Lanka
342.	Rafeek Udayar	RU.Trading Company	Sri Lanka
343.	Rahul Prasad	Lanka Commodities	Sri Lanka
344.	Raisdeen	Quality Spice Company LTD	Sri Lanka
345.	Rajeewa Ranasinghe		Sri Lanka
346.	Ravi Samaraweera	Tharupathi Food Products	Sri Lanka
347.	Ravindu Priyanath Runage	Rathna Producers Cinnamon Exports (Pvt) Ltd	Sri Lanka
348.	Rehan	Business	Sri Lanka
349.	Rohitha Thilakaratne	Merchant Lanka (Pvt) Ltd	Sri Lanka
350.	Rumesh Jayasuriya	Imperial Spices (Pvt) Ltd	Sri Lanka
351.	Ruwan Abeyesirigunawardena	U10 CCCC Pvt Ltd	Sri Lanka
352.	Ruwan Rathnayaka	Nestle Lanka PLC	Sri Lanka

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
353.	Ryan Rambukwella	Synthite Industries Ltd	Sri Lanka
354.	S. I. C. Silva	Department of Export Agriculture	Sri Lanka
355.	S.B.U.S.K. Ranaweera	Department of Export Agriculture	Sri Lanka
356.	S.M. Ranatunga	Department of Export Agriculture	Sri Lanka
357.	S.M. Rifaideen	Well Spice & Car Sale	Sri Lanka
358.	S.M.G Dayarathna Bandara	Export Agriculture Department	Sri Lanka
359.	S.M.M Kuddoos	Ceylon Spice Exports	Sri Lanka
360.	S.M.M. Samarakoon	Kurunegala Plantations Limited	Sri Lanka
361.	S.T.C. Sri Nikethi	Premawardane Export	Sri Lanka
362.	Sahan Wijesena	Infinity Engineering	Sri Lanka
363.	Saman Buddhika Senarathpathirana	BTF Premier Pvt Ltd	Sri Lanka
364.	Samantha Harankahadeniya	Department of Export Agriculture	Sri Lanka
365.	Sarada De Silva	The Spice Council of Sri Lanka	Sri Lanka
366.	Sarath Ranaweera	Bio Foods (Pvt.) Ltd.	Sri Lanka
367.	Senarath Yatigammana	Bio Foods (Pvt.) Ltd.	Sri Lanka
368.	Shantha Senevirathne	Department of Export Agriculture	Sri Lanka
369.	Srinath Senadheera	Bio Foods (Pvt.) Ltd.	Sri Lanka
370.	Subash Bandara	Grupo Canela (Pvt)Ltd.	Sri Lanka
371.	Subhashini M K Seneviratne	Department of Export Agriculture	Sri Lanka
372.	Sujatha Indurage	Department of Export Agriculture	Sri Lanka
373.	Sujeewa Senarath Yapa	Department of Export Agriculture	Sri Lanka
374.	Sujeewa Ayupala Jayasundera	Everest Green Plant	Sri Lanka
375.	T.M.P.J. Thilakarathna	Department of Export Agriculture	Sri Lanka
376.	Thanuja Herath	Department of Export Agriculture	Sri Lanka
377.	Tharindu Gallage	Empire Food Solutions (Pvt) Ltd.	Sri Lanka
378.	Thushari Liyanage	Department Of Export Agriculture	Sri Lanka
379.	Tushara Jayalath	Sri Lanka Export Development Board	Sri Lanka
380.	U.K. Kodikara	Department of Export Agriculture	Sri Lanka
381.	Upali A. De Silva	HDDES Extracts Pvt. Ltd.	Sri Lanka
382.	Upendrika Jayasundara	Merchant Lanka (Pvt) Ltd	Sri Lanka
383.	Ushanth Loganathan	DLK Spice Exports	Sri Lanka
384.	Usman	Ru Trading company	Sri Lanka
385.	V.W.R.M.M.B Ranaraja	Department of Export Agriculture	Sri Lanka
386.	W.A,A Hasitha shamaka.	Department of Export Agriculture	Sri Lanka
387.	W.A.C.A.S. Perera		Sri Lanka

Report of the 25TH Pepper Exim Meeting of IPC1ST November 2017, Kandy, Sri Lanka**LIST OF DELEGATES**

<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
388.	W.A.N.D.Fonseka	Department of Export Agriculture	Sri Lanka
389.	W.D.L.Gunaratne	Freelance	Sri Lanka
390.	W.M. Chandrarathna	Department of Export Agriculture	Sri Lanka
391.	W.M.A.L.. Weerasekara	Department of Export Agriculture	Sri Lanka
392.	W.M.G.K Weerasinghe	Kurunagala Plantations Limited	Sri Lanka
393.	W.M.M.R.B. Wijekoon	Department of Export Agriculture	Sri Lanka
394.	W.M.R.W.B.Wijekoon	Department of Export Agriculture	Sri Lanka
395.	W.M.S.R.Bandara	Department of Export Agriculture	Sri Lanka
396.	Wathsala D. Geekiyanage	Department of Export Agriculture	Sri Lanka
397.	WGMNU Abdullah		Sri Lanka
398.	Y MR B Yaparathne	Department of Export Agriculture	Sri Lanka
399.	Y.M.D.B Yapa	Department of Export Agriculture	Sri Lanka
400.	Yazeer Mukthar	Lanka Guardian Commodities	Sri Lanka
401.	Chen Jui-Fang		Taiwan
402.	Potjana Loahapotjanart	McCormick Thailand	Thailand
403.	Abdullah Durak	Alperen Gida Ltd	Turkey
404.	Saeed Ahmed		Turkey
405.	Kunal Goel	Kunal Goel	UAE
406.	Mahmoud Akrin	Al Jameel International Trading Co.Ltd	UAE
407.	Muhammad Asif Qureshi	Commodity King Traders LLC	UAE
408.	Muzammil Akhtar	Maxons General Trading LLC	UAE
409.	Vishal Amratlal Shah	MMT General Trading LLC	UAE
410.	Waseem Ansari	Emco International LLC	UAE
411.	Andre Tonye	Deanto Corporation	USA
412.	Cheryl Deem	American Spice Trade Association	USA
413.	Kaushal Mehta	John H. Elton, Inc.	USA
414.	Vivek D. Shah	John H. Elton, Inc.	USA
415.	Aneel Dhirani	Royal Golden General Trading	Vietnam
416.	Balakrishnan Ravindranath	Olam International	Vietnam
417.	Bui Chi Buu	IAS Vietnam	Vietnam
418.	Dhananjay Vidyasagar	VASTC Trading Company Ltd	Vietnam
419.	Dinh Dinh Uyen Nhu	ThuThuy Greenfarm	Vietnam
420.	Dinh Xuan Thu	Thu Thuy Green Farm	Vietnam
421.	Hari Prasad.P	Pearl Corporation	Vietnam
422.	Ho Tri Nhuan	Gohan Company Ltd.	Vietnam
423.	Jasvinder Singh Sethi	Namagro	Vietnam
424.	Lam Hoang Quoc Khoi	Nedspice Processing Vietnam.Ltd	Vietnam

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<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
425.	Le Xuan Thanh	Phuc Sinh Corporation	Vietnam
426.	Ly Thi Be Hai	Indochine Spices JSC	Vietnam
427.	Mahaweer Dhirani	Royal Golden General Trading	Vietnam
428.	Masahiko Miyai	KSS Vietnam Co., Ltd.	Vietnam
429.	Mathew George.	Harris Freeman Vietnam Co. Ltd.	Vietnam
430.	Ngo Duy Hai	Ministry of Agriculture and Rural Development	Vietnam
431.	Ngo Hon Dinh	Ngo Gia Trading & Services Co. Ltd.,	Vietnam
432.	Ngoc Luan Nguyen	Lam San Farmers Cooperative	Vietnam
433.	Nguyen Huy Hung	Phuc Sinh Corporation	Vietnam
434.	Nguyen Mai Oanh	Vietnam Pepper Association	Vietnam
435.	Nguyen Minh Thien	Royal Golden Gen. Trading LLC	Vietnam
436.	Nguyen Nam Hai	Vietnam Pepper Association	Vietnam
437.	Nguyen Tan Hien	Pearl Corporation	Vietnam
438.	Nguyen Thi Cuc		Vietnam
439.	Nguyen Thi Nga	DK Commodity Co., Ltd	Vietnam
440.	Nguyen Trong Doan	KSS Vietnam Co., Ltd	Vietnam
441.	Nguyen Truong Long	Hoang Gia Luan Trading Service Co., Ltd	Vietnam
442.	Parsram Dhirani	Royal Golden General Trading	Vietnam
443.	Pham Quan Nam	PMP Saigon	Vietnam
444.	Pham Thanh Hop	DK Commodity Co., Ltd	Vietnam
445.	Pham Thanh Lam	Kim Toan Phuc Trading Co., Ltd	Vietnam
446.	Pham Thi Kim Oanh	McCormick	Vietnam
447.	Pham Thi Thuy Loan	Hoang Gia Luan Trading Service Co., Ltd	Vietnam
448.	Pham Van Hiep	Phuc Loi Im - Export Trading Coy. Ltd.	Vietnam
449.	Phan Quynh Anh	Indochine Spices JSC	Vietnam
450.	Phan Thanh Tinh	Pearl Corporation	Vietnam
451.	Phung Van Sam	Vietnam Hanfimec Corporation	Vietnam
452.	Ritutapan Neog	Olam International Ltd.	Vietnam
453.	Santosh Dhirani	Royal Golden General Trading	Vietnam
454.	Sidath Tennakoon	Expo Commodities (Vietnam) Ltd	Vietnam
455.	Suresh Kumar	Robust Trade Links DMCC	Vietnam
456.	Tam Ngo	Haprosimex JSC	Vietnam
457.	Vuong Thi Hoang Yen	Unispice Co., Ltd	Vietnam
458.	Hoang Thi Lien	International Pepper Community	IPC Jakarta
459.	Juniana Ambarwati	International Pepper Community	IPC Jakarta
460.	Nur Haryanto	International Pepper Community	IPC Jakarta

Report of the 25TH Pepper Exim Meeting of IPC

1ST November 2017, Kandy, Sri Lanka

LIST OF DELEGATES

<u>No.</u>	<u>Name of Delegates</u>	<u>Organization/Company Name</u>	<u>Country</u>
461.	Yadi Suryadi	International Pepper Community	IPC Jakarta

Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 02

Adopted Agenda



INTERNATIONAL PEPPER COMMUNITY REPORT OF THE 25TH PEPPER-EXIM MEETING

1st November 2017, Kandy, Sri Lanka

Adopted Agenda

1. Welcome Address by Executive Director of the IPC
2. Election of Chairman, Co-Chairman/Vice-chairman and members of Drafting Committee.
3. Adoption of Agenda
4. Review of the progress made on the decisions and recommendations of the 24th Pepper-Exim Meeting
5. Paper on Pepper Market Outlook, an Industry Perspective by Mr. Jasvinder Singh Sethi, Namagro Viet Nam
6. Paper on 2017 Brazil Crop & 2018 Outlook by Parsram Dhirani, Managing Director Royal Golden General Trading LLC, UAE
7. Paper on Development of a Practical Procedure Suitable to Determine the Geographical Origin and Authenticity of Spices with relevant Market by means of 1H-NMR-Analytics (HAGen) by M. Sc. Iris Cordero – NMR Project Manager, arotop food and environment GmbH
8. Paper on Trends in Consumption of Black & White pepper by Mr. Giridhar Rao, Director – Sustainable Sourced Spices & Herbs, Griffith Foods Asia and Middle East, Bangalore, India
9. Paper on Pepper production & trade in Madagascar - a trader's perspective by Mr. Girish Kumar, Business Head, ETS FLOWERINE, 501 Toamasina, Madagascar. Email: gkumarks@gmail.com
10. Consideration and adoption of report of the 25th Meeting of Pepper-Exim
11. Token of Appreciation
12. Vote of Thanks

Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 03

**Review on the decisions made by the 24th Pepper Exim Meeting
and its status / action taken**

Statement on the review of the decisions of the 24th Pepper Exim Meeting held on 10th August 2016, Jakarta, Indonesia

No.	Minutes of the Meeting	Status / Action taken
1	The 24th Pepper-Exim Meeting was held on 10th August 2016 along with the 44th Session and other related Meetings. The Meeting was organized jointly by the Ministry of Trade of the Republic of Indonesia and the International Pepper Community.	Noted
2.	The meeting was attended by delegates consisting of the Officials, Scientists and Trade representatives from the IPC member countries, other pepper producing countries like China, Cambodia, Philippines, Micronesia as well as the trade representatives of consuming countries from Netherlands, Japan, Turkey, Pakistan, UAE, Singapore, etc.	Noted
3.	The list of the delegates is given in Annex 01.	Noted
	Agenda item 1: Welcome Address by Executive Director of IPC	
4.	Mr. W.D.L. Gunaratne, Executive Director of IPC welcomed all the delegates from the exporting and importing countries and hoped that to have active participation from the delegates in the deliberation and discussion of the Meeting.	Noted
	Agenda item 2: Election of Chairman, Co-Chairman/Vice-chairman, and members of Drafting Committee.	
5.	Mr. Iman Pambagyo, the Chairman of IPC who is also Director General of International Trade Negotiations of Ministry of Trade, chaired the Meeting while Mr. Bandula Wickramarachchi of Sri Lanka as Vice-Chairman.	Noted
6.	The Vice Chairman is also the Chair of the Drafting Committee which consists of the following members:	Noted
	Mr. Prathyuis of India Mr. Deny Kurnia of Indonesia Mr. Philip Gaweng of Malaysia Dr. A. P. Henkende of Sri Lanka Mrs. Nguyen Mai Oanh of Vietnam	
	Agenda item 3: Adoption of Agenda	
7.	The meeting adopted the agenda as given in Annex 02.	Noted

Statement on the review of the decisions of the 24th Pepper Exim Meeting held on 10th August 2016, Jakarta, Indonesia

No.	Minutes of the Meeting	Status / Action taken
	Agenda item 4: Review of the progress made on the recommendations and decisions of the 23rd Pepper-Exim Meeting	
8.	Mr. W.D.L. Gunaratne, Executive Director of IPC briefly informed the meeting on some of the decisions and recommendations made by the last meeting and the action taken by the IPC Secretariat in respect of those recommendations. The meeting took note of the statement presented by Executive Director of IPC. Mr. Gunaratne also informed that the IPC has finalized and adopted the IPC Quality Standard Specifications for Pepper and Pepper Products which is available from the IPC registration counter for this session or in IPC website.	Noted
9.	In response to the question from a Sri Lanka exporter for IPC grade specifications for the Light Berries, Executive Director responded that IPC does not promote the production of light berries taking into consideration that the Pepper producers will not receive the better income, as such IPC does not consider the grade for Light Berries in the IPC Quality Standard Specifications. The action sheet is given in Annex 03.	No`ted
	Agenda item 5: Paper on “Sustainable Agriculture Relevance in Pepper Industry” by Mr. Gulshan John, President of All India Spice Exporters Forum (AISEF), Cochin, India and Managing Director, Nedspice Processing India Pvt. Ltd.	
10.	Mr. Gulshan John, the President of AISEF (All India Spice Exporters Forum) and Managing Director of Ned Spice Processing India Pvt. Ltd. presented a paper on Sustainable Agriculture Relevance in Pepper Industry.	Noted
11.	He briefly informed about the AISEF and its activities and gave an overview of the Indian Spice industry being world's largest producers of spices as well as largest consumers of spice, which consumed almost 90% of the spice produced in India. He added that the 48% of world spice consumption is supplied by India. Mr. Gulshan further mentioned about the stunning exports growth from India in the last decade from 2005-06 which was at 300,000 Mt valued at 0.5 billions US\$ and by 2014-15 the exports of spices from India was recorded at 893,000 Mt valued at 2.43 billions US\$. Mr. Gulshan also informed about the growth of the world population and the possible high increase in the spice consumption in the coming years which the industry has to respond.	Noted
12.	He further informed on the sustainability concept and the initiatives made by the spice industry on sustainability in early 2011 and the initiative undertaken by the spice industry in India to response the	Noted

Statement on the review of the decisions of the 24th Pepper Exim Meeting held on 10th August 2016, Jakarta, Indonesia

No.	Minutes of the Meeting	Status / Action taken
	sustainability challenge. As regard to the sustainability in Pepper, he mentioned that with the current global production of pepper he projected that by 2025 the world will need another 80,000 Mt of pepper to fulfil the world demand. Mr. Gulshan also highlighted the increasing trend on the quality requirements and sustainable pepper taking place in the state of Karnataka, India as well as the project undertaken in 2016 by India.	
13.	In response to a question raised by the exporter whether there is any incentive or premium prices for the producers, Mr. Gulshan said that there is a premium price offered to producers / exporters who follow the pepper sustainability initiatives that will promote and ensure the sustainability supply chain for the long run. His full paper is given in Annex 04.	Noted
	Agenda item 6. Paper on Market of pepper in Australia and update on quality requirements for pepper in Australia by Mr. Shaun Borg, Head of Procurement, Langdon Ingredients, Australia	
14.	A paper on Market of Pepper in Australia was presented by Mr. Shaun Borg, Head of Procurement of Langdon Ingredients of Australia. In his paper, Mr. Borg presented a video introduction about Langdon Ingredients business activity, a family owned business, now is 163 years old and operate under a high level of quality standards are A grade BRC accredited with the customer base includes more than 95% of major food businesses operating in the Asia Pacific region.	Noted
15.	Mr. Borg further gave charts showing the increasing trend of pepper consumption in Australia and the pepper/spice products available in Australia retail markets. He also highlighted the challenge of local packers and producing countries particularly on the need of value addition to pepper products to enter Australia market to meet the requirements of the consumers in the country. His paper is given in Annex 05.	Noted
	Agenda item 7: Presentation of paper on Global Pepper Economy by Mr. B.N. Jha, Economist of IPC	
16.	Mr. B.N. Jha, Economist of IPC presented a paper on Global Pepper Economy. In his paper he gave detailed information on the world global pepper production, exports and the share of production and exports by the IPC countries / major pepper producing countries.	Noted
17.	He also mentioned that the exports of pepper from producing countries have shown continued substantial growth during the last 30 years as compared to the period of 1985 which was only at 96,000	Noted

Statement on the review of the decisions of the 24th Pepper Exim Meeting held on 10th August 2016, Jakarta, Indonesia

No.	Minutes of the Meeting	Status / Action taken
	Mt. The annual growth of exports as per Mr. Jha is recorded at 7.1% with Vietnam, as the largest exporters recorded highest export growth. Mr. Jha also gave information on the statistics of imports by the main pepper importing countries and prospect and challenge of the pepper industry. His paper forecasted that in the year 2016 not much volatility in price and marginal increase of up to 10% in prices may be seen during 2017. His full paper is given in Annex 06.	
	Agenda item 8. Presentation of the report of the approved statement on consolidated figures on production, exports, imports, consumption and carry over stock (actual for 2015, estimate for 2016 and projection for 2017)	
18.	The Meeting discuss and consider the adopted statement on consolidated figures of world pepper production, exports, imports, domestic consumption and carry over stock covering the year of 2015 (actual), 2016 (estimates) and projection for 2017. The Global Pepper Scenario statement was compiled based on the country papers presented by the representative of the IPC member countries and other pepper producing countries at the Pepper-Tech Meeting held on 9th August 2016.	Noted
19.	The meeting agreed to adopt the revised consolidated statement of the World Pepper scenario after taking into account of the revision made by the Indian delegate.	Noted
20.	As per the Statement, during the year of 2015, the total world pepper production was recorded at 416,180 Mt comprising of 331,550 Mt. of black pepper and 84,650 Mt of white pepper.	Noted
21.	Total production of the 2016 is estimated at 397,153 Mt comprising of 303,703 Mt of black pepper and 93,450 Mt of white Pepper. It was also informed that the decline in the world pepper production in 2016, mainly due to unfavourable weather condition (La Nina phenomenon) occurred in the first half of 2016. Exports form pepper producing countries for 2016 was estimated at the level of 290,583 (242,603 Mt. black pepper and 47,980 Mt of white pepper). With the domestic consumption estimated at 149,976 Mt (107,355 Mt black pepper and 42,621 Mt of white pepper), the stock carry forward by end of 2016 is projected at 65,546 Mt (48,269 Mt of black pepper and 17,277 Mt of white pepper).	Noted
22.	The statement also that the production for 2017 is forecasted to increase from 2016 at 418,604 Mt (328,504 Mt of black pepper and 90,100 Mt of white Pepper). With the domestic consumption for 2017 at producing countries is projected at 154,030 Mt (109,604 Mt of black pepper and 44,226 Mt of white pepper) and export is estimated at 308,778 Mt (259,603 Mt black pepper and 49,175 Mt white pepper),	The adopted statement was circulated to delegates of the last Pepper Exim and member countires

Statement on the review of the decisions of the 24th Pepper Exim Meeting held on 10th August 2016, Jakarta, Indonesia

No.	Minutes of the Meeting	Status / Action taken
	the stock carry over for 2017 is projected to be around 65,325 Mt comprising of 48,449 Mt black pepper and 16,877 Mt of white pepper.	
23.	The full statement of the World Pepper Scenario adopted at the Meeting is given in Annex 07	
	Agenda item 9. Brief report on the development of proposal Crop Survey by member countries by Mr. B.N. Jha, Economist of IPC	The proposed format of crop survey was further discussed at the R&D Meeting held in Viet Nam during 7-8 Aug 2017.
24.	Mr. B.N. Jha, Economist of IPC presented the proposed format for the Pepper Crop Survey to be undertaken by the IPC member countries. The paper is given in Annex 08.	
	Agenda item 10. Discussion on the provisional agenda for the 25 th Meeting of Pepper-Exim	
25.	The meeting requested the IPC Secretariat to prepare the provisional agenda for the next Meeting and suggest the IPC countries may also send inputs on the items to be included in the agenda of the next Meeting.	Agenda was prepared and circulated to member countries
	Agenda item 11 Discussion on the date and venue for the 25th Meeting of Pepper-Exim	
26.	The next 25th Meeting of Pepper-Exim will be hosted by the Government of Sri Lanka along with the 45th Annual Session and other related meetings of IPC. Dates and venue will be communicated to IPC in due course.	Noted
	Agenda item 12 Other matters	
27.	There were no other matters being discussed.	Noted
	Agenda item 13 Consideration and adoption of report of the 24th Meeting of Pepper-Exim	
28.	The report of the Pepper-Exim Meeting was considered and adopted.	Noted
	Agenda item 14 Vote of Thanks	
29.	Mr. Bandula Wickramarachchi, the Vice Chairman of the Meeting who is also the Secretary of the Ministry of Primary Industries of Sri Lanka extended his sincere thanks and gratitude to the Government of the Republic of Indonesia for the warm hospitality extended to all the delegates and for hosting the Meeting along with the 44th Session of IPC. He also thanked the Chairman, Mr. Iman Pambagyo for	Noted

Statement on the review of the decisions of the 24th Pepper Exim Meeting held on 10th August 2016, Jakarta, Indonesia

No.	Minutes of the Meeting	Status / Action taken
	smooth conduct of the Meeting, Executive Director, Liaison Officers and all the delegates for their support and active participation to make the meeting a success.	

Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 04

Paper on Pepper Market Outlook, an Industry Perspective *by Mr. Jasvinder Singh Sethi* *Namagro Viet Nam*

Black Pepper

IPC Conference 2017

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Jasvinder Singh Sethi

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Structure

Demand

Supply

Price

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Demand

- Region wise
 - Imports
 - Consumption
- Category
 - Food
 - Industrial
 - **Speculative**

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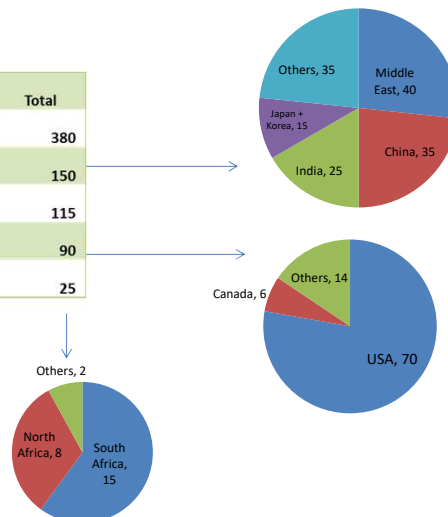
Demand

Region wise imports 2016 Qty KMT

Region	Whole Pepper	Ground Pepper	Total
World Imports	300	80	380
-Asia	130	20	150
-Europe	80	35	115
-Americas	70	20	90
-Africa	20	5	25

Source: ITC

- Other than EU all other regions grow pepper.
- Ground Pepper imports have been rising in the past decade.



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Demand

Region wise estimated consumption

Region	Population Bn	Consumption KMT	gm/person
Asia	4.43	200	45
Europe	0.74	115	155
Americas	0.98	80	81
Africa	1.21	50	41
Total	7.37	445	60

→ Western EU approx over **200 gm/person**
 → US consumption at 70K and a population of 300 Mn is over **200gm /person**

*We observe that the consumption per person in the developed world is close to 3 times that of the developing world.

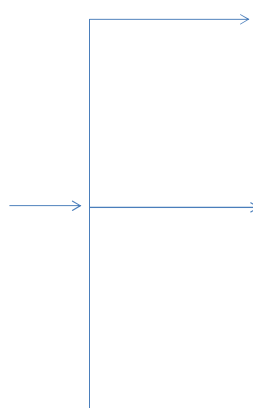
High Income populations take a high protein diet and pepper consumption can be directly linked to the meat consumption. The consumption in the developed world is directly linked to meat consumption.

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Demand

Category

Black Pepper



Food

- **Meat Related**
- Vegetarian (Salads, home cooking)
- Snacks

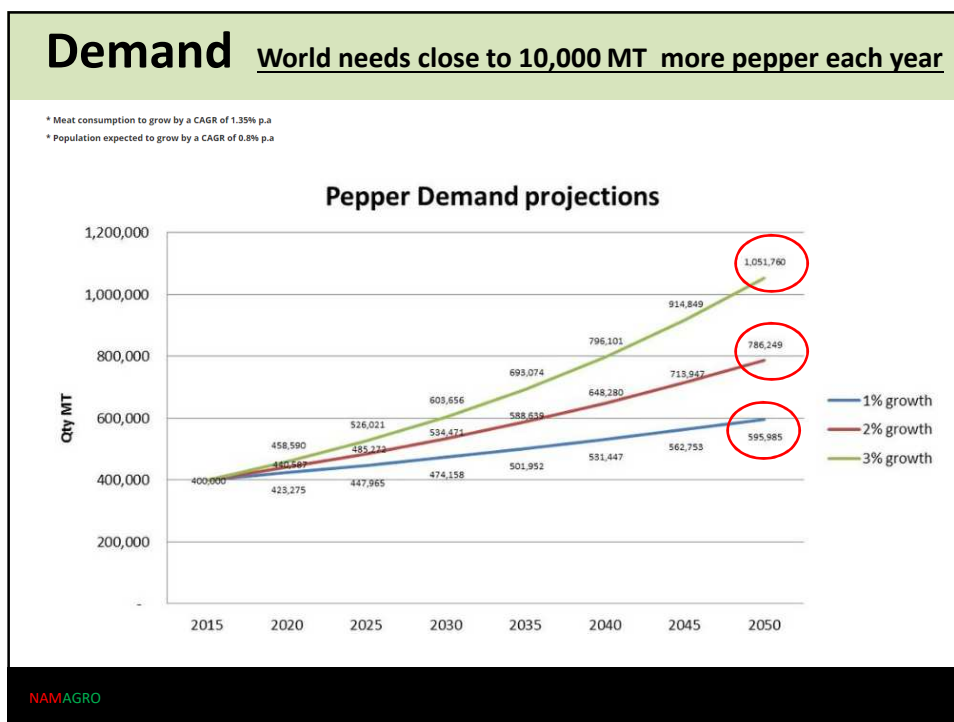
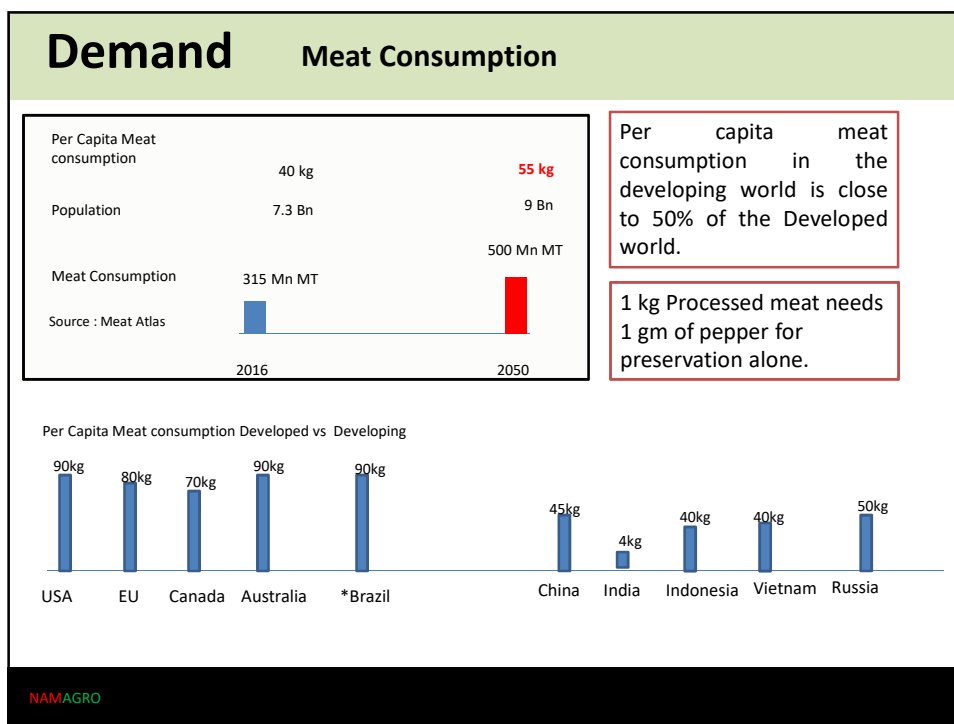
Industrial

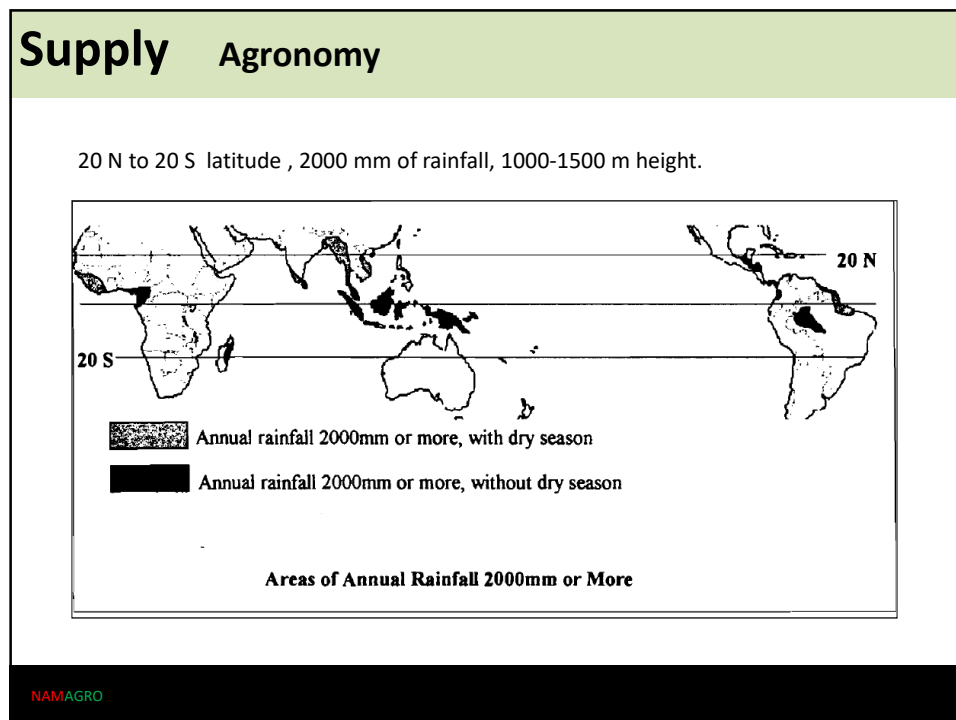
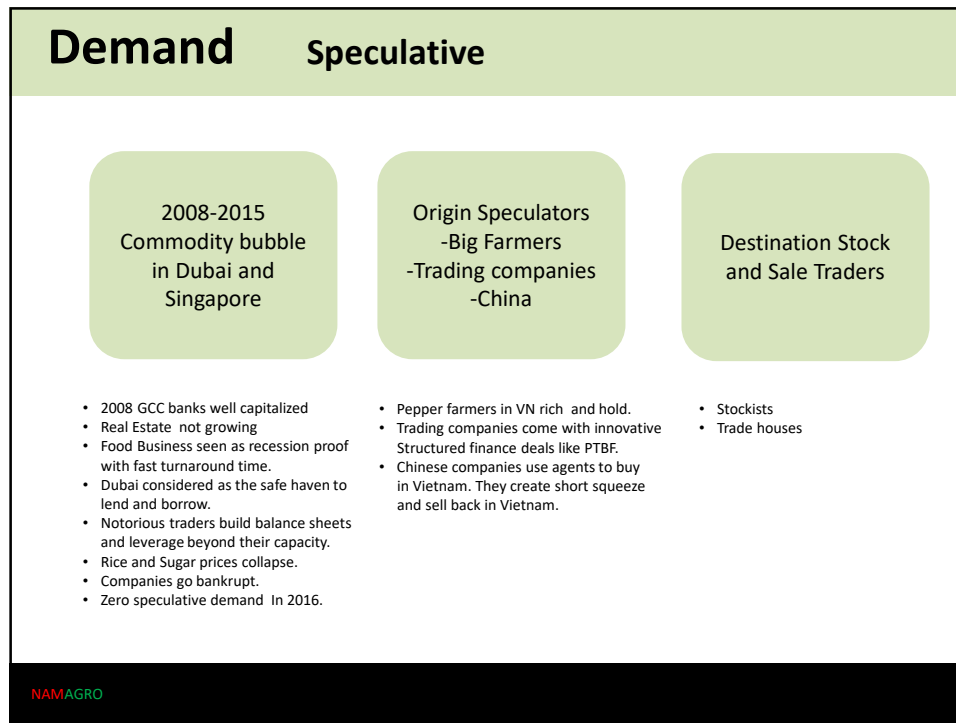
- Nutraceuticals
- Medicinal
- Cosmetics
- *Wastage

Speculative

- Trade houses
- Origin

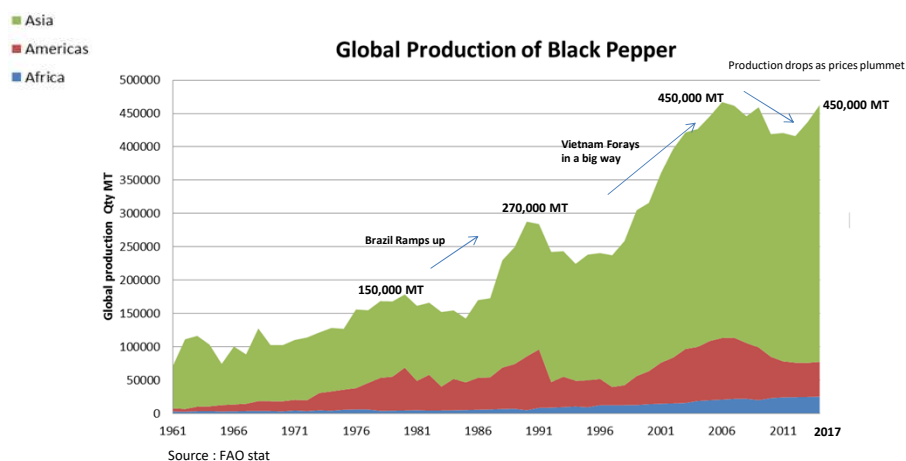
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Supply A historical perspective

Pepper production doubled in past 20 years and quadrupled in past 50 years.



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Supply Current Supply situation

Global Production in 2017 is estimated at 450 K MT. A rise of 12.5% YOY basis.

Country	2016	2017	Increase%
Vietnam	175	195	11%
Brazil	55	60	9%
India	45	50	25%
Indonesia	45	49	17%
Malaysia	17	20	18%
China	20	24	20%
Sri Lanka	13	16	23%
Cambodia	10	12	20%
Others*	20	25	33%
Total	400	450	12.5%

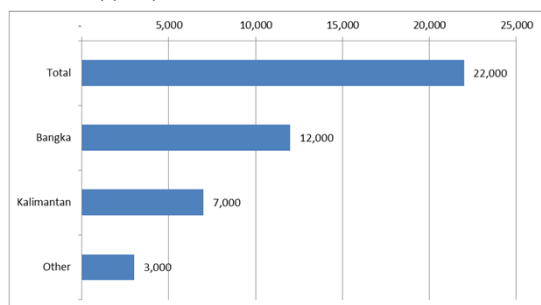
Source : International Spice Conference 2017

- There is no origin that reports a lower crop.
- Expanding area is the main reason and not growth in yields.
- Unfavorable weather impacting yields and flows.

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Supply Current Supply situation- White Pepper

White Pepper production in MT -Indonesia estimate 2017



Vietnam, India, others .. Typically process White from Black and therefore supply depends on the price. Theoretically therefore there is no production limitation.

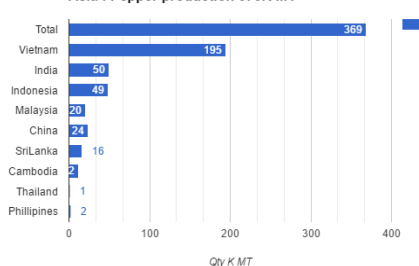
Global demand is close to 44,000 MT and is largely catered by Indonesia and Vietnam . Flavor, Color, smell preferences vary with markets.

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Supply Asia



Asia : Pepper production 370K MT



- Yields in VN have been lower but area under plantation has been expanding .
- There is enough land, water and other resources in VN , Cambodia, Kalimantan to expand the crop.
- VN, Indonesia, Malaysia, India .. Have good processing infrastructure.

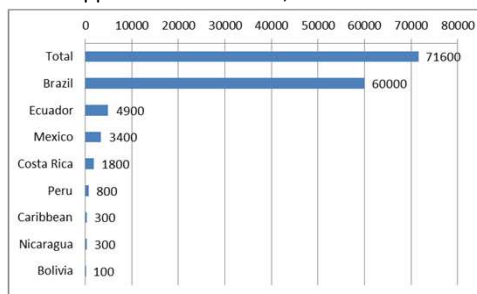
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Supply

Americas



Pepper Production : 71,600 MT

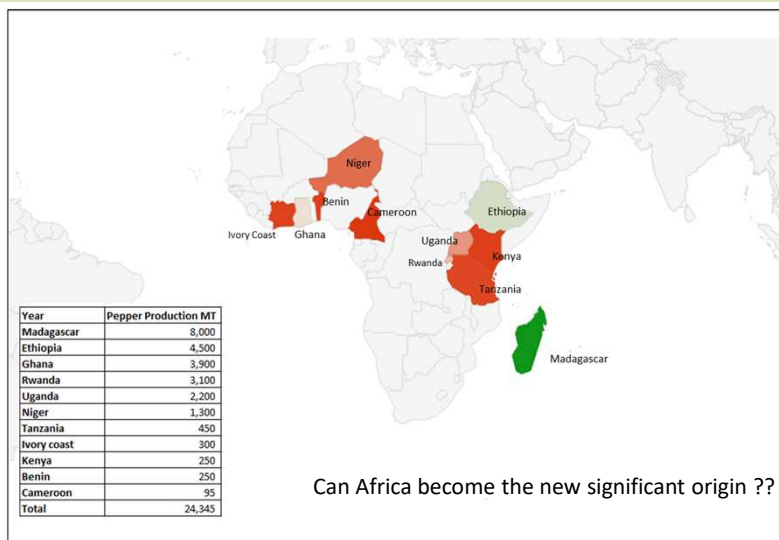


- Central and South America has enough area to expand.
- Farming techniques are advanced when compared to Asia.
- Processing of FG is not as advanced as in Asia.
- Labour costs in Brazil may be deterrent to expansion

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Supply

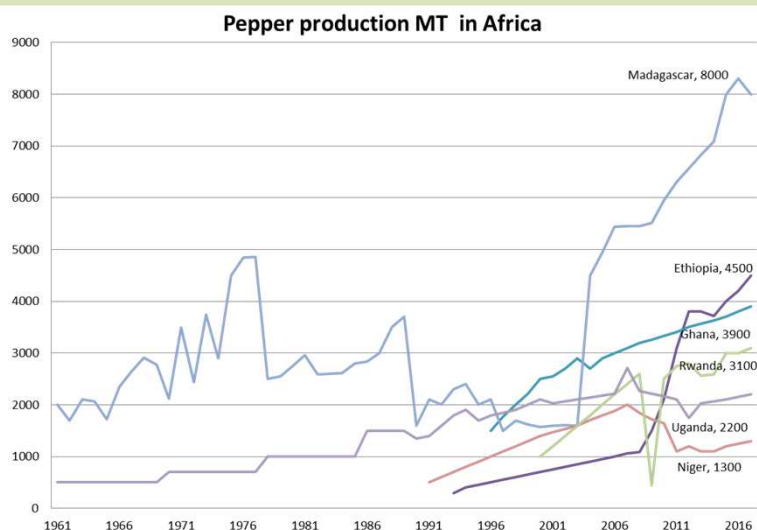
Africa



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Supply

Africa



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Supply

Africa

Can Africa become the new significant origin ??

Population Africa : 1.2 Bn
 Domestic Production : 25KMT
 Expected consumption : 50,000 MT

Net imports :

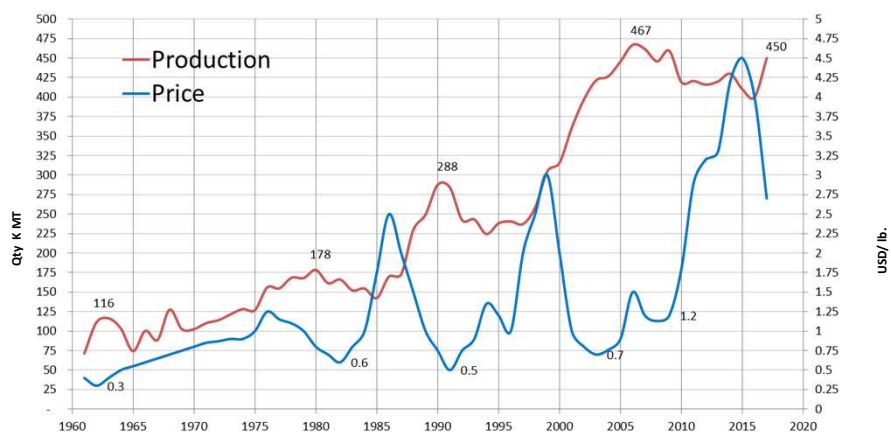
South Africa Imports : 10,000 MT
 Central and North Africa Imports : 15,000 MT from Vietnam, Middle east etc.

Whole Pepper Imports into Africa would slow down if Central Africa is able to ramp up production.

Origination for the non growing countries is not expected in the near future.

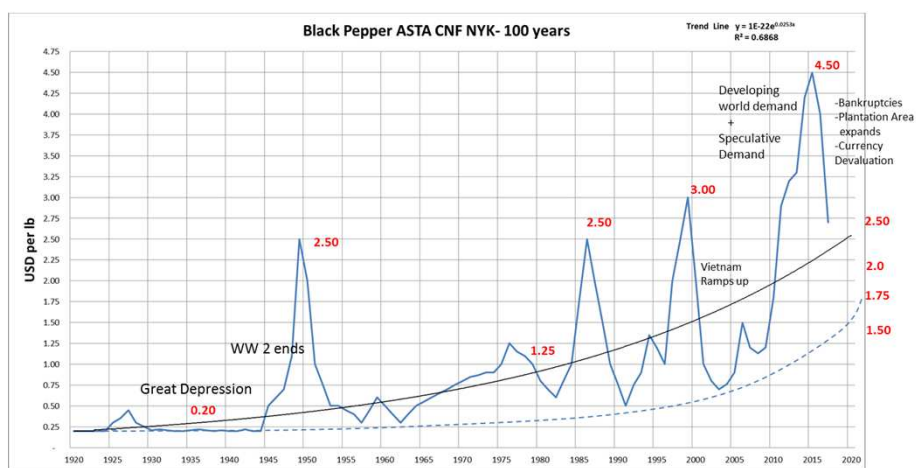
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Price A Historical Perspective



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Price A Historical Perspective



Source : Commodity Research Bureau of USA, Namagro

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Price Inflation Perspective

	2008	Inflation	2018	ASTA USD/kg	ASTA USD/lb
VND/USD	16000		22700		
Raw Pepper 500gl VND	40000	60%	64000	3.2	1.5
ASTA USD/kg	2.7	15%	3.1		
ASTA USD/lb	1.2	15%	1.4		

Current price of VN ASTA = 4000 , forward price of ASTA = USD 3500 = 1.58 USD/lb
 Considering Global supply in excess of demand perhaps prices should fall further in the region of 1.5 .

Going below this point will depend on crop situation, sentiment etc.

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Summary

Long Term :

- Global Demand remains strong . Consumption growth in the developing world due to rising incomes and structured change in diet across the globe will demand close to 10,000 MT pepper p.a on an average till 2050.
- Supply will keep improving till farmers make a decent profit.
- We may see ASTA cnf NYK prices falling as low to 1.5 to 1.7 region and rise again as farmers cut back inputs and production.

Short term :

- Lack of International Market makers and speculators will lead to reduced liquidity.
- Improving Supply Situation will keep pressure on prices.
- Weather will be a key factor in purchase decisions.

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Thank You

Jasvinder Sethi

mail@namagro.com

Disclaimer : Please note that the price view mentioned in the presentation is the personal opinion of the presenter. The company , IPC or the presenter are not liable for any damage or loss caused to due any action taken by the viewers based on the view presented in this presentation.

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Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 05

Paper on

2017 Brazil Crop & 2018 Outlook

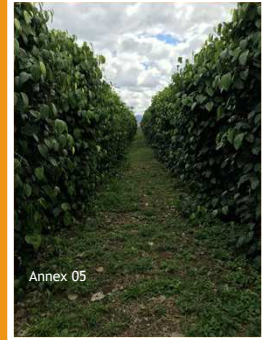
by Mr. Parsram Dhirani

Managing Director

Royal Golden General Trading LLC, UAE

2017 BRAZIL CROP & 2018 OUTLOOK

Parsram Dhirani
Royal Golden General Trading
Oct 29 - Nov 02, 2017
Kandy, Sri Lanka



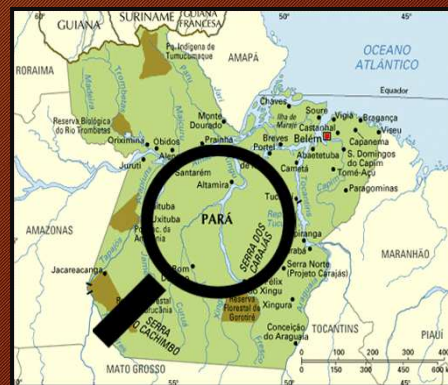
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2017 BRAZIL CROP & 2018 OUTLOOK

Production Regions



Esírito Santos (ES) South Of Brazil



Para State (Pa) North Of Brazil



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Espirito Santo (ES)

Type	Period	Production%	Monsoon Period
Main Crop	Jan/Feb	60%	Jan-March
Catch Crop	Mar/Apr	20%	
Catch Crop	May/June	20%	

- ✓ Due to good irrigation system, and new plantations pepper is available throughout the year.
- ✓ Heavy Density Pepper 560-650 gram per litter
- ✓ Average yield 2-3 kg per tree. If Sprinkle Irrigation Systems is used, yield 5-7 kg per tree.
- ✓ Ratio of dying wines 10-15% each year.



Sprinkle Irrigation



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Pepper Drying Methods



✓ In direct Heat

✓ Direct Heat

Unacceptable for few countries



2017 BRAZIL CROP & 2018 OUTLOOK

Production (ES)

- Usual production is about 15,000-20,000 tons.
- High prices in recent years encouraged farmers to plant new trees. New trees are ready to give full fruits.
- 2017 production is close to 25,000 tons.
- 2018 production expected to exceed 30,000 tons and 2019 even more.
- Farmers have stopped planting new trees due to lower prevailing prices.



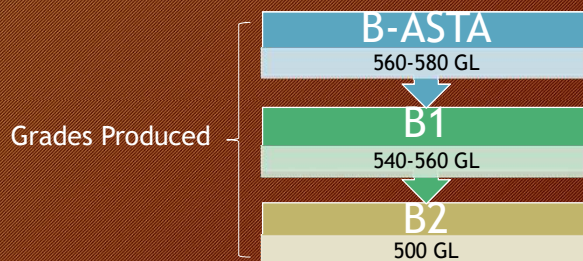
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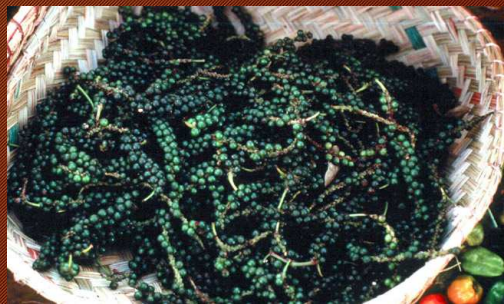
2017 BRAZIL CROP & 2018 OUTLOOK

Para Region (PA)

- Harvest Period - August / September.



- Average yield 2-3 kg per tree and dying ratio is also 10-15%.



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Pepper Drying Methods

1)

SUNDRIED

More demand from Europe due to sun dried



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Pepper Drying Methods

2)

MECHANICAL

Also acceptable to many countries



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Production (PARA)

- Usual production is 25,000 - 30,000 tons.
- No. of New plants are ready to give fruits now and even more in 2018.
- 2017 Aug/Sept production expected to exceed 35,000 tons.
- Farmers have stopped Planting new trees due lower prevailing prices.



Annex 05



New Plantations

2017 BRAZIL CROP & 2018 OUTLOOK



New Plantations



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

New Plantations



2017 BRAZIL CROP & 2018 OUTLOOK

Top 10 Importing Countries

Country	2013	2014	2015	2016	YTD June 2017
USA	11,437	11,706	12,479	7,767	3,742
Germany	3,015	9,885	9,760	9,988	5,848
Spain	2,264	1,545	2,624	2,532	2,318
Mexico	1,791	2,069	2,860	1,813	1,514
France	1,634	2,066	2,406	2,413	1,269
Vietnam	725	1,917	2,100	668	376
Netherlands	1,018	316	521	1,564	634
Egypt	110	85	324	415	199
Pakistan	433	90	320	701	246
India	227	500	538	425	643
Total	22,654	30,179	33,932	28,286	16,789



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Exported Quantities 2013-2017

Month	2013	2014	2015	2016	2017	
January	1,897	3,175	3,563	4,035	3,710	
February	2,272	2,517	3,057	4,021	3,350	
March	2,099	2,828	1,991	3,947	4,137	
April	2,327	2,057	2,387	1,857	3,373	
May	2,288	947	1,526	1,205	3,572	
June	1,948	684	1,393	937	2,312	
July	1,854	1,085	1,556	803	2,975	
August	1,322	2,139	2,647	555	5,127	
September	3,215	2,782	2,927	2,417	8,189	
October	3,371	4,570	4,969	2,498	7,000	EXPECTED
November	3,471	4,528	5,305	5,061	7,000	EXPECTED
December	2,631	5,244	5,608	3,777	7,000	EXPECTED
	28,695	32,556	36,929	31,112	57,745	86% UP



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Average Prices (Asta Grade)

Year	Vietnam	Indonesia	Brazil
2014	7817	8975	8185
2015	9151	9391	9006
2016	8030	8510	7941
2017	5064	5700	4400
2015 vs 2016	13% ↓	10% ↓	13% ↓
2016 vs 2017	63% ↓	50% ↓	80% ↓



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Availability of Brazil Pepper in 2018

Year	2017	2018 Estimated
Carry Over	3000	2100
Add: Productions	65000	75000
Add: Imports	400	400
Less: Domestic Consumption	7500	8000
Less: Export Jan-Sept 2017	37800	
Less: Expected Export Oct-Dec 2017	21000	
Balance Stocks	2100	
Available Stocks in 2018 for Export		69,500



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Observation

- Cost of production 2000-2500 USD per MT small farmers incur less cost.
- Cleaning is done thru old traditional method with de-stoning and magnets. However, few exporters are in processing of installing spiraled cleaning machines.
- Due to Lower prices , farmer are likely to switch to other commodities such as coffee, cocoa, and papaya trees.
- 70% of farmers would like to sell their crop in the beginning of the season and 30% would like to hold.
- Usual processing time of each lot is about 15 days. This includes drying, cleaning, fumigation, and transportation.
- Local Demand of 7000-8000 tons is usually fulfilled from Vitoria(ES) due to short distance to industries based in Sao Paulo. Belem is too far.



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Conclusion

- 2018 crop is going to be bigger than 2017 and 2019 crop even bigger than 2018. Provided that the weather conditions remains favorable.
- Due to safe pepper and preferential import duties, neighboring countries and Europe will remain active for this origin.
- Price difference is 800 pmt lower compared to other origins. More demand is obvious from export figures.



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Conclusion

- Currency can affect prices.
Brazil Real from 4.15 in 2016 and now around 3.15 to dollar, 25% volatility.
- If prices fall below \$3000, internal speculators may become active.
- Quantity of Sundried Pepper will reduce post December 2017.



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Conclusion

- Lowest Price Speculative & Actual 2017 (Vietnam) FOB

Grades	Speculative	Actual	-5% <i>DUE TO GOOD CROP</i>	2018 Forecast
FAQ	3200	3350	-5%	3183
500 Clean	3400	3500	-5%	3350
550 Clean	3500-3600	3700	-5%	3515
570 Asta	3600	3800	-5%	3610

- For Brazil Prices are likely to be:



Annex 05



2017 BRAZIL CROP & 2018 OUTLOOK

Thank You.



Annex 05

Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 06


Paper on

**Development of a Practical Procedure Suitable to Determine
the Geographical Origin and Authenticity of Spices with relevant
Market by means of ¹H-NMR-Analytics (HAGen)**


by M. Sc. Iris Cordero

NMR Project Manager

arotop food and environment GmbH




International Pepper Community
45th Session
30th October-2nd November 2017
Kandy, Sri Lanka



“Development of a Practical Procedure Suitable to Determine
the Geographical Origin and Authenticity of Spices with
relevant Market by means of ¹H-NMR-Analytics (HAGen)“

With support from




Federal Ministry
of Food
and Agriculture

by decision of the
German Bundestag

Mr. Stefan Kollenda – CEO
Dr. Wolfram Wendler- Project Leader
M. Sc. Iris Cordero – Project Manager


Dr. Manfred Spraul – CEO
Dr. Andrea Steck- Lab & Data analysis
Dr. Birk Schütz – Statistics




Projekträger Bundesanstalt
für Landwirtschaft und Ernährung

For Food on Top


**Institute for Taste
Research,
Food and
Environmental Analytics**






- Private Institution with accreditation
- Specialiste in food industry & food trade
- Founded in 1990
- 70 Employees
- Located in Mainz

With support from



Federal Ministry
of Food
and Agriculture



Annex 06

1

For Food on Top

Hand in Hand for Your Product!

arotop food & environment GmbH

Analytical Research:

- Microbiology
- Instrumental
- Chemical
- Environmental

Marketing Research

Development Research

- Innovations
- Optimization

Legal Law Consulting

With support from

Federal Ministry of Food and Agriculture

ptble

Annex 06

Bruker BioSpin

Innovation with Integrity

FoodScreener™ - The 400 MHz Platform Concept

Modules already released by Bruker BioSpin

- Honey-Profiling™ Module**
- Wine-Profiling™ Module**
- SGF-Profiling™ Module**

Modules under development or evaluation

- Module Spices**
- Module Edible Oils**
- Module Spirits**

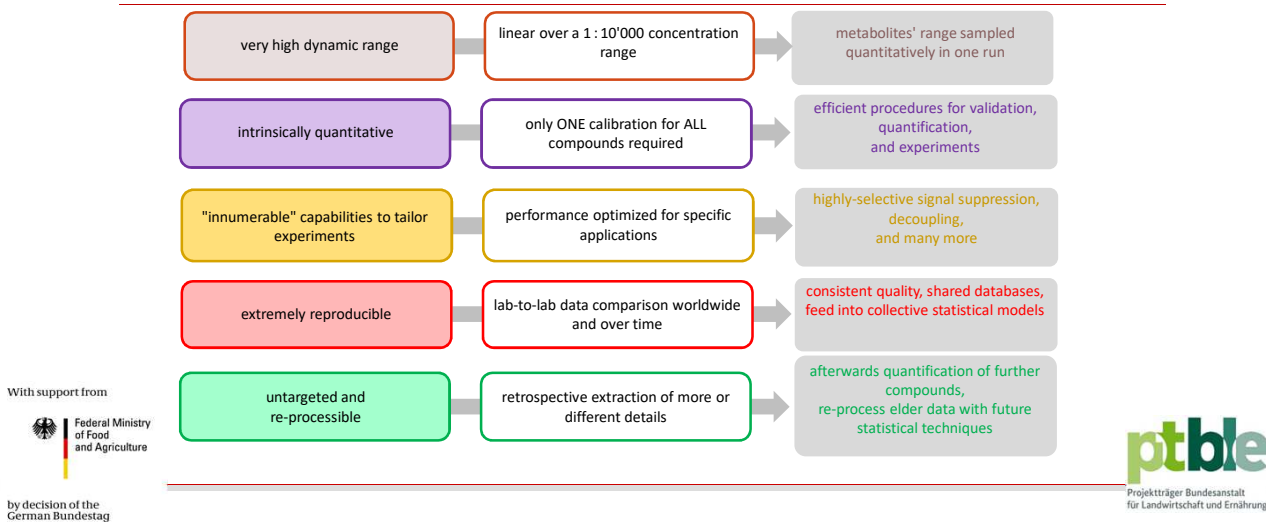
- High-performance scientific instruments
 - Analytical & diagnostic solutions
- >60 years producing NMR magnets
- One measurement :
 - Geographical Origin
 - Quantification
 - Detection of Deviations
 - Quality indicators
- ISO 17025 certified

Profiling by NMR spectroscopy



Why using this technology ?

The major features of NMR



Introduction

•Economically Motivated Food Fraud


- Origin
 - Variety
 - Quality
- No health risk = no priority




- Lost consumer confidence = economical damage
- Grow of consumer interest
- Spices are used in different industries
- Commercially available analysis
- German Government support

With support from
 Federal Ministry of Food and Agriculture
 by decision of the German Bundestag







Project Goals

- New ^1H -NMR profiling method
- Identification chemical differences
 - Black and white pepper (*Piper nigrum* L.)
 - Paprika (*Capsicum* spp.)
 - Saffron (*Crocus sativus* L.)
- **Collection 1000 samples/spice – data base**
- + Multivariate Statistics
 - Geographical origin & Authenticity
- Quantification of single marker components
- Automated push-button routine for broad usability
- ISO-17025 accreditation for the pepper/paprika/saffron matrices

Industry representative


Defined Geographical Origin

European Spice Association (esa)

Samples from:


- China
- India
- Indonesia
- Malaysia
- Brazil
- Ecuador
- Vietnam
- Sri Lanka
- Cambodia?

With support from






Federal Ministry of Food and Agriculture

by decision of the German Bundestag

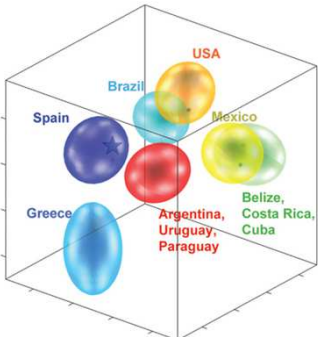



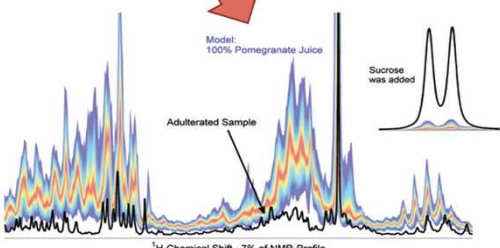
Projektträger Bundesanstalt für Landwirtschaft und Ernährung







Statistical Model ^1H -NMR i. e. Juice Screener




^1H -Chemical Shift - 7% of NMR-Profile




With support from

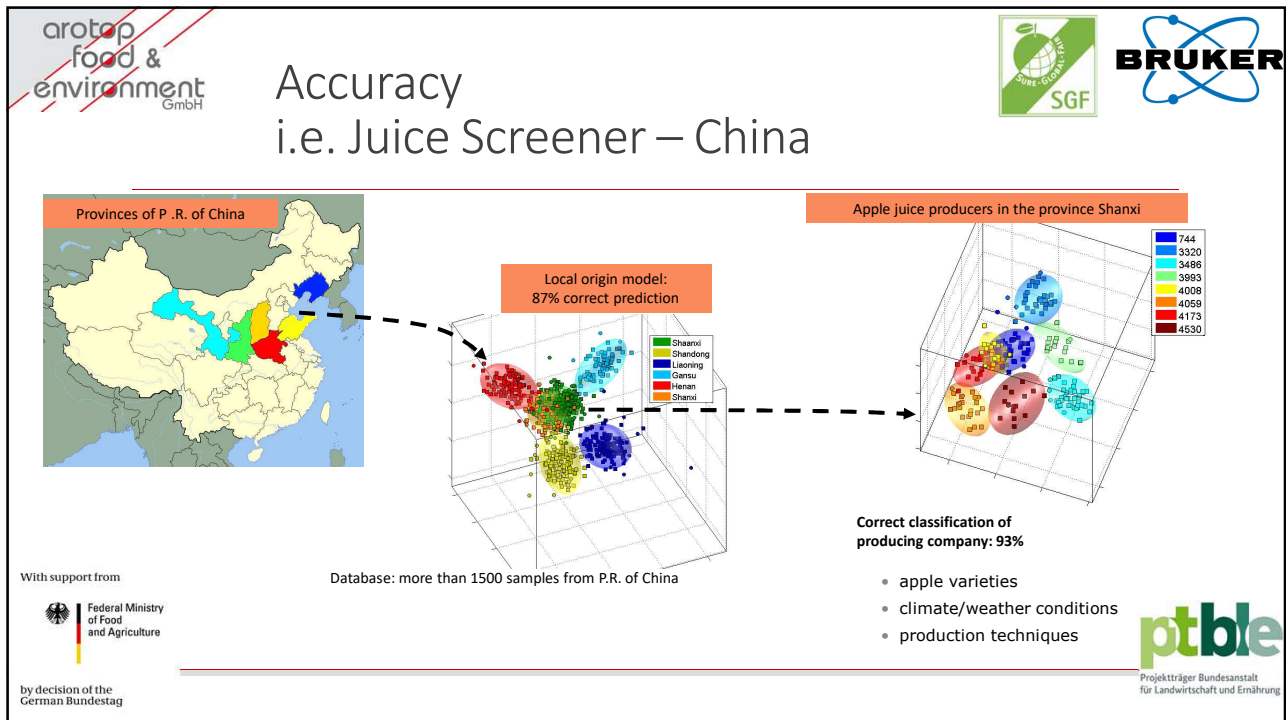


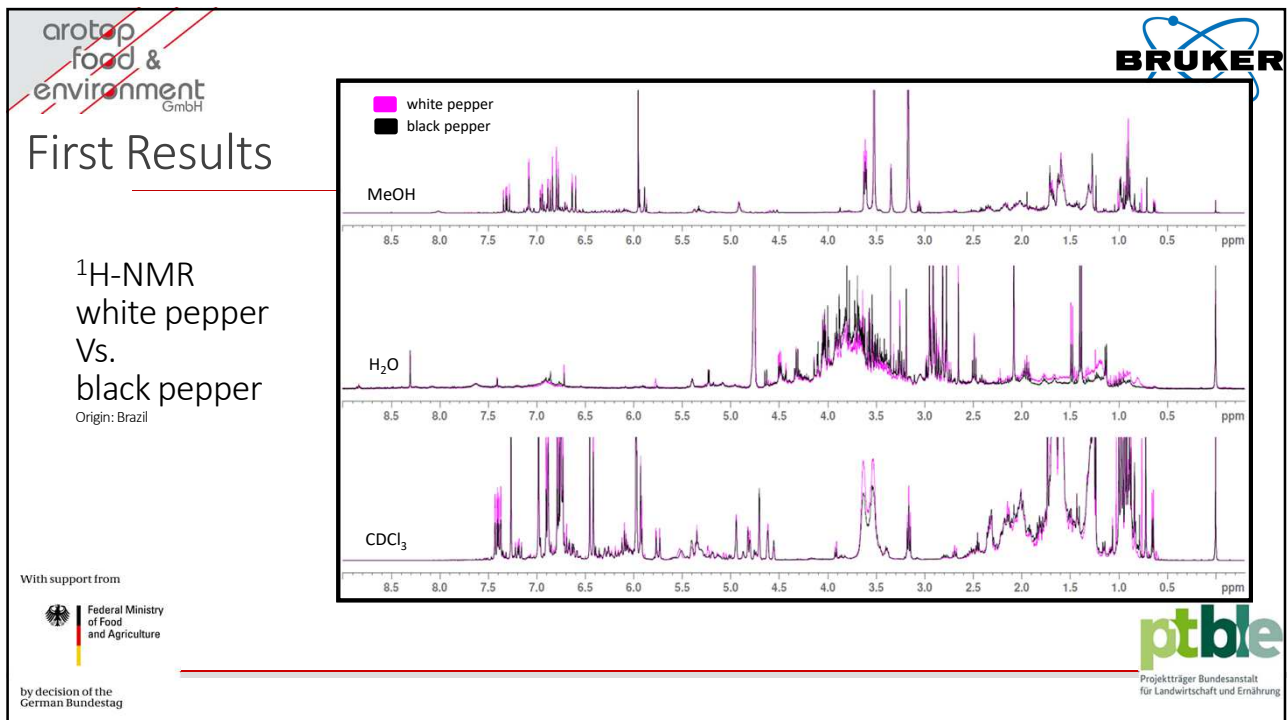
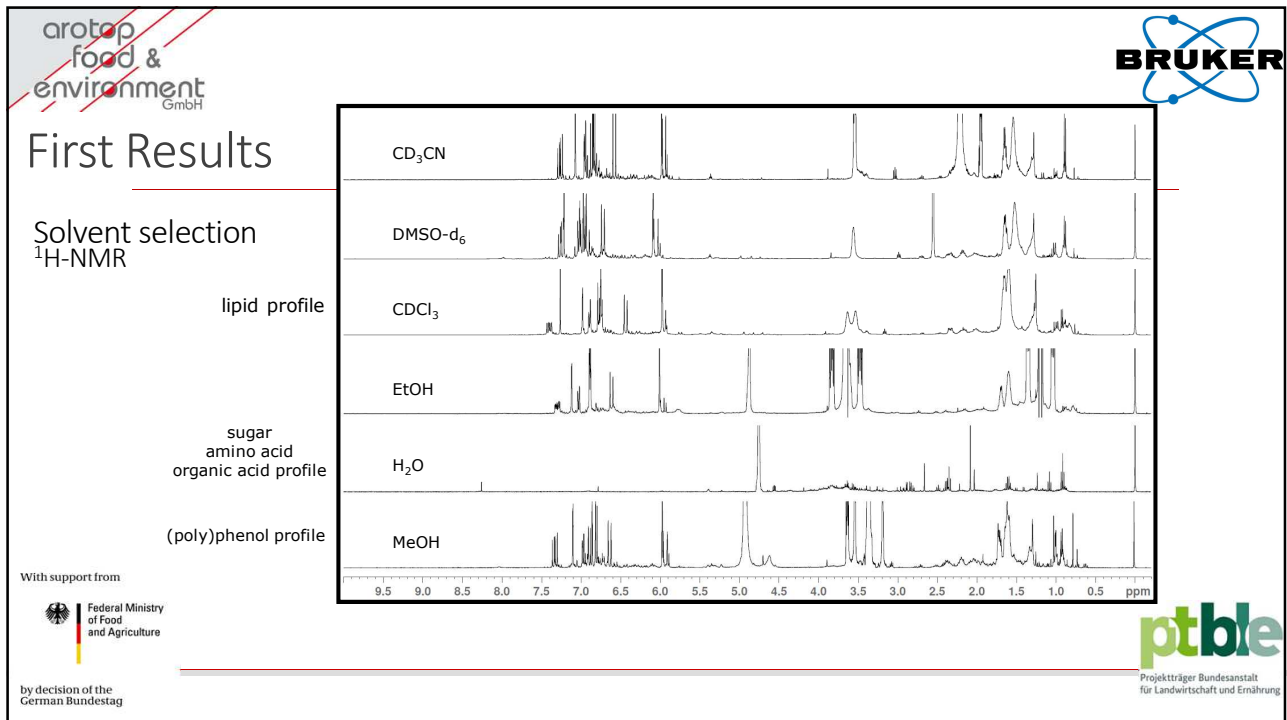
Federal Ministry of Food and Agriculture

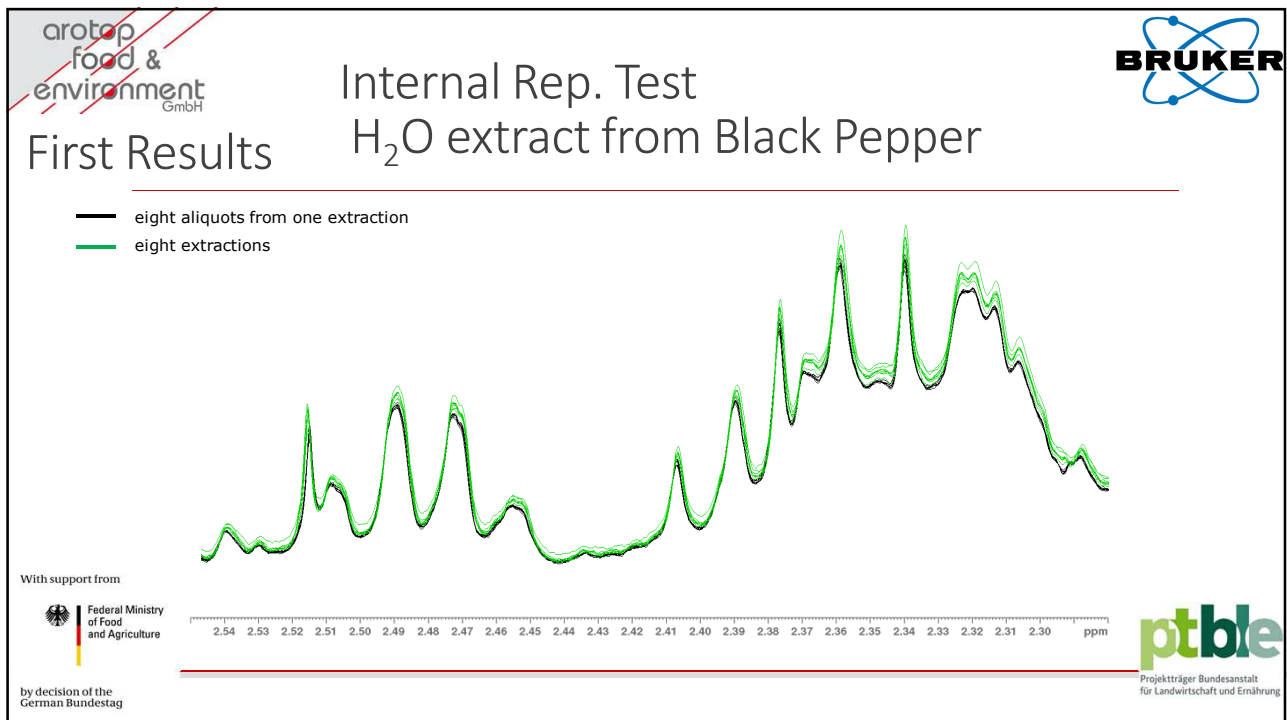
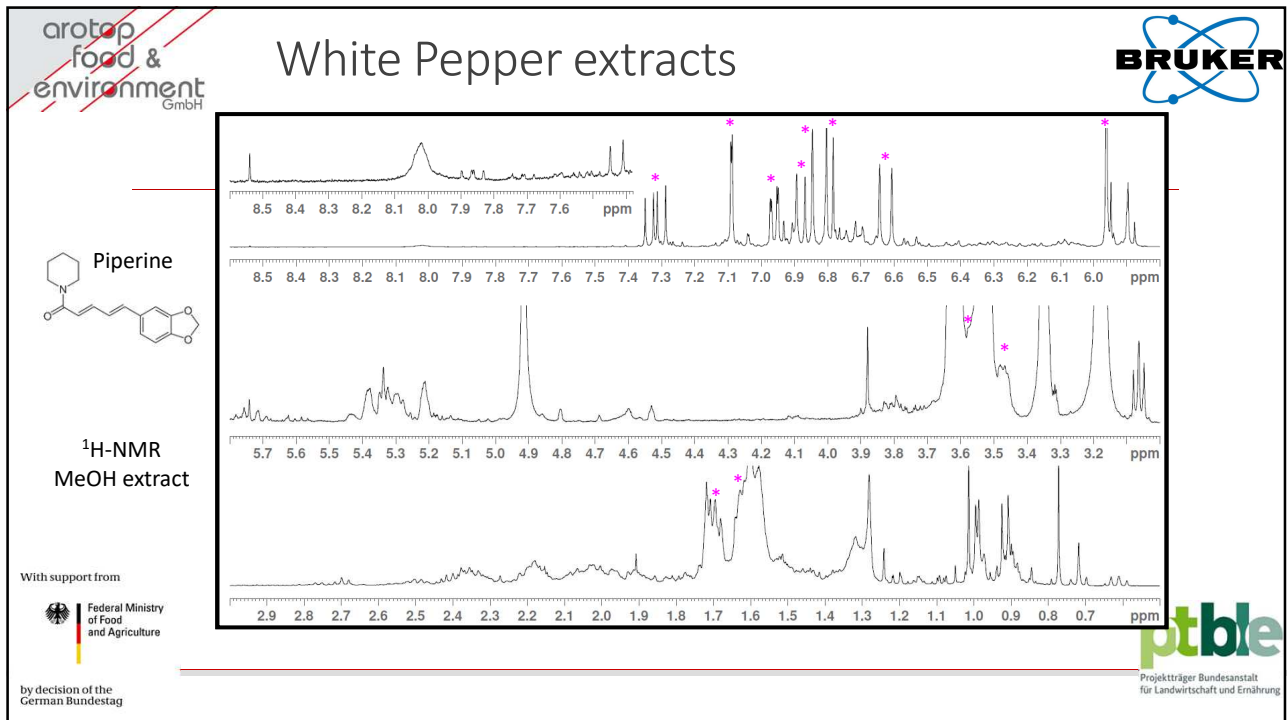
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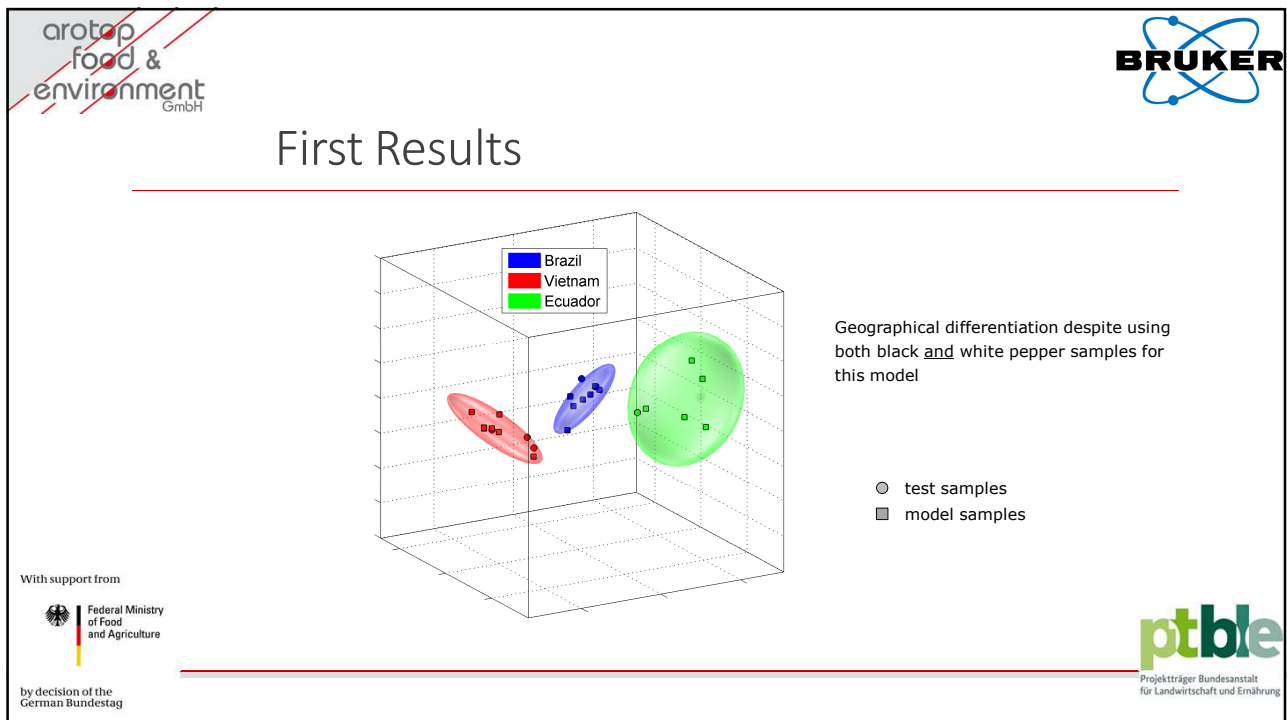
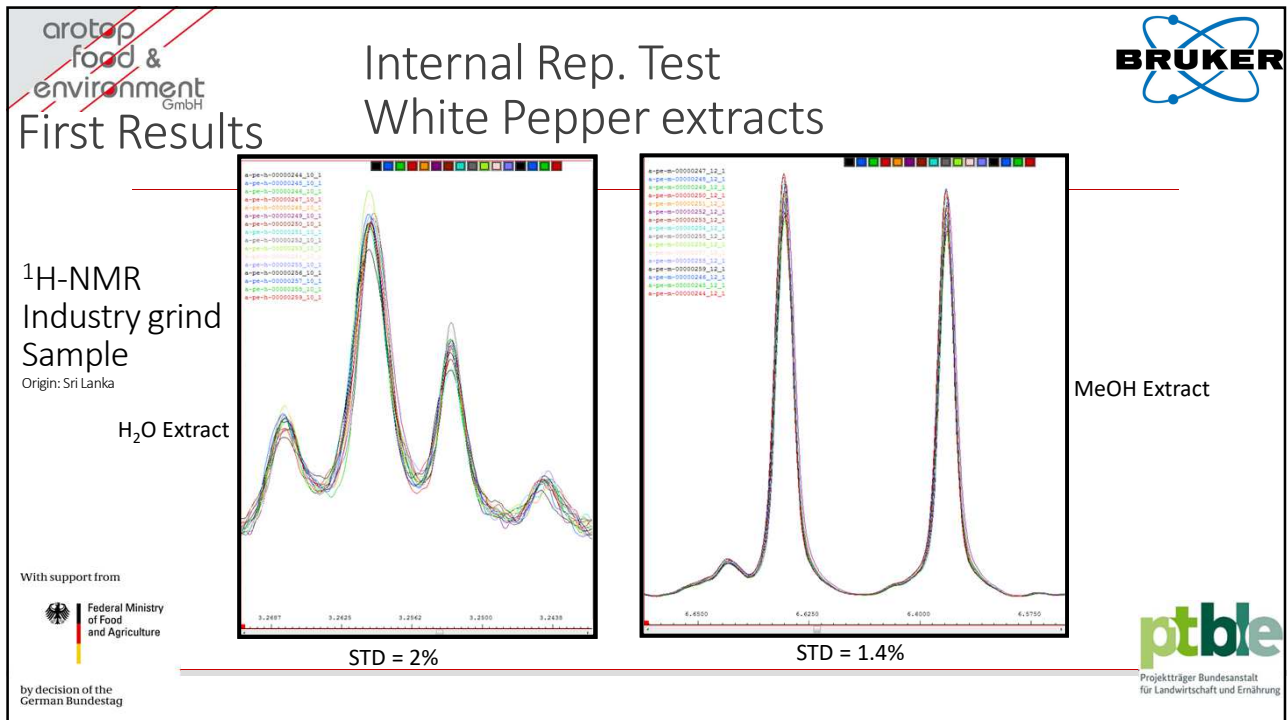


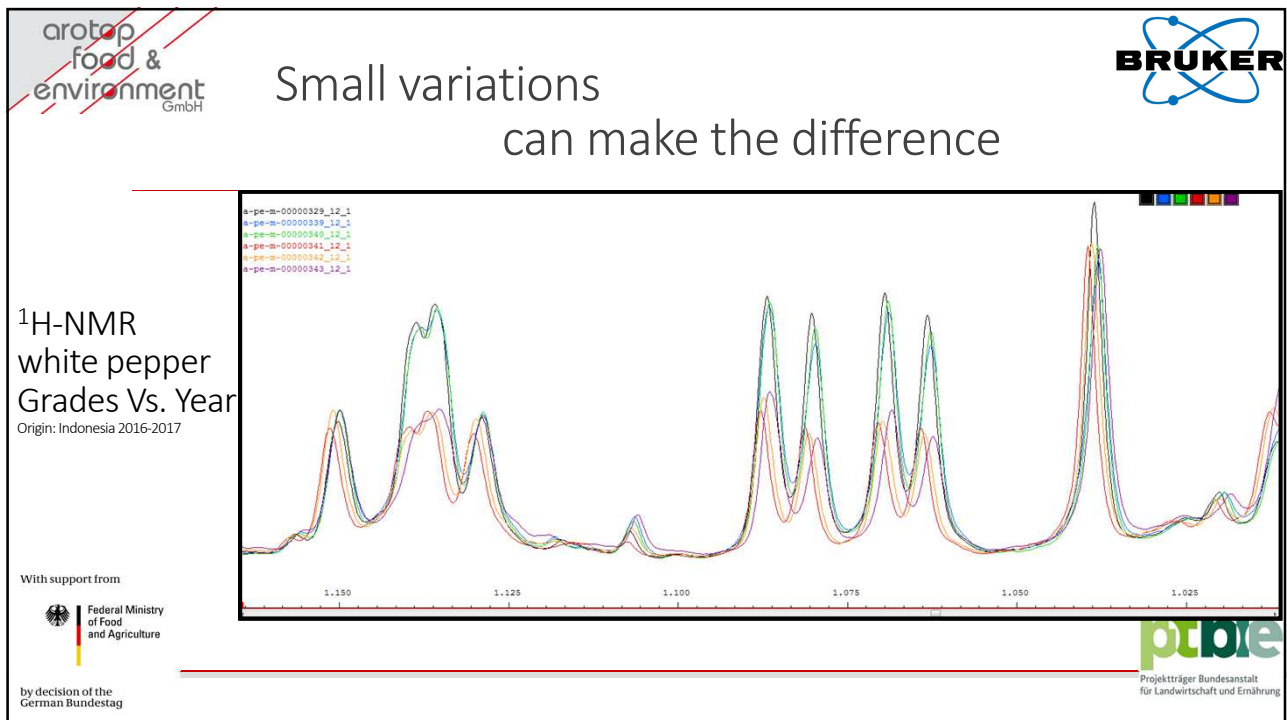
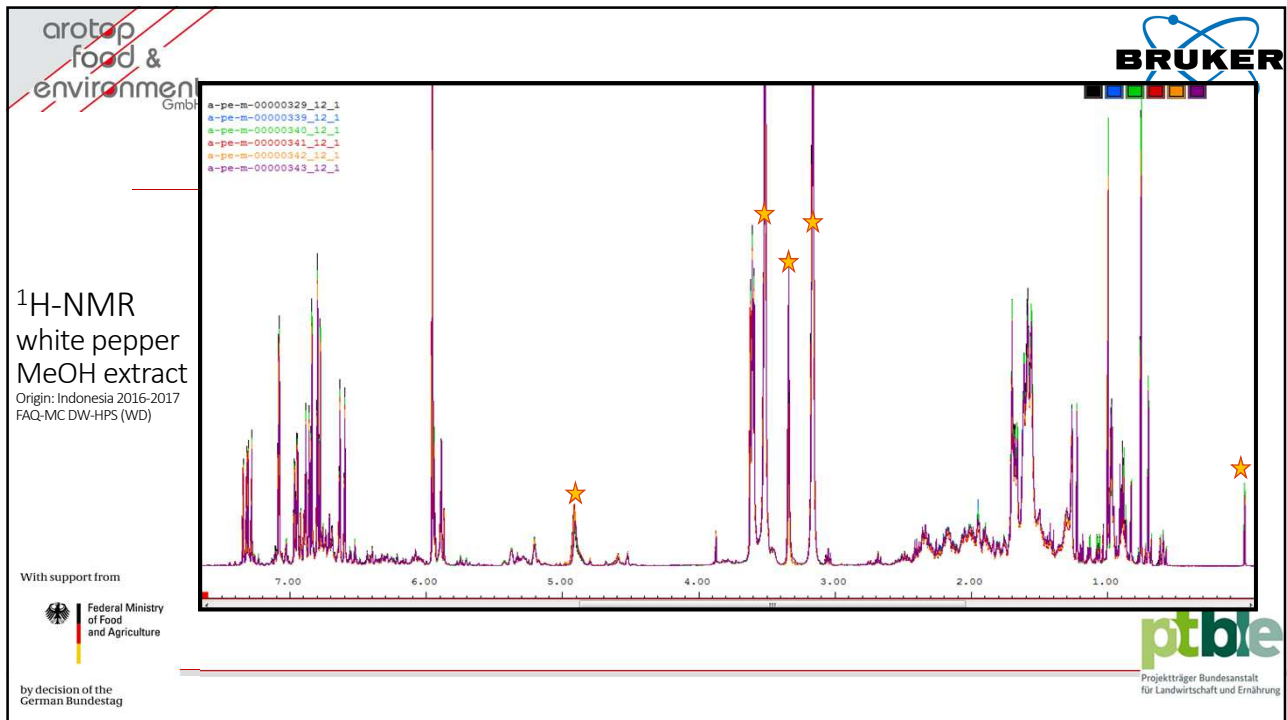
Projektträger Bundesanstalt für Landwirtschaft und Ernährung

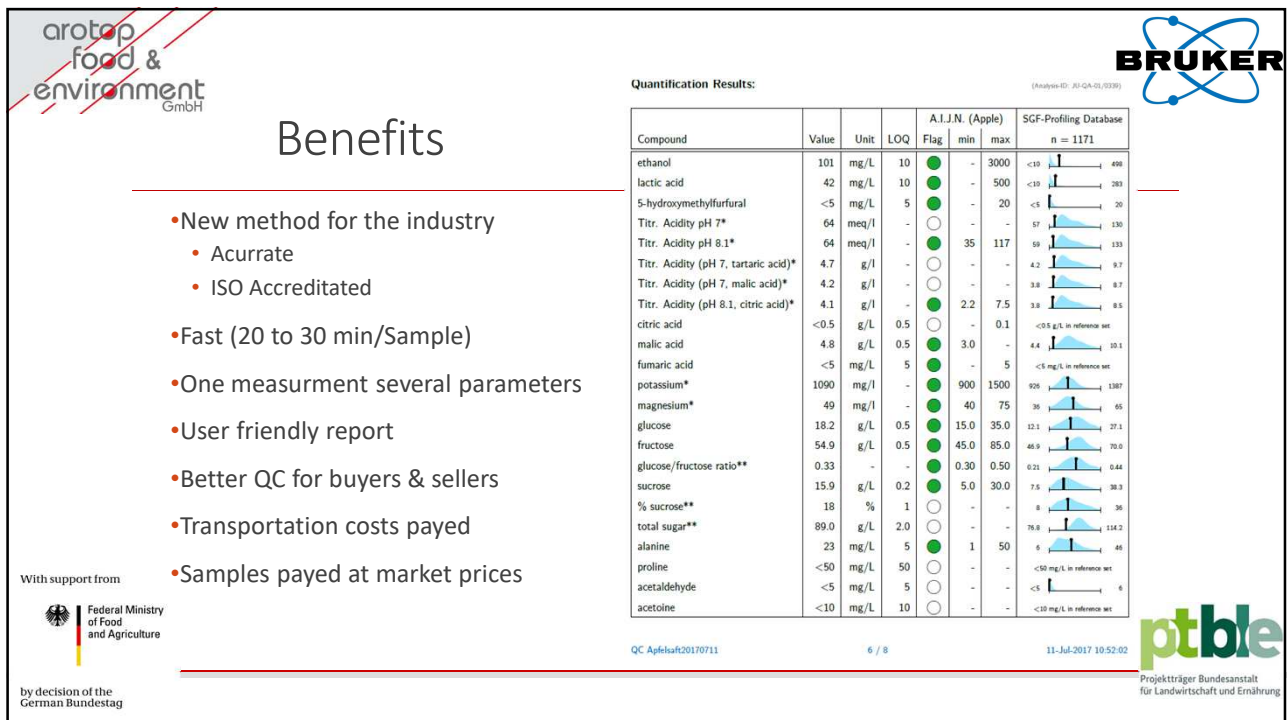
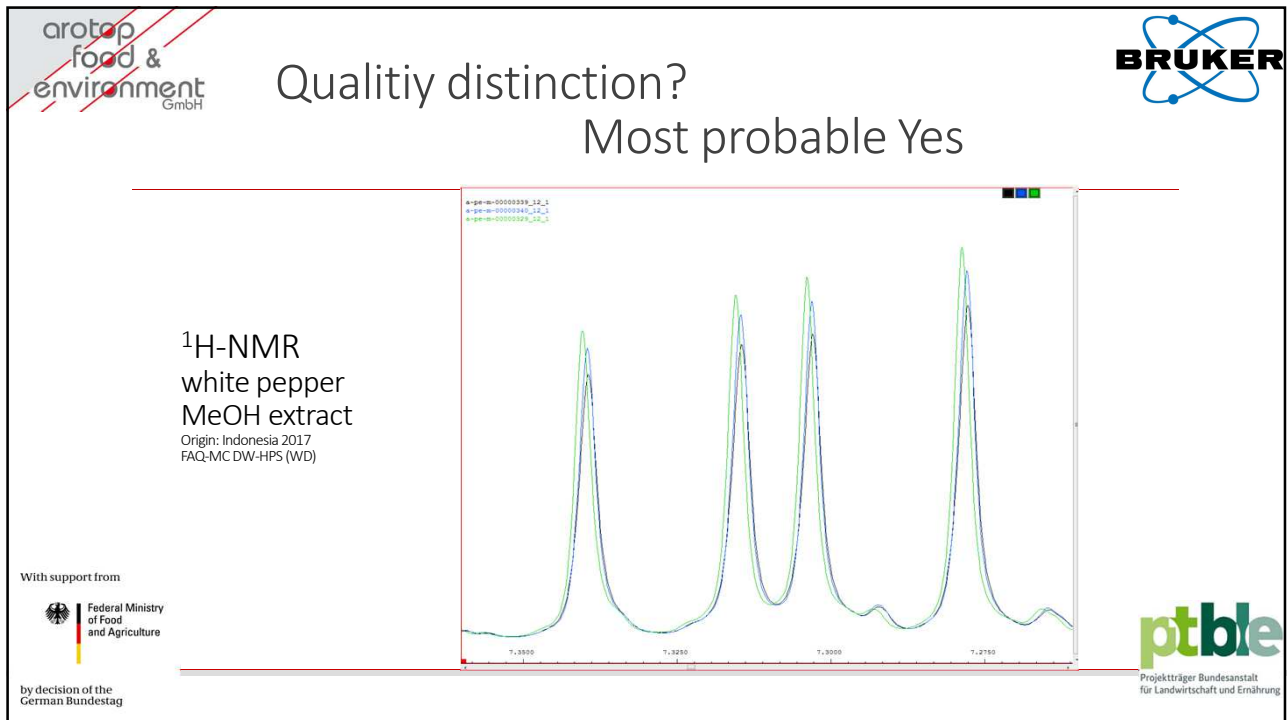












Acknowledgments

- Bruker BioSpin Rheinstetten, Germany
- Federal Ministry of Agriculture in Germany
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- Project Executing Organisation Federal Office for Agriculture and Food
 - Projektträger Bundesanstalt für Landwirtschaft und Ernährung, Bonn, Germany (ptble)
- European Spice Association (esa)
- Working teams at Bruker & Arotop

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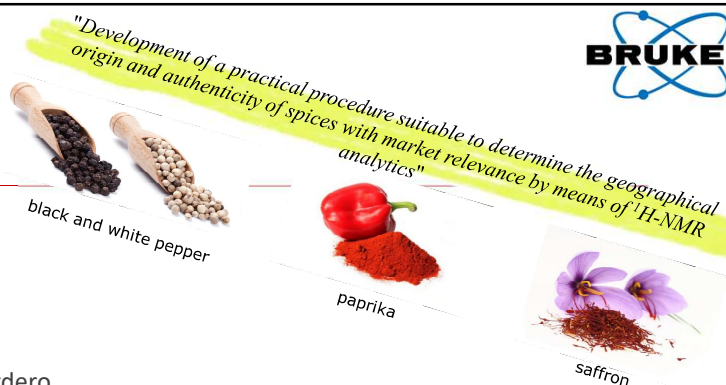
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Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 07

Paper on

Trends in Consumption of Black & White pepper

by Mr. Giridhar Rao

Director – Sustainable Sourced Spices & Herbs

Griffith Foods Asia and Middle East, Bangalore, India

Presentation made to the International
Pepper Community Annual Conference
at Kandy, Sri Lanka

Trends in Consumption of Black & White pepper

by Giridhar Rao

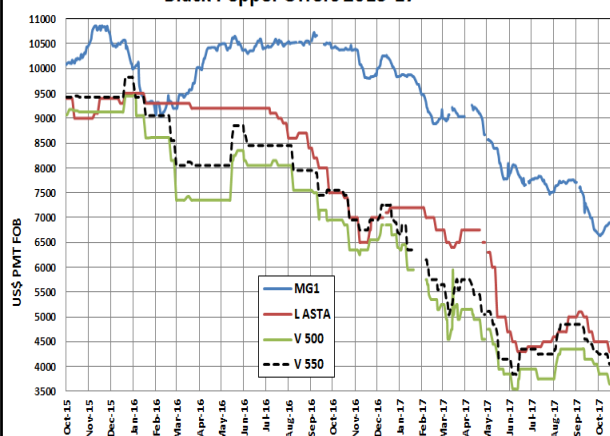
1st Nov 2017



Black & White Pepper: Market Movement

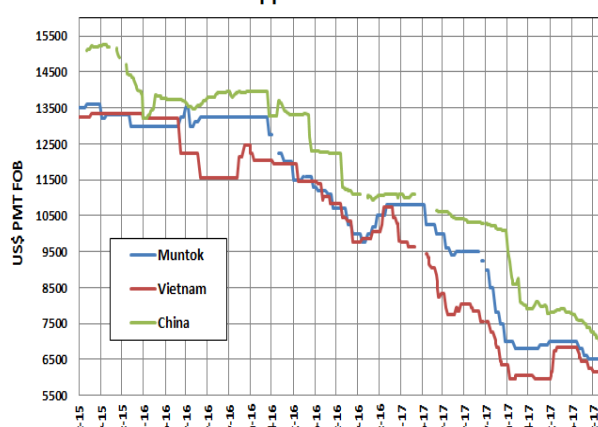


Black Pepper Offers 2015-17



Source: IPC reports

White Pepper Offers 2015-17



Objectives of the Presentation



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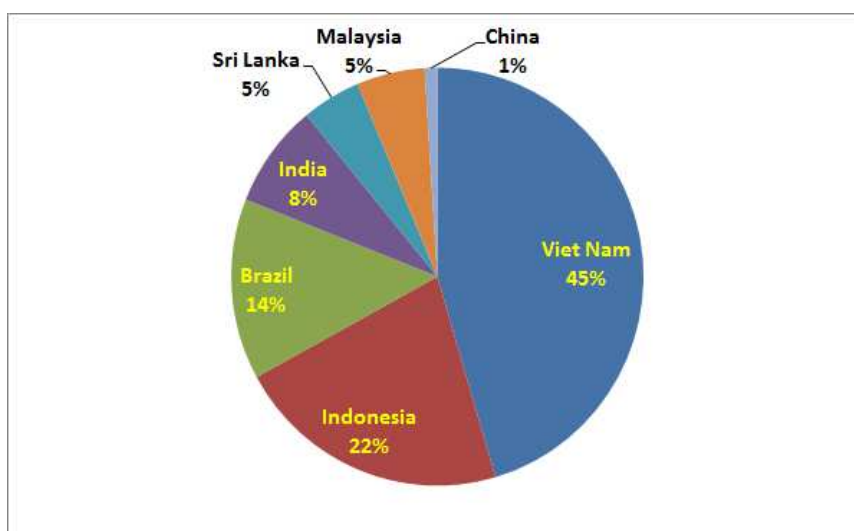
- ☐ To look at the development in the International Pepper consumption since 2012
- ☐ Pick key movements and trends
- ☐ Identify opportunities especially for the Exporters in the Producing countries

3

Major Exporting Countries (2012-16)

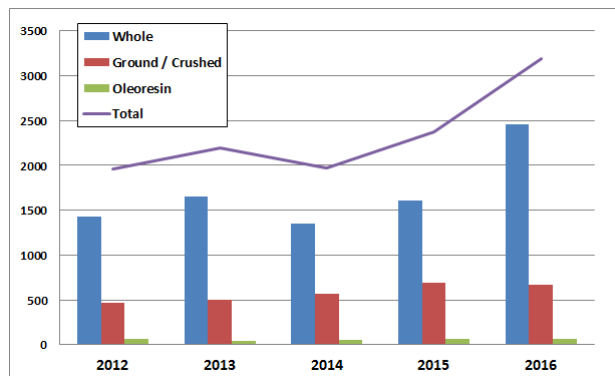


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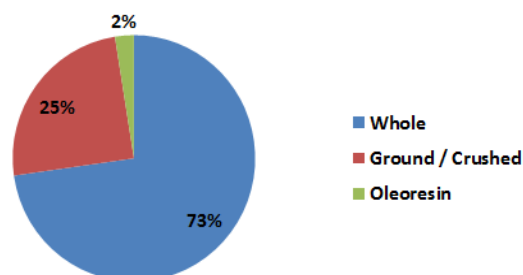


Source: From ITC-International trade statistics

Growth of Pepper Exports in value terms



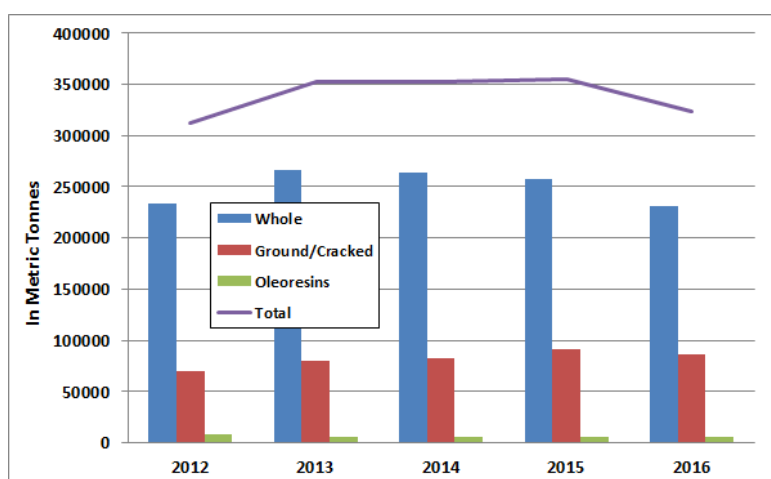
Exports of B&W Pepper in Value



- Whole Black and White Pepper continue to dominate
- Growth fueled by increase in commodity price due to the shortage situation

Source: From ITC-International trade statistics

Import of Pepper in Quantity terms

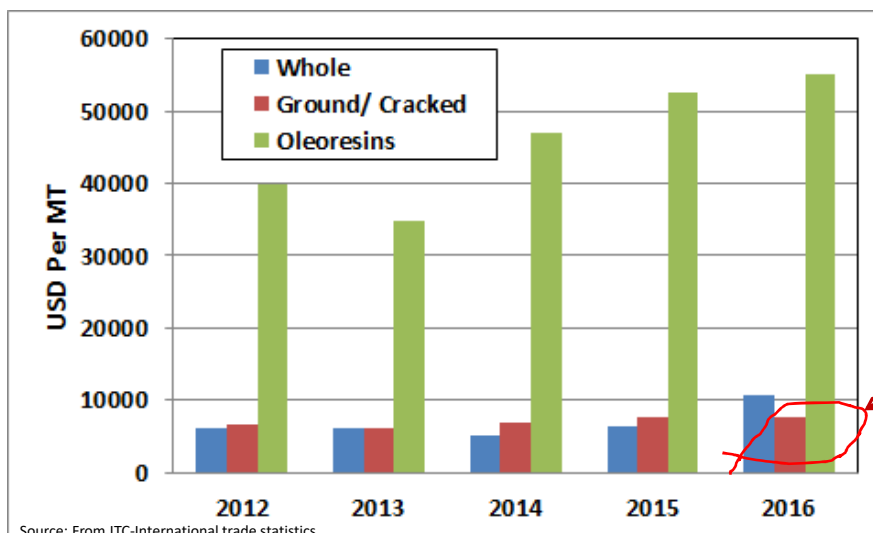


Note: The quantity of Oleoresin is the equivalent Raw Material required

Source: From ITC-International trade statistics

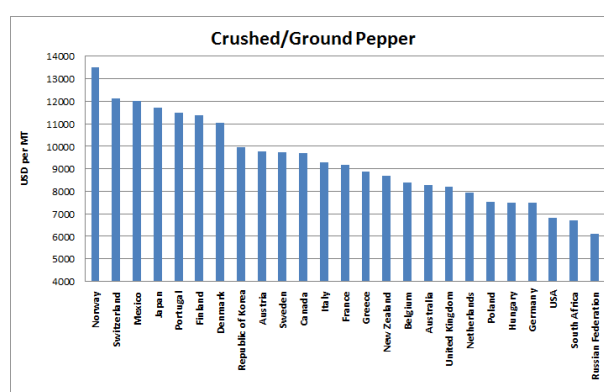
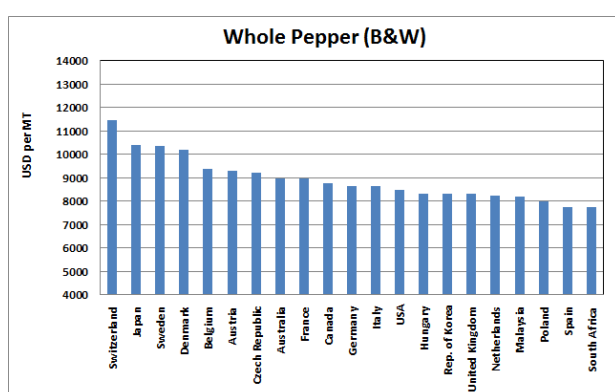
- World Imports of Pepper has stagnated in Quantity terms
- The coming 4 to 5 years likely to see a spurt in the imports of Pepper

Unit Realization of Exports



- Unit price has gone up in all categories
- Not much difference between whole Pepper and Crushed/Ground Pepper
- Whole Pepper was more expensive than Crushed/Ground in 2016

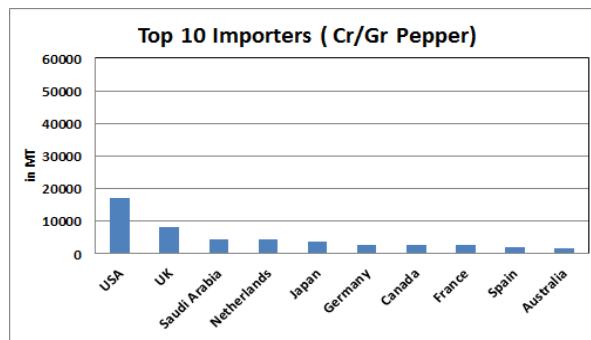
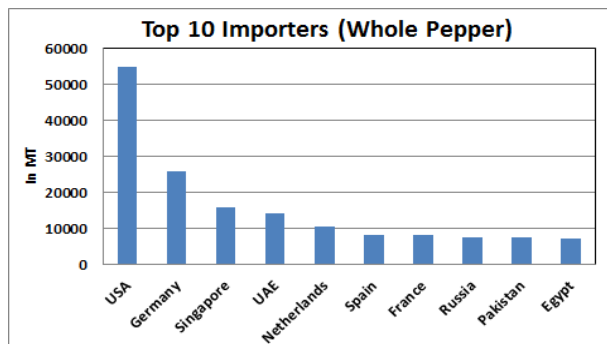
Unit realization from Importing Countries (2012-2016)



- Western Europe and Japan are markets with high prices for Pepper imports
- In Europe the prices are higher due to high level of reimports from other EU countries

Source: From ITC-International trade statistics

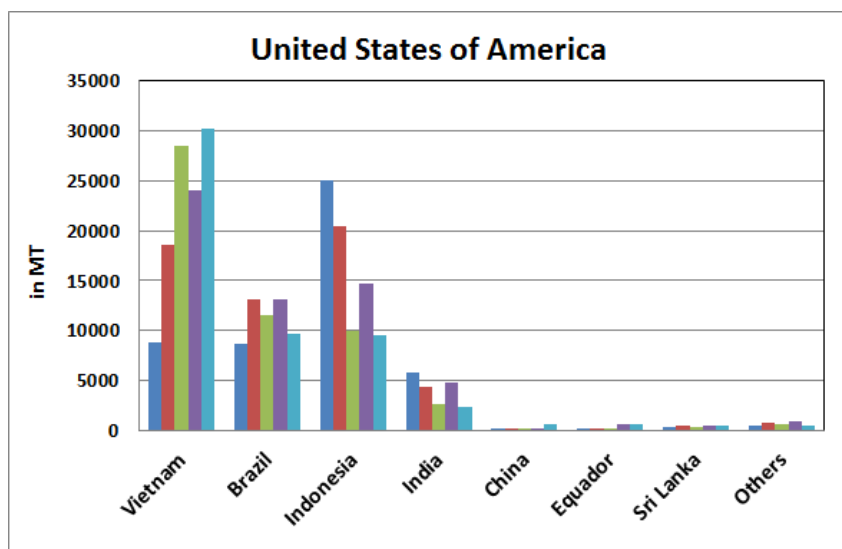
Key Importers (2012-2016)



USA, Germany, UK, UAE and the Netherlands emerge as the key importers of B& W Pepper

Source: From ITC-International trade statistics

Who shipped?(2012-2016)



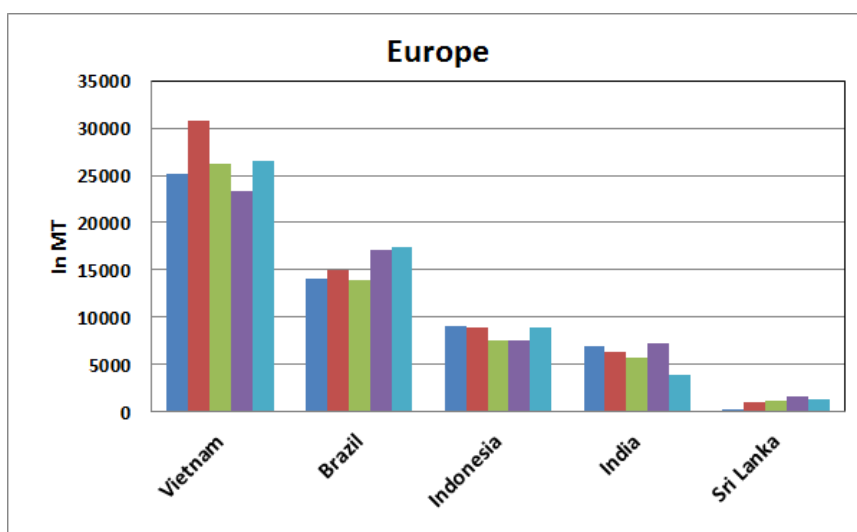
Source: From ITC-International trade statistics

- Brazil and Indonesia strong alternatives to Vietnam
- Vietnam still rules
- But Indonesia share erratic

Who shipped ?(2012-2016)



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- No reason to believe that Europe has reduced imports from Vietnam
- Brazil has increased its share, though

Imports to Germany, Netherlands, Spain, France, UK, Italy, Russia are considered

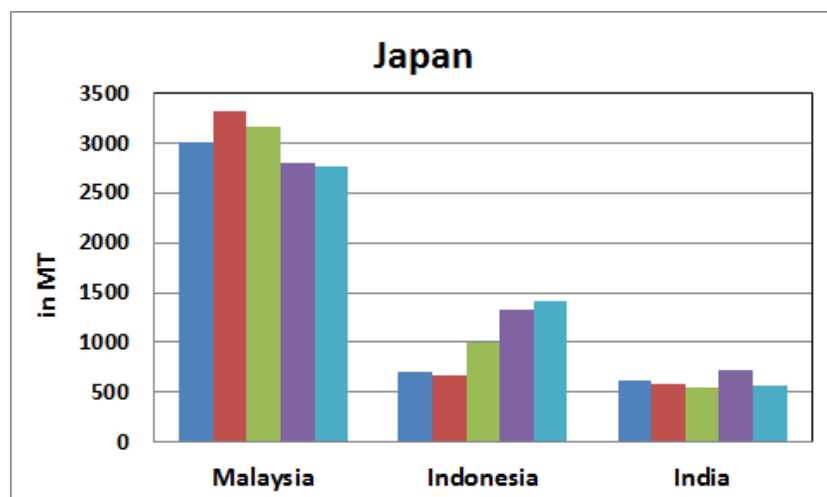
Source: From ITC-International trade statistics

11

Who shipped ?(2012-2016)



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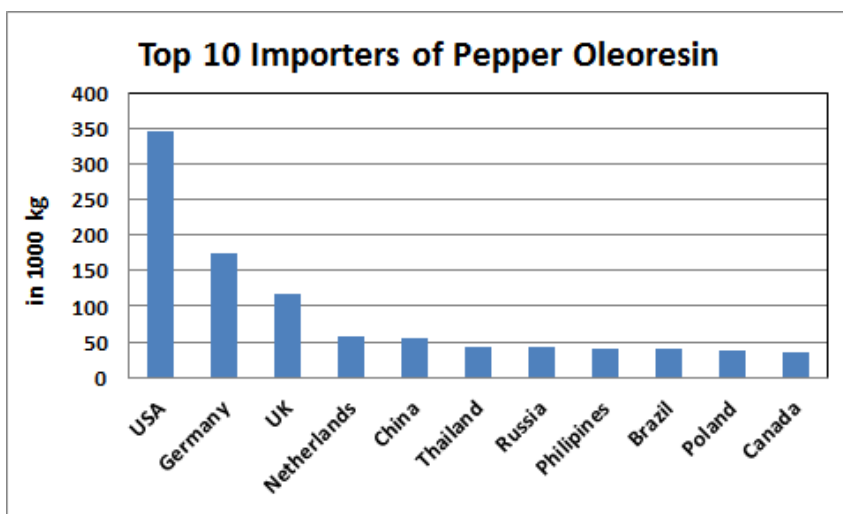


- Japan continues to keep off Vietnam
- Malaysia continues to dominate
- Indonesia share increasing

Source: From ITC-International trade statistics

12

Key Importers of Pepper Oleoresin (2012-2016)



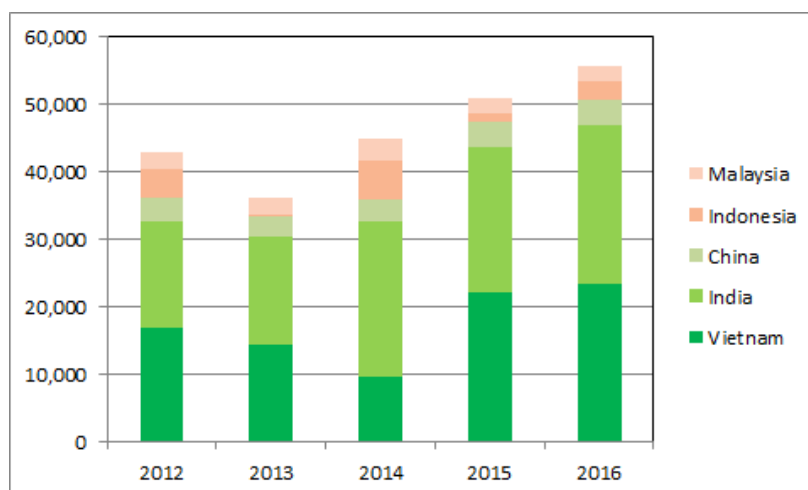
Source: Ministry of Commerce Import-Export Data, Govt. of India

- USA, Germany and Netherlands import nearly 70% of the Pepper Oleoresin manufactured

- This trend is likely to continue for some time

13

Imports by Producing Countries



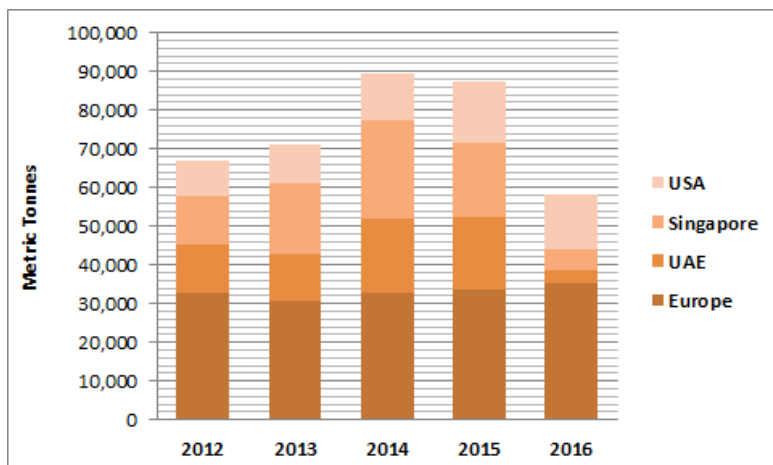
Source: From ITC-International trade statistics

- Imports by Producing Countries is on the rise

- Good opportunity for Exporters to take up traceable sourcing

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Re-Exports of B&W Pepper

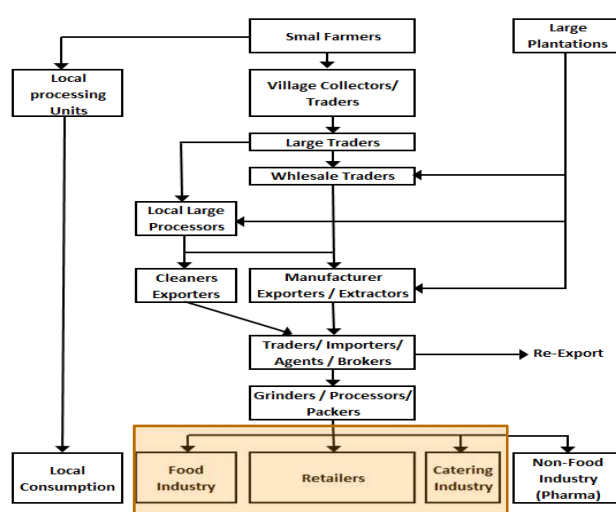


Source: From ITC-International trade statistics

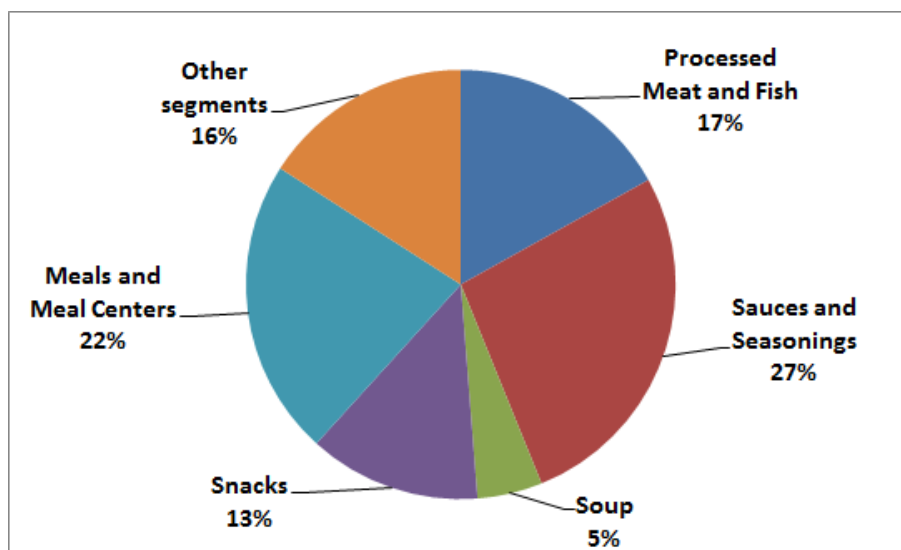
- Europe Re-exports nearly 50% of the Pepper it imports
- The re-exports business in Singapore and UAE seems to be on the decline

15

Typical Pepper Supply Chain



Key Application Segments B&W Pepper(2012-2016)

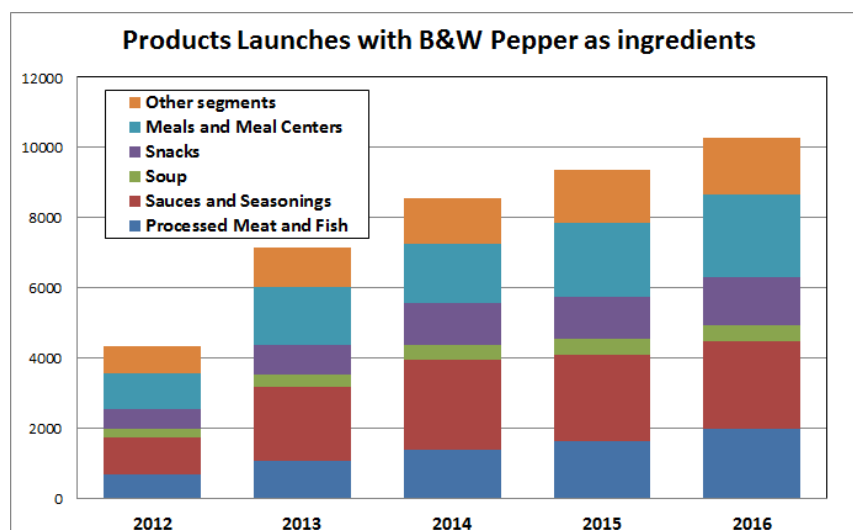


Source: From Mintel GNPD reports

- Sauces and Seasonings is the largest user of Pepper
- The trend is likely to continue
- Demand from Processed Meat and Fish likely to increase more rapidly in the coming years
- Meals / Meal Centers will continue to be big users

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Growth in application of B&W Pepper

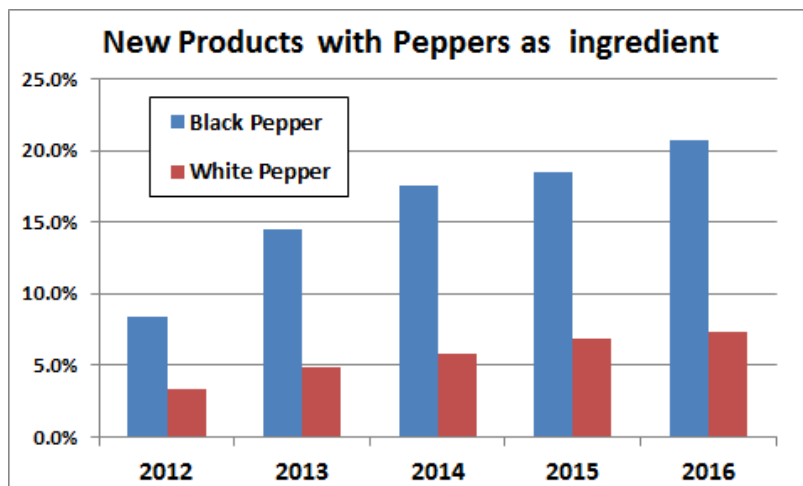


Source: From Mintel GNPD reports

- The demand from the organized sector is on the increase
- Exporters who offer value added, ready to use Pepper products will earn a premium
- Exporters will become more locked in to end product quality

18

Penetration of B&W Pepper



Source: From Mintel GNPD reports

- More than 20% of all products launched in 2016 had Black Pepper as an ingredients
- For White Pepper, it was 7%
- Increasing trend will continue

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The European Spice & Herbs Market: Profile



Adaption of Healthier Lifestyle

- More healthy food
- Unhealthier ingredients like salt, sugar etc are being replaced by spices,
- Meat Consumption is reducing and vegetarianism is on the rise
- Synthetic ingredients making way for Natural, Clean Label
- Allergens and GMO Concerns

Growing Popularity of Ethnic Food

- Culinary traditions from other continents catching on Indian & Chinese cuisine established
- Flavors and spices of Mexican, Moroccan and Thai cuisine are especially popular at the moment, in
- Growing share of people from various Asian and North African ethnic groups

Growing Awareness of Sustainability

- environmental, social and economic issues related to the food they consume.
- Many EU buyers of spices are implementing sustainable sourcing policies.
- Focus on increased productivity
- Requirement for Traceable sourcing with use of Technology to trace back to the farms
- Labor Laws/ Child Labor will become more relevant

Increased Interest in Convenience Foods

- Easy to Cook, Ready to serve segments
- Fast Foods, Take-aways to become more popular
- Local suppliers will be replaced by Mixed-Spices suppliers based at origins
- Sophisticated suppliers will replace unorganized traders
- To fuel increase in Spices consumption

The European Spice & Herbs Market: Profile

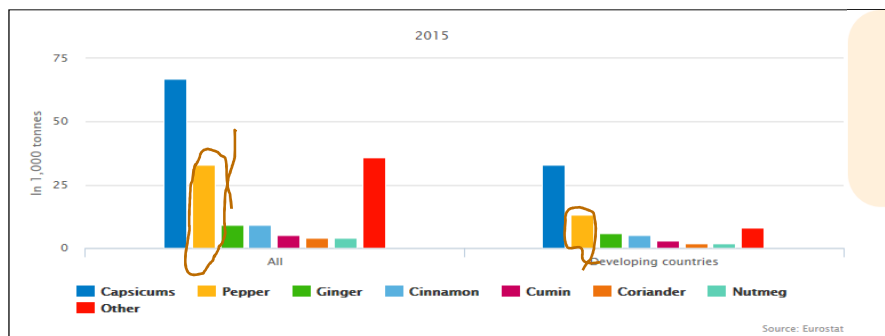


European buyers look for compliant suppliers

- A bulk of the buyers depend upon re-export from EU based Traders or Processors
- They want to see good FS & Quality Systems in place
- Best Steam Sterilization facility

Stricter Allergen Legislation:

- Since December 2014, if a product includes over 2% spices, the label must list any allergens or glutens contained in the spices



Target Re-importers and supply directly to them & Private Label to Retail

Nearly 80% of the Spices Imported by EU from the Developing countries goes to re-exporters

Source: From Mintel GNPD reports

The US Spice & Herbs Market: Profile



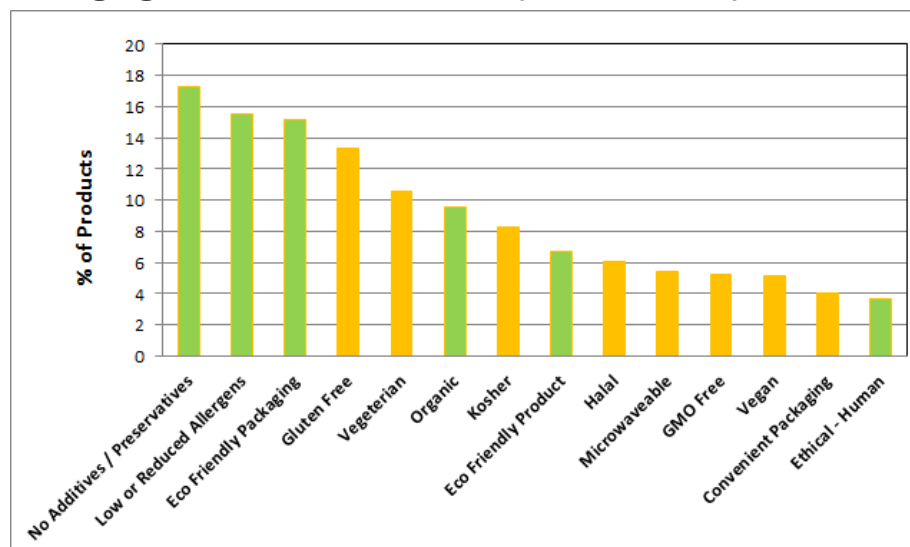
FSVP Implementation

- Responsibility on the Food Importer to ensure that the Foreign Supplier is assessed and is capable of meeting US FS Requirements
- Many suppliers would be averse to buying directly from foreign suppliers whom they do not know
- Big opportunity for GSS to develop new customers and also hold cleared stock in the US Warehouse for re-sale to US Food companies
- FSVP will become a reality in 2017-18

Trends

- USA Accounts for 30% of the World's imports
- Unit value of Whole pepper is higher than that of Crushed/Ground pointing to questions on quality of Cr/Gr products
- US likely to shift to higher grades/better quality of imports in coming years
- Trend shows increasing imports of Processed spices against Whole
- Brazil likely to gain prominence into the USA
- Imports of Spices including Pepper is growing steadily

Emerging Trends in Label Claims (Food & Drink): 2012-17



Source: From Mintel GNPD reports



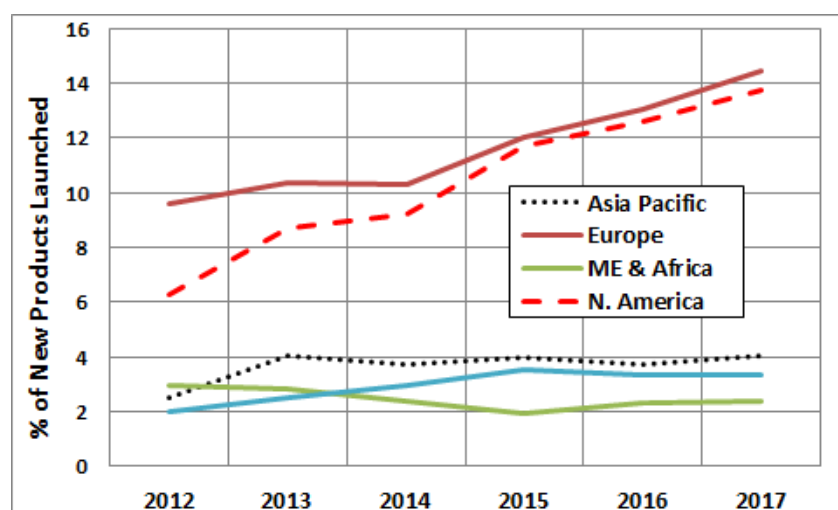
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Consumer preferences provide a great opportunity for Producing countries to create higher value

23

Growth of Organic Products



Source: From Mintel GNPD reports



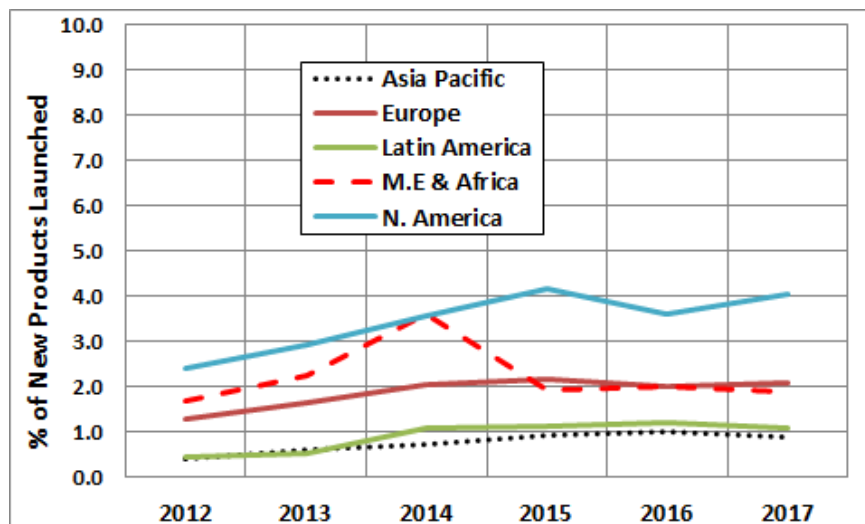
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- The Organic segment is small but is growing steadily
- The growth is happening in Europe and North America

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Growth of Sustainable Products

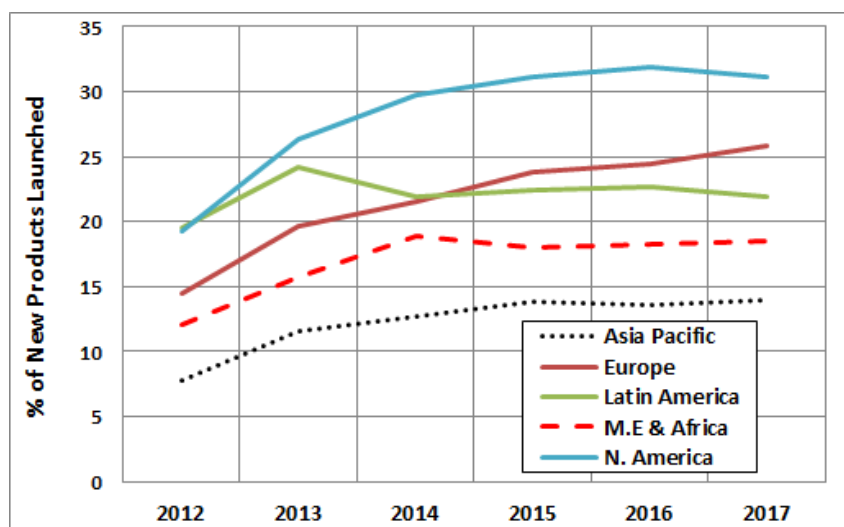


Source: From Mintel GNPD reports

- Use of Sustainable ingredients is growing quite slowly in all regions
- However, their demand is large and growing
- Clearly points to a huge shortage of Sustainable Ingredients

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Ethical Practices towards Environment & Humans



Source: From Mintel GNPD reports

However, good growth is seen in products that claim

- Environment friendly practices
- Ethical treatment of Humans and Animals

26



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Changing Needs of Consumers

- **The image of their products:** The Products are Food Safe and are natural and not contaminated with chemicals or disease causing organisms that could affect end- consumers
- **The security of their supply:** Assurance of supplies under various circumstances affecting the cultivation and availability of stocks both for current and future requirements
- **Their corporate image:** To assure compliant practices up the Supply Chain for which they may be held responsible and accountable, but on which they have no direct control or influence
- **Their competitiveness:** To ensure prices and costs are optimal and all efforts are made in the supply chain to cut out unnecessary cost adding activities
- **Sustainability:** is becoming an important factor in decision making on Sourcing and supplier selection



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In Short....

- ✓ The traditional sources will continue to dominate the world supply of B&W Pepper
- ✓ Growth stagnated in the last 5 years but likely to pick up in the next 5 years
- ✓ Opportunity to supply directly to users in Europe as currently half the Pepper imported is re-exported within EU
- ✓ Increasing cross imports; Opportunity to create value by guaranteeing origins through traceable sourcing
- ✓ There will be higher demand for Processed spices due to the higher consumer demand of processed foods
- ✓ Will be helped by the growth in the demand for Convenience, Clean& Natural, Sustainable and Allergen free products
- ✓ Organic Pepper is a small segment but with good growth potential; Need to keep the products price-competitive
- ✓ Regulatory requirements, especially implementation of FSVP will force Exporters to adopt good manufacturing and sourcing practices and also to get better margins
- ✓ This will help the industry get a better realization for the products which are currently erratic and not uniformly distributed throughout the importing world



THANK YOU

and Safe Travels

Report of the 25th Pepper-Exim Meeting of IPC

1st November, Kandy, Sri Lanka

Annex 08

Paper on

Pepper production & trade in Madagascar - a trader's perspective

by Mr. Girish Kumar

Business Head, ETS FLOWERINE

501 Toamasina, Madagascar.

Pepper production & trade in Madagascar - a trader's perspective

By: GIRISH KUMAR K S

Presented at IPC Session, Kandy, 1st November, 2017



Etablissement FLOWERINE

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- ▶ Anjoma, Atsinanana, 501, Toamasina, Madagascar.
- ▶ Email: gkumarks@gmail.com;
- ▶ Whatsapp: +261336196095
- ▶ The CLOVE people from Madagascar registered in TAMATAVE.

MADAGASCAR - an Island country filled with Opportunities.

- ▶ An island country in the Indian Ocean
- ▶ 27 Million population
- ▶ 580,000 square km area
- ▶ 1600 km length from North to South & 620 km long East to West
- ▶ A 100% agri commodity country
- ▶ Main cash crops are clove, vanilla, coffee, cotton, litchi, groundnut, pepper, sugar cane, raw cashew nut and ylang-ylang.



Agriculture in Madagascar

- ▶ IT IS NATURALLY ORGANIC.
- ▶ No usage of chemical fertilizers or pesticides.
- ▶ Agriculture production is UNORGANISED in Madagascar. Many are still wild growth !!
- ▶ Majority is house hold production below 1.5 Acres of land.
- ▶ No use of "fastest chemical or fertilizer technology" to increase production
- ▶ Agri Commodity Trading and Export, by and large, is in the hands of foreigners migrated to Madagascar, especially Indians, Pakistanis, Chinese and European business groups.
- ▶ Major share of Agri commodity exported to France and Spain.

Black Pepper in Madagascar

- ▶ Madagascar is not a prominent producer of black pepper as of now.
- ▶ Current average pepper production is only 2500 Mt per season, with 3000 Mt the highest production in 2016.
- ▶ BUT in the coming 7 to 10 years, Madagascar would emerge as a major producer of SAFE BLACK PEPPER. More farmers are planting pepper now.
- ▶ June to September is the pepper season in Madagascar.
- ▶ Famous for LIGHT BERRIES. Also available small quantity of heavy weight pepper of density 550 and 600 gm per litre
- ▶ Major share of its pepper produced is of density below 450 gm per litre.

Madagascar pepper - 100% safe pepper

- ▶ Production areas in Madagascar are found mainly on the East Coast, South East coast and the North coast of the big island
- ▶ It is ORGANIC by Nature.
- ▶ No use of chemical pesticides or fertilizers, or any kind of harmful chemicals at any level of production or processing.
- ▶ Only organic & bio-fertilizers used 100%.
- ▶ Madagascar exports :
 - ▶ Green berries
 - ▶ Light Berries
 - ▶ Heavy pepper 550 g/l and 600 g/l
 - ▶ France and Spain are major trade partners for black pepper

Production figures & price in recent years:

YEAR	QUANTITY PRODUCED in Mt	AVERAGE PRICE in USD per Mt *
2012	1000	\$ 4800
2013	1500	\$ 5200
2014	2000	\$ 5500
2015	2500	\$ 6500
2016	3000	\$ 8000
2017	3000#	\$ 7800

Estimated.

* price of heavy pepper

Madagascar started trading and exporting black pepper significantly from 2008.

Production in 2008 was less than 500 Mt based on trading figures available from traders, and middlemen and pepper collectors in villages.

However, pepper production was available since 2003, even though negligible.

Trade Flow of Mada black pepper

- ▶ India is a major buyer of LIGHT BERRIES from Madagascar.
- ▶ During 2016 export to India was 1200 Mt light berries as per figures available from Tamatave Port.
- ▶ Dubai and Saudi Arabia imports black pepper from Madagascar.
- ▶ Almost full quantity of heavy pepper from Madagascar exported to France and Spain.
- ▶ France also takes green berries from Madagascar.
- ▶ GREAT ADVANTAGE OF MADAGASCAR PEPPER : Free from chemical and pesticide contamination

Future of Mada black pepper

- ▶ In next 10 years period, Madagascar would come up as a leading producer of safe black pepper.
- ▶ World might turn to Madagascar for chemical free pepper
- ▶ Farmers of Madagascar are not for large quantity production.
- ▶ Increasing production by use of chemical fertilizers or pesticides is not in their agenda.

The Tail End

- ▶ **Madagascar would be a source for safe black pepper, source for non-contaminated spices.**
- ▶ **REQUEST YOU ALL**
- ▶ **please do not spoil this safe spice source with 'fastest chemical & fertilizer technology' to multiply production.**

THANK YOU!

- ▶ THANK YOU VERY MUCH
- ▶ THANK YOU IPC FOR THIS TIME SLOT AND OPPORTUNITY TO ADDRESS YOU
- ▶ WISHING YOU ALL A GOOD TRADING TIME WITH MADAGASCAR IN FUTURE

▶ **Etablissement FLOWERINE**

- ▶ FOR YOUR MADAGASCAR CLOVE REQUIREMENT, PLEASE CONTACT US :
- ▶ Reach me at Whatsapp"+261336196095. Email: gkumarks@gmail.com & skype me at girishks@hotmail.com

BLACK PEPPER PRODUCTION & TRADE IN MADAGASCAR –

A Traders' Perspective

Presented at IPC SESSION, KANDY, SRI LANKA on 1st November, 2017 by: GIRISH KUMAR K S,
BUSINESS HEAD,
Etablissement FLOWERINE,
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501, Toamasina, Madagascar.
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Whatsapp: +261336196095

Dear Ladies and Gentlemen,

Good Morning to you all, and hope you are having a good and wonderful time in KANDY.

I have been associated with Madagascar spice industry since 2007, and have been living in Madagascar since 2014. This write up is based on what I have seen and experienced in Madagascar. Basically we are CLOVE people from Madagascar; 80% of our export is Clove.

Madagascar, a big Island Country in the Indian Ocean, with a small population of 27 Million is currently NOT A major player in global black pepper industry. With an average annual production of 2500 Mt, its pepper production is not in any accountable level as far as global black pepper industry is concerned.

But at the same time, one can not write off Madagascar from the global pepper industry. Madagascar is emerging as a PEPPER PRODUCER, producer of safe pepper, and in the coming next one decade time, Madagascar flag would definitely fly on top layer of pepper producers with a sizeable quantity of production. And one decade period is very small in the spice industry.

Madagascar is a 100% Agri based country with vast opportunities. I would say Madagascar is spice dominated agri land, which is 100% free from chemical and pesticide segment. Madagascar is not using any kind of chemical fertiliser or chemical pesticide, nor use any ""advanced chemical production technology"" to multiply its production. Hence, Madagascar offers you 100% naturally organic product, free from chemical and fertilizer contamination. You will not find any chemical or pesticide residues in its Crops - that is Madagascar. And, of course, because of this, produced quantity is limited for all its crops !!

SILENT FEATURES OF MADAGASCAR FARMERS & FARM PRODUCTION:

1. *They are not interested in huge production figures, nor interested to increase production over night.*
2. *They are not worried about crop damage, nor interested in protecting crop with chemicals or pesticides. They go for very natural, what is given by the nature, they accept.*
3. *They never get fascinated over high export figures, nor they plan upfront for higher exports.*
4. *They do not care much on the international price; they only look at their production cost and what they want to survive the production. So simple. And they move very slowly.*
5. *They do not use or practice any high end technology for increasing production.*

From the above, you can understand what you will get from Madagascar. In this world where all traders and manufacturers are running in search of “SAFE CROP” , Madagascar is your “The Destination” where you get non-contaminated spices, non-contaminated agri commodities. The choice is yours. I repeat:

- **MAIN ADVANTAGE OF Agri Crops from Madagascar is IT IS NATURALLY ORGANIC.** No usage of chemical fertilizers or chemical pesticides, or any harmful chemical treatment in agri farm land

BLACK PEPPER PRODUCTION:

With a small population of 27 million, and with a vast geographical area of nearly 580,000 Sq. Mtr. , its pepper production is concentrated to the East Coast area spreading to South East Coast and North East Coast.

Black pepper production in Madagascar is mainly tiny land units of house hold cultivation. There is no “plantation” or any wide area cultivation. Maximum farm land holding is One hectre, which is filled with multiple products - black pepper, cloves, turmeric, ginger, litchi, cotton, etc. Cannot find any “exclusive producer or grower” of any agri crop. Its all a blend of many in one small land area. More than 70% of Madagascar cultivation is in small house hold hands.

Madagascar is not a prominent producer of black pepper as of now. BUT in the coming next 7 to 10 years, world will have to count on Madagascar as a major producer of safe pepper. More farmers started planting pepper in their backyards.

Current average pepper production is only 2500 Mt per season, with 3000 Mt the highest production in 2016.

June to September is the pepper season in Madagascar.

Madagascar is famous for LIGHT PEPPER BERRIES used for extraction/essential oil. India is a major importer of light pepper berries from Madagascar. Madagascar has heavy weight pepper of density 600 and 550 gm per litre. However, major share of its pepper produced is of density below 450 gm per litre.

Production areas in Madagascar are found mainly on the East Coast, South East coast and the North coast of the big island. It is ORGANIC by Nature. No use of chemical pesticides or chemical fertilizers, or any kind of harmful chemicals at any level of production or processing. No production of chemicals, fertilizers or pesticides in Madagascar / and No import of these items into this island. Only organic & bio-fertilizers used 100%.

- Madagascar exports :
 - Green berries
 - Light Berries
 - Heavy pepper 550 g/l and 600 g/l

PEPPER TRADE IN MADAGASCAR

Madagascar started trading and exporting black pepper in a significant way from 2008. Production was available from 2003 onwards. Production in 2008 was less than 500 Mt based on trading figures available from traders, and middlemen and pepper collectors in villages.

Known and available FIGURES of black pepper trade are as below:- based on export figures from Customs and terminal market arrival for trading. Practically no organized system to get production figures or trading figures.

BLACK PEPPER PRODUCTION & AVERAGE PRICE IN MADAGASCAR		
Year	Quantity in Mt	Average price in USD per MT*
2012	1000	\$ 4800
2013	1500	\$ 5200
2014	2000	\$ 5500
2015	2500	\$ 6500
2016	3000	\$ 8000
2017	3000#	\$ 7500
# Estimated		
* Price of heavy pepper		

EXPORT DIRECTIONS

India is a major buyer of LIGHT BERRIES from Madagascar. During 2016 export to India was 1200 Mt light berries as per figures available from Tamatave Port.

Dubai and Saudi Arabia imports black pepper from Madagascar.

Almost full quantity of heavy pepper from Madagascar goes to France and Spain.

France also takes green berries from Madagascar.

GREAT ADVANTAGE OF MADAGASCAR PEPPER : Free from chemical contamination

FUTURE OF MADAGASCAR AS A BLACK PEPPER PRODUCER:

In next 10 years period, Madagascar would come up as a leading producer of safe black pepper. World might turn to Madagascar for chemical free pepper.

Farmers of Madagascar are not for large quantity production; but they stand for small production as feasible by them, with limited cost of production and ensuring “good price” for their product. And therefore, increasing production by use of chemical fertilizers or pesticides is not in their agenda. And this is the greatest advantage to the world pepper industry.

REQUEST TO THE WORLD PEPPER INDUSTRY: once you realize potential of Madagascar as a source for safe black pepper, you all might come down to Madagascar – **MOST WELCOME** with a **REQUEST TO YOU ALL** please do not come with chemicals, pesticides, and such kind of “fastest technology” to multiply production. Madagascar is not for that. Let us maintain the serenity of this farm land with traditional production methods and availability of non-contaminated and safe crops.

THANK YOU VERY MUCH.

GIRISH KUMAR