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Global Pulse Scenario 2016

Global Grain, Food and Feed, Pune

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Canada

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
- Total demand is about 22-23 million MT
- Imports is about 4-6 million MT

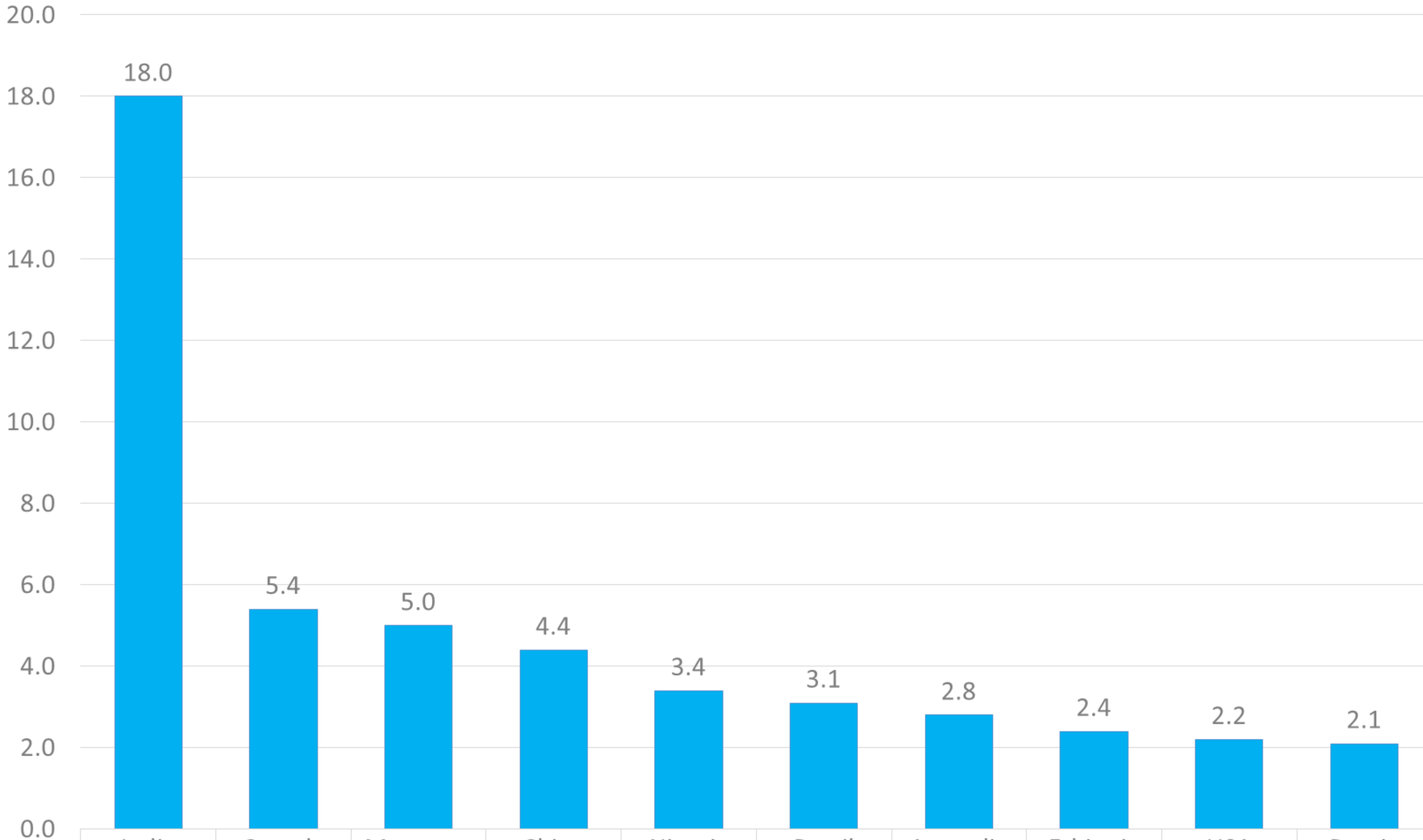
1 million = 10 lakh

mMT =million Metric Tonnes

The Canadian Trade Commissioner Service

Top 10 Pulse Producers (mMT)

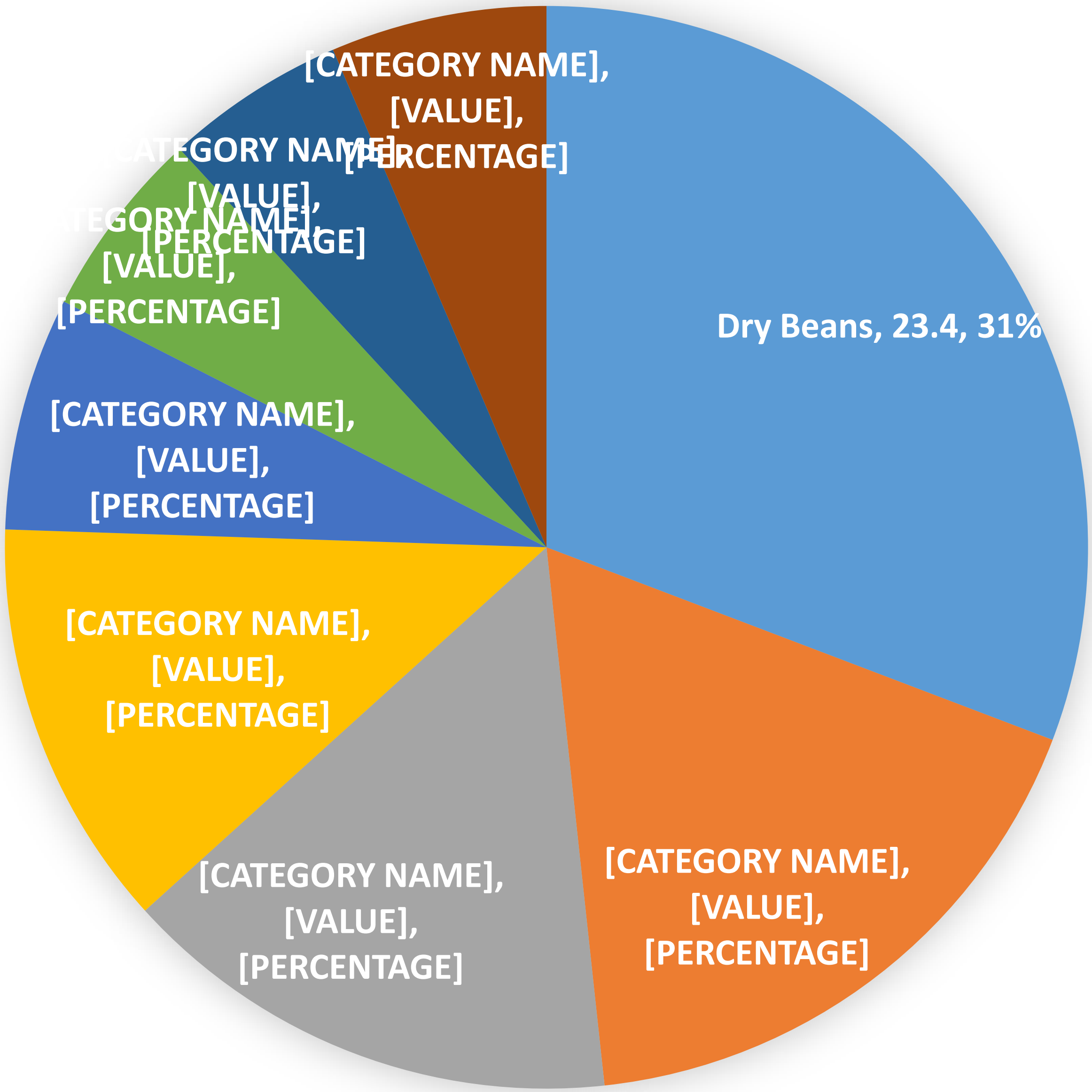
(5 year Average)



	India	Canada	Myanmar	China	Nigeria	Brazil	Australia	Ethiopia	USA	Russia
Series1	18.0	5.4	5.0	4.4	3.4	3.1	2.8	2.4	2.2	2.1

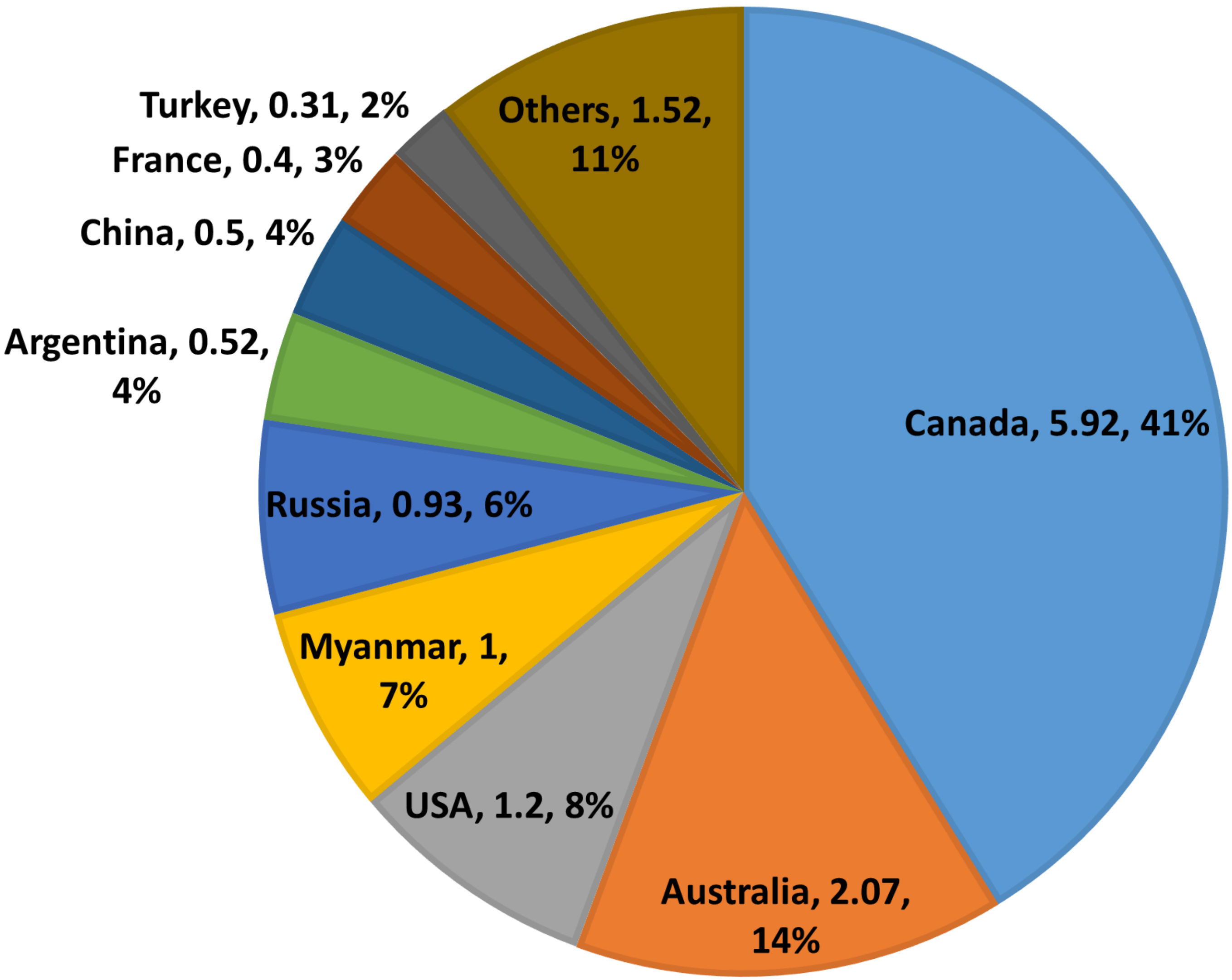
World -Type of Pulses

(mMT,% of total production)

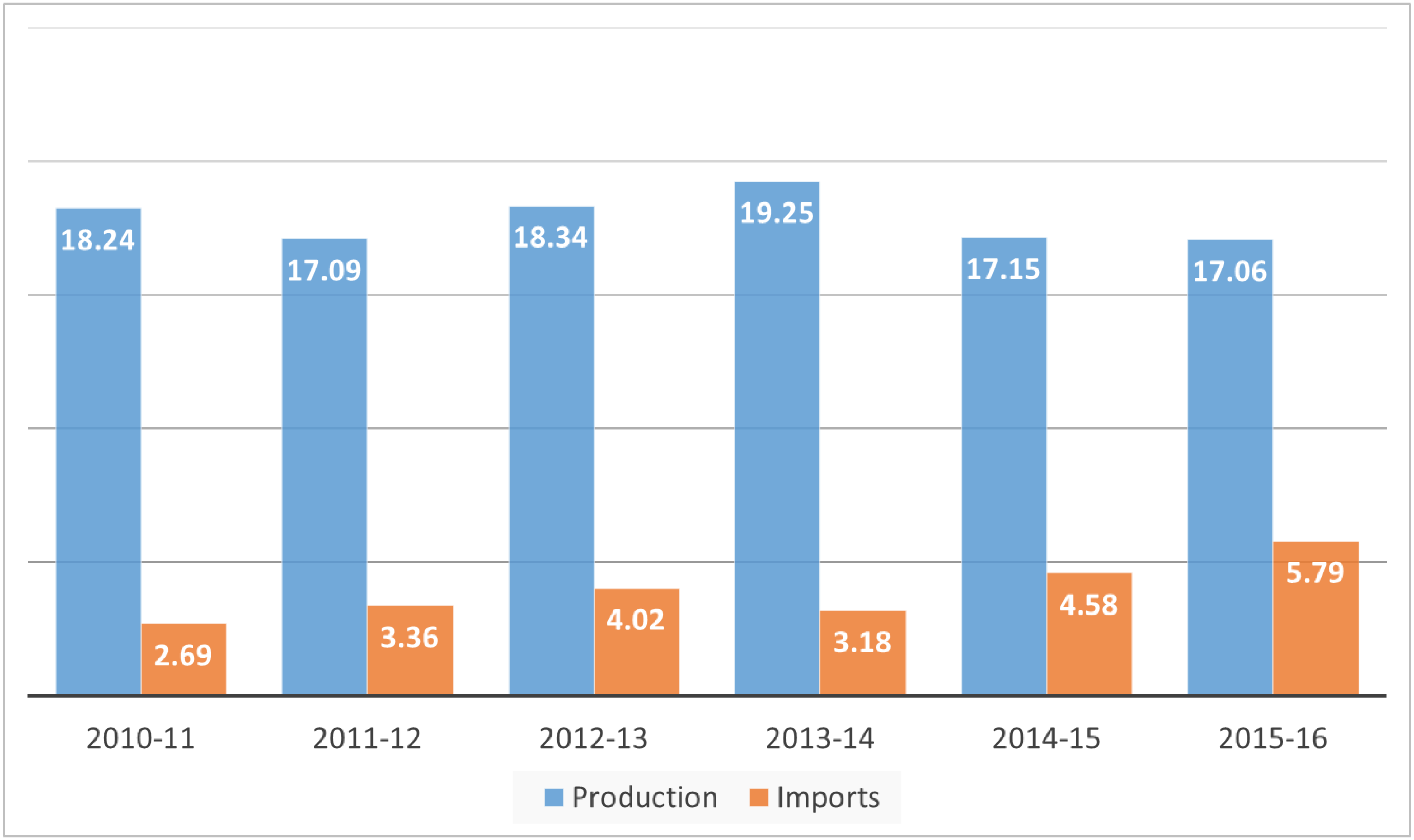


Top 10 Exporters of Pulses

(mMT, % of total exports)



India Pulse Production and Imports
(mMT)



Types of Pulses by Production Volume in India (mMT)

Pulses	2011-12	2012-13	2013-14	2014-15	2015-16
Chickpea	7.70	8.83	9.53	7.33	7.48
Tur	2.65	3.02	3.17	2.81	2.60
Urad	1.77	1.90	1.70	1.96	1.88
Moong	1.63	1.19	1.61	1.50	1.59
Other Pulses	3.33	3.35	3.24	3.54	3.51

Other Pulses

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

Imports of Pulses

Pulses	2013-14 mMT	2014-15 mMT	2015-16 mMT	Key Origins (% of total imports) – 2014-15
Peas	1.33	1.95	2.12	Canada (79%) USA (10%) Australia (4%)
Chickpeas	0.27	0.42	0.99	Australia (46%) Russia (39%)
Lentils	0.71	0.81	1.23	Canada (80%) USA (13%) Australia (7%)
Tur	0.47	0.58	0.42	Myanmar (51%) Tanzania (20%) Mozambique (15%) Malawi (8%)
Urad/Moong	0.62	0.62	0.53	Myanmar (85%) Tanzania (5%)
Beans	0.10	0.20	0.15	China (36%) Tanzania (24%) Brazil (16%) Ethiopia (12%)

Outlook - India

- Above average monsoon is expected.
- 7.5 mMT chickpea production in 2016 (~ 2.5 mMT shortage).
- Kharif: 10-15 % increase in acreage and 7.0 mMT expected (5.5 mMT in 2015), a 25-30 % increase
- Kharif plantation in June/July with expected good harvest of Tur; Urad and Moong in Oct/Nov.
- Good Monsoon may also help Rabi plantation in Nov leading to good Chickpea production in March/April 2017.

Outlook - Australia

- Australia – Chickpeas, lentils
- Chickpea area expected to increase in 2016 by 29%.
- Production estimated to be 1.2 to 1.6 mMT depending on rain. (last year production ~1.0 mMT). Harvest in Oct/Nov/Dec.
- Demand for chickpeas from Bangladesh and Pakistan
- Lentils area has increased in 2016 by 10-30%. Production estimated to be 350, 000 MT. Harvest in Sept/Oct/Nov.

Outlook - Canada

- Canada – Lentils and Peas
- Lentil area expected to increase by 35% and production is estimated to be 3.3 million metric tonnes (2.4 mMT in 2015), a 40% increase from last year
- Peas area expected to increase by 16% and production is estimated to be 4.2 million metric tonnes (3.2 million MT in 2015), a 32% increase from last year
- Harvest in Aug/Sept
- Expect Higher ending stocks for peas and lentils.

Outlook-Myanmar

- Myanmar – Tur; Urad; Moong
- As in India, low production last year – 5.5 mMT as opposed to average of 6 mMT
- Export in 2016-17 is expected to be around1.4 mMT from 1.2 in 2015-16.
- Harvesting expected in - Tur-Dec/Jan; Urad-Feb/Mar.
- 70% exports to India

Outlook - Africa

- Tur; Urad; Moong
- Africa contributed to > 50% of India’s Tur imports in 2015. Harvest in July/Aug
- Tanzania; Mozambique, Malawi, Kenya
- No clear data on expectations for 2016-17. However, average production and exports are expected.

Conclusion

- 2016-17 is expected to be a good year for pulse production – record harvest expected globally. – IYOP
- Oct/Nov/Dec – Oversupply in Global Pulses expected – India, Myanmar, Australia, Canada, USA
- In India, Imports will be strong from Oct-Feb for chickpeas, yellow peas and lentils.
- Prices will go down by Oct– but by how much is unpredictable

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Thank You!

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