

**RED CHILLI**

**Fundamentals:**

**Today's Update:**

- No major movement was witnessed in the Red Chilli spot market on Saturday due to weekly off.
- Further correction in the prices is expected in coming days as overall the Chilli crop is in good conditions so far in all the key growing states and production is also expected to be higher in 2023 seasons.
- However, we expect good export demand for premium quality likely to support Red Chilli prices from lower levels.
- We suggest stockists and masala millers are likely to wait for price correction for fresh procurement. AgriWatch expects from mid-February they may start buying.

**Previous Update:**

- As per AgriWatch estimates, Red Chilli all India production for 2023 is estimated at 15.56 lakh metric tonne (LMT). Last year's production was 14.07 lakh MT, up by 10.59%.
- As per AgriWatch's revised estimates, Red Chilli all India sowing area for 2022 is estimated at 9.21 lakh hectares as compared to last year's 9.03 lakh hectares, up by 2.03%.

Red Chilli Spot Market Prices(Loose): (Rs/Qtl)							
State	Centre	Grade	04-Feb-23	04-Feb-23	03-Feb-23	03-Feb-23	Change
			Low	High	Low	High	
Andhra Pradesh	<b>Guntur Benchmark market</b>	NCDEX Quality	Closed	Closed	18000	19000	-
		LCA 334 (S4)	Closed	Closed	18000	20000	-
		Teja (S17)	Closed	Closed	17000	19000	-
		No. 273	Closed	Closed	18000	19000	-
		No. 5	Closed	Closed	20000	22000	-
		Fatki	Closed	Closed	9000	12000	-
		Byadgi	Closed	Closed	20000	23000	-
		US 341	Closed	Closed	18000	20500	-
		Denvor Delux	Closed	Closed	18000	20500	-
Telangana	<b>Warangal</b>	Indam 5	Closed	Closed	20000	24000	-
		Teja	Closed	Closed	16000	18000	-
		Wonder Hot	Closed	Closed	33000	35500	-
		341	Closed	Closed	17500	19000	-
		Denvor Delux	Closed	Closed	17500	19500	-
		Paprika	Closed	Closed	75600	75600	-
	<b>Khammam</b>	Fatki	Closed	Closed	8500	13500	-
		Teja (Cold storage)	Closed	Closed	NA	NA	-
Madhya Pradesh	<b>Bedia</b>	Teja (Non cold storage)	Closed	Closed	16500	18000	-
		No. 12	18000	20000	Closed	Closed	-
		Indu 2070	NA	NA	Closed	Closed	-
		Fatki	12500	14000	Closed	Closed	-
		Jhankar	14500	16000	Closed	Closed	-

		Ganesh	NA	NA	Closed	Closed	-
Delhi	New Delhi	Teja(Khamam)	Closed	Closed	21500	21500	-
		M.P. MacoTeja	Closed	Closed	NA	NA	-
		Pala 12	Closed	Closed	NA	NA	-
		LCA 334	Closed	Closed	22500	23500	-
		Fatki	Closed	Closed	13500	13500	-
		Packing	Closed	Closed	NA	NA	-
Karnataka	Byadgi	2043 Best	NA	NA	NA	NA	-
		5531 Best	NA	NA	NA	NA	-
		5531 M Best	NA	NA	NA	NA	-
		Dabbi Dlx Local	NA	NA	NA	NA	-
		Dabbi Medium Best (Local)	NA	NA	NA	NA	-
		Dabbi Best (Bellary)	NA	NA	NA	NA	-
		KDL Deluxe (Local)	NA	NA	NA	NA	-
		KDL Deluxe (Bellary)	NA	NA	NA	NA	-
		KDL Best(Local)	NA	NA	NA	NA	-
		KDL Best(Bellary)	NA	NA	NA	NA	-
		KDL Medium	NA	NA	NA	NA	-
		Denvor Deluxe	NA	NA	NA	NA	-
		2043	NA	NA	NA	NA	-
		5531	NA	NA	NA	NA	-
		C 5	NA	NA	NA	NA	-
		KDL Fatki	NA	NA	NA	NA	-
Seed Fatki	NA	NA	NA	NA	-		
<b>Arrivals &amp; Off-take in bags (1 bag = 45 Kg), (1 bag = 38Kgs)*</b>							
<b>State</b>	<b>Centre</b>	<b>Parameter</b>	<b>04-Feb-23</b>	<b>03-Feb-23</b>	<b>Change</b>		
Andhra Pradesh	Guntur	Arrivals	Closed	40000	-		
		Off-take	Closed	35000	-		
Telangana	Warangal	Arrivals	Closed	16000	-		
	Khammam	Arrivals (Cold storage) *	Closed	NA	-		
		Arrivals (Non cold storage) *	Closed	35000	-		
Karnataka	Byadgi	Arrivals	NA	NA	-		

### TURMERIC

**Fundamentals:**
**Today's Update:**

- No major movement was witnessed in Turmeric spot market on Thursday.
- Early sown crop harvesting has been completed and it started in nominal quantities in the Nizamabad benchmark market. Overall harvest will start from the end of February month.
- In Sangli district Turmeric harvesting started and in the other districts like Hingoli and Nanded it will start from mid-week of February.

**Previous Update:**

- AgriWatch initial estimates, Turmeric (Dry) all India production for 2023 is at 5.13 lakh MT compared to last year's 4.67 lakh MT.
- *As per AgriWatch revised estimates, Turmeric all India sowing area for 2022 is estimated at 1.70 lakh hectares as compared to last year 1.66 lakh hectares, up by 2.44%.*
- AgriWatch estimates, Turmeric (Dry) all India production for 2022 is revised lower at 4.67 lakh MT compared to last year's 4.89 lakh MT. Crop damage reports due to excessive rainfall during October and November in AP and Telangana remain the key reason for revising production downwards.

Turmeric Spot Market Prices (Loose): (Rs/Qtl)					
State	Centre	Grade	04-Feb-23	03-Feb-23	Change
Telangana	<b>Nizamabad</b> <b>Benchmark market</b>	Nizam quality	Closed	7300	-
		Double polish finger	Closed	7500	-
		Gattah (unpolished)	Closed	6200	-
		Gattah (double polished)	Closed	6800	-
	<b>Warangal</b>	Finger	Closed	5500	-
		Round	Closed	5200	-
Tamil Nadu	<b>Erode</b>	Finger	Closed	7300	-
		Gattah	Closed	6400	-
		Sellem	Closed	8500	-
	<b>Coimbatore</b>	Bulb	NA	NA	-
		Finger	NA	NA	-
		<b>Salem</b>	Bulb	NA	NA
Finger	NA		7250	-	
Andhra Pradesh	<b>Duggirala</b>	Bulb	Closed	6000	-
		Bilty	Closed	NA	-
		Finger	Closed	6000	-
		Bilty	Closed	6540	-
Maharashtra	<b>Sangli</b>	Rajpuri/Salem Finger	Closed	Closed	-
		Rajpuri Medium	Closed	Closed	-
		DesiKadappa	Closed	Closed	-
	<b>Basmat</b>	Salem Powder	Closed	5700	-
		Mini Salem	Closed	6400	-
		Super Salem	Closed	7500	-
		Gattah Powder	Closed	5700	-
		Gattah Premium	Closed	6200	-
<b>Nanded</b>	Turmeric Finger Polished	Closed	6800	-	

		Turmeric Bulb Polished	Closed	6000	-
		Turmeric Mix	Closed	6200	-
Delhi	Delhi	Gattah	7400	7400	Unch
		Mini Salem	8700	8700	Unch
		Finger Single Polished	7800	7800	Unch
		Finger Double Polished	8800	8800	Unch
State	Arrival & Off-take in bags *(1 bag = 75 Kg),#(1 bag = 60 Kgs)				
Telangana	Centre	Parameter	04-Feb-23	03-Feb-23	Change
	Nizamabad	Arrival	Closed	6000	-
		Off-take	Closed	6000	-
Warangal	Arrival	Closed	NA	-	
Tamil Nadu	Erode	Arrival	Closed	3500	-
		Off-take	Closed	3500	-
	Coimbatore	Arrival	NA	NA	-
	Salem	Arrival*	NA	0.1	-
Andhra Pradesh	Duggirala	Arrival*	Closed	280	-
Maharashtra	Sangli	Arrival#	Closed	Closed	-
	Basmat	Arrival*	Closed	750	-
	Nanded	Arrival	Closed	1200	-
					Arrival * Qtl

**NCDEX-FUTURES MARKET**

Turmeric									
Contract	+/- \$	Open	High	Low	Close	Volume	Vol. Change	OI	OI Change
Apr-23	-	-	-	-	-	-	-	-	-
May-23	-	-	-	-	-	-	-	-	-
Jun-23	-	-	-	-	-	-	-	-	-

Spread	Apr-23	May-23	Jun-23
Basis	-	-	-
Apr-23	-	-	-
May-23	-	-	-

NB: Spot prices used for spread calculation is the basis Nizamabad for Nizam grade. Basis = Spot prices – Near month futures.

**NCDEX- STOCK POSITION**

Stocks	Demat	In-Process	Total
	10.01.2023	10.01.2023	10.01.2023
Sangli (Rajapore)	1242	-	1242
Erode	-	-	-
Nizamabad	-	104	104
Warangal	-	-	-

(Quantity in MT)

**NCDEX Turmeric EED Wise Stock Position (Qty in MT) on 10th January, 2023**

EED	Sangli (Desi Cuddapah)	Sangli (Rajapore)	Nizamabad	Nizamabad (Farmer Polished)	Basmat (Salem)	Total
10-Jan-23	-	1242	104	-	-	1346
Total	-	1242	104	-	-	1346

\*EED – Exchange Deliverable Date

### BLACK PEPPER

**Fundamentals:**
**Today's Update:**

- Continued steady to weak sentiment was witnessed in Black pepper spot market on Saturday.
- Vietnam Pepper price as on last trade in the world market is less volatile. Domestically, pepper prices remained stable around 56,000 - 58,500 VND/kg. Specifically, Dak Lak and Dak Nong pepper prices today remained at 57,000 VND/kg; in Gia Lai traded at 56,000 VND/kg; in Dong Nai remained unchanged and purchased at 57,000 VND/kg; in Ba Ria - Vung Tau continues to be purchased at the threshold of 58,500 VND/kg; in Binh Phuoc traded at 57,500 VND/kg.
- World pepper market, in Indonesia, the price of Lampung black pepper was flat, staying at 3,660 USD/ton. The price of Muntok white pepper in this country increased slightly by 0.02%, to USD 6,171/ton. Malaysia's Kuching ASTA black pepper price remained stable at \$4,900/ton; while the country's ASTA white pepper is still priced at \$7,300/ton. For the Brazilian market, the price of black pepper ASTA 570 kept at \$2,800/ton. In Vietnam, the export price of black pepper 500g/l and 550g/l remained at \$3,250-3,350/ton. And the price of white pepper is 4,750 USD/ton. World pepper prices increased only slightly in Indonesian white pepper and flat in other countries. The world pepper market forecast is gloomy in the first quarter of 2023 due to abundant supply. India and Vietnam entered the harvest season.

**Previous Update:**

- Current year lower production in India supported the domestic prices. As per trade sources production down by around 10% compared to last year.
- The main harvest season of Vietnam lasts until the end of April. The Vietnam Pepper Association (VPA) predicts that in 2023 production will increase by about 5% compared to 2022 to 180,000-185,000 tons.
- In 2022, Vietnam pepper export reported 228,000 tons, a decrease of 12% in volume compared to the same period in 2021.
- As per current situation, AgriWatch expects India's pepper production for 2022-23 likely to be around 52,000 to 53,000 MT. Last year production was 57,000 to 58,000 MT.

Black Pepper Spot Market Prices (Loose): (Rs/Qtl)					
State	Centre	Grade	04-Feb-23	03-Feb-23	Change
Kerala	Kochi Benchmark market	Ungarbled	48900	49000	-100
		Garbled	50900	51000	-100
Karnataka	Chikmagalur	Ungarbled	Closed	50000	-
Delhi	New Delhi	Unpolished	55000	55000	Unch
		550 GL	54500	54500	Unch
		Number 11.5	58500	58500	Unch
Arrivals & Off-take in Tons					
State	Centre	Parameter	04-Feb-23	03-Feb-23	Change
Kerala	Kochi	Arrivals	40.5	39.5	1
		Off-take	40.5	39.5	1

Black Pepper FOB Prices (USD/MT)						
Date	Brazil ASTA 570	ex Kochi (India) ASTA	Lampung (Indonesia) ASTA 570	Kuching (Sarawak, Malaysia) ASTA	Ho Chi Minh (Vietnam) 500g/l	Ho Chi Minh 550g/l
27-01-23	2800	6331	3587	4900	3250	3350
30-01-23	2800	6331	3663	4900	3250	3350
31-01-23	2800	6331	3660	4900	3250	3350
01-02-23	2800	6331	3660	4900	3250	3350
02-02-23	2800	6331	3660	4900	3250	3350
03-02-23	2900	-	3683	4900	3250	3350

**JEERA (CUMIN SEED)**
**Fundamentals:**
**Today's Update:**

- Mostly firm sentiment has been recorded in Jeera spot market on Saturday.
- *As per AgriWatch initial estimates, current year Cumin seed expected production would be around 3.00 lakh MT as compared to last year 3.16 lakh MT, down by 5.06%.*
- Overall keeping in view of lower ending stocks by 50% till the end of the coming marketing year Cumin prices are likely to trade in firm sentiment.

**Previous Update**

- On the Rabi sowing front, as per the Agriculture Department of Gujarat, as on 23rd January 2023, about 275,830 hectares of sowing has been completed in Jeera against 307,135 hectares sown in the corresponding period last year down by 10.19% due to higher temperature during the sowing period. The normal area (three years average) is 421,457 hectares.
- Thunderstorms with lightning and hail storms over isolated place in Cumin growing regions in Rajasthan are expected between 24th Jan, 2023 to 28th Jan 2023. These situations may result in damage to standing crops.
- However, the situation has started to improve in Rajasthan due to a drop in temperature during the past weeks. But now if a hail storm-like situation happens then there are high chances of crop damage.
- In Gujarat Jeera sowing area may go down 20 - 25%, however in Rajasthan area up by 10 - 12%, but yield may lower current year due to higher temperature earlier and currently frost situation in some areas. However, actual damage percentage may come after 7 to 10 days.
- As per AgriWatch initial estimates, current year Jeera all India sowing area is estimated at 7.09 lakh hectares as compared to last year 7.26 lakh hectares, down by 2.31%.

Jeera(Cumin Seed) Spot Market Prices (Loose): (Rs/Qtl)					
State	Centre	Grade	04-Feb-23	03-Feb-23	Change
Gujarat	Unjha Benchmark market	Local	29000	28500	500
		NCDEX Quality	32700	32200	500
		Poojari type /Machine Cut	34200	33700	500
	Mundra Port (FoR)	1% Singapore	NA	NA	-
		2% Singapore	NA	NA	-
		1 % European	NA	NA	-
		2% European	NA	NA	-
	Rajkot	Local	30750	29250	1500
	Patan	Local	29575	29250	325
	Dhrol	Local	NA	NA	-
Gondal	Local	30605	29305	1300	
Rajasthan	Jodhpur	Local	31000	30000	1000
	Merta City	Local	31000	30700	300
	Nagaur	Local	NR	29500	-
	Anandpur Kalu	Local	30000	30000	Unch
Delhi	New Delhi	Ganesh	32500	32000	500
		Poojari type / Machine Cut	35500	35000	500
Arrival & Off-take in bags (1 bag = 55 kg)					
State	Centre	Parameter	04-Feb-23	03-Feb-23	Change

Gujarat	Unjha	Arrival	3000	2000	1000
		Off-take	3000	2000	1000
	Rajkot	Arrival*	180	180	Unch
	Patan	Arrival*	25	13	12
	Dhrol	Arrival*	NA	NA	-
	Gondal	Arrival	207	228	-21
Rajasthan	Jodhpur	Arrival	60	50	10
	Merta City	Arrival	600	100	500
	Nagaur	Arrival	NR	NA	-
	Anandpur Kalu	Arrival	NA	NA	-
Arrival * Qtl					

**NCDEX-FUTURES MARKET**

Jeera (Cumin Seed)									
Contract	+/- \$	Open	High	Low	Close	Volume	Vol. Change	OI	OI Change
Mar-23	-	-	-	-	-	-	-	-	-
Apr-23	-	-	-	-	-	-	-	-	-
May-23	-	-	-	-	-	-	-	-	-

Spread	Mar-23	Apr-23	May-23
Basis	-	-	-
Mar-23	-	-	-
Apr-23	-	-	-

NB: Spread was done by taking Spot prices at Unjha or NCDEX Quality. Basis = Spot prices – Near month futures.

**NCDEX- STOCK POSITION**

Stocks	Demat	In-Process	Total
	02.02.2023	02.02.2023	02.02.2023
Jodhpur	-	-	-
Unjha	1347	-	1347

(Quantity in MT)

**NCDEX Jeera (Cumin Seed) EED Wise Stock Position Qty in MT on 02<sup>nd</sup> February, 2023**

EED	Jodhpur	Unjha	Total
10- Feb-23	-	1347	1347
Total	-	347	1347

\*EED – Exchange Deliverable Date



## CARDAMOM

### Fundamentals

#### Today's Update:

- Steady to weak sentiment has been recorded in Small Cardamom Kerala (Kochi) spot market on Saturday.

#### Previous Update:

- Lower supply reported as planters are expecting higher prices in coming days for releasing their produce.
- Current year Guatemala Cardamom production reported higher, around 40,000 MT. But for the best quality buyers are looking for Indian variety due to which bullish sentiment is expected in coming days.
- Good export demand reported for Indian small Cardamom due to quality. We expect buyers likely to active further in the spot market and support the prices.
- As per initial report AgriWatch estimates India's production for the marketing year 2022-23 is expected to be around 30,000 metric tonne (MT). Last year it was 27,000 MT. Favorable weather condition in Kerala growing regions is the main reason for higher production expectations.

Small Cardamom Spot Market Prices (Loose): (Rs/Kg)					
State	Auction Price		04-Feb-23	03-Feb-23	Change
Kerala	Kochi Benchmark market	Max price	1672	1897	-225
		Avg. Price	1119	1155	-36
Delhi	New Delhi	Medium	875	875	Unch
		6.5 (Bold)	975	975	Unch
		7 (Bold)	1175	1175	Unch
		7.5 (Bold)	1375	1375	Unch
		8 (Bold)	1725	1725	Unch
Large Cardamom Spot Market Prices: (Rs/Kg)					
Sikkim	Singtam	Badadana	NA	NA	-
	Singtam	Chotadana	NA	NA	-
	Gangtok	Badadana	NA	NA	-
	Gangtok	Chotadana	NA	NA	-
West Bengal	Siliguri	Badadana	NA	NA	-
	Siliguri	Chotadana	NA	NA	-
Arrival & Off-take in Kg					
State	Parameter	Centre	04-Feb-23	03-Feb-23	Change
Kerala	Kochi	Arrivals	85545	88024	-2479
		Off-take	79623	80286	-663

### CORIANDER SEED

**Fundamentals:**

**Today's Update:**

- Steady to weak sentiment was recorded in Coriander spot market on Saturday.
- Anticipation of higher production this season keeping the trade participants away from the market, which is further weighing on prices.
- *As per AgriWatch estimates, Current year Coriander seed expected production would be around 4.43 lakh MT as compared to last year 3.10 lakh MT, down by 5.06%.*
- New Coriander crop has started in Neemuch and Ramganj spot markets around 150 to 250 bags on an average daily basis with higher moisture content.
- New crop arrivals are likely to start after 15 Feb, 2023 in bulk quantities and it is expected that prices may correct after that on higher production.
- Overall keeping in view of higher ending stocks in the coming marketing year Coriander prices are likely to trade in weak sentiment. However, weather is likely to play very important role in the next 15 to 20 days as the Coriander standing crop is at maturity stage.

**Previous Update:**

- Reportedly, due to higher prices in Coriander cash markets, its sowing area in Gujarat's growing regions is likely to increase by 60%-70% from the previous year. In Madhya Pradesh, it is likely to increase by 30%-35% from the season 2021-22.
- However, in Rajasthan growing regions, the total sowing area may increase by 10%-15% from the previous year. It is mainly because farmers are interested in sowing other commodities like Paddy, Mustard, etc. because of higher prices as compared to Coriander.
- As per AgriWatch estimates, current year Coriander all India sowing area is estimated at 4.08 lakh hectares as compared to last year 2.97 lakh hectares, up by 37% due to all time higher prices at the time of sowing period.

Coriander Spot Market Prices (Loose): (Rs/Qtl)					
State	Centre	Grade (New)	04-Feb-23	03-Feb-23	Change
Rajasthan	<b>Kota Benchmark market</b>	Eagle	8500	8500	Unch
		Eagle(Split)	8800	8800	Unch
		Badami	8300	8300	Unch
		Badami(Split)	8400	8400	Unch
	<b>Ramganj</b>	Eagle	7700	Closed	-
		Eagle(Split)	7700	Closed	-
		Badami	6800	Closed	-
		Badami(Split)	7500	Closed	-
		Scooter	9100	Closed	-
	<b>Baran</b>	Eagle	7400	7400	Unch
		Badami	6700	6900	-200
	<b>Bhawani</b>	Eagle	NA	NA	-
		Badami	NA	NA	-
		Scooter	NA	NA	-
Double Paroot		NA	NA	-	
Madhya Pradesh	<b>Guna</b>	Badami	6700	7000	-300
		Eagle	7200	7500	-300

		Scooter	8000	8000	Unch
	Neemuch	Badami	7000	7000	Unch
		Eagle	7500	7500	Unch
		Scooter	8300	8300	Unch
Gujarat	Gondal	Badami	6905	7155	-250
		Eagle	7305	7305	Unch
Delhi	Khari Baoli (Delhi)	Eagle (Dal)	9500	10000	-500
		Eagle	10000	10500	-500
		Scooter	11000	11400	-400
<b>Arrival &amp; Off-take in bags (1 bag = 40 kg)</b>					
<b>State</b>	<b>Centre</b>		<b>04-Feb-23</b>	<b>03-Feb-23</b>	<b>Change</b>
Rajasthan	Kota	Arrival	200	300	-100
		Offtake	200	300	-100
	Ramganj	Arrival	4000	Closed	-
		Offtake	4000	Closed	-
	Baran	Arrival	200	150	50
		Offtake	200	150	50
	Bhawani	Arrival	NA	NA	-
		Offtake	NA	NA	-
Madhya Pradesh	Guna	Arrival	500	1500	-1000
		Offtake	500	1500	-1000
	Neemuch	Arrival	750	800	-50
		Offtake	750	800	-50

**NCDEX-FUTURES MARKET**

Coriander										
Contract	+/- \$	Open	High	Low	Close	Volume	Vol. Change	OI	OI Change	
Apr-23	-	-	-	-	-	-	-	-	-	-
May-23	-	-	-	-	-	-	-	-	-	-
Jun-23	-	-	-	-	-	-	-	-	-	-

Spread	Apr-23	May-23	Jun-23
Basis	-	-	-
Apr-23	-	-	-
May-23	-	-	-

NB: Spread was done by taking Spot prices of Average quality prices at Kota. Basis = Spot prices– Near month futures

**NCDEX- STOCK POSITION**

Stocks	Demat	In-Process	Total
	02.02.2023	02.02.2023	02.02.2023
Baran	-	-	-
Gondal	551	-	551
Kota	325	-	325
Ramganj	-	-	-

(Quantity in MT)

**NCDEX Coriander EED Wise Stock Position Qty in MT on 02<sup>nd</sup> February, 2023**

EED	Gondal	Kota	Ramganj Mandi	Total
10- Feb-23	551	325	-	876
<b>Total</b>	<b>551</b>	<b>325</b>	<b>-</b>	<b>876</b>

\*EED – Exchange Deliverable Date

CLOVE

Clove Spot Market Prices (Loose): (Rs/Qtl)					
State	Centre	Grade	04-Feb-23	03-Feb-23	Change
Kerala	Kerala	Kochi	90000	90000	Unch
		Kattapana	85000	85000	Unch
		Idukki	NA	NA	-
Delhi	Delhi	Madagascar	77000	77000	Unch
		Zanzibar	NA	NA	-

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