

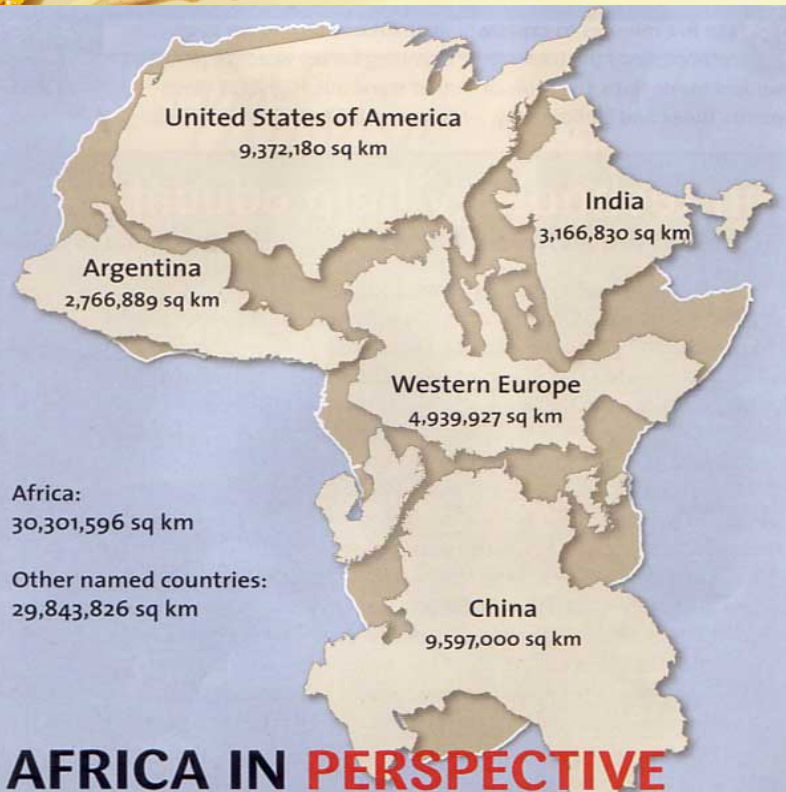


Pulses from Africa

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Africa- In Perspective



People often underestimate quite how large Africa is, so we figured we'd put it in perspective by transposing as many of the world's other countries over it as we could. As you can see, Africa is larger than China, the USA, Western Europe, India, Argentina and the British Isles... combined!

Source: The Times Atlas

AGRICULTURE IN AFRICA



16%

of Africa's land is arable, the largest share in the world



79%

of Africa's arable land remains uncultivated



7 OF THE 17

countries that had the highest agricultural growth from 2000-2008 are in Africa



17 OF THE 20

countries whose economies relied most on agriculture* in 2010 are in Africa

* According to percentage of GDP.
Source: Ibrahim Forum 2011



#AFRICA2013

Knowing Africa

Agriculture In Africa

THE POTENTIAL

50 percent of the world's remaining uncultivated land is in Africa

450m hectares of this land are not forested, protected, or densely populated



The current value of food markets on the continent is estimated at \$313bn

By 2030, the World Bank estimates that Africa's agriculture sector could constitute a \$1trn opportunity

THE SECTOR

65%

of Africa's labour force is employed in agriculture, which accounts for 32 percent of GDP



Smallholder farmers provide up to 80 percent of food produced in sub-Saharan Africa

Percentage of cultivated land that is irrigated

6%

Irrigation alone could increase output by up to

50%

Renewable water usage

Africa 2%

World average 5%

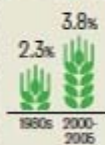
MOMENTUM

Private investment is up but has become a contentious issue, with frequent accusations of "land grabs" by foreign governments and firms



34m ha

Africa's share of globally tracked land deals totaling 58m ha since 2000



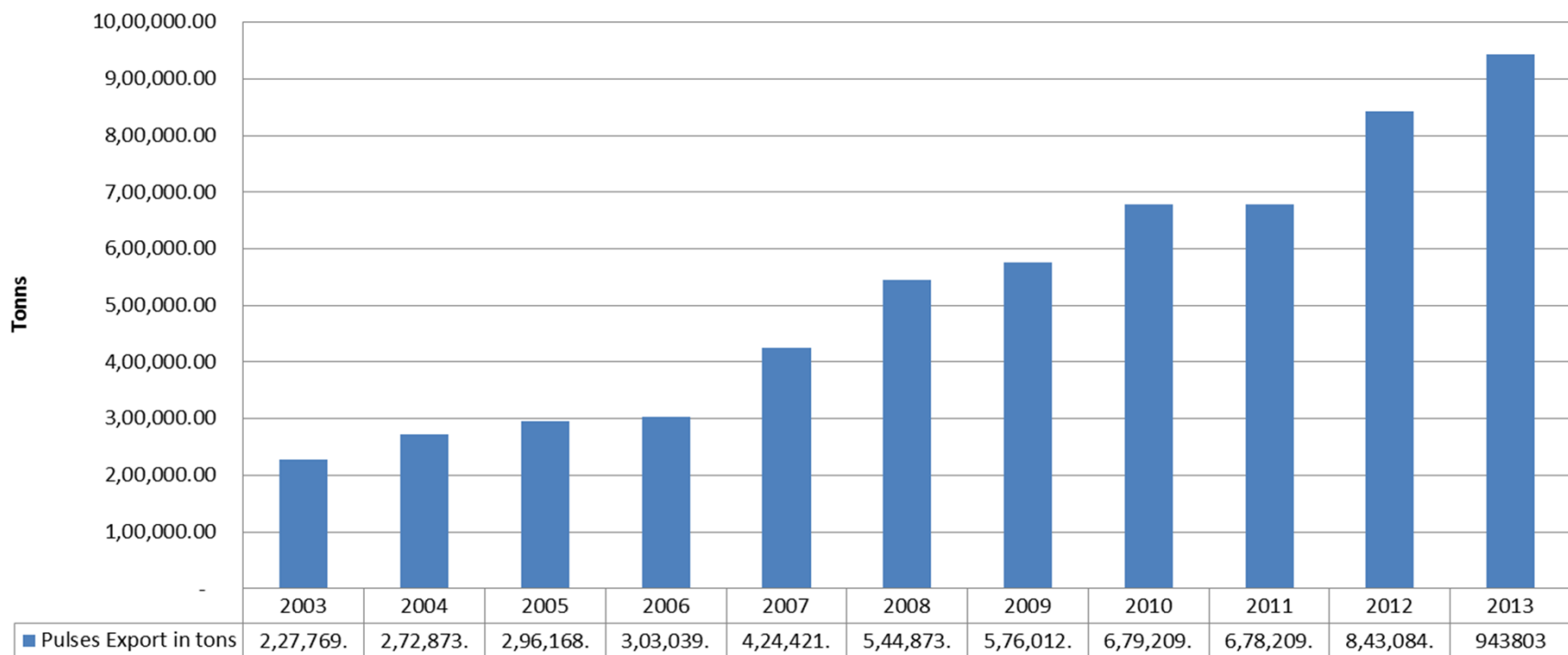
Agricultural GDP growth in sub-Saharan Africa has accelerated



In 2003, 53 African heads of state agreed to allocate at least 10 percent of their national budgets to investment in agriculture and livestock by July 2008. Only 7 have reached this target

Pulses Export from Africa

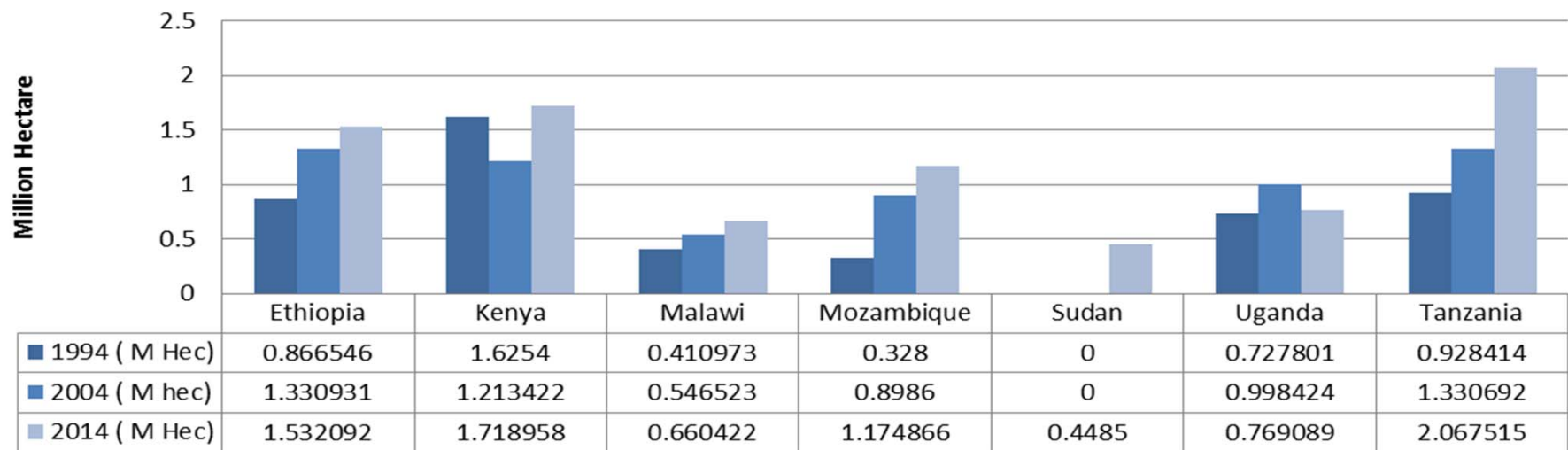
Pulses Export from Africa



Area Under Cultivation

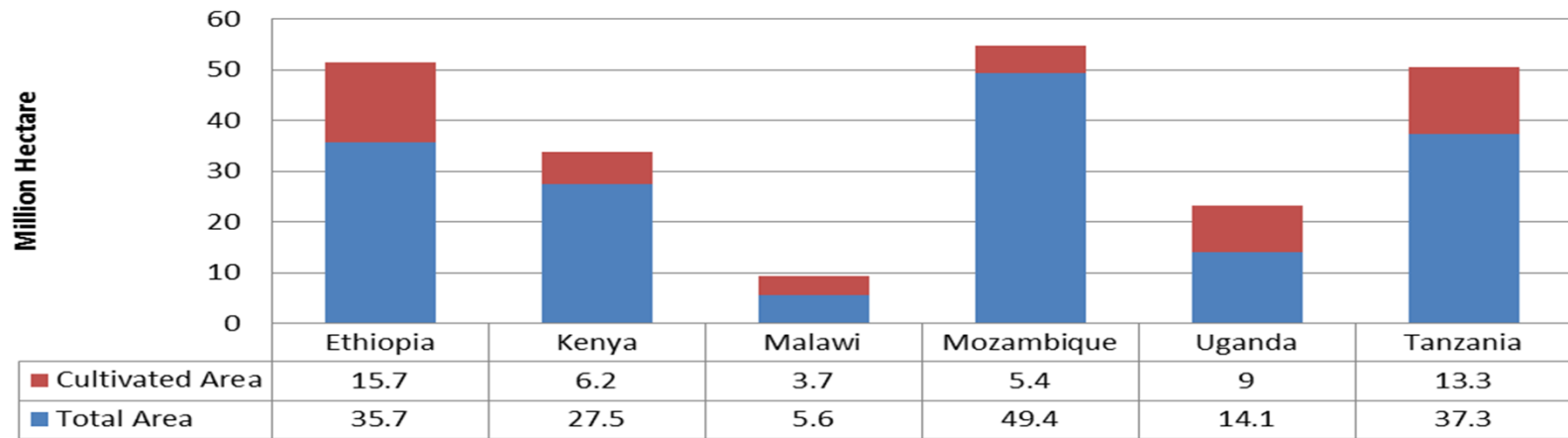
- Pulses are grown majorly in the Eastern Africa
- Almost all countries have shown steep rise in area under cultivation
- Fastest growth is registered in Tanzania
- New kids on the Block- Sudan
- Countries looking for entering this market- Nigeria, Ghana

Area Under Cultivation- Growth

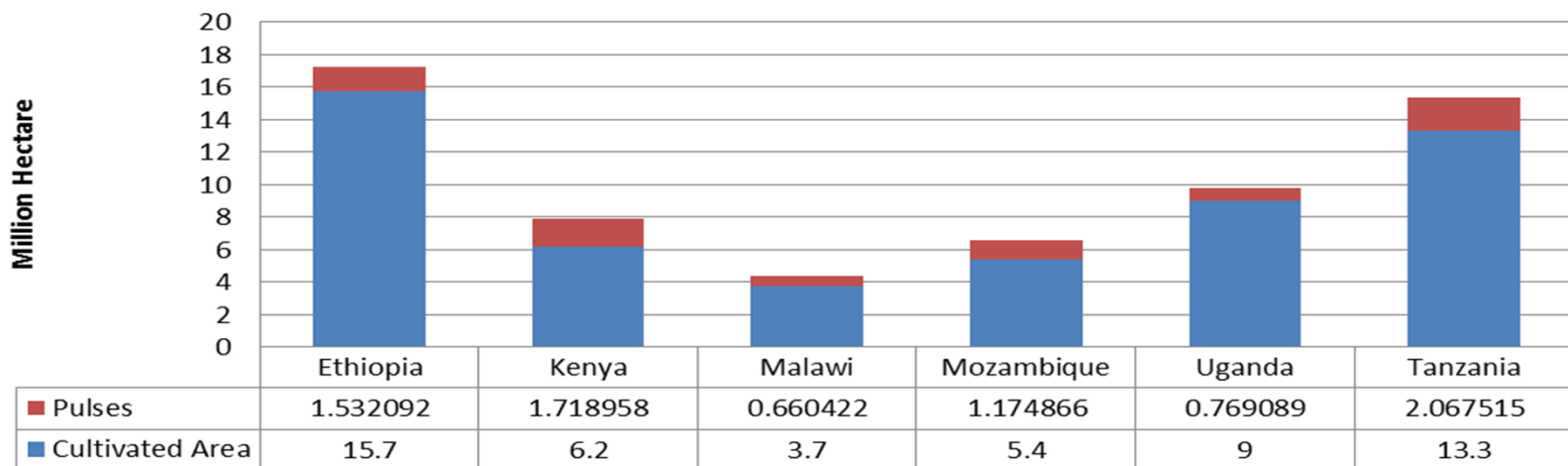


Pulses is still under exploited sector

Potential of Growth- Available Vs Cultivated Area



Cultivated Area vs Pulses Area





India and Africa- Pulses Trade

- Major Pulses grown in Africa-
 - Pigeon Peas (Tur/ Arhar)
 - Yellow Gram (Desi Chana)
 - Green Mung Beans
 - Beans like Red Kidney Beans, Black Eyed beans, haricot Beans
 - Pease- Cow peas

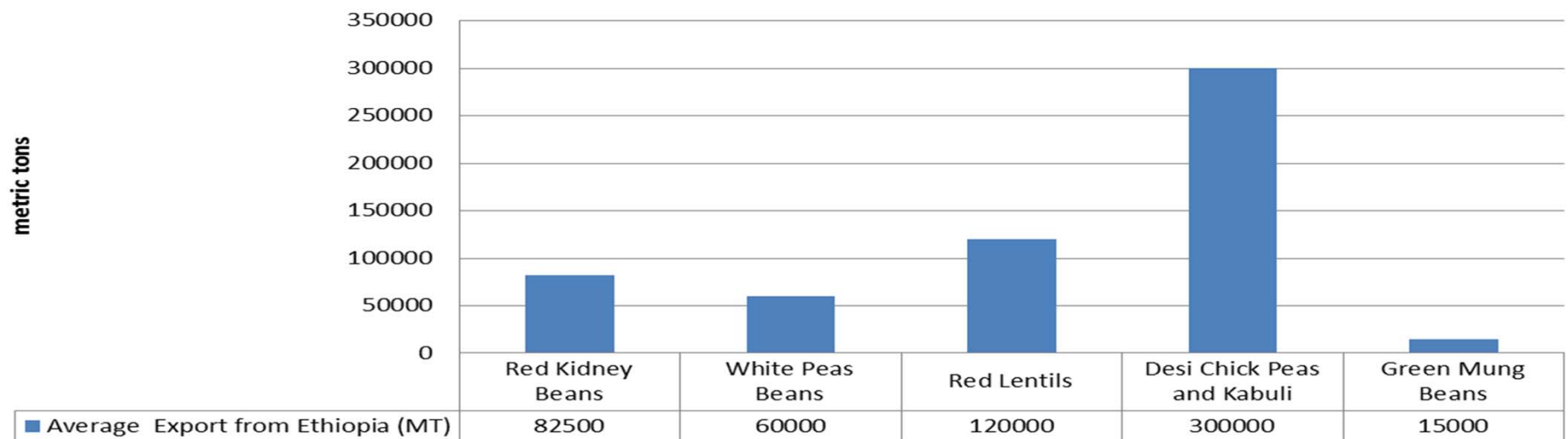
Pulses	Imports From
Chickpeas (Garbanzos)	Australia (61.43%), Russia (22.77%), Tanzania (7.84%) , Myanmar (6.40%), USA (0.47%)
Moong/Urad	Myanmar (82.83%), Tanzania (4.23%) , Kenya (3.55%) , Australia (3.05%), Mozambique (1.61%)
Lentils (Mosur)	Canada (79.33%), USA (10.70%), Australia (9.85%), Uzbekistan (0.01%), Turkey (0.01%)
Pigeon Peas (Tur)	Myanmar (51.37%), Tanzania (27.44%) , Mozambique (14.69%) , Malawi (4.53%) , Kenya (1.79%)

Ethiopia

- **Ethiopia-** A country strategically located within the horn of Africa, is one of the fastest growing countries.
- **Pulses** is an important crop group and occupies approximately 13% of cultivated land.
- **Major Pulses** grown in Ethiopia – Lentils, Masoor, Green Mung, Chick Peas and Pigeon Peas
- Last Year the Average price of Chick peas was around 600 to 700 USD FOB Djibouti



Average Export from Ethiopia (MT)

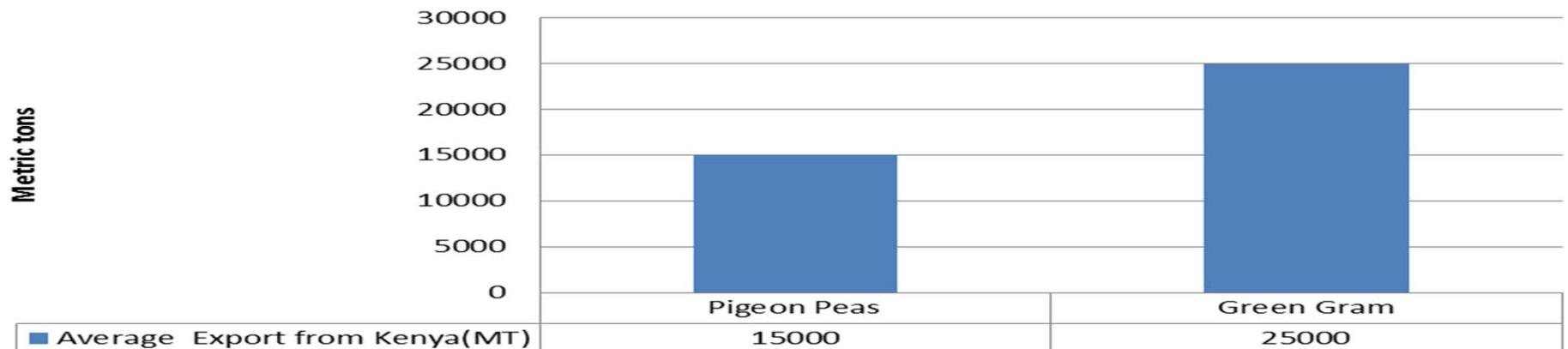


Kenya

- Pulses accounts for approximately 11% of the total daily-calorie requirements, only ranking second to cereals
- Among the pulses, pigeon pea ranks second to beans, which is among the most important staple crops in the country, with critical relevance to national food security equation.
- Last year Average price of Pigeon Peas was about 570 USD per ton



Average Export from Kenya(MT)

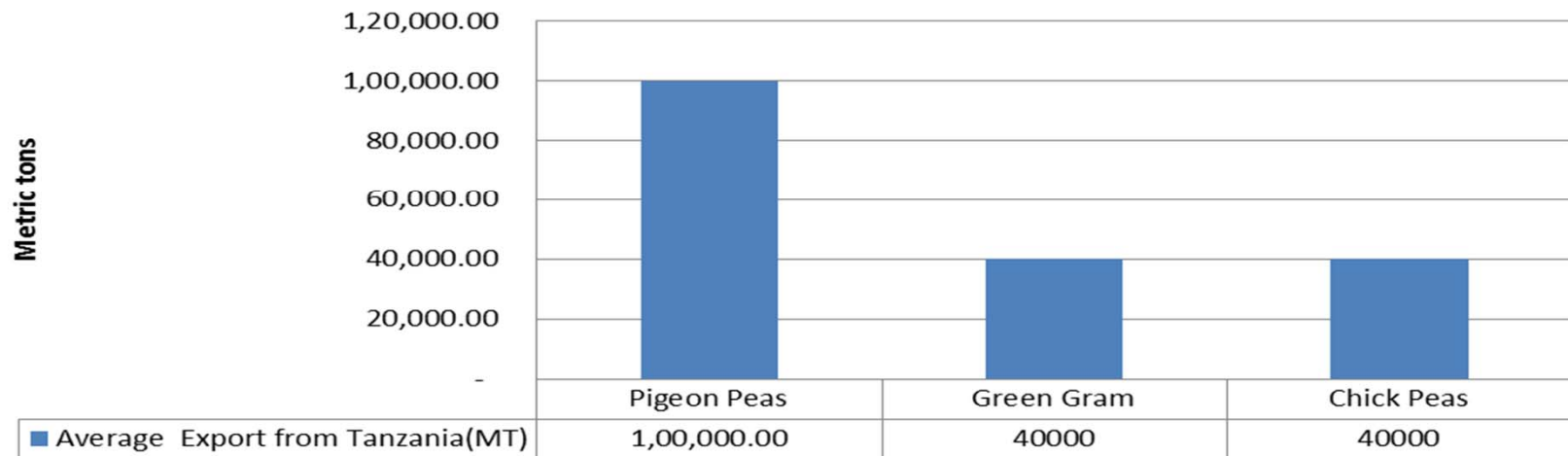


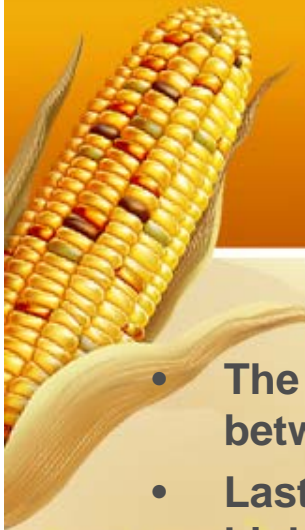
Tanzania

- One of the major exporter of Pigeon peas to India is Tanzania. It exports both varieties (*Arusha* and *Mutwara*).
- Both these varieties are considered the best in Africa by the importers in India, primarily due to their purity of color.
- Export of Tanzania to India is increasing significantly in recent years.
- Last year the prices ranged below 575 USD per ton



Average Export from Tanzania(MT)



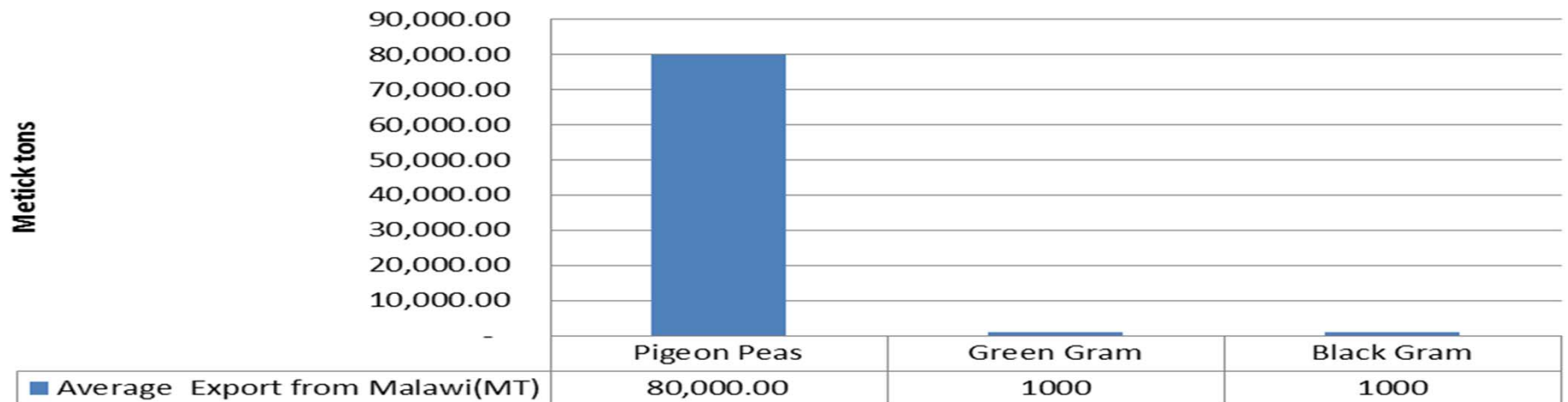


Malawi

- The average export of pigeon peas from Malawi is between 80 thousand to one lakh tones.
- Last year the production was up and was about 15-20% higher than usual.
- Major issues in Malawi is the logistics challenge and access to the market
- Opportunity to work with government parastatal ADMARC



Average Export from Malawi(MT)

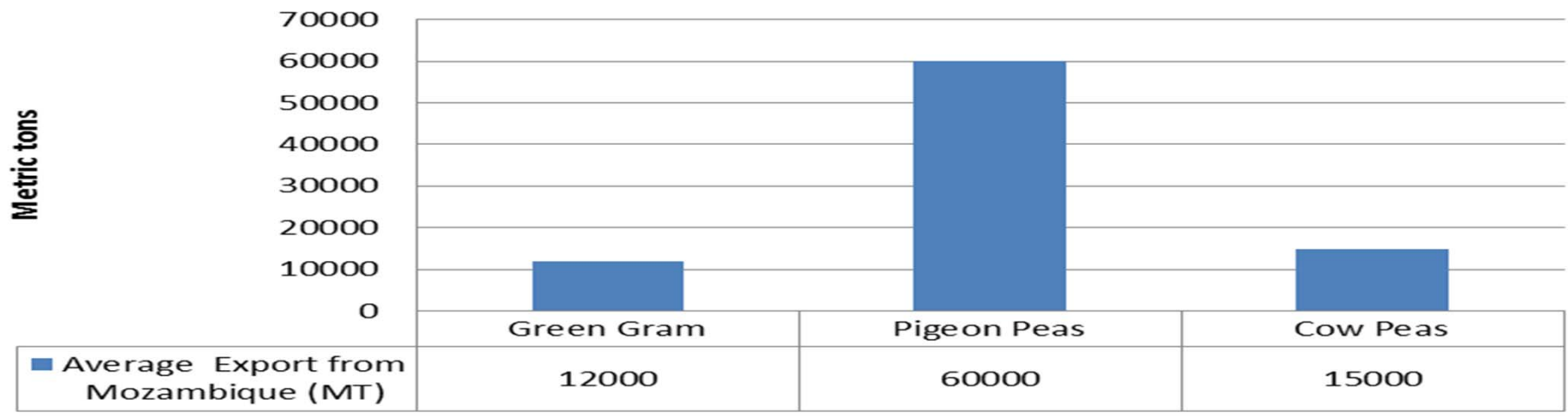


Mozambique

- One of the important producer in East – Southern Africa.
- Major boost to the sector after India signed a agreement for pigeon pulses.
- Major pulses produced are Cow Peas, Pigeon Peas, green mung beans



Average Export from Mozambique (MT)



Sudan

- New origin in the market.
- Major variety is Pigeon peas.
- Quality is being appreciated by the market in India
- Average Exports has been around 45,000 tons

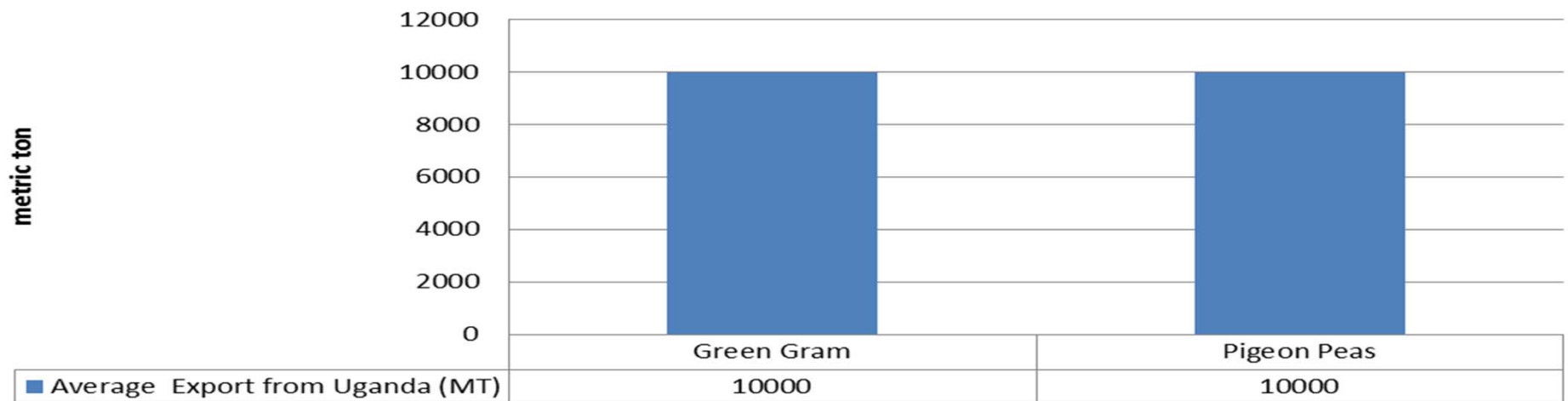


Uganda

- Neighbor with Kenya and Tanzania.
- Has been a player in pulses exports.
- Major pulses produced are Pigeon Peas, green mung beans



Average Export from Uganda (MT)





New Developments

- Govt of India MOU with African countries to expand- Promotion of import;
- Pulses Export Policy developed in Kenya, Tanzania, Ethiopia under the SITA program of the International Trade Centre (Geneva)
- Investment support by India to Kenya for-
 - **Agricultural Mechanisation (100 Million)** mainly to be used for pulses
 - **Processing Facilities for pulses (30 Million) ; Some dall mills to be set up**
- Value chain level interventions introduced in-
 - **Kenya has got new varieties that will give 2-3 crops in a year**
 - **Ethiopia is working in developing Desi Chana variety for India**



But Africa is not a easy terrain

- Pulses is not a priority crop for most of the farmers in Africa
- Market access for importers is not easy
- Issues with quality and contract performances
- Regulations like the Fumigation challenge
- Now with Import duty, the market may be in confusion

The background of the slide is a vibrant autumn-themed illustration. It features a golden-yellow sky at the top, a field of tall, golden wheat in the foreground, and a line of trees in the middle ground. In the upper left corner, a large, detailed ear of corn with yellow and red kernels is shown, partially covered by a brown husk. The word "Thanks" is written in a bold, red, sans-serif font, positioned in the lower-left area of the wheat field.

Thanks