



भारतीय कृषि एवं खाद्य परिषद
INDIAN COUNCIL OF FOOD AND AGRICULTURE



HORTICULTURE

Market Update

Global Scenario

Global Fruits and Vegetables Production, Area and Productivity; 2013-14

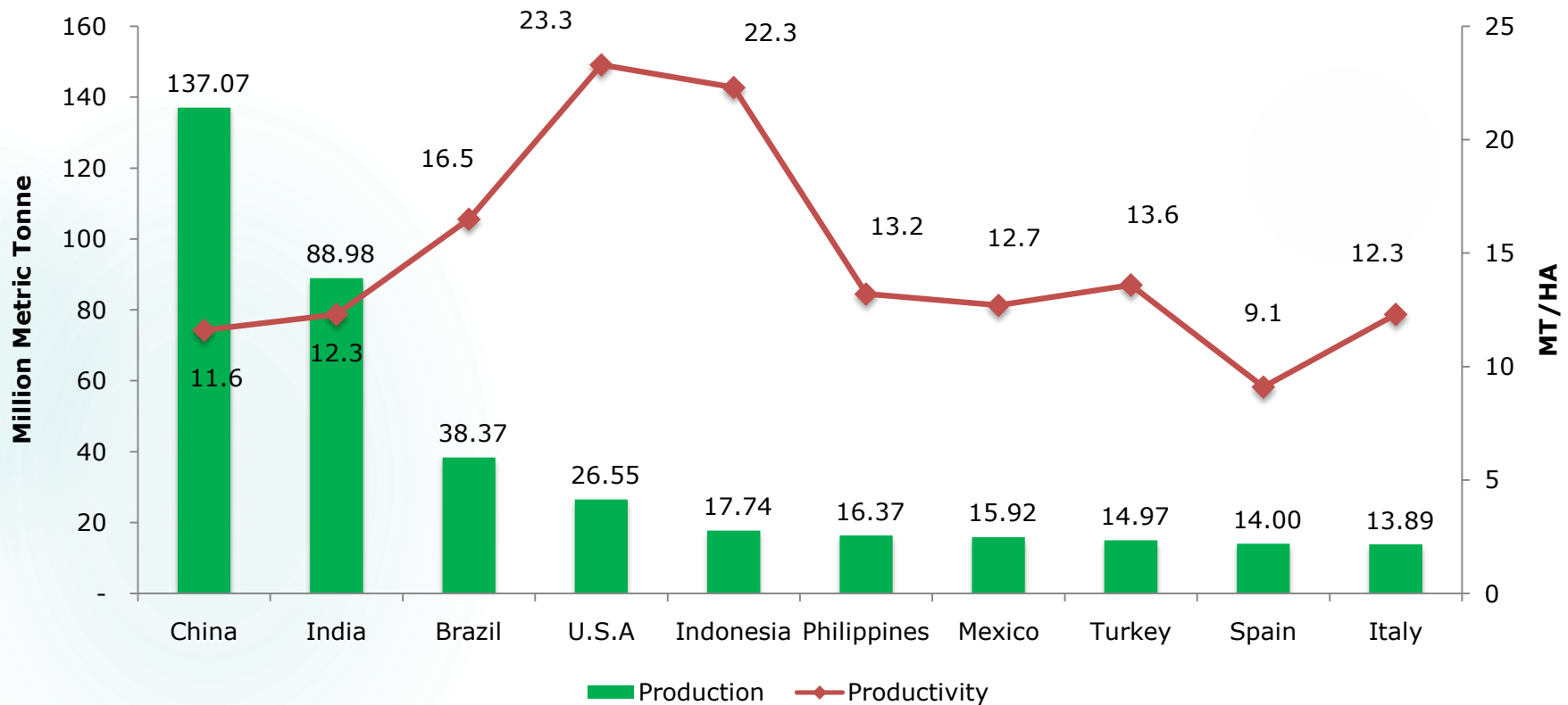
Segments	Production (Million MT)	Area (Million Ha)	Productivity (MT/HA)
Fruits	654.45	57.50	11.40
Vegetables	1,159.89	59.16	19.60
Total	1,814.34	116.66	-

- Vegetables account 63.92% share in the total production of Fruits and Vegetables.
- The global horticulture market is largely lead by China and India

Global Scenario

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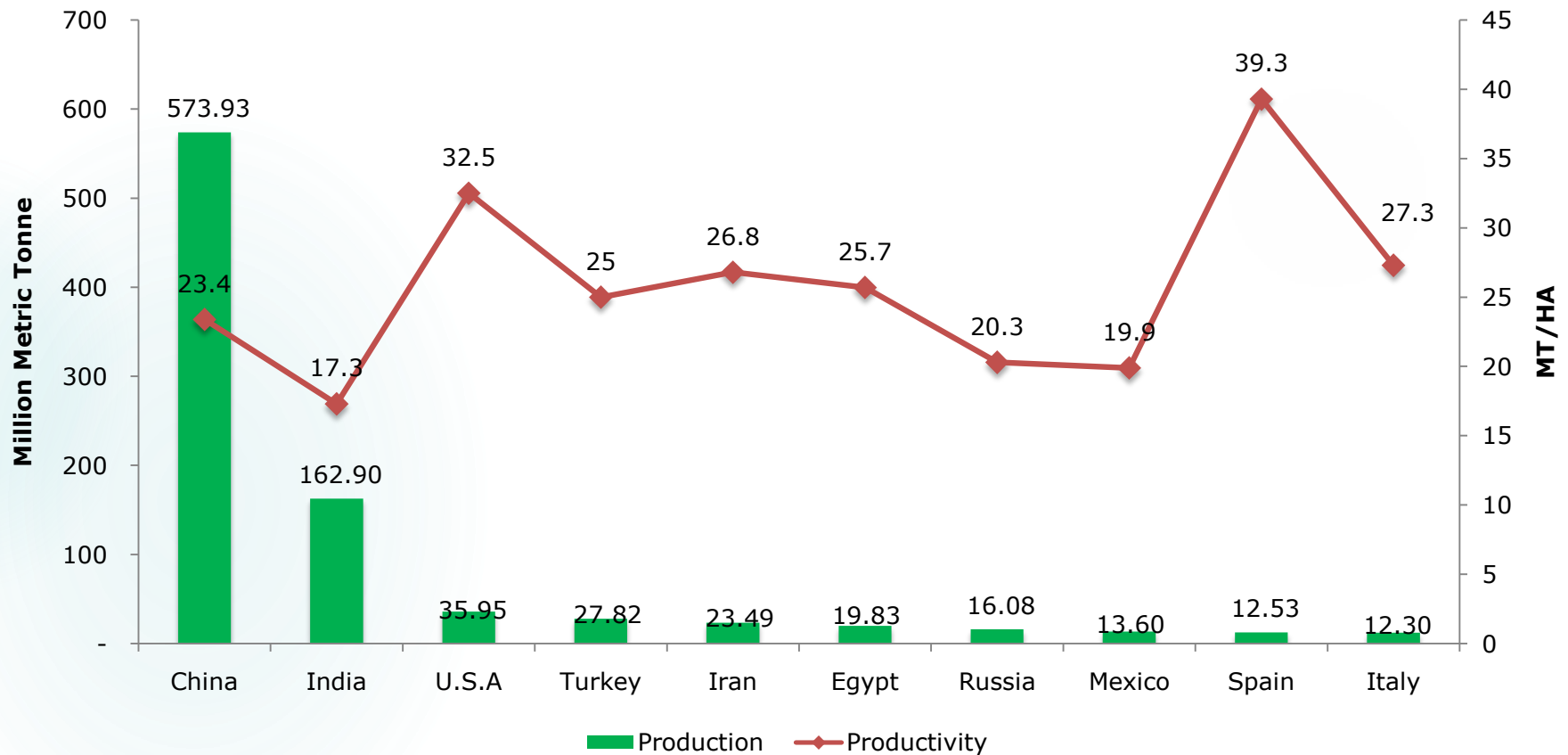
Top 10 Countries Producing Fruits; 2013-14



Global Scenario

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Top 10 Countries Producing Vegetables; 2013-14



India's Position in the Global Market

- India is the largest producer, consumer and exporter of spices.
- India ranks 2nd in the production of Fruits and Vegetables.

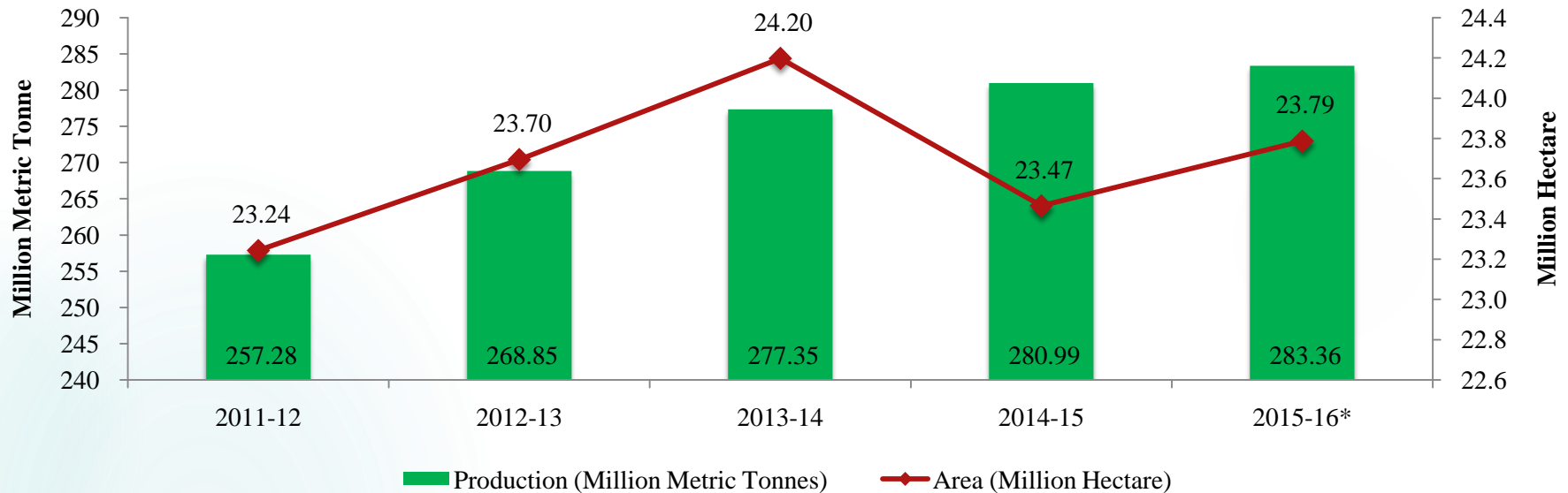
Indian Horticulture Fruits and Vegetables Share in World Production; 2013	
Fruits and Vegetables	Share (%)
Mango	44.1%
Papaya	42.6%
Okra	37%
Cauliflower	35.6%
Banana	25.6%
Onion	20.2%

Source: Hortidaily.com

India Horticulture Production

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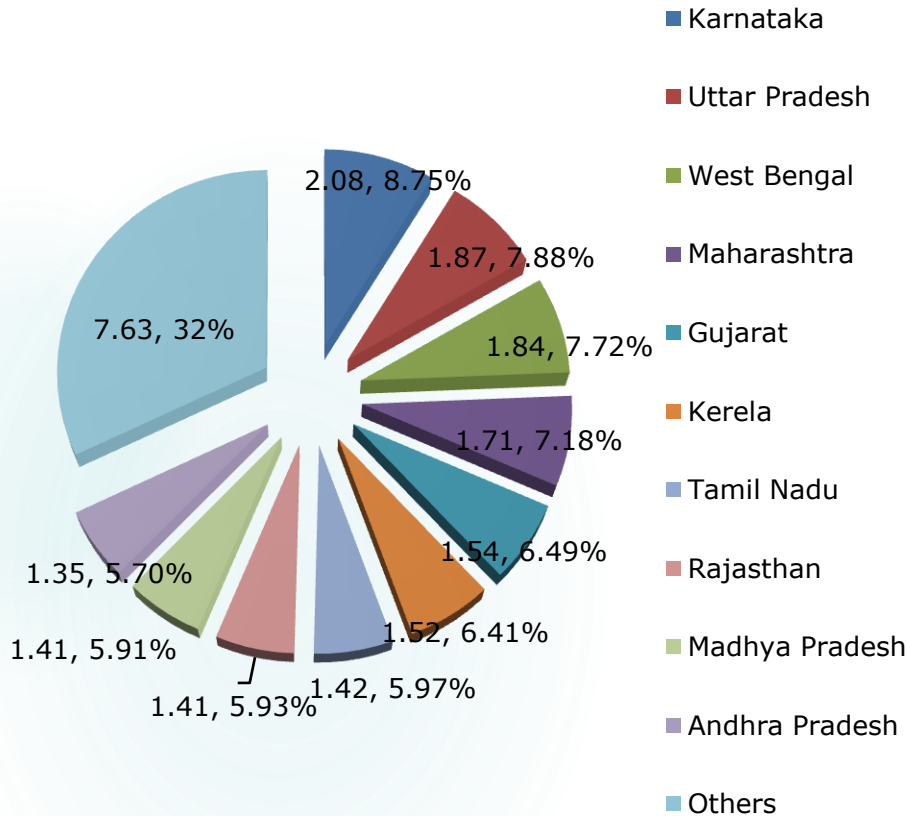
Indian Horticulture Crops Area and Production (2011-16*)



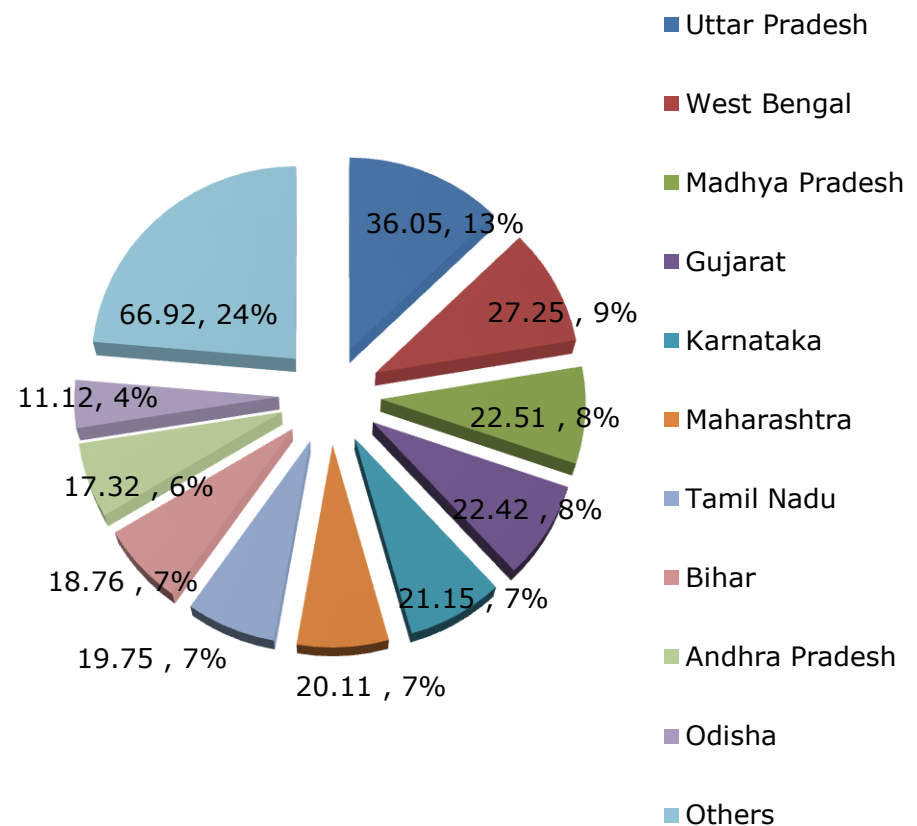
- Increase in production at a CAGR of 1.95% during 2011-2016.
- The year 2015-16 marked the fourth straight year that India's horticulture production will outstrip food grain output.
- Horticulture crops are grown in about 10% of India's gross cropped area, compared to over 50% of the area used to grow food grain

Horticulture Crops by States

**On the Basis of Area Cropped; 2015-16
(Million Hectare)**

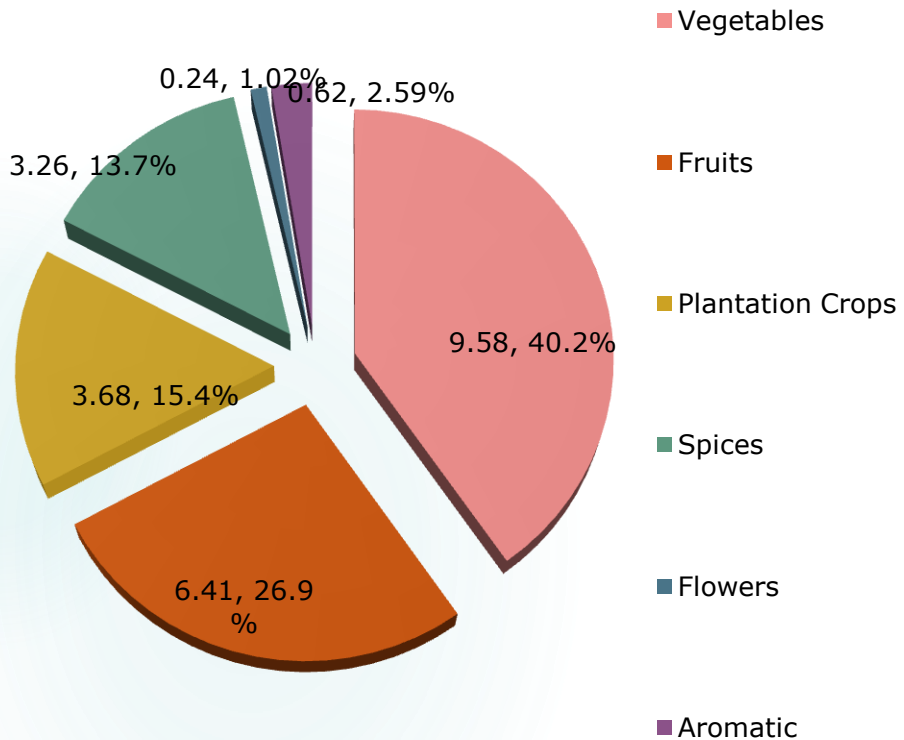


**On the Basis of Production; 2015-16
(Million MT)**

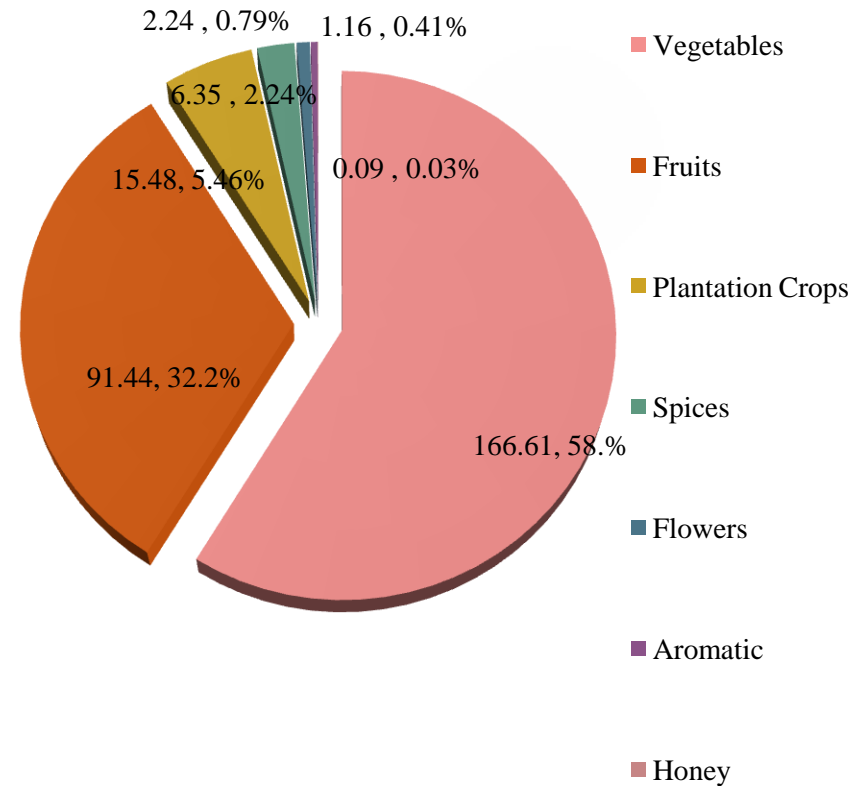


Horticulture Crops by Segments

**On the Basis of Area Cropped; 2015-16
(Million Hectare)**



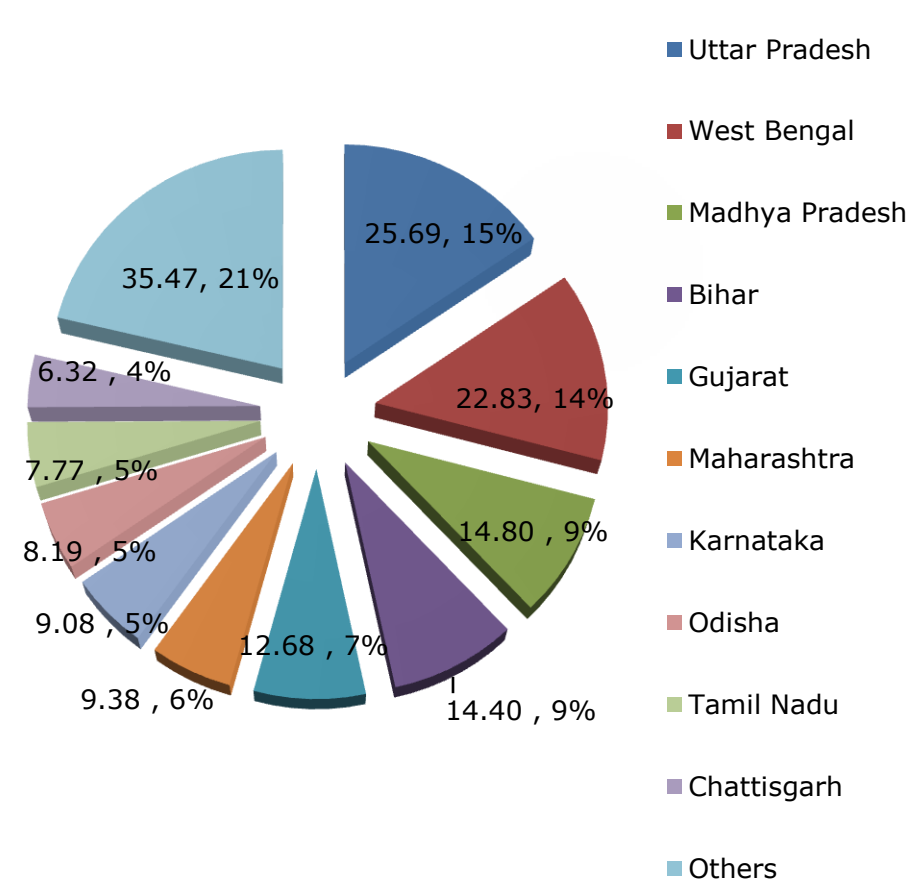
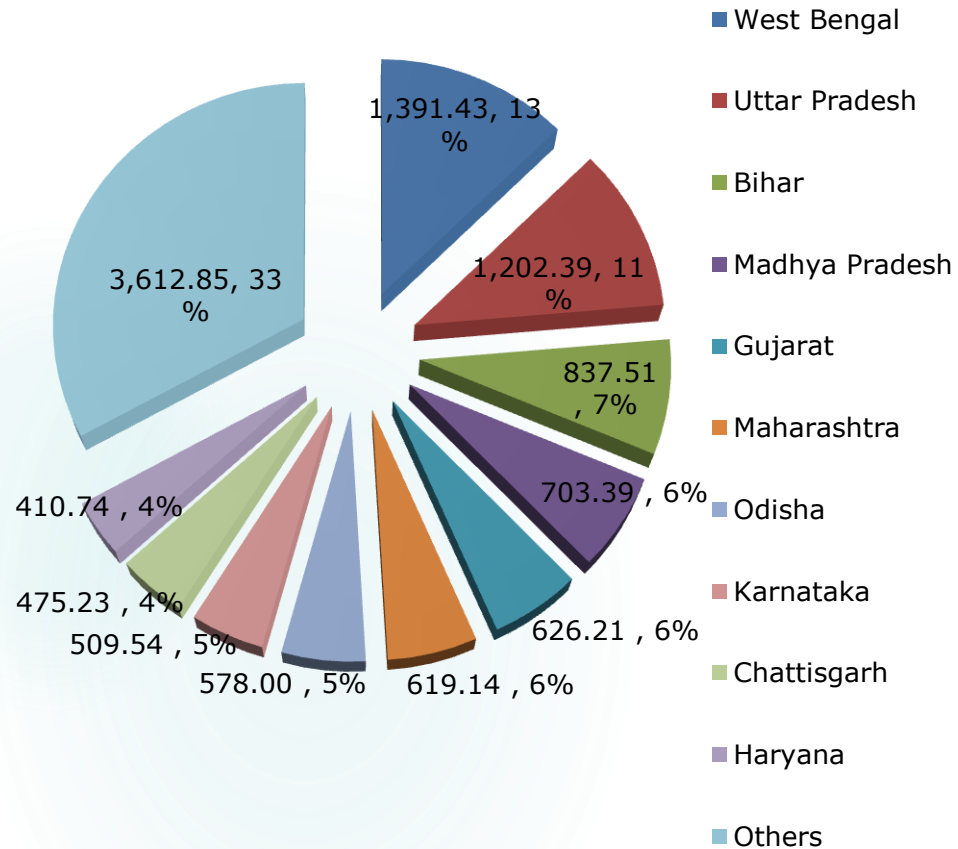
**On the Basis of Production; 2015-16
(Million MT)**



Horticulture Vegetables by States

**On the Basis of Area Cropped; 2015-16
(000' Hectare)**

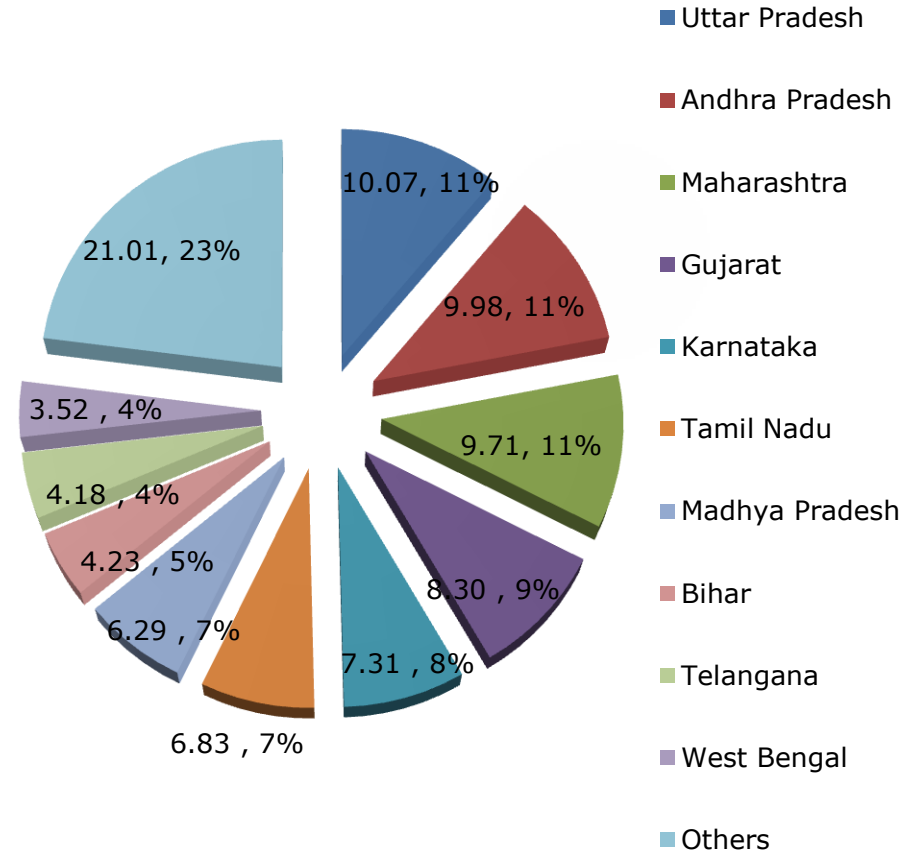
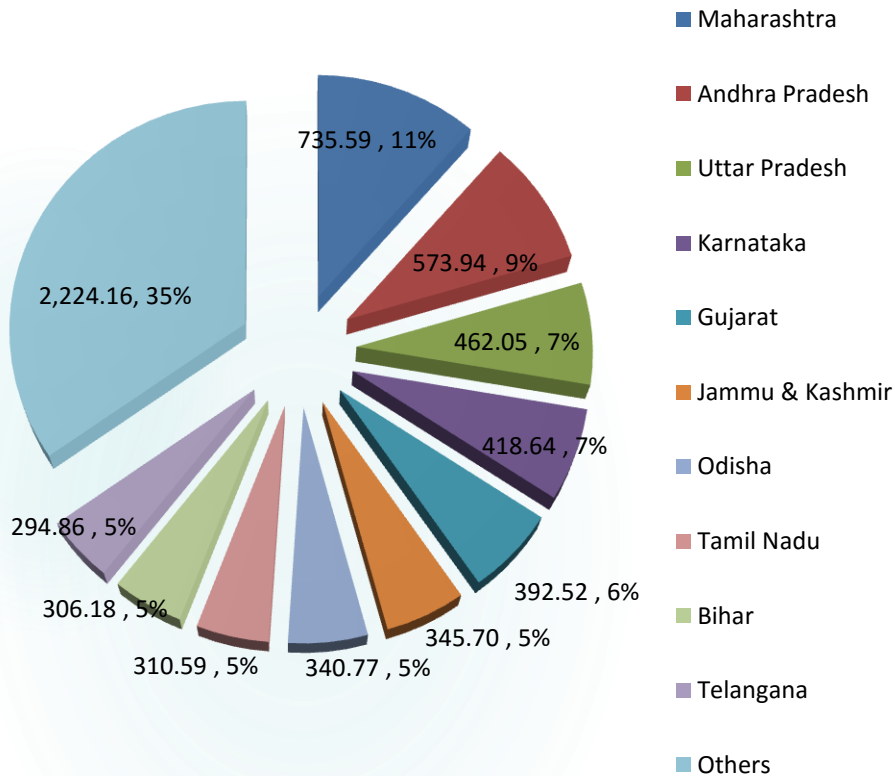
**On the Basis of Production; 2015-16
(Million MT)**



Horticulture Fruits by States

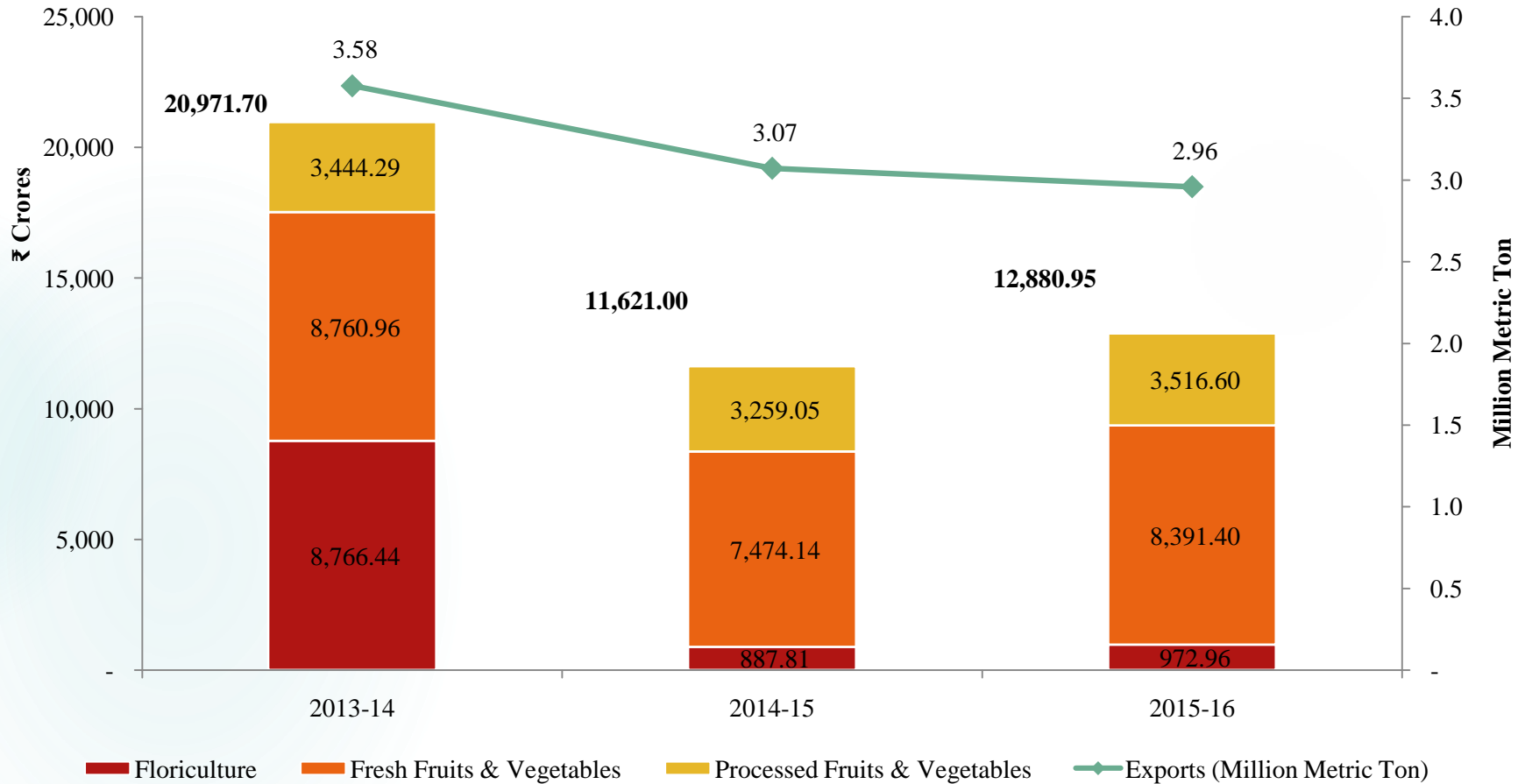
**On the Basis of Area Cropped; 2015-16
(000' Hectare)**

**On the Basis of Production; 2015-16
(Million MT)**



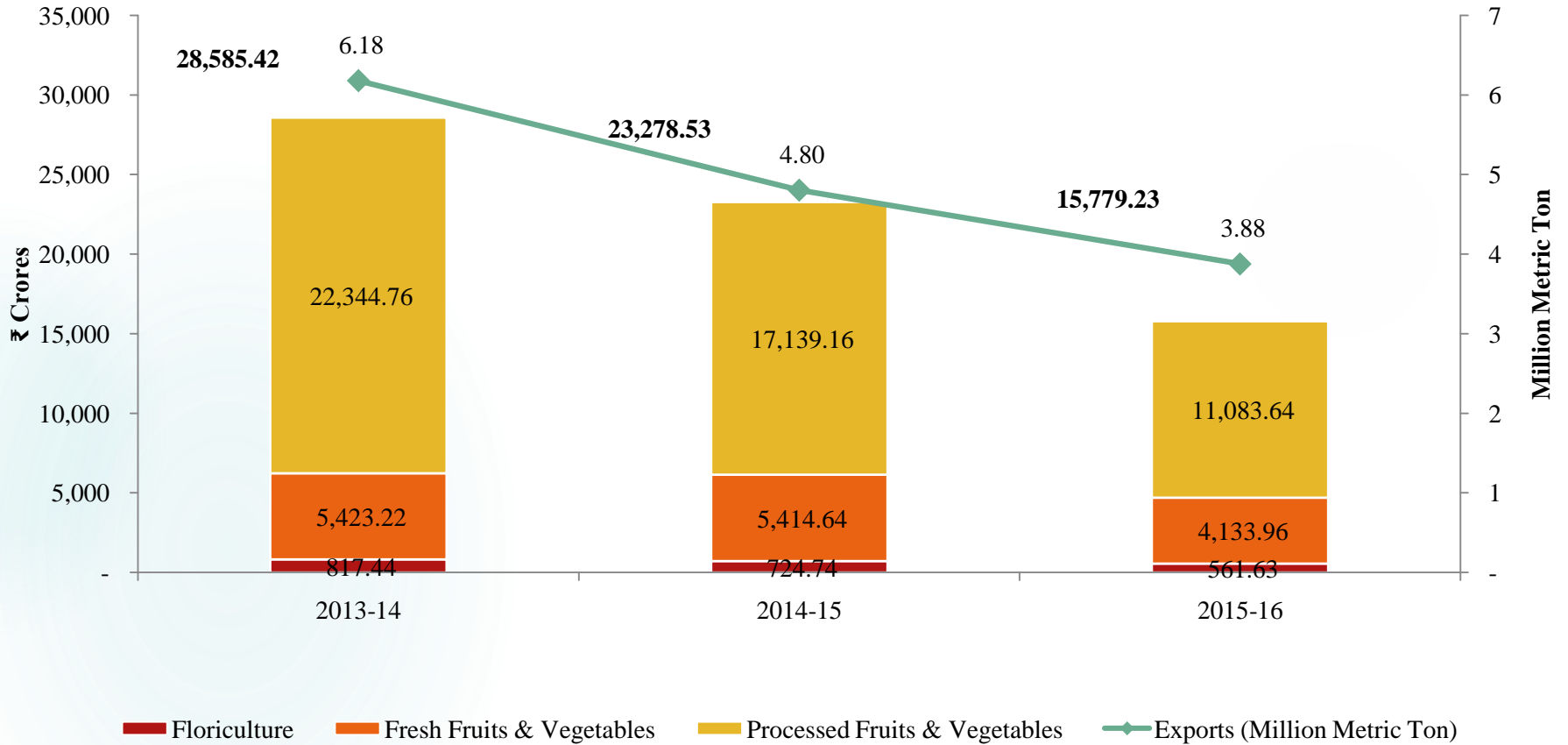
India Horticulture Exports

Indian Horticulture Exports by Segments (2013-16)



India Horticulture Imports

Indian Horticulture Imports by Segments (2013-16)



Top 10 Floriculture Products Exports and Imports

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Exports; 2015-16

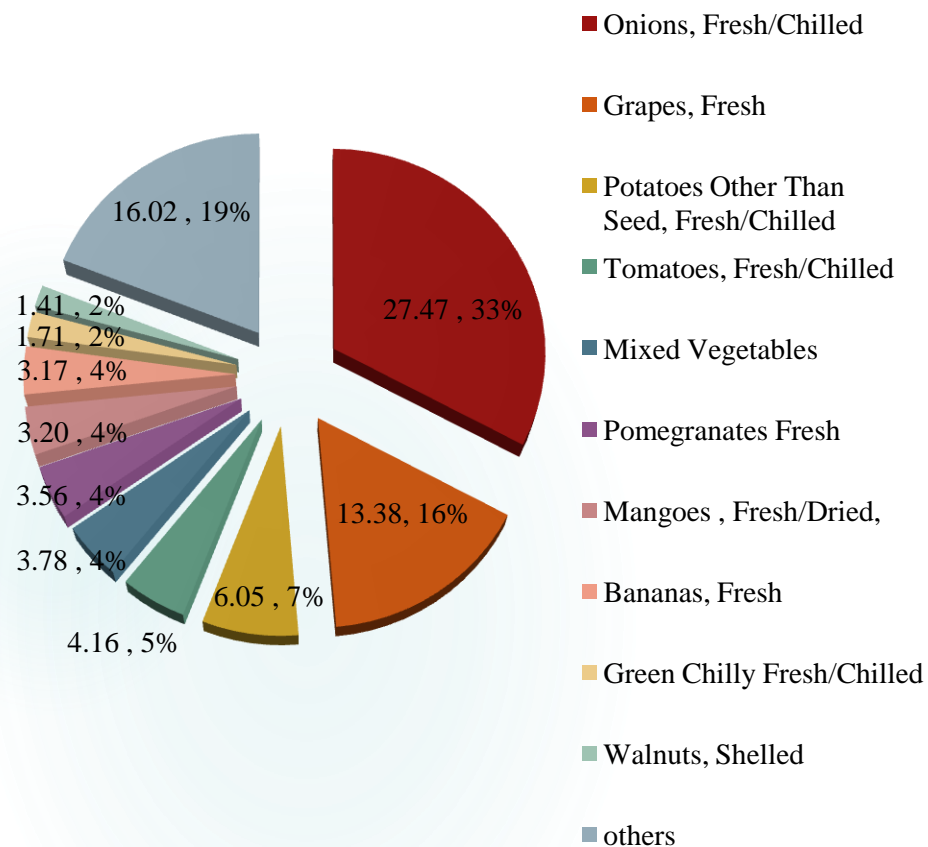
S.No.	Products	₹ Crore
1	Tomato Seeds	8,400.33
2	Fresh Cut Flowers And Flower Buds For Bouquets Or For Ornamental Purpose : Roses	5,614.87
3	Tissue Culture Plants	4,985.89
4	Fruit Seeds For Planting Or Sowing	4,687.83
5	Onion Seeds	1,460.06
6	Lucerne (Alfalfa) Seed, For Sowing	913.78
7	Seeds Of Herbaceous Plants Cultivated Principally For Their Flowers	839.64
8	Cauliflower Seeds	660.53
9	Fescue Seed Of Forage Plants	376.56
10	Radish Seeds	357.21

Imports; 2015-16

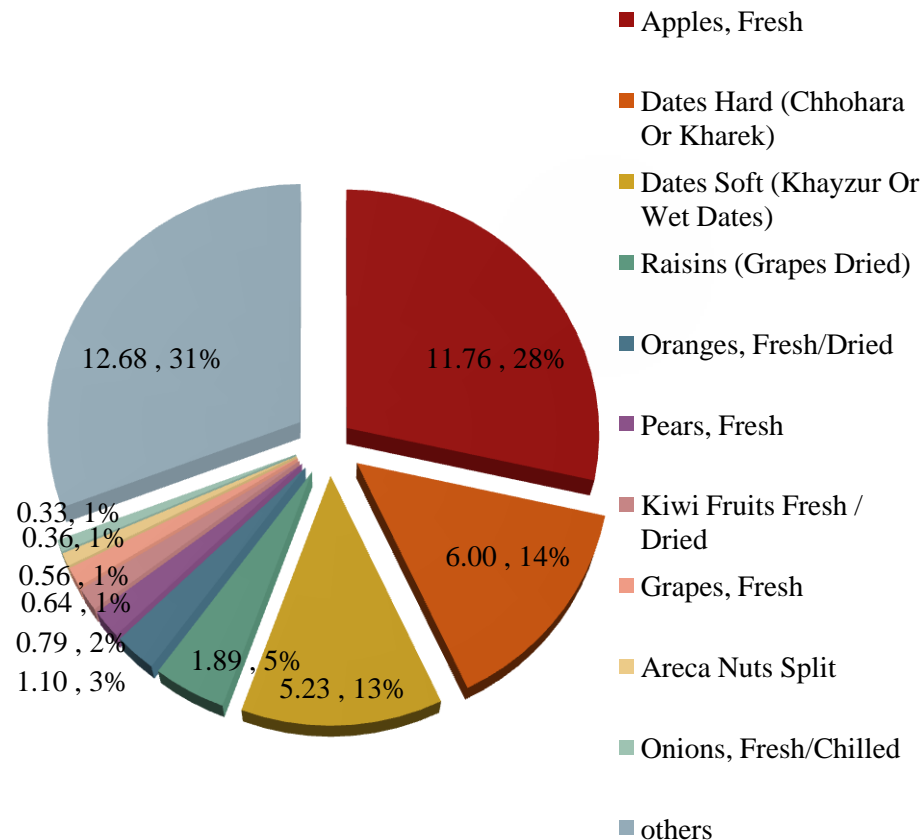
S.No.	Products	₹ Crore
1	Cabbage Seeds	61.50
2	Clover (Trifolium Spp) Seed, For Sowing	46.76
3	Cauliflower Seeds	40.21
4	Fresh Cut Flowers And Flower Buds For Bouquets Or For Ornamental Purpose : Orchids	29.85
5	Seeds Of Herbaceous Plants Cultivated Principally For Their Flowers	29.21
6	Fruit Seeds For Planting Or Sowing	21.14
7	Bulbs Horticultural	15.21
8	Bulbs, Tubers, Tuberous Roots, Corms, Crowns & Rhizomes, Dormant	13.62
9	Tomato Seeds	11.18
10	Tissue Culture Plants	9.08

Top 10 Fresh Fruits & Vegetables Products Exports and Imports

Exports; 2015-16 (₹ Billion)

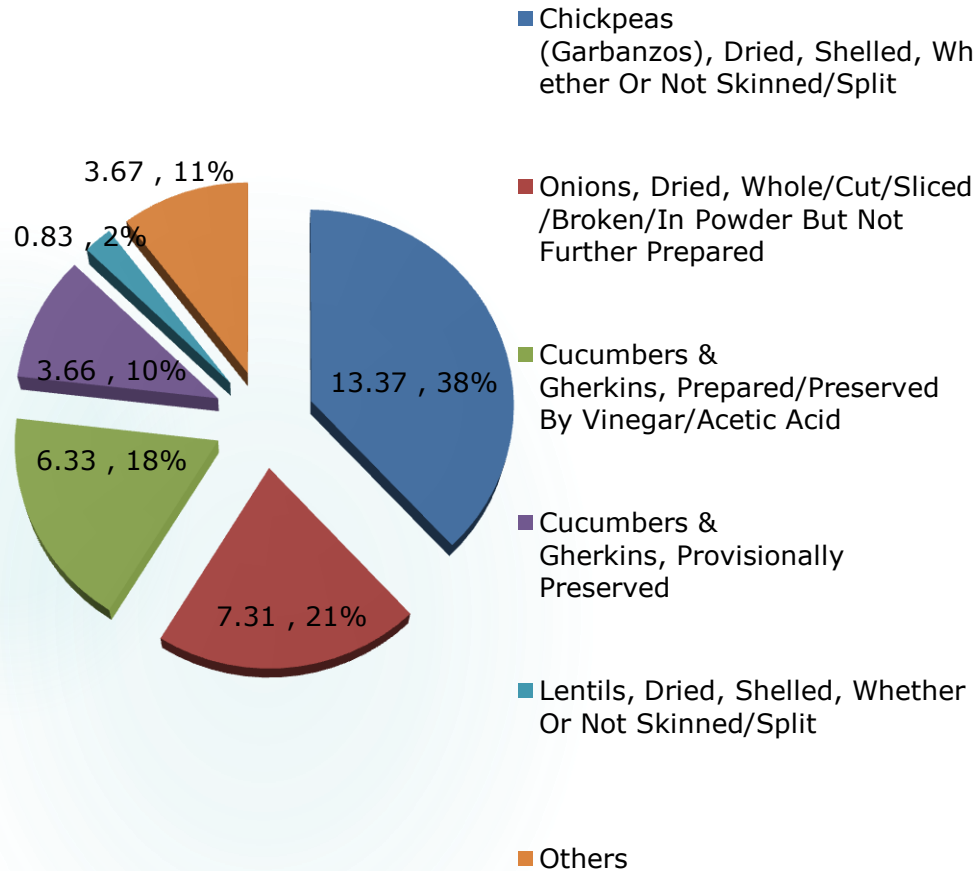


Imports; 2015-16 (₹ Billion)

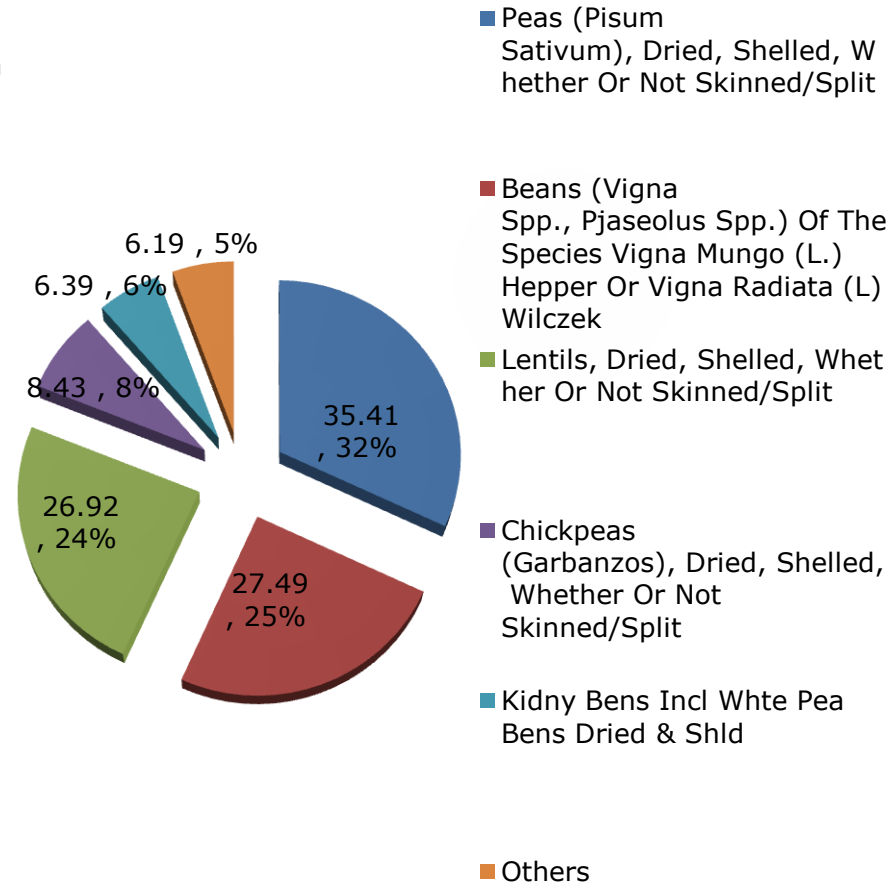


Top 5 Processed Fruits & Vegetables Products Exports and Imports

Exports; 2015-16 (₹ Billion)



Imports; 2015-16 (₹ Billion)



Major Issues and Challenges

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- Dearth of high quality planting material
- Insufficient technical know-how
- Lack of technologies and equipments for small and medium farms
- Lack of extension services faced by farmers and rural entrepreneurs
- Inappropriate Cold Storages
- Inadequate transportation facilities
- Presence of middlemen in the supply chain
- Heavy metal toxicity found in vegetables, especially those grown in peri-urban area.
- Horticultural production is not suitable for processing industry, as it require A and B grade produce.
- Unfavorable CODEX standards

Recommendations

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- Certification to ensure the traceability of produce and conditions of crop growth.
- Research to develop disease resistant, drought resistant varieties, capable of giving quality produce with high yields, suitable for processing industry.
- Promotion of tissue culture for adequate supply of high quality planting material.
- Technologies like nano-technology irradiation by gamma rays need to be promoted and well supported.
- Micro irrigation should be promoted, specifically for horticulture crops.
- Adoption of resource efficient technologies such as hydroponics, vertical gardening, fertigation system and pulse integration system should be promoted and PPP model can be adopted for the same as there is a requirement of huge investment.
- Integrating the horticulture with “Make In India” and “Stand Up India” programme to make it an integral component of development programme.
- Live pricing mechanism to ensure fair price to farmers as well as buyers.
- Increasing the share of subsidy for horticultural machinery to promote mechanization and provision of Minimum Support Price (MSP) for horticultural crops.
- Floriculture in peri-urban areas for ornamental purposes.

Thank You