Global Pulse Scenario 2017
Global Grain, Food and Feed, New Delhi
2nd February 2017
Parthi Muthukumarasamy
# Nomenclature

<table>
<thead>
<tr>
<th>English Names</th>
<th>Indian Names and Synonyms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pigeon Peas</td>
<td>Arhar/Rahar/Tur/Tuar/Red Gram</td>
</tr>
<tr>
<td>Desi Chickpeas</td>
<td>Chana/brown chickpeas</td>
</tr>
<tr>
<td>Kabuli Chickpeas</td>
<td>Chhole/white chickpeas/Garbanzo beans</td>
</tr>
<tr>
<td>Red Lentils</td>
<td>Masoor</td>
</tr>
<tr>
<td>Green Gram</td>
<td>Moong/Mung bean</td>
</tr>
<tr>
<td>Black Gram</td>
<td>Urad Daal/Kaali Daal/Black gram/Udid/Black Mapte</td>
</tr>
<tr>
<td>Peas</td>
<td>Matar</td>
</tr>
<tr>
<td>Cowpea</td>
<td>Black eyed pea/Lobia</td>
</tr>
<tr>
<td>Kidney beans</td>
<td>Rajma</td>
</tr>
</tbody>
</table>
Pulses – Key Message

• India is world’s largest producer, processor, importer and consumer of Pulses.
• India’s production varies year over year and is about 17-19 million MT 21-22
• Total demand is about 22-23 million MT
• Imports is about 3.5-5.5 million MT

1 million = 10 lakh
mMT = million Metric Tonnes
India Pulse Availability (mMT)

<table>
<thead>
<tr>
<th>Year</th>
<th>Production</th>
<th>Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-13</td>
<td>18.34</td>
<td>4.02</td>
</tr>
<tr>
<td>2013-14</td>
<td>19.25</td>
<td>3.18</td>
</tr>
<tr>
<td>2014-15</td>
<td>17.15</td>
<td>4.58</td>
</tr>
<tr>
<td>2015-16</td>
<td>16.47</td>
<td>5.79</td>
</tr>
<tr>
<td>2016-17</td>
<td>17.82</td>
<td>4.67</td>
</tr>
</tbody>
</table>

- Exports – 200,000 to 300,000 Tonnes
- 2016-17 – Last three year estimate

Source: Ministry of Agriculture and Farmers Welfare
## Imports of Pulses

<table>
<thead>
<tr>
<th>Pulses</th>
<th>2013-14 mMT</th>
<th>2014-15 mMT</th>
<th>2015-16 mMT</th>
<th>Key Origins (% of total imports) – 2015-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peas</td>
<td>1.33</td>
<td>1.95</td>
<td>2.25</td>
<td>Canada (60%) Russia (15%) USA (7%) France (5%) Lithuania (4%)</td>
</tr>
<tr>
<td>Chickpeas</td>
<td>0.27</td>
<td>0.42</td>
<td>1.03</td>
<td>Australia (74%) Russia (16%) Tanzania (2.7%)</td>
</tr>
<tr>
<td>Lentils</td>
<td>0.71</td>
<td>0.81</td>
<td>1.26</td>
<td>Canada (90%) USA (7%) Australia (3%)</td>
</tr>
<tr>
<td>Tur</td>
<td>0.47</td>
<td>0.58</td>
<td>0.46</td>
<td>Myanmar (46%) Tanzania (18%) Mozambique (15%) Malawi (12%) Sudan (3%)</td>
</tr>
<tr>
<td>Urad/Moong</td>
<td>0.62</td>
<td>0.62</td>
<td>0.58</td>
<td>Myanmar (70%) Kenya (7%) Australia (6%) Tanzania (3%)</td>
</tr>
<tr>
<td>Beans</td>
<td>0.10</td>
<td>0.20</td>
<td>0.29</td>
<td>China (23%) Brazil (23%) Tanzania (13%) Australia (12%) Ethiopia (10%)</td>
</tr>
</tbody>
</table>

Source: Ministry of Agriculture and Farmers Welfare and Trade Tracker online
Key Trends in 2015-16

- Low Production in India
- Significant demand in India and around the world
- Demand filled by increased imports
- Price of all pulses—Highest in Years
- Low carryover stock
- Significant media attention
Government Interventions

– Impose Stocklimits
– Government Bufferstock
– Ban on Chickpea futures
– Increase in Minimum Support Price
– Arvind Subramanian Committee – Incentivize Pulse Production

MSP Rs/Quintal

<table>
<thead>
<tr>
<th>Tur</th>
<th>Gram</th>
<th>Moong</th>
<th>Urad</th>
<th>Lentils</th>
</tr>
</thead>
<tbody>
<tr>
<td>5050</td>
<td>4000</td>
<td>5225</td>
<td>5000</td>
<td>3950</td>
</tr>
</tbody>
</table>
Key Trends 2016-17

• Worldwide increase in pulse production (79 mMT)
Types of Pulses by Production Volume in India (mMT)

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Chickpea</td>
<td>8.83</td>
<td>9.53</td>
<td>7.33</td>
<td>7.17</td>
<td>9.60</td>
<td>8.7</td>
</tr>
<tr>
<td>Tur</td>
<td>3.02</td>
<td>3.17</td>
<td>2.81</td>
<td>2.60</td>
<td>3.62 (4.29)</td>
<td>4.3</td>
</tr>
<tr>
<td>Urad</td>
<td>1.90</td>
<td>1.70</td>
<td>1.96</td>
<td>2.20</td>
<td>2.15 (2.01)</td>
<td>2.7</td>
</tr>
<tr>
<td>Moong</td>
<td>1.19</td>
<td>1.61</td>
<td>1.50</td>
<td>1.59</td>
<td>1.87 (1.35)</td>
<td>1.9</td>
</tr>
<tr>
<td>Other Pulses</td>
<td>3.35</td>
<td>3.24</td>
<td>3.54</td>
<td>3.04</td>
<td>3.51 (1.06)</td>
<td>3.8</td>
</tr>
<tr>
<td>Total</td>
<td>18.34</td>
<td>19.25</td>
<td>17.15</td>
<td>16.47</td>
<td>20.75 (8.70)</td>
<td>21.4</td>
</tr>
</tbody>
</table>

**2016-17 – Targets (Kharif Estimates) Experts Opinion

Other Pulses
- Lentils – 1.0 million MT
- Peas & beans – 0.7-0.9 million MT
- Horsegram ~ 200,000 MT
- Horsegram (Khesari) ~ 300,000 MT
- Moth Bean (Matki) ~ 350,000 MT

Source: Ministry of Agriculture and Farmers Welfare
India 2016-17

- Record Kharif Production in India (8.7 mMT)
  ~60% increase over 2015-16
- Prices of Tur; Urad; Moong falls
- Rabi plantation increase by >10%
- Increase Rabi production but will Chana production meet government target (9.6 mMT)?
- Expect 21 to 22 mMT Production
- Imports will decrease from 2015-16 values but will still be around 4 mMT.
- Government Procurement and Buffer stock
Canada 2016-17

• Canada – Lentils and Peas
• Lentil production was 3.2 (2.4 mMT in 2015), a 28% increase from last year
• Peas production was 4.8 million metric tonnes (3.2 million MT in 2015), a 51% increase from last year
• Record exports of peas in Aug/Sept/Oct
• Expect Higher ending stocks for peas and lentils.
Australia 2016-17

- Australia – Chickpeas, lentils
- Chickpea production has touched 1.25 mMT (25% increase)
- Harvest/shipping of chickpeas delayed by 4 weeks.
- Demand for chickpeas from Bangladesh and Pakistan
- Lentils Production has reached record levels 500,000 MT (almost doubled from 2015-17)
Myanmar 2016-17

- Myanmar – Tur; Urad; Moong
- 6.5 mMT Production
- Export in 2016-17 is expected to be around 1.4 mMT
- Harvesting expected in - Tur-Dec/Jan; Urad-Feb/Mar.
- 70-80% exports to India
Africa

- Tur; Urad; Moong
- Africa contributes to > 50% of India’s Tur imports. Harvest in July/Aug
- 10% increase in 2016-17.
- Tanzania; Mozambique, Malawi, Kenya
Emerging Pulse Exporters

- Russia (Peas; Chickpeas)
- Ukraine; Lithuania; Estonia; Romania; Bulgaria; Germany – Yellow Peas
- Sudan (Pigeon Peas)
- Uzbekistan (Moong)
2017 and beyond

- Too early to estimate 2017 Kharif and beyond.
- Price fluctuations make it difficult for farmers to decide on sowing.
- Expect good global production to continue.
Conclusion

• 2016-17 a good year for pulse production – record harvest globally. – International Year of Pulses

• Oversupply in Global Pulses expected – India, Myanmar, Australia, Canada, USA

• In India, Imports was strong from Aug-Jan for chickpeas, yellow peas and lentils. It will taper significantly starting February.

• Prices of most pulses will be down for most part of 2017.
Thank You!

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High Commission of Canada in India
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