



इंडियन कॉफ़ी IndianCoffee

The Coffee Magazine

Vol. 84 No. 3-4 March - April 2020

Management of Coffee White Stem Borer



Coffee Board of India at the Silver Jubilee of Gulfood 2020, Dubai

P - 10



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कॉफी पत्रिका

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डॉ. श्रीवत्स कृष्णा, आई.ए.एस.
सचिव, कॉफी बोर्ड
Dr. Srivatsa Krishna, I.A.S.
Secretary, Coffee Board

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The views expressed in this journal are purely those of the authors and not necessarily of the Coffee Board.

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1, डॉ. बी. आर. अंबेडकर बीथी, बेंगलूरु,
कर्नाटक, भारत

COFFEE BOARD

Ministry of Commerce & Industry
Government of India
1, Dr. B. R. Ambedkar Veedhi,
Bengaluru - 560 001, Karnataka, India
Ph: 91-80-2226 6991 - 994
Fax: 91-80-2225 5557

Website: www.indiacoffee.org

अधिकृत एवं मुद्रणकर्ता

शरद एंटरप्राइसिस, बेंगलूरु

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Your views, opinions & observations are welcome as long as it is in the spirit of the magazine's principles and values, and may be sent to: editor.indiancoffee1@gmail.com
The publisher reserves the right to respond/publish the same in this magazine.





स्वच्छ भारत अभियान



सुरक्षित आवास, शुद्ध वातावरण
यही हमारा स्वच्छ भारत देश है
हम "स्वच्छ भारत" को
सफल बनाएं



काँफ़ी बोर्ड



वाणिज्य एवं उद्योग मंत्रालय
भारत सरकार



From the Secretary's desk



Coffee Times

Coffee White Stem Borer popularly known as CWSB is a century old pest threatening the fortunes of Arabica coffee cultivation. The Integrated Pest Management (IPM) strategies recommended by the Coffee Board Research Department from time to time have helped the coffee growers to a great extent in efficient management of the pest over the years. But recent developments such as vagaries of climatic change, shortage of skilled workers for tracing of stem borer affected plants etc. are contributing to the frequent flare-up of CWSB. In this context, our scientists at CCRI have reviewed the existing management strategies for CWSB and analysed their prospects and adoptability for protecting the healthy plants. An article on the management of CWSB is presented in this issue which reveals various management measures in terms of efficiency for obtaining best results.

Coffee Board of India has participated in Gulfood-2020, the world's largest annual food event held at Dubai World Trade Centre which provided an opportunity for the Indian coffee producers, R&G coffee manufacturers and exporters to meet large number of buyers from the UAE and Middle East. Apart on domestic promotion front, the Board participated in major events like the 5th edition of CII, Food Processing Conclave-2020 held at Kolkata and 33rd edition of "AAHAR-2020" exhibition held at Pragathi Maidan, New Delhi. Brief reports on these trade promotion activities are presented in this article for the benefit of coffee fraternity.

This issue also contains regular features viz., Coffee Market Reports, articles on Coffee & Health, Calendar of Coffee Estate Operations etc. for the benefit of readers.

COVID-19 pandemic crisis brought everything to a halt. The nationwide lockdown from 25th March 2020 affected the lives and livelihoods of many. The complete lockdown during first phase also affected the Indian coffee sector especially the estate operations, farmgate sales, trade, export and domestic coffee roasting and retail business. The Coffee Board played a role in facilitating relaxations on estate operations, movement of labour, transportation and customs clearance of containers at ports by taking up the issues with the concerned District administrations and Port authorities which greatly helped in resumption of activities from second phase of lockdown onwards. The pandemic has thrown up a new challenge for the coffee industry worldwide as the out-of-home consumption is severely affected due to closure of hotels, restaurants and cafes. Now it is realised worldwide that this pandemic is not going away anytime soon and we will have to live with it till an effective vaccine is available. The Covid-19 pandemic has put an additional impact on Indian coffee sector which is reeling under recurring natural calamities and unremunerative prices for the past four years. The Board is making all efforts to highlight the cumulative impacts of natural calamities, low prices and Covid-19 pandemic on Indian coffee sector to the concerned authorities in Government of India for consideration of suitable relief measures.

Reaffirm that we all shall fight together against the Covid-19. Cheers to Coffee!

Dr. Srivatsa Krishna
Secretary

Can we manage White Stem Borer? A close relook at the prospects of existing technologies...

Roobak Kumar A, Krishna Reddy P, Uma M S, Seetharama H G, and Surya Prakash Rao N

Division of Entomology, Central Coffee Research Institute, Coffee Research Station – 577117,
Chikkamagaluru District, Karnataka



The Coffee White Stem borer popularly known as CWSB, is a century old pest reported for the first time in India during 1938. Since then, the CWSB has been threatening the fortunes of arabica coffee cultivation. Because of the economic significance of this pest, development of appropriate management strategies has been the major thrust of coffee research over the decades. Initially, tracing, uprooting & destroying of the infested plants was widely practiced as a successful management strategy for CWSB. Subsequently, Lindane swabbing became very popular and was very effective in containing the pest devastation not only because of its contact action but also due to its fumigant action. The ban of Lindane leads to the shift to Chlorpyrifos which is relatively better effective against CWSB than all other available insecticides.

In addition to the need-based insecticide swabbing, the other Integrated Pest Management (IPM) strategies like cultural, mechanical and physical management measures recommended by the Coffee Board Research Department (CBRD) from time to time have been adopted by the arabica coffee growers at estate level. Thus, the IPM strategies recommended by the institute helped the growers to a great extent in efficient management of this pest over the years.

Nevertheless, some of the recent developments such as inadequate estate workforce with skill in precise/correct identification of the infested plants, lack of efficient insecticides for swabbing, vagaries of climatic change and the innovative agronomic practices of the growers for production enhancement are directly or

indirectly contributed for the high flareup of CWSB. Consequently, CWSB management has been visualized as an impossible and tough task at estate level forcing the arabica planters to shift for robusta cultivation. In this context, we felt that there is an obvious need to relook at the existing management strategies for CWSB, analyze their prospects in the backdrop of practical feasibility and to suggest the way forward.

Are the available technologies effective?

Definitely Yes! On close review, it could be inferred that, the management measures that have been widely practiced were primarily targeting on preventing the egg laying on the stems or towards killing the eggs laid on main stems in the early stages itself. Of late, in a desperate situation, planters are resorting for choosing the most convenient pest control measures specifically in terms of ease and flexibility of time, rather than preventive measures for egg laying. Even in the current scenario, planters using the preventive management measures can contain the pest incidence to the economic threshold level. Hence, selection of appropriate management measures in terms of efficiency is critical in obtaining best results.

Strategies to be followed for protecting the healthy plants

1. Bark smoothening/ Bark polishing

Bark smoothening/ Bark polishing is the removal of loose scaly bark on the main stem and thick



Fig.1. Bark Scrubbed plants



Fig .2. Close view of Bark Scrubbed plant

primaries of the coffee plant using coir gloves or gunny bag strips. Removal of the loose scaly bark helps in reducing the egg-laying of CWSB adult beetles because of the smooth surface. In order to avail maximum benefit from this strategy, it has to be completed before the onset of the flight period. Bark smoothening has no negative effect on the physiology of the plant, but utmost care should be taken to see that the green portion of the stem is not damaged.

When to do?

This strategy is mainly aimed at targeting the pest before egg laying. Hence, this operation must be completed before the end of March and September as the flight period of CWSB starts during April and October. Bark smoothening before the flight season was found to be a highly effective and best strategy for the management

of the borer. This is neither a one-time operation nor a regular operation, but has to be performed at least once in three years. The incidence of the borer can be effectively checked by integrating bark smoothening with maintenance of a two-tier mixed shade canopy.

2. Lime Coating

Application of 10% lime (spray lime at 20kg in 200 litres of water along with 200ml Fevicol DDL) as coating on main stem and thick primaries is



Fig .3. Lime coating using brush



Fig .4. Close view of lime coated plant

found to be very effective in preventing the egg laying and thus the CWSB attack. The quantity of lime can be adjusted based on the density of the solution. A paint brush of five-inch thickness can be used to apply the lime solution uniformly. The lime coating should be done on the main stem as well as thick primaries in such a way that the cracks and crevices are covered well without any space to CWSB adults for egg laying. It is more effective if the lime coating is taken up after smoothening of the stem so that the lime adheres well once loose scaly bark is

removed off the stem while smoothening. It is pertinent to mention that, extensive laboratory and field experiments have been conducted at Central Coffee Research Institute (CCRI) on the efficiency of lime coating against CWSB egg laying. In all the experiments, coating of the stems with thick lime solution both in laboratory and plants in field prevented 100 percent CWSB egg laying. This strategy also aimed at targeting the pest before egg laying. Hence, this operation must be completed before the end of March and September.

3. Chemical options

Central Coffee Research Institute has been conducting extensive laboratory and field trials on the efficacy of insecticides available in the market against CWSB. It is rather disappointing to note from the chemical screening experiments that, there is no chemical found to be as effective as lindane. Among the various chemicals tested, Chlorpyrifos 50EC + Cypermethrin 5 EC @ 240 ml per 200 L of water, along with 200 ml of any wetting agent, is the only insecticide found to be better in both efficacy and persistence compared to Chlorpyrifos alone. The persistence study also found that the dissipation of Cypermethrin is lower in the field compared to Chlorpyrifos and therefore it will be effective for long duration (45 days).

It is felt that, the chemical option should be the last choice for the growers in CWSB management strategies and it is not advisable for resorting to the blanket sprays. It may be a wise option to target the hot spot areas like less shaded areas, rocky patches, blocks with western aspect and blocks neighboring neglected plantations with high stem borer incidence while preferring for chemical sprays in such blocks. To achieve good results in terms of efficacy from the insecticide sprays, the main stem and thick primaries should be well covered with insecticide solution. The insecticide spraying has some flexibility in time of application because, the insecticide spray even

after egg laying also lethal to eggs and newly hatched larva. Keeping all the aspects in view, insecticide spray is recommended during second fortnight of April in summer flight and second fortnight of October in winter flight of CWSB.

Thus, all the interventions are mainly targeted to prevent the egg laying, because for pest like CWSB, it is very difficult to access once the larva enters inside the coffee stem. More importantly, community approach is very much essential for successful management of the pest like CWSB especially when high pest flareup is seen due to changing climate. As of now, we relooked the best options available for protecting the healthy plants. Then what are the options available for handling infested plants apart from tracing and uprooting?

Management strategies targeting the CWSB infested plants

It is well known that, tracing and uprooting of CWSB infested plants is the only strategy recommended over the decades for control of CWSB and this strategy has been widely adopted at the estate level with great success. However, this strategy is not well taken by growers of late, as they are not interested in losing the existing crop and the plant, and prefer to postpone the uprooting of the infested plant till completion of harvest. This tendency of retaining the infested plants in field proves to be detrimental, as it leads to the emergence of CWSB adults in large numbers during post-monsoon flight (October to December) and facilitates the attack of healthy plants.

Keeping this practical constraint in view, CCRI conducted extensive field experiments to kill the CWSB stages/adults inside the infested stems, so that the infested plants could be protected from uprooting. Nevertheless, some of the strategies like root feeding and stem injection of insecticides were not effective. The much-publicized Sealer cum Healer strategy has also

proved to be ineffective. The only approach with some positive prospects was found to be stem wrapping. In the initial stages, gunny bag strips were used as wrapping material and were found to be effective in killing emerging adults. However, non-availability of readymade gunny strips, less field durability due to weathering and termite attacks have necessitated for any other alternate material. In this context, Non-Woven fabric (NWF) material was found as an alternative wrapping material and experiments with this material gave some encouraging results. Systemic field trials conducted with NWF material have established that, the NWF material of 1 mm to 1.3 mm thickness is ideal for wrapping. Let us look at the details of the stem wrapping method.

Stem wrapping with non-woven fabric, an innovative approach for WSB Management

Stem wrapping with non-woven fabric (NWF) material is recommended only for CWSB



Fig .7.a Dead adults at NWF wrapped plant



Fig .7. b. Dead adults at NWF wrapped plant



Fig .5. A view of infested plants wrapped with NWF



Fig .6. Close view of NWF wrapped plant

infested plants. During tracing operation, plants with less infested or suspected to be infested plants can be retained and wrap the main stem and thick primaries with NWF material (above 1mm thickness) without leaving any gap. After wrapping, the NWF wrapped portion has to be sprayed with insecticide Chlorpyrifos 50EC + Cypermethrin 5EC, a combi product @ 1.2 ml per litre along with 1 ml of any wetting agent. This strategy of stem wrapping with NWF material followed by the insecticidal spray was proved very successful as 100% mortality of adult beetles was observed. The CWSB adult beetles that were trying to emerge from infested stems were found killed after getting contact with the insecticide sprayed NWF material.

Further, it is very interesting to see that, there is a remarkable recovery in wrapped plants

within couple of seasons except in few severely infested plants. Thus, uprooting of less infested plants could be avoided by wrapping with NWF followed by insecticidal spray. This technology has been validated across the arabica growing zones of Karnataka and the results are very consistent. Even though, this technology required initial investments (₹.35-40/plant), the NWF material lasts for a minimum of four seasons.

Hence, at present, this technology has been recommended as one of the important interventions for WSB management which will help in three ways.

1. To prevent the adult emergence by tackling/ killing at emergence site itself, thus minimizing the population load of adult beetles in field during flight season.
2. Advantage of realizing the existing crop from the infested plant.
3. Scope to recover the infested plant without

uprooting so that the replanting costs and time could be saved.

It is pertinent to mention that, this NWF wrapping technology has been adopted on large scale by some of the planters in Coorg Region. All these planters who adopted this technology are well convinced about the efficacy and prospects of the technology. Because of these promising results, the Coffee Board Research Department has been recommending this strategy as the best alternative to uprooting of infested plants with high prospects of recovering the infested plants. In fact, this technology can also be adopted for healthy plants to avoid egg laying, provided the grower is able to invest in initial stages and gain from long term benefits.

Thus, based on the foregoing relook and review of the recommended IPM interventions, management of CWSB is possible to contain the pest to economically threshold levels by scrupulous adoption of specific interventions on time.

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Coffee twice a day keeps doctor away!

Venkat Raj M.

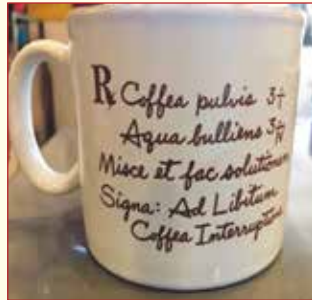
Senior Liaison Officer, Technology Evaluation Centre, Coffee Board, Vazhavara, Kerala.



Coffee is not only a good idea, but a potion. Can know about this as a coffee table discourse.

We know coffee as a drink with positive effects on human health. Presently, coffee has become a treatment in hospitals. Of late, it has been proved in medical hospitals of France and India that coffee helps to treat patients with rare genetic disorder and became a successful coffee treatment.

An eleven year old boy with ADCY5 gene related mutations causing dyskinesia of severe involuntary movements of limbs, neck and face, had a miracle cure just with coffee treatment. There is no treatment available for this genetic disorder currently. The doctors of Pitié-Salpêtrière Hospital and the Brain and Spinal Cord Institute both in Paris decided to treat the patient with coffee. They prescribed him coffee twice a day containing around 100mg of caffeine. Miraculously the symptoms disappeared, with the effect lasting for seven hours. They increased the dose per day and it almost entirely wiped out the involuntary movements and the boy could attend school, write and ride his bike. When mistakenly the boy was given decaf coffee, the symptoms returned and when caffeine treatment done, the symptoms vanished. Thereafter, doctors have concluded coffee as best to manage the disorder and the case report was published in the *Annals of Internal Medicine*, one of the most widely cited and influential speciality medical journals in the world from USA.



A vintage Italian ceramic prescription coffee mug about making coffee and having it

On seeing the case report, recently in India the Global Hospitals, Mumbai and the Centre for DNA finger printing and Diagnostics, Bengaluru have adopted the same coffee therapy for their patients of same genetic disorder and have observed surprising results of vanishing symptoms.

The humble coffee is great!

Doctors know for long time that a strong coffee suppresses muscle spasms and when this is almost common on hectic days, have a medicinal coffee break! As it is said, 'Everything gets better with coffee', take the magical potion - Coffee, to see better results. If you are an occasional coffee drinker, be in the club, drink coffee twice a day and have coffee talks! Increase in coffee consumption is increase in good health.

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Coffee Board of India at the Silver Jubilee of *Gulfood 2020, Dubai*

Dr. Chethan J, Research Assistant

Plant Breeding and Genetics Division, Central Coffee Research Institute, Coffee Research Station – 577117, Chikkamagluru Dist.

K. Mohammed Aseef, Senior Liaison Officer

Coffee Board of India, Koppa Taluq- 577126, Chikkamagluru Dist.



Introduction

Gulfood, is the world's largest annual food event at the Dubai World Trade Centre (DWTC) held from 16 to 20 February 2020 which occupies more than one million square feet of exhibition space. The *Gulfood* is celebrating its silver jubilee this year, the 25th edition anniversary was celebrated under the theme "Rethinking Food". The event hosts a number of innovative experiences including tastes of the world – the most creative multi-sensory culinary experience, interactive showcase of the innovative products of foods of the future. Over the course of 25 editions it has proved vital in linking the food and beverage industry from across the world with emerging markets across the Middle East and beyond. The event attracts about 5000 exhibitors and not less than 1,00,000 visitors per year to Dubai world trade centre.

The *Gulfood 2020 Expo*

On February 16th, 2020, His Highness Sheikh Hamdan bin Rashid Al Maktoum, Deputy

Ruler of Dubai and Minister of Finance, officially opened the *Gulfood* Event.

On 17th Feb 2020, His Highness Sheikh Mohammad bin Rashid Al Maktoum, Vice President and Prime Minister of UAE, toured *Gulfood* with Abdul Rahman Al Owais, Minister of Health and Prevention, UAE's minister of state for food security Mariam bint Mohammed Saeed Hareb Al Mehairi and other officials. Indian Minister of food processing Industries, Smt. Harsimrat Kaur Badal inaugurated the Indian pavilion at *Gulfood 2020* on the same day. Minister addressed a business roundtable on opportunities in the food processing sector in India, more than 50 prominent business groups, traders and investors participated in the meeting. Since there was risk of corona virus scare on the international events, there was less attendance on the first day of the expo.

More than 5000 companies representing 160 countries took part in the food exhibition.



Interaction of UAE traders with Indian exporters and with Coffee Board's officials



Teh team of Indian exporters and coffee growers participated through Coffee Board pavilion



Visitors at Coffee Board stall seeking the information on Indian coffee



Visitors at Coffee Board stall seeking the information on Indian coffee



Visitor's giving their valuable feedback on Indian Coffee



Visitors testing the aroma of Indian coffee

India, stand again the largest country pavilion at *Gulfood*, with a spread over 4,500 square meters. About 300 Indian companies showcased their diversity in their products like beverages, dairy, meat and poultry, pulses, cereals and grains, fats and oils. Hence it was great opportunity for Indian food producers to enhance their reach and open up new markets across the globe for their products and services.

Coffee Board of India's participation at *Gulfood 2020*

Frequent visitors to *Gulfood* during its past years have already proven that powerful things can happen when smart people get together. India's large presence in the expo will also reflect the close relations between India and UAE. Participants from different countries and different sectors of buyers and traders will explore new opportunities in the expo. Considering these growing importance for *Gulfood 2020*, exhibitions in the International food and hospitality trade show calendar, Coffee Board of India participate in *Gulfood 2020*, Dubai, during February 16-20/2020.

The World Trade Centre, Dubai is the epicenter for events and business at the centre of the region's economy. The holding of WTC is of one million square feet and it is the first choice for industry gathering, which hosts many events annually with 3 million visitors. The Coffee Board's exhibition pavilion at *Gulfood 2020*

was at Booth # 25-D14, Za'abeel Hall 5 at the World Trade Centre. The Coffee Board put up an impressive designed stall with an attractive backdrop. The wall panel showcasing the unique features of coffees of India supporting biodiversity, shade grown, handpicked, sundried, eco friendly, diversification with intercrops and sustaining livelihood. A brief depiction on specialty coffee of India such as Monsooned Malabar, Robusta Kaapi Royale and Mysore Nuggets Extra Bold. The five regional coffees viz., Coorg Arabica Coffee, Bababudan Giri's, Wayanad Robusta Coffee, Araku Valley Arabica Coffee and Chikkamagaluru Arabica Coffee, which was recently accorded Geographical Indication (GI) tag by the Department for Promotion of Industry and Internal trade as five regional specific coffees was depicted on the backdrop. The display material consisted of both washed and unwashed green coffee beans of different grades such as Arabica Plantation A, Arabica Cherry, Robusta Parchment, Robusta Cherry, Indian Specialty Monsooned Malabar Coffee, Roasted and Ground Coffee samples. Regional logos representing all 16 different coffee growing regions of the country were displayed in attractive pouches.

In order to facilitate the contact between the Indian coffee exporters and the interested importers in Dubai, printed leaflets with details of Indian exporters and coffees of India were distributed. The short duration films like 'Coffee Connoisseur', 'Coffees of India' and 'Coffee



Karma’ were displayed in the stall. Although, 19 exporters from Indian Coffee industry expressed their willingness to participate in *Gulfood*, only 10 exporters could make possible to participate under the umbrella of Coffee Board. This absence is because of the severity of a deadly coronavirus outbreak all over the world. Some of the Indian coffee exporters’ viz., M/s. Vintage Coffee Pvt. Ltd, M/s. Indus Coffee Pvt. Ltd, Nellore, M/s. CCL Products (India) Ltd, Hyderabad, M/s. S. L. N. Coffee Pvt. Ltd, Kushal Nagar, Karnataka, M/s. Vayhan Coffee Limited, M/s. Allanasons Private Limited, Bengaluru, M/s. Aakash Beverages Pvt. Ltd, Mumbai, M/s. Neel Beverages, Mumbai, M/s. Shri Vinayaka Services, M/s. Value Beverages, had their separate stall at *Gulfood 2020*.

List of Indian coffee exporters and coffee growers participated through Coffee Board pavilion

Sl. No.	Name of the Company
1	M/s. Vero Coffee, Mumbai
2	M/s. Vstexim, Thiruvapur
3	M/s. Plantrich Agritech Pvt. Ltd,
4	M/s. BM Foods, Mumbai
5	M/s. Supernaturals
6	M/s. MSP Coffee Pvt. Ltd, Yercaud
7	M/s. Ramesh Exports
8	M/s. Eco Agripreneurs Pvt. Ltd,
9	M/s. Hulikere Coffee
10	M/s. Chaitanyya Coffee

Visitors’ response to Coffee Board stall

Large number of coffee traders, roasters, retail coffee sellers, restaurant owners, logistic providers and also other traders from different parts of the Gulf countries as well as from different parts of the world visited Coffee Board

stall and showed keen interest in importing high quality coffee from India. They were overwhelmed to know about various aspects of Indian Coffee. The visitors were explained about the strength of the Indian Coffees particularly about shade grown coffee growing cultures as diversity of coffee growing regions, eco friendly nature, small holdings, rural enterprises and sustainability, as well as other certified coffees and GI tags were high lightened. During the course of interactions with the visitors, the interests and specific requirements if any were noted down and contact particulars of individual visitors were collected. Many traders have noted the contact details of Indian exporters and discussed about the pricing, payment mode and the availability of the required quantity, which made us more eager to expand the export quantity into the Gulf market. Many of the trade related enquiries were handled by the representatives of M/s. Ramesh Exports, M/s. Vstexim, M/s. Vero coffee and M/s. Hulikere coffee.

Liquid Coffee service

Fresh coffee brew made out of the Indian coffee was served to the visitors at the pavilion by M/s. Chaitanyya coffee and M/s. Vero coffee. The coffee served by them was much appreciated by many visitors, roasters and buyers. Diet rich green coffee samples were distributed by M/s. Supernaturals, visitors expressed their curiosity and interest on green coffee. M/s. Hulikere coffee distributed samples of green coffee beans to many traders at the venue.

Coffee consumption trends in UAE

Consumption of coffee and tea has more to do with culture in UAE, along with a perfect aura and ambience. Declining the served coffee is considered as rude because offering coffee is symbol of hospitality. In traditional view, the coffee and tea are household beverages has come a long way and attained the status of



Gift box of Indian Coffee samples were handed over to many traders

a perfectionist drink with specific tastes and blends. The coffee shops have evolved in to a multibillion dollar industry, with specialty coffee and tea riding high on its popularity. According to the Dubai International coffee and tea festival, average consumption of coffee in the UAE is 3.5 kg per head and around \$630 millions are spent per annum on coffee.

Traditionally in Dubai and other parts of UAE, a long spouted pot called as “Dallah” will be used to serve coffee to small cup called “Finjaan”. These cups are usually made up of bronze metals with beautiful Arabic arts on it. Coffee is called as “Qahwa”, which is traditional Arabic style of coffee recipe, most popular Arabian cuisine, made from green coffee beans or lightly roasted and coarsely ground with Cardamom. Usually Quhwa is found to be little bitter and gives the taste of spice. Today the country is home to more than 4000 cafes with around six million cups consumed per day at an average. Changing lifestyle, new hospitality trends and expanding tourism are acting as catalysts in boosting the Industry. The demand for specialty coffee is increasing within the UAE with more people buying coffee based on a more informed choice.

Important observation during the *Gulfood 2020 Expo*

- The Coffee Board stall received a very good response from the visitors. Coffee lovers in UAE are being highly quality conscious and

there exists high market value. Therefore there is scope for exporting high quality/ specialty coffees.

- Most of the visitors were very much pleased with the branding of Indian coffees and enquired about the availability of such coffees in Dubai for retail marketing. Hence there appears to be more demand for value added coffees like roasted and ground coffees in retail market.
- Some of the visitors at the Boards stall had enquired about the availability of smaller quantities of Indian coffees, because procuring from local distributors is getting expensive.
- An Oman trader enquired about Indian Robusta Pea berry and expressed his willingness to buy many containers if available at valuable price. A trader from Iran very much appreciated about Indian coffee and enquired about Indian coffee and made business dealing with our exporters to buy Arabica Plantation ‘AA’ grade.
- Visitors at the Coffee Board’s stall appreciated very much about Indian Coffee because of its uniqueness, shade grown, eco friendly and sustainable nature.
- Indian exporter’s visit to *Gulfood 2020* is relevant in view of the Indian-UAE comprehensive strategic partnership in which trade and investment is an important element of co-operation.

Conclusion

India stood as second largest trading partner for the UAE for last two years. Both countries are also co-operating to establish an India-UAE food corridor which will entail UAE investments into our farming, food parks etc. Especially in coffee sector, the UAE market will always be growing, hence there is lot of scope in experimenting on different blends. India is liable permanent partner

for UAE’s food security and its investment into India will enhance access to our agriculture products. The participation of Coffee Board with exporters at *Gulfood 2020* in Dubai has provided an opportunity to strengthening further on R & G coffee trades. Our participation has provided an excellent opportunity to the Indian coffee producers and exporters to meet large number of buyers from UAE.

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Coffee Board of India Participated in CII, Food Processing Conclave - 2020

A. Jagannadharao

Asst. Secretary, ICH, Kolkata



Kolkata is the intellectual capital of India. Kolkata is also the largest metropolis in India. A great personality like Rabindranath Tagore, Vivekananda, Raja Ram Mohan Roy and Satyajit Ray hails from the land of West Bengal. Kolkata has always been a land of



religious superstition and social awakening. The City has witnessed numerous social and political revolutions. Kolkata is also an important industrial, commercial city, where the hand driven rickshaw of yesteryears and the ultra—modern underground metro train co-exist.

Coffee Board participated in “Fifth edition of CII, Food Processing Conclave-2020” on 13th March 2020 at ITC Royal Bengal, Kolkata organized by “Confederation of Indian Industry, Eastern Region Head Quarters” Kolkata.



Shri. A.K. Banerjee, Chairman, CII ER Agricultural Food processing Sub- Committee and Vice Chairman & Managing Director IFB Agro Industries Ltd. has made welcome address and the theme of the event before the august dignitaries and delegates present in the occasion.

The primary objective of this event was “Policy Environment and Business Opportunities”. The event has conducted into four Sessions as:

- 1) Inaugural Session addressing about the “Policy Environment and Business Opportunities”,
- 2) Technical Session on Managing the Food Value Chain Responsibly,
- 3) Technical Session on Fisheries,



- 4) Evolution of Restaurants.

Coffee Board of India participated in this mega event to promote the coffees of India installing

COFFEE BOARD CIRCUIT

an impressive, specially designed 9 sq mtrs stall suitably decorated with attractive wall panels showcasing the strengths of Indian Coffee. The samples of Indian prime grades of Arabica, Robusta and Specialty Coffee and Coffee Filters in different sizes were displayed.

DVDs on event of “Coffee Karma”, "Coffees of India” and “Brew your own Coffee” were screened. Wet samplings were also displayed during the exhibition for knowledge of Coffee preparation. The leaflets and literatures on “Coffees of India and Health Related Aspects” of Coffee drinking were displayed. Coffee Powder Packets were sold to the visitors. Board’s officials who have represented the event have explained the coffee promotional activities to the visitors.

Board’s Participation in the 5th edition of CII, Food Processing Conclave-2020 was a best platform to promote “Indian Coffee” among the high level delegates and dignitaries. This



type of exhibition is very much needed for non-traditional area for consumption of Coffee promotion.



Rotary Dryer

Can be used for both Cherry and Parchment Coffee.
Capacity Range: 1,000 ltrs. to 16,000 ltrs., per batch.
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Coffee Board of India Participated in AAHAR 2020 Exhibition

N.K.B, Ryntathieng

Officer on Special Duty, Coffee Board, New Delhi



Coffee Board participated in the 33rd edition of “AAHAR-2020” exhibition held at Pragati Maidan New Delhi from 3rd to 7th March, 2020 which was organized by ITPO, at Pragati Maidan, New Delhi. Shri Piyush Goyal, Honorable Minister of Railway and Commerce and Industry had inaugurated the fair. More than 500 exhibiting companies took participation in this Event.

AAHAR is one of the most comprehensive food industry and hospitality sector related trade show in India. The main event comprises of Food India and the Hospitality India business events which brings in a large contingent of qualified industry experts from this sector. Conferences and seminar sessions were also organized with a view to update attendees with the latest developments and happenings from this sector. Visitors could browse through different kinds of food products, processing and packaging tools, housekeeping equipment, air conditioning units, dairy products, pollution control tools and a host of other related items. The interactive Culinary Show that was organized here enhanced the attraction of the show. Many international buyers attend the event as well.

Coffee Board participated in its traditional way by displaying different types of coffee seeds and regional coffees from different parts of India. Books like Coffee Gyan, and health brochure



were made available for the visitors. Stall was prepared with a beautiful backdrop which in itself depicted lot of knowledge on coffee cultivation as well as coffee brewing and its health benefits to attract visitors.

M/s Falcrum Marketing Pvt. Ltd. a startup for Coffee Machine Manufacturing and joined AAHAR-2020 sharing Coffee Board stall for displaying Coffee Machines and served free coffee to the visitors all the five days.

Coffee Board had shared the stall with India Coffee Trust to promote the **World Coffee Conference** in AAHAR 2020. They have displayed their agenda of World Coffee Conference in our stall and reported a good footfall of over 1000 visitors. They received a lot of enquiries and people showed keen interest and excitement about WCC.

The exhibition concluded on 7th March with a splendid response from the general public and provided a great platform for Coffee Board to promote information on Coffees in India.



MARCH

South West Monsoon Areas

1. Completing of harvesting of Robusta
2. Collection and disinfestations/disposal of berry borer-infested gleanings
3. Removal of leftover fruits and off-season berries in berry borer infested areas
4. Refilling of lure material in Brocatraps
5. Pruning of Arabica and Robusta
6. Pre-blossom manuring
7. **Leaf Rust:** Pre-Blossom spraying with 0.5% Boardeaux mixture if not completed earlier.
8. **Stem Borer:** Tracing & burning of Stem-borer affected plants to be completed before end of March in the entire estate without fail. If uprooted stumps are to be retained for further use, immerse them in water for about 10 days to kill all pest stages.
9. Collecting and destruction of pupae of hairy caterpillars
10. Control measures against root and shoot mealy bugs and green scale, if necessary
11. Cleaning of paths around the estates to prevent fire accidents
12. **Nursery:** Transplanting of button stage seedlings into poly bags and after-care of seedlings
13. **New Clearings:** Watering young seedlings when necessary
14. **Backing:** irrigation for Robusta within 20 days from blossom irrigation

North-East Monsoon Areas

Same as above

APRIL

South-West Monsoon Areas

1. Collection and disinfestations/disposal of gleanings in berry borer infested Robusta areas.
2. Pruning of Robusta
3. **Stem Borer:** If tracing of stem borer affected plants is not completed by end of March covering the entire estate, it should be completed by the 2nd week of April.
4. **Stem Borer:** For the remaining healthy plants, the main stem and thick primary branches should be sprayed or swabbed with *Chlorpyrifos* @ 600ml + 200 ml wetting agent in 200 litres of water to protect against stem borer. Spraying/ swabbing should be completed by the end of April for the entire area.
5. Control measures against root and shoot mealy bug and green scale, if necessary.
6. Collection and destruction of pupae of hairy caterpillars.
7. Line marking and opening of pits in new clearings.
8. **Nursery work and after care:** Spraying of nursery seedlings with *Dithane M-45* or *Indofil M45* at 0.4% against brown eye-spot disease. If *myrothesium* incidence is noticed, spray *Propiconazole* 0.02% (*Tilt 25EC* @ 0.8 ml/litre of water) once in a month till field planting stage.
9. Application of compost/bulky organic manures.

North-East Monsoon Areas

Same as above

MAY

South-West Monsoon Areas

1. Regulation of permanent shade.
2. Lopping of dadap in the second fortnight depending on weather conditions.
3. Pre-monsoon manuring.
4. **Leaf Rust:** Pre-monsoon spraying of 0.5% Bordeaux mixture against coffee leaf rust. Susceptible varieties like S.795, Cauvery etc., should be sprayed with systemic fungicides like *Triademefon* @ 0.02% a.i. (*Bayleton 25 WP*@160g in 200 litres of water) or *Hexaconazole* @ 0.01% (*Contaf 5% EC* @ 400 ml in 200 litres of water).
5. Control measures against shoot mealy bug and green scale, if necessary.
6. Opening of planting pits in new clearings.
7. Planting of dadap stakes depending on weather conditions.
8. Clearing of drains and renovation of cradle pits/ trenches.
9. Weeding in new clearings.
10. Application of compost/bulky organic manure.
11. Application of agricultural lime for correction of soil pH, wherever necessary.
12. **Berry Borer:** If berry borer infestation is noticed in a few berries, remove and destroy the infested berries. If incidence is more, spot spray with *chlorpyrifos* 20EC (600 ml per barrel of water) may be taken up.
13. **Nursery work and aftercare:** Spraying nursery seedlings with recommended fungicides against brown eye-spot disease and myrothesium.
14. **Root Diseases:** Wherever root diseases are observed, drench the soil with *Bavistin* 50 WP 0.4% @ 3 litre / plant (24g / 3.1 of water) or *Vitavax* 75 WP 0.3% @ 3 litre / plant (12g / 3 litres of water) in the just wilting stage.

North-East Monsoon Areas

Same as above except items 2, 6 and 11.



NATIONAL COOPERATIVE DEVELOPMENT CORPORATION (NCDC) IN SERVICE OF AGRICULTURE & RURAL DEVELOPMENT

National Cooperative Development Corporation is promoting various development programmes through Cooperatives for agricultural activities like production, processing, marketing & inputs, storage, export & import of agricultural produce, foodstuff and allied activities. NCDC plays a key role in doubling farmers' income through many modes including its Mission called SAHAKAR-22 targeting 222 districts in the country which include 117 Aspirational Districts identified by NITI Aayog. Activities broadly include:-

- **Ginning, Pressing & Spinning, Weaving & Garmenting**
- **Sugar and other agro-processing units**
- **Credit for procurement and marketing of agriculture product**
- **Storage and cold chain activities**
- **Support to Cooperatives for undertaking Consumer Business**
- All types of **Industrial Cooperatives**, Cottage & Village Industries, Handicrafts/rural crafts etc.
- **Credit & Service Cooperatives** Labour Cooperatives & Service Cooperatives: Water Conservation works & Irrigation in Rural Areas, Animal Care/Health, Agricultural Insurance & Agriculture Credit, Rural Sanitation, Tourism, Hospitality & Transport/ Generation & Distribution of Power by New, Non-Conventional & Renewable Sources of Energy/ Rural Housing/ Hospital / Health Care & Education through Cooperatives etc.
- **Integrated Cooperative Development Projects** in selected districts
- **Weaker Sections** Fisheries, Dairy & Livestock, Poultry, Schedule Caste/ Tribe, Handloom, Coir, Jute, Sericulture, Hill area, & Labour & Women Cooperative
- **Assistance for Computerization**

Net NPA of NCDC are at zero and loan recovery position is approximately 99%. Cumulatively assistance of almost ₹ 1.25 Lac Crore has so far been provided for various cooperative development programmes by NCDC.



NCDC
Assisting Cooperatives. Always!

NATIONAL COOPERATIVE DEVELOPMENT CORPORATION

(An ISO 9001:2015 Certified Organisation)
4, Siri Institutional Area, Hauz Khas, New Delhi-110016
Phone: 26567475, 26567026, 26567202, 26567140
Fax: 0091-011-26962370, 26516032
Website: www.ncdc.in

February and March 2020

Dr. D.R. Babu Reddy,

Dy. Director (Market Research), Coffee Board, Bengaluru



In this column, the extracted information from March 2020 Coffee Market Reports of ICO on global production, global prices, world consumption and global exports as well as domestic prices and exports are covered.

Global Production and Consumption

In 2019/20 world coffee production is estimated at 168.86 million bags, a decrease of 0.8% on 2018/19. Arabica production is estimated 3.9% lower at 96.37 million bags while Robusta output is estimated 3.7% higher at 72.5 million bags. World coffee consumption is estimated 169.34 million bags, 0.7% greater than in 2018/19, following a year of exceptional consumption growth in Europe and North America. In coffee year 2019/20, a deficit of 0.48 million bags is currently estimated, however Covid-19 presents considerable downside risk to global coffee consumption.

In 2019/20, world coffee consumption is estimated at 169.34 million bags, 0.7% higher than in 2018/19 as Covid-19 presents considerable downside risk to global coffee consumption. Currently demand is estimated to exceed production, estimated at 168.86 million bags, by 0.47 million bags in 2019/20. However, the situation is evolving quickly impacting both supply and demand. On one hand, coffee consumption may contract as a result of the containment measures against the spread of coronavirus, particularly for out-of-home consumption.

Additionally, global economic growth in 2019 is expected to be much lower than initially forecast, accompanied by rising unemployment rates, further reducing demand and putting downward pressure on prices. On the other hand, disruptions to the supply chain both in shipping and harvesting could lead to temporary shortages in the supply, putting upward pressure on prices in the short term.

World Supply/Demand Balance (in thousand 60-kg bags)

Coffee Year	2015	2016	2017	2018	2019*	% change 2018/19
PRODUCTION	154797	158471	162570	169988	168864	-0.70%
Arabicas	90982	100622	97183	100081	96370	-3.70%
Robustas	63815	57849	65386	69906	72494	3.70%
Africa	15557	16575	17269	18388	18188	-1.10%
Asia & Oceania	49484	45652	48408	48064	50649	5.40%
Mexico & Central America	17106	20322	21725	21345	21694	1.60%
South America	72651	75921	75167	82191	78333	-4.70%

CONSUMPTION	155491	158642	162555	168099	169337	0.70%
Exporting countries	47548	48488	49793	50510	51018	1.00%
Importing countries (Coffee Years)	107943	110154	112763	117589	118319	0.60%
Africa	10951	11130	11527	11724	11939	1.80%
Asia & Oceania	32863	34573	35697	36470	37511	2.90%
Mexico & Central America	5295	5226	5321	5401	5474	1.40%
Europe	52147	52045	53148	55731	55395	-0.60%
North America	28934	29559	29941	31644	31876	0.70%
South America	25299	26111	26992	27128	27141	0.10%
BALANCE	-694	-172	14	1889	-474	

Prices

Domestic Market Prices: ICTA (Bangalore) Weekly Auction Prices (Rs./kg)

Month/ Week	Feb'20	Feb'19	Feb'20	Feb'19	Feb'20	Feb'19	Feb'20	Feb'19	Feb'20	Feb'19
	I		II		III		IV		Average	
Plant . 'A'	247.06	192.00	248.96	---	255.50	194.50	268.50	192.26	255.01	192.92
Arb.Chy. 'AB'	---	---	---	---	---	---	---	---	---	---
Rob.Pmt. 'AB'	144.00	---	---	---	---	---	---	---	144.00	---
Rob.Chy. 'AB'	130.00	---	130.50	127.36	130.00	---	---	---	130.17	127.36

Domestic Market Prices: ICTA (Bangalore) Weekly Auction Prices (Rs./kg)

Month/ Week	Mar'20	Mar'19	Mar'20	Mar'19	Mar'20	Mar'19	Mar'20	Mar'19	Mar'20	Mar'19
	I		II		III		IV		Average	
Plant . 'A'	297.50	193.00	302.76	180.00	302.50	185.00	---	---	300.92	186.00
Arb.Chy. 'AB'	165.00	---	---	---	---	---	---	---	165.00	---
Rob.Pmt. 'AB'	---	---	---	---	---	170.00	---	---	---	170.00
Rob.Chy. 'AB'	---	---	---	---	---	---	---	---	---	---

International Spot Prices – ICO Daily Group Indicator Prices of Arabica (Other Milds) and Robustas

After two months of decrease, the ICO composite indicator rose in March, averaging 109.05 US cents/lb, 6.9% higher than in February. This is the second highest monthly average in coffee year 2019/20. The daily price of the ICO Composite

ranged between 103.22 US cents/lb on 17 March and 117.41 US cents/lb on 25 March. Concerns over disruptions to the supply chain – as March is usually a month of lower stock on-hand in countries with crop years commencing in April, particularly Brazil – pushed prices higher.

Prices for all Arabica group indicators rose in March 2020, while Robusta prices fell by 0.9% to

67.46 US cents/lb. Brazilian Naturals increased by 10% to 112.87 US cents/lb, Other Milds by 9.5% to 148.33 US cents/lb and Colombian Milds by 8.6% to 158.99 US cents/lb. The differential between Colombian Milds and Other Milds narrowed in March 2020, by 2.5% to 10.66 US cents/lb, after more than doubling in February 2020. Uncertainty about the immediate availability of washed Arabica kept prices firm for the Arabica group indicators.

The New York Arabica futures market rose by 8.8% to an average of 116.09 US cents/lb in March 2020, while the London Robusta futures market declined by 2.8% to 57.39 US cents/lb. As a result, the spread between Arabica and Robusta coffees, as measured on the New York and London futures markets, increased to 58.70 US cents/lb, which is 11.03 US cents/lb higher than in February. Certified Arabica stocks decreased by 6.1% month-on-month to 2.29 million bags in March 2020.

The volatility of the ICO composite indicator increased by 1.8 percentage points to 9.6% over the past month. The volatility of all Arabica indicators grew in March 2020. Other Milds rose by 3.5 percentage points to 11.5%, Brazilian Naturals by 2.6 percentage points to 13.1% and Colombian Milds by 2 percentage points to 10.5%. The Robusta group indicator volatility was 4.5%, a decrease of 2.3 percentage points from February 2020.



Exports:

Global exports in February 2020 totalled 11.11 million bags, compared with 10.83 million in February 2019. Exports in the first five months of coffee year 2019/20 have decreased by 3.4% to 50.97 million bags compared to 52.78 million bags for the same period in 2018/19. Exports of Arabica decreased by 7.8% to 31.86 million bags in October 2019 through February 2020 while Robusta shipments increased by 4.8% to 19.1 million bags.

In February 2020, exports from **Brazil** decreased by 24.3% to 2.7 million bags compared to February 2019. Its shipments from October 2019 through February 2020 fell by 13.2% to 16.19 million bags compared to the same period in 2018/19. In 2019/20, Brazil's crop is estimated at 57 million bags, 12.2% lower than 2018/19. Arabica production, which typically accounts for around 65-70% of its total crop, is in the off-year of its biennial cycle for 2019/20 leading to the downturn in total output this crop year. Typically harvesting of its new Robusta crop commences in April with Arabica activity beginning in June. However, delays may occur due to the spread of coronavirus making it more difficult to hire and manage labour for harvesting and transportation. This could result in lower shipments in the short-term, particularly since stocks are relatively low at the end of its 2019/20 crop year.

Viet Nam's exports in February 2020 rose by 51.4% to 2.8 million bags, though this compared with an exceptionally low volume in February 2019. Further, Viet Nam's exports in the first five months of the coffee year, however, are down 4.1% at 11.15 million bags. Since the start of the coffee year in October 2019, Robusta prices have fallen each month, except in November 2019, making it likely that farmers in Viet Nam are holding on to their coffee until prices rise. From 1 April, the Government of Viet Nam has

implemented a social distancing policy to curb transmission of coronavirus. This is unlikely to have a large impact on production, estimated 4.4% higher at 31.2 million bags, as harvesting is mostly complete. However, this could impact shipments in the near-term.

In February 2020, shipments from **Colombia** declined by 13.4% to 1.08 million bags compared to February 2019. Its exports in the first five months of coffee year 2019/20 are 1.6% lower at 5.9 million bags. Production for Colombia is estimated 1.7% higher at 14.1 million bags in 2019/20. According to the National Federation of Coffee Growers of Colombia, 6.6 million bags were harvested through February, which is 8.8% higher than in the same period one year ago due to strong growth at the start of the season. There have been reports about lower availability of shipping containers passing through Colombia from China, which may have impacted exports in February. Additionally, its output was reported 9.5% lower at just over 1 million bags in February 2020 compared to February 2019. A country-wide 19-day lockdown was announced by Colombia's president from 25 March to slow the spread of coronavirus. Colombia's second Mitaca crop typically begins harvesting in April, which is likely to be impacted by the containment measures as well as fewer migrant labourers available from neighbouring countries.

Indonesia's exports in February 2020 were 80.2% higher than one year ago, reaching 876,000 bags. Its shipments from October 2019 through February 2020 are 84.7% higher at 2.87 million bags. However, this follows exceptionally low volumes last year, when production fell by 13.2% to 9.42 million bags, the lowest output since 2011/12. Indonesian production is estimated 16.8% higher at 11 million bags in crop year 2019/20. At present, it is difficult to foresee how harvesting of the Robusta crop as well as exports may also be affected by Indonesia's policies related to the COVID-19 pandemic.

In February 2020, exports from **Honduras** declined by 2.8% to around 800,000 bags. Its shipments in the first five months of coffee year 2019/20 are estimated 1.6% higher at 2.04 million bags. Production in 2019/20 is estimated at 7.3 million bags, similar to the output in 2018/19, but 3.4% lower than the record volume of 7.56 million bags in 2017/18. Low prices have already had a negative impact on production in Honduras, but a nationwide curfew has been imposed since 20 March, which will have a negative impact on shipments. Harvesting for 2019/20 has already been completed by this time and will not begin again until much later in the year. In the near term, exports of coffee, particularly if there is a lower availability of shipping containers or fewer workers at ports, may be reduced.

Indian coffee exports (01.01.2020 to 31.03.2020) in MT

Sl. No.	Exports	Provisional exports		Provisional re-exports		Total provisional exports	
		Indian coffee 1	corresponding period last year 2	Provisional re-exports 3	corresponding period last year 4	Total provisional exports (1+3) 5	corresponding period last year (2+4) 6
1	Ar. Pmt.	10941	14893	5	0	10946	14893
2	Ar.Chy.	4492	3682	0	0	4492	3682
3	Rob.Pmt.	7098	10295	0	0	7098	10295
4	Rob.Chy.	40947	52746	0	0	40947	52746
5	Roasted Seeds	18	15	0	0	18	15
6	R&G	54	57	0	0	54	57
7	Instant	3025	5424	26274	21626	29300	27050
	Total	66574	87112	26279	21626	92853	108738

फरवरी एवं मार्च 2020

इस कॉलम में भारतीय स्वदेशी मूल्य एवं निर्यात के साथ-साथ वैश्विक उत्पादन, मूल्य, उपभोग, निर्यात पर आई सी ओ कॉफ़ी बाज़ार रिपोर्ट फरवरी एवं मार्च-2020 की सार-सूचना सम्मिलित हैं।

वैश्विक उत्पादन तथा उपभोग

2019/20 में विश्व कॉफ़ी उत्पादन 168.86 मिलियन बैग्स तक अनुमानित है, जो 2018/19 की तुलना में 0.8% कम है। अरेबिका का उत्पादन 3.9% की कमी के साथ 96.37 मिलियन बैग्स तक अनुमानित है, जबकि रोबस्टा का उत्पादन 3.7% की वृद्धि के साथ 72.5 मिलियन बैग्स तक अनुमानित है। यूरोप तथा उत्तरी अमेरिका में उपभोग की असाधारण वृद्धि के एक वर्ष के बाद, विश्व कॉफ़ी का उपभोग 169.34 मिलियन बैग्स अनुमानित है, जिसमें 2018/19 की तुलना में 0.7% की वृद्धि हुई है। कॉफ़ी वर्ष 2019/20 में, अब 0.48 मिलियन बैग्स की कमी अनुमानित की है, हालाँकि, वैश्विक महामारी कोविड-19 के कारण कॉफ़ी उपभोग में उल्लेखनीय नकारात्मक जोखिम दिखाई दी है।

2019/20 में, वैश्विक कॉफ़ी उपभोग 169.34 मिलियन बैग्स तक पहुँचने का अनुमान किया गया है, जो 2018/19 की तुलना में 0.7% अधिक है, चूँकि, वैश्विक महामारी कोविड-19 के कारण कॉफ़ी उपभोग में उल्लेखनीय नकारात्मक जोखिम दिखाई दी है। वर्तमान माँग के अनुसार, 2019/20 में अनुमानित 168.86 मिलियन बैग्स से 0.47 मिलियन बैग्स के अधिक उपभोग अनुमानित है। हालाँकि, वर्तमान स्थिति आपूर्ति एवं माँग दोनों पर प्रभाव डाल रही है। अतः, कोरोना वायरस के संक्रमण के नियंत्रण उपायों के परिणामस्वरूप कॉफ़ी का उपभोग, विशेषतः घर के बाहर का उपभोग सीमित हो सकता है।

इसके अतिरिक्त, बढ़ती बेरोजगारी दर के साथ माँग की कमी तथा मूल्यों की गिरावट की प्रवृत्ति के कारण 2019 की वैश्विक आर्थिक वृद्धि, प्रारंभिक पूर्वानुमान से अत्यधिक कम हो सकता है। दूसरी ओर, नौभरण एवं फसल-प्राप्ति दोनों के द्वारा आपूर्ति श्रृंखला में व्यवधान से आपूर्ति तत्काल कम हो सकती है, जिससे अल्पावधि के लिए मूल्य प्रभावित हो सकते हैं।

वैश्विक आपूर्ति/ माँग शेष (हज़ारों में- 60 कि. ग्रा. बैग्स में)

कॉफ़ी फसल वर्ष	2015	2016	2017	2018	2019 *	2018/19 में परिवर्तन का %
उत्पादन	1,54,797	1,58,471	1,62,570	1,69,988	168,864	-0.70%
अरेबिका	90,982	100,622	97,183	1,00,081	96,370	-3.70%
रोबस्टा	63,815	57,849	65,386	69,906	72,494	3.70%
अफ्रीका	15,557	16,575	17,269	18,388	18,188	-1.10%
एशिया व ओशियानिया	49,484	45,652	48,408	48,064	50,649	5.40%
मेक्सिको एवं मध्य अमेरिका	17,106	20322	21,725	21,345	21,694	1.60%
दक्षिण अमेरिका	72,651	75,921	75,167	82,191	78,333	-4.70%
उपभोग	1,55,491	1,58,642	1,62,555	1,68,099	169,337	0.70%
निर्यातक देश	47,548	48488	49,793	50,510	51,018	1.00%
आयातक देश (कॉफ़ी वर्ष)	1,07,943	1,10,154	1,12,763	1,17,589	1,18,319	0.60%
अफ्रीका	10,951	11,130	11,527	11,724	11,939	1.80%
एशिया एवं ओशियानिया	32,863	34,573	35,697	36,470	37,511	2.90%
मेक्सिको एवं मध्य अमेरिका	5,295	5,226	5,321	5,401	5,474	1.40%
यूरोप	52,147	52,045	53,148	55,731	55,395	-0.60%
उत्तरी अमेरिका	28,934	29,559	29,941	31,644	31,876	0.70%
दक्षिण अमेरिका	25,299	26,111	26,992	27,128	27,141	0.10%
शेष	-694	-172	14	1,889	-474	

मूल्य

स्वदेशी बाज़ार मूल्य: आईसीटीए (बेंगलूरु) साप्ताहिक नीलामी मूल्य (₹/किलो)

माह/	फरवरी 2020	फरवरी 2019	फरवरी 2020	फरवरी 2019	फरवरी 2020	फरवरी 2019	फरवरी 2020	फरवरी 2019	फरवरी 2020	फरवरी 2019
सप्ताह	I		II		III		IV		औसत	
प्लांटे 'ए'	247.06	192.00	248.96	---	255.50	194.50	268.50	192.26	255.01	192.92
अरे. चेरी. 'एबी'	---	---	---	---	---	---	---	---	---	---
रोब.पार्च. 'एबी'	144.00	---	---	---	---	---	---	---	144.00	---
रोब. चेरी. 'एबी'	130.00	---	130.50	127.36	130.00	---	---	---	130.17	127.36

स्वदेशी बाज़ार मूल्य: आईसीटीए (बेंगलूरु) साप्ताहिक नीलामी मूल्य (₹/किलो)

माह/	मार्च 2020	मार्च 2019	मार्च 2020	मार्च 2019	मार्च 2020	मार्च 2019	मार्च 2020	मार्च 2019	मार्च 2020	मार्च 2019
सप्ताह	I		II		III		IV		औसत	
प्लांटे 'ए'	297.50	193.00	302.76	180.00	302.50	185.00	---	---	300.92	186.00
अरे. चेरी. 'एबी'	165.00	---	---	---	---	---	---	---	165.00	---
रोब.पार्च. 'एबी'	---	---	---	---	---	170.00	---	---	---	170.00
रोब. चेरी. 'एबी'	---	---	---	---	---	---	---	---	---	---

अंतर्राष्ट्रीय स्पॉट मूल्य - अरेबिका (अन्य मृदु) तथा रोबस्टा के आई सी ओ दैनिक समूह सूचकांक मूल्य

दो माह की गिरावट के बाद, मार्च में आईसीओ समष्टिक सूचकांक, 109.05 यूएस सेंट्स/एलबी की औसत के साथ बढ़ गया, जो फरवरी की तुलना में 6.9% अधिक था। यह कॉफी वर्ष 2019/20 का दूसरा सर्वाधिक मासिक औसत है। 17 मार्च को आईसीओ समष्टिक सूचकांक का दैनिक मूल्य 103.22 यूएस सेंट्स/एलबी तथा 25 मार्च को 117.41 यूएस सेंट्स/एलबी के बीच था। सामान्यतः अप्रैल के साथ फसल वर्ष विशेषतः ब्राज़ील में प्रारंभ होने तथा निम्न स्तरीय स्टॉक के कारण, वितरण श्रृंखला में व्यवधान की चिंता के कारण - मार्च में आम तौर पर अप्रैल में शुरू होने वाले फसल वर्ष वाले देशों में मार्च के दौरान स्टॉक कम होने के कारण मूल्य प्रवर्धित हो गया।

मार्च 2020 में, सभी अरेबिका समूह सूचकांक के मूल्य प्रवर्धित हुए हैं, जबकि रोबस्टा के मूल्य 0.9% की कमी के साथ 67.46 यूएस सेंट्स/पाउंड तक पहुँच गए। ब्राज़ीलियाई नैचुरल्स के मूल्य 10% की वृद्धि के साथ 112.87 यूएस सेंट्स/एलबी, अन्य मृदुओं के मूल्य

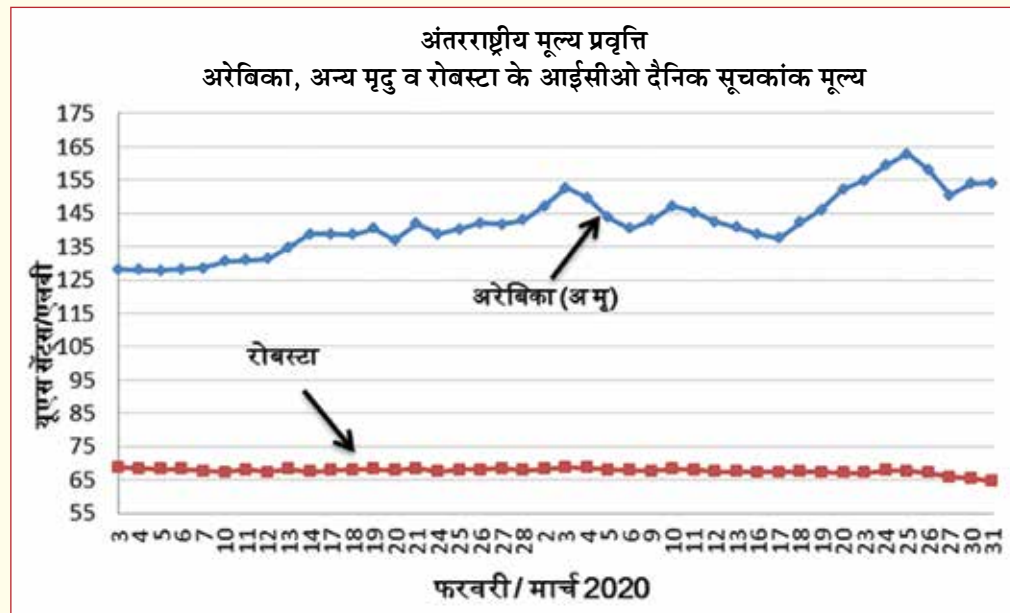
9.5% की वृद्धि के साथ 148.33 यूएस सेंट्स/ एलबी एवं कोलंबियाई मृदुओं के मूल्य 8.6% की वृद्धि के साथ 158.99 यूएस सेंट्स/एलबी हो गए। फरवरी 2020 में कोलंबियाई मृदुओं एवं अन्य मृदुओं के बीच का अंतर फरवरी 2020 में द्विगुना प्रवर्धन के बाद, 2.5% के साथ 10.66 अमेरिकी सेंट्स/ एलबी तक सीमित हो गया। धुली हुई अरेबिका की तत्काल उपलब्धता की अनिश्चितता के कारण अरेबिका समूह सूचकांकों के मूल्य स्थिर रहा है।

मार्च 2020 में, न्यूयॉर्क अरेबिका फ़्यूचर्स बाज़ार 8.8% की वृद्धि के साथ 116.09 यूएस सेंट्स/ एलबी तक पहुँच गया, जबकि लंदन रोबस्टा फ़्यूचर्स बाज़ार 2.8% की कमी के साथ 57.39 यूएस सेंट्स/ पाउंड तक पहुँच गया। इसके परिणामस्वरूप, न्यूयॉर्क एवं लंदन फ़्यूचर्स बाज़ारों के मापन के अनुसार, अरेबिका एवं रोबस्टा कॉफी के बीच का प्रसार बढ़कर 58.70 यूएस सेंट्स/पाउंड तक पहुँच गया, जो फरवरी की तुलना में 11.03 यूएस सेंट्स/पाउंड अधिक है। प्रति माह कम होते हुए मार्च 2020 में, प्रमाणित अरेबिका स्टॉक 6.1% की कमी के साथ 2.29 मिलियन बैग्स तक पहुँच गया।

विगत माह के दौरान, आईसीओ समूह सूचकांक की अस्थिरता 1.8% वृद्धि के साथ 9.6% हो गई। मार्च 2020 में सभी अरेबिका संकेतकों की अस्थिरता बढ़ी है। अन्य मृदु में यह 3.5% के वृद्धि के साथ 11.5%, ब्राज़ील नैचुरल्स 2.6% अंक बढ़कर 13.1% तथा कोलंबियाई मृदु 2% अंक बढ़कर 10.5% हो गए। रोबस्टा समूह सूचक की अस्थिरता 4.5% थी, जो फरवरी 2020 की तुलना में 2.3% अंक कम थे।

कुल उत्पादन में अत्यधिक कमी आई है, जो सामान्यतः यहाँ की कुल फसल का लगभग 65-70% होते हैं। सामान्यतः अप्रैल में, नई रोबस्टा फसल की कटाई प्रारंभ होती है, जिसके बाद, जून में अरेबिका की फसल-प्राप्ति होती है। हालाँकि, कोरोना वायरस के प्रसार के कारण कटाई एवं परिवहन के लिए किराए पर श्रमिकों की व्यवस्था तथा उनके प्रबंधन में देरी हो सकती है। इसके परिणामस्वरूप, 2019/20 के फसल वर्ष के अंत में, विशेषतः जब स्टॉक अपेक्षाकृत कम हो जाता है, तब अल्पावधि में नौभरण कम हो सकता है।

फरवरी 2020 में वियतनाम का निर्यात 51.4% की वृद्धि के साथ 2.8 मिलियन बैग्स हो गया, यदि फरवरी 2019 से इसकी तुलना करें, तो यह परिमाण अत्यधिक है। इसके आगे, कॉफ़ी वर्ष के प्रथम पाँच महीनों के दौरान, हालाँकि, वियतनाम का निर्यात 4.1% की कमी के साथ 11.15 मिलियन बैग्स तक पहुँच गया है। अक्टूबर 2019 में, कॉफ़ी वर्ष प्रारंभ होने के बाद,



निर्यात:

फरवरी 2019 के 10.83 मिलियन की तुलना में, फरवरी 2020 में वैश्विक निर्यात 11.11 मिलियन बैग्स था। 2019/20 के प्रथम पाँच महीनों के दौरान, निर्यात 2018/19 की समान अवधि के 52.78 मिलियन बैग्स की तुलना में 3.4% कम होते हुए 50.97 मिलियन बैग्स तक पहुँच गया है। अक्टूबर 2019 से फरवरी 2020 तक अरेबिका का निर्यात 7.8% कम होते हुए 31.86 मिलियन बैग्स हो गया, जबकि रोबस्टा का नौभरण 4.8% की वृद्धि के साथ 19.1 मिलियन बैग्स हो गया।

फरवरी 2020 में, ब्राज़ील से निर्यात 2.7 मिलियन बैग्स तक पहुँच गया, जो फरवरी 2019 की तुलना में 24.3% कम था। फरवरी 2019 से फरवरी 2020 तक यहाँ का नौभरण, 2018/19 की समान अवधि की तुलना में, 13.2% की कमी के साथ 16.19 मिलियन बैग्स पहुँच गया। 2019/20 में, ब्राज़ील की फसल का अनुमान 57 मिलियन बैग्स रहा है, जो 2018/19 की तुलना में 12.2% कम है। 2019/20, यहाँ के अरेबिका उत्पादन के द्विवार्षिक चक्र के निष्क्रिय वर्ष होने के कारण

वियतनाम के किसानों के द्वारा मूल्य बढ़ने तक कॉफ़ी अपने पास रखने के कारण नवंबर 2019 को छोड़कर, प्रत्येक माह के दौरान रोबस्टा के मूल्य कम हुए हैं। वियतनाम सरकार ने 1 अप्रैल से कोरोना वायरस के संक्रमण रोकने हेतु सामाजिक अंतर नीति कार्यान्वित की है। इससे, यहाँ का उत्पादन अधिक प्रभावित नहीं होगा, जो 4.4% की वृद्धि के साथ 31.2 मिलियन बैग्स तक अनुमानित है, जहाँ की फसल कटाई लगभग पूरी हुई है। हालाँकि, इससे निकटस्थ नौभरण प्रभावित हो सकता है।

फरवरी 2019 की तुलना में, फरवरी 2020 के दौरान कोलंबिया का नौभरण 13.4% कमी के साथ 1.08 मिलियन बैग्स हो गया। 2019/20 के प्रथम पाँच महीनों के दौरान, यहाँ का निर्यात 1.6% के कमी के साथ 5.9 मिलियन बैग्स तक पहुँचा है। 2019/20 में, कोलंबिया का उत्पादन 1.7% की वृद्धि के साथ 14.1 मिलियन बैग्स तक अनुमानित है। कोलंबिया के राष्ट्रीय कॉफ़ी रोपक परिषद के अनुसार, कॉफ़ी मौसम के प्रारंभ में हुई अत्यधिक वृद्धि के कारण फरवरी के दौरान 6.6 मिलियन बैग्स फसल प्राप्त हुई, जो विगत

वर्ष की समान अवधि की तुलना में 8.8% अधिक है। कोलंबिया से चीन होकर जाने नौभरण पोतों की कम उपलब्धता के बारे में रिपोर्ट मिली है, जिससे फरवरी का निर्यात प्रभावित हो सकता है। इसके अलावा, फरवरी 2019 की तुलना में, फरवरी 2020 में यहाँ का आउटपुट 9.5% की कमी के साथ 1 मिलियन बैग से थोड़ा अधिक था। कोलंबिया के राष्ट्रपति द्वारा कोरोना वायरस के संक्रमण का प्रभाव कम करने के लिए 25 मार्च से 19 दिन के देश व्यापी लॉक डाउन की घोषणा की गई थी। सामान्यतः कोलंबिया की दूसरी मिटाका फसल की कटाई अप्रैल में प्रारंभ होती है, जो कि कोरोना संक्रमण के रोकथाम के उपायों के साथ-साथ पड़ोसी देशों से आने वाले प्रवासी मज़दूरों के कमी से प्रभावित हो सकती है।

विगत वर्ष की तुलना में, फरवरी 2020 में इंडोनेशिया का निर्यात 80.2% वृद्धि के साथ 876,000 बैग्स तक पहुँच गया है। फरवरी 2019 से फरवरी 2020 तक यहाँ का नौभरण 84.7% वृद्धि के साथ 2.87 मिलियन बैग्स रहा है। हालाँकि, यह विगत वर्ष के अत्यधिक कम परिमाण का अनुगमन है, जब उत्पादन 13.2% के कमी के साथ 9.42 मिलियन बैग्स तक पहुँच गया था तथा यह 2011/12 के बाद सबसे कम परिमाण का उत्पादन था। फसल वर्ष 2019/20

में, इंडोनेशिया का उत्पादन 16.8% की वृद्धि के साथ 11 मिलियन बैग्स तक अनुमानित है। वर्तमान में, यह अनुमान लगाना कठिन है कि महामारी कोविड-19 से संबद्ध नीतियों के कारण रोबस्टा फसल की कटाई के साथ-साथ निर्यात कितना प्रभावित होगा।

फरवरी 2020 में, **होंडुरास** से निर्यात 2.8% की कमी के साथ लगभग 800,000 बैग्स तक पहुँच गया। कॉफ़ी वर्ष 2019/20 के प्रथम पाँच महीनों के दौरान यहाँ का नौभरण 1.6% की वृद्धि के साथ 2.04 मिलियन बैग्स तक पहुँचने का अनुमान किया गया है। 2018/19 के उत्पादन के समान 2019/20 में भी उत्पादन 7.3 मिलियन बैग्स तक अनुमानित है, लेकिन 2017/18 के 7.56 मिलियन बैग्स के कीर्तिमान की तुलना में यह उससे 3.4% कम है। होंडुरास में, पहले से ही कम मूल्यों के कारण उत्पादन पर नकारात्मक प्रभाव पड़ा है, परंतु 20 मार्च से देश व्यापी कर्फ्यू लगा दिया गया है, जिससे नौभरण पर नकारात्मक प्रभाव पड़ेगा। अब 2019/20 की कटाई पूरी हो चुकी है और इस वर्ष के अंतिम माह तक पुनः प्रारंभ नहीं होगी। निकटस्थ अवधि में, विशेषतः अगर बंदरगाहों पर नौभरण पोतों की कम उपलब्धता या श्रमिकों की कमी के कारण कॉफ़ी का निर्यात कम हो सकता है।

भारतीय कॉफ़ी निर्यात (01.01.2020 से 31.03.2020 तक) मे. ट. में

क्र. सं.	निर्यात	अनंतिम निर्यात		अनंतिम पुनः निर्यात		कुल अनंतिम निर्यात	
		भारतीय कॉफ़ी	विगत वर्ष की संगत अवधि	अनंतिम पुनः निर्यात	विगत वर्ष की संगत अवधि	कुल अनंतिम निर्यात	विगत वर्ष की संगत अवधि
		1	2	3	4	(1 + 3)	(2 + 4)
1	अरे. पार्च.	10941	14,893	5	0	10946	14,893
2	अरे. चेरी	4492	3682	0	0	4492	3682
3	रोब. पार्च.	7098	10,295	0	0	7098	10,295
4	रोब. चेरी	40,947	52,746	0	0	40,947	52,746
5	भुने बीज	18	15	0	0	18	15
6	अ व वि	54	57	0	0	54	57
7	इंस्टेंट	3025	5424	26,274	21,626	29,300	27050
	कुल	66,574	87,112	26,279	21,626	92,853	108,738

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