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
Top 10 Pulse Producers (mMT) (5 year Average)
World - Type of Pulses
(mMT, % of total production)

Dry Beans, 23.4, 31%

[CATEGORY NAME], [VALUE], [PERCENTAGE]

[CATEGORY NAME], [VALUE], [PERCENTAGE]

[CATEGORY NAME], [VALUE], [PERCENTAGE]

[CATEGORY NAME], [VALUE], [PERCENTAGE]

[CATEGORY NAME], [VALUE], [PERCENTAGE]

[CATEGORY NAME], [VALUE], [PERCENTAGE]
Top 10 Exporters of Pulses
(mMT, % of total exports)

- **Canada, 5.92, 41%**
- **Australia, 2.07, 14%**
- **Germany, 1.2, 8%**
- **France, 0.4, 3%**
- **Russia, 0.93, 6%**
- **Argentina, 0.52, 4%**
- **Myanmar, 1, 7%**
- **Others, 1.52, 11%**
- **Turkey, 0.31, 2%**
- **China, 0.5, 4%**
# Types of Pulses by Production Volume in India (mMT)

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Chickpea</td>
<td>7.70</td>
<td>8.83</td>
<td>9.53</td>
<td>7.33</td>
<td>7.48</td>
</tr>
<tr>
<td>Tur</td>
<td>2.65</td>
<td>3.02</td>
<td>3.17</td>
<td>2.81</td>
<td>2.60</td>
</tr>
<tr>
<td>Urad</td>
<td>1.77</td>
<td>1.90</td>
<td>1.70</td>
<td>1.96</td>
<td>1.88</td>
</tr>
<tr>
<td>Moong</td>
<td>1.63</td>
<td>1.19</td>
<td>1.61</td>
<td>1.50</td>
<td>1.59</td>
</tr>
<tr>
<td>Other Pulses</td>
<td>3.33</td>
<td>3.35</td>
<td>3.24</td>
<td>3.54</td>
<td>3.51</td>
</tr>
</tbody>
</table>

## 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
## 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) – 2014-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peas</td>
<td>1.33</td>
<td>1.95</td>
<td>2.12</td>
<td>Canada (79%) USA (10%) Australia (4%)</td>
</tr>
<tr>
<td>Chickpeas</td>
<td>0.27</td>
<td>0.42</td>
<td>0.99</td>
<td>Australia (46%) Russia (39%)</td>
</tr>
<tr>
<td>Lentils</td>
<td>0.71</td>
<td>0.81</td>
<td>1.23</td>
<td>Canada (80%) USA (13%) Australia (7%)</td>
</tr>
<tr>
<td>Tur</td>
<td>0.47</td>
<td>0.58</td>
<td>0.42</td>
<td>Myanmar (51%) Tanzania (20%) Mozambique (15%) Malawi (8%)</td>
</tr>
<tr>
<td>Urad/Moong</td>
<td>0.62</td>
<td>0.62</td>
<td>0.53</td>
<td>Myanmar (85%) Tanzania (5%)</td>
</tr>
<tr>
<td>Beans</td>
<td>0.10</td>
<td>0.20</td>
<td>0.15</td>
<td>China (36%) Tanzania (24%) Brazil (16%) Ethiopia (12%)</td>
</tr>
</tbody>
</table>
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.
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 around 1.4 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
Thank You!

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