

IPGA Pulses Conclave 2016

Jaipur, India

# USA Pulse Update

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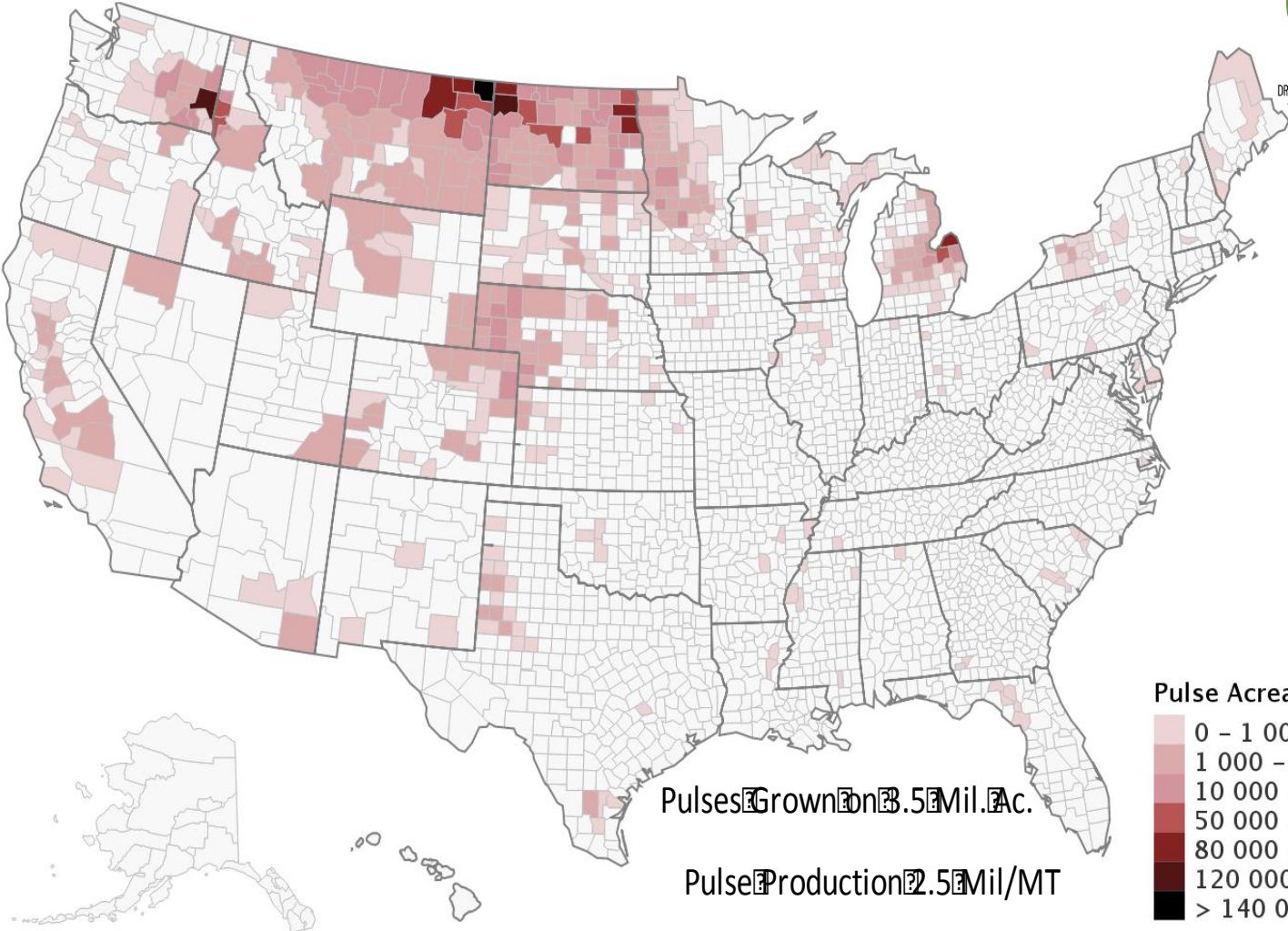
# USA Pulse Growing Regions by County, 2015

Source: USDA/FSA

**PULSES**



DRY PEAS, BEANS, LENTILS & CHICKPEAS  
THE FUTURE OF FOOD



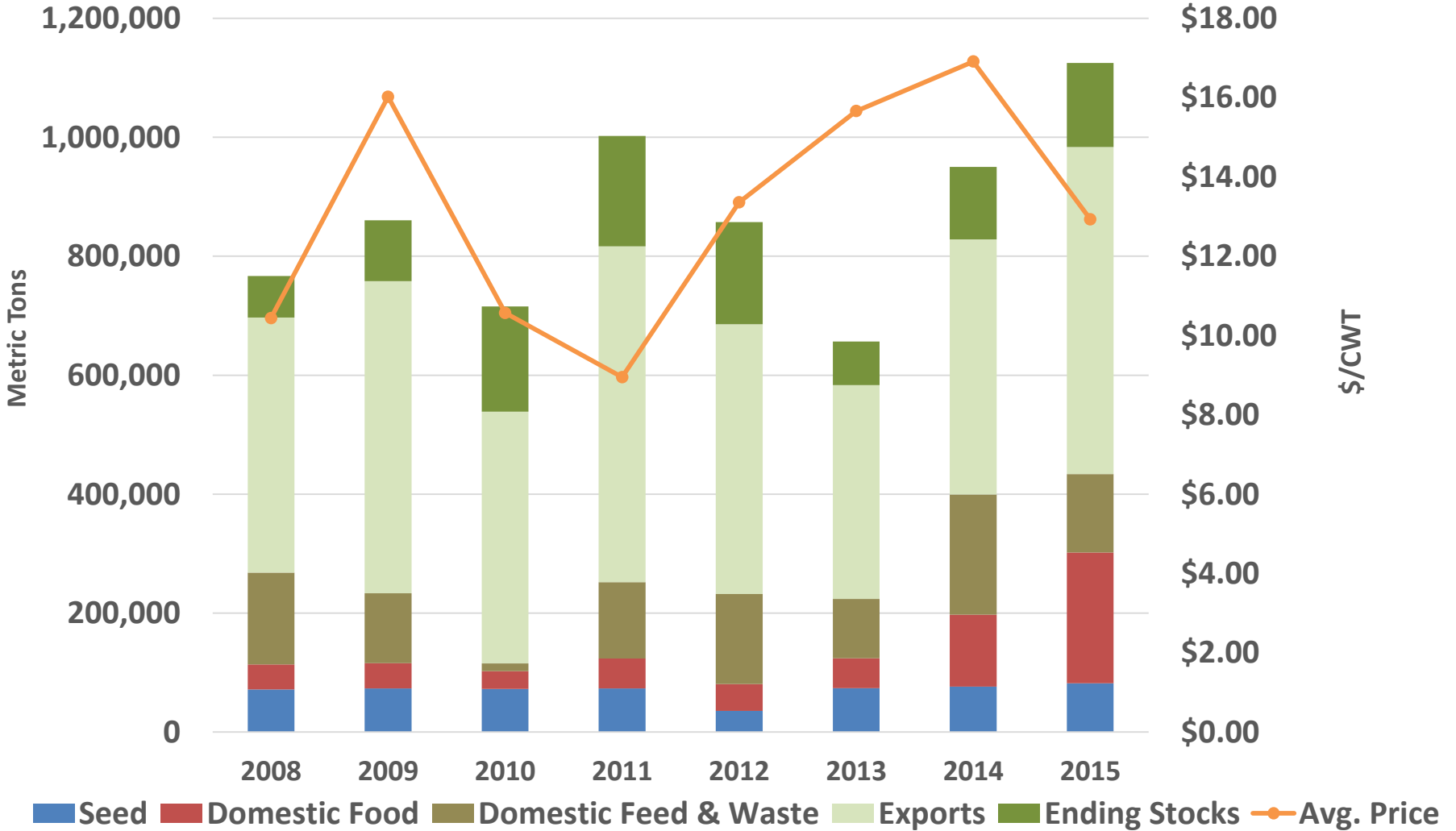
### Pulse Acreage

- 0 - 1 000
- 1 000 - 10 000
- 10 000 - 50 000
- 50 000 - 80 000
- 80 000 - 120 000
- 120 000 - 140 000
- > 140 000

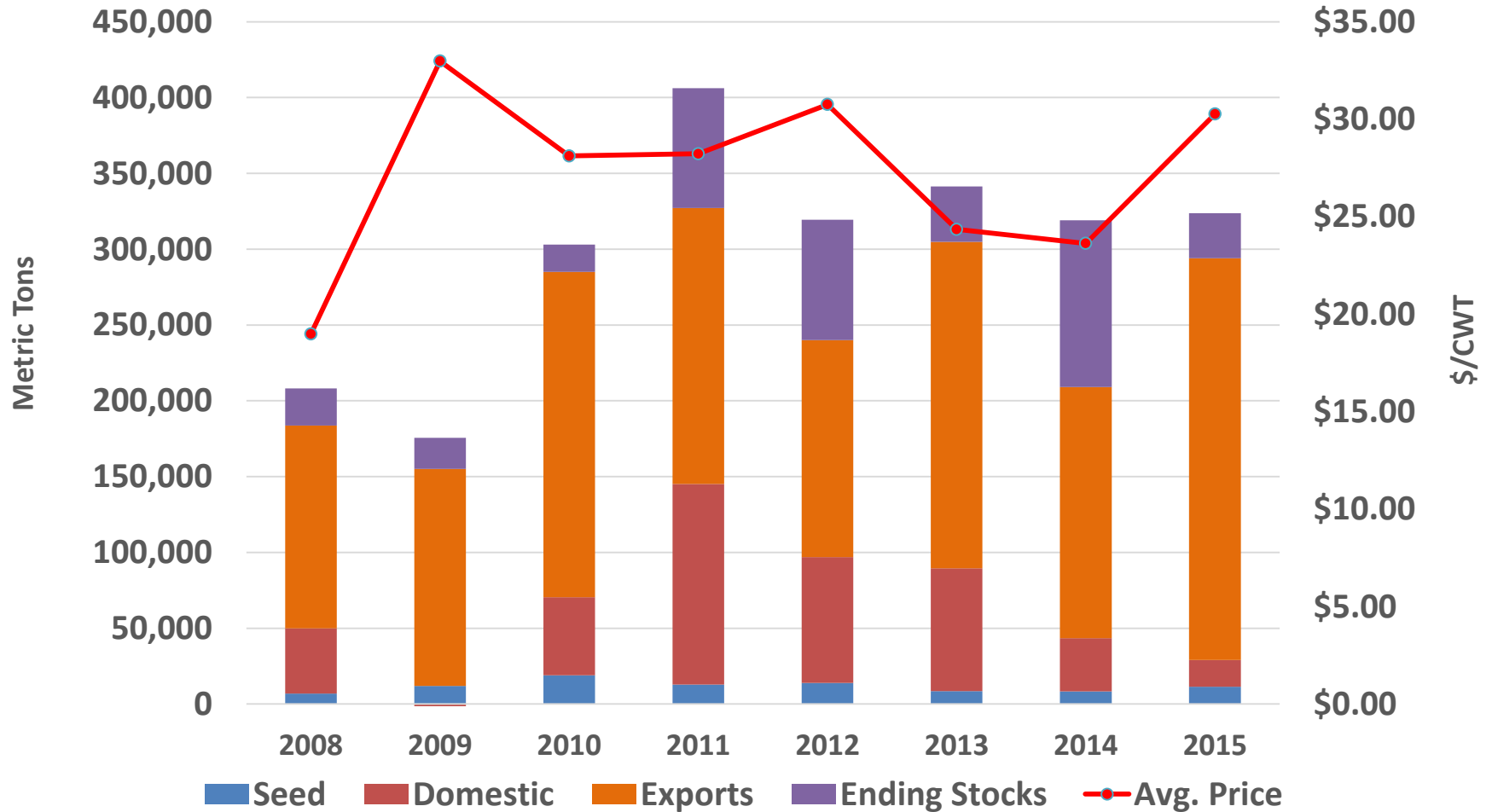
Pulses Grown on 3.5 Mil. Ac.

Pulse Production 2.5 Mil./MT

# USA Dry Peas Supply & Demand Estimates

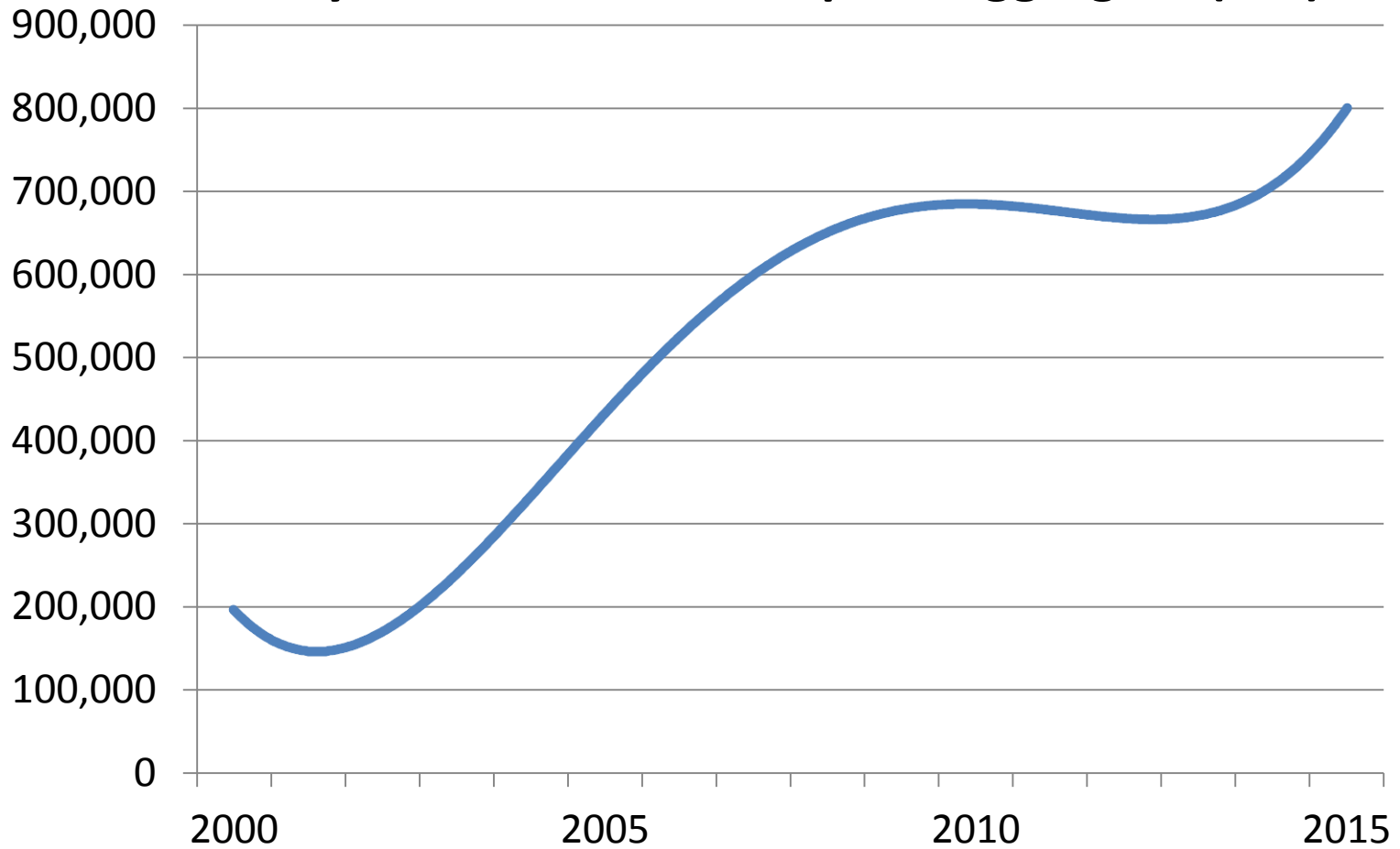


# USA Lentils Supply & Demand Estimates

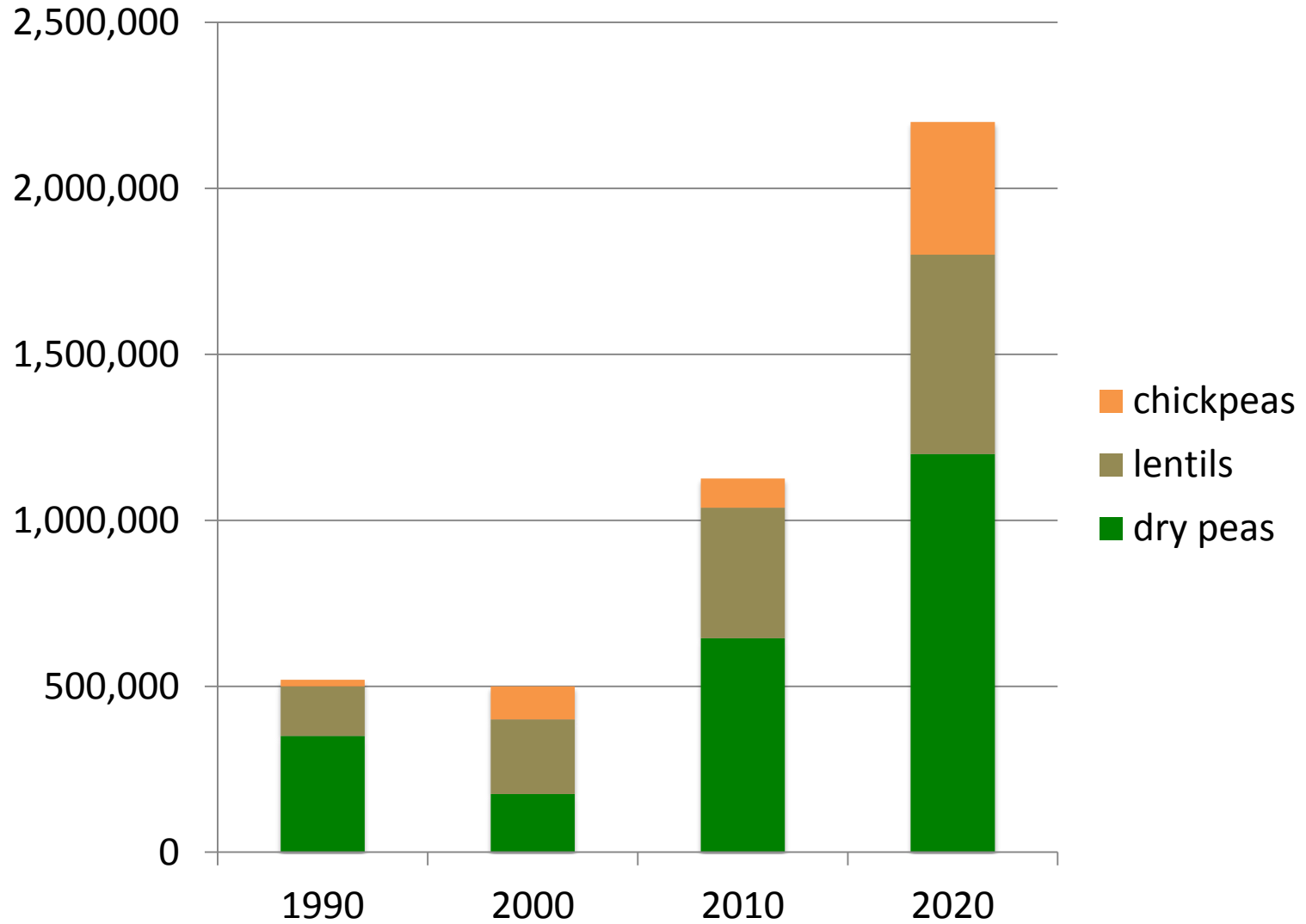


# US EXPORTS 2000-2015

## Dry Peas, Lentils, Chickpeas Aggregate (MT)



# US Pulse Production Projection (MT)



## US Dry Pea Exports By Country

2000		2010		2015	
Top 15	(MT)	Top 15	(MT)	Top 15	(MT)
CANADA	10,237	<b>INDIA</b>	<b>166,253</b>	<b>INDIA</b>	<b>156,464</b>
PHILIPPINES	9,035	CHINA	56,905	CHINA	45,200
PERU	7,031	PAKISTAN	43,880	ETHIOPIA	41,077
TANZANIA	7,011	CANADA	33,679	CANADA	26,380
<b>INDIA</b>	<b>6,623</b>	ETHIOPIA	27,131	DJIBOUTI	22,366
RUSSIA	6,472	PHILIPPINES	24,488	PERU	16,077
MEXICO	5,317	KENYA	22,214	MEXICO	15,246
SPAIN	3,248	SOUTH AFRICA	12,670	PHILIPPINES	14,716
ANGOLA	2,977	MEXICO	11,667	KENYA	12,614
KENYA	2,548	PERU	10,539	TAIWAN	9,944
TAIWAN	2,270	EGYPT	9,937	SRI LANKA	7,397
HUNGARY	1,910	INDONESIA	8,708	SOUTH AFRICA	6,560
S KOREA	1,706	DJIBOUTI	8,133	SOMALIA	5,713
RWANDA	1,668	HAITI	7,878	COLOMBIA	5,424
ITALY	1,634	TAIWAN	6,448	BENIN	3,608
Other Countries	20,233	Other Countries	69,872	Other Countries	48,302
<b>Total Exports</b>	<b>89,921</b>	<b>Total Exports</b>	<b>520,402</b>	<b>Total Exports</b>	<b>437,094</b>

## U.S. Lentil Exports By Country

2000		2010		2015	
Top 15	(MT)	Top 15	(MT)	Top 15	(MT)
SPAIN	11,927	<b>INDIA</b>	<b>43,294</b>	<b>INDIA</b>	<b>95,716</b>
PERU	8,903	SPAIN	26,926	SPAIN	32,069
RUSSIA	6,308	CANADA	19,218	CANADA	15,575
MEXICO	4,761	UAE	12,833	SUDAN	14,464
HAITI	4,369	PERU	10,988	MEXICO	13,209
CANADA	3,103	TURKEY	10,468	PERU	12,977
<b>INDIA</b>	<b>2,993</b>	SUDAN	10,051	ITALY	9,524
SIERRA LEONE	2,718	SRI LANKA	9,232	UAE	7,032
ITALY	2,595	PAKISTAN	8,387	COLOMBIA	6,136
BOLIVIA	2,297	MEXICO	7,234	DJIBOUTI	5,852
PAKISTAN	2,098	HAITI	5,202	TURKEY	5,326
KENYA	1,968	COLOMBIA	4,857	BELGIUM	4,400
SUDAN	1,574	ETHIOPIA	4,588	SRI LANKA	3,469
GREECE	1,408	ALGERIA	4,199	PAKISTAN	3,224
ALGERIA	864	ITALY	3,877	GREECE	2,907
Other Countries	8,968	Other Countries	49,880	Other Countries	22,292
<b>Total Exports</b>	<b>77,937</b>	<b>Total Exports</b>	<b>209,033</b>	<b>TOTAL Exports</b>	<b>254,170</b>

Source: USDA/FAS database SEP-AUG



## US Chickpea Exports By Country

2000		2010		2015	
Top 15	(MT)	Top 15	(MT)	Top 15	(MT)
COLOMBIA	1,003	SPAIN	15,268	SPAIN	9,937
CANADA	352	TURKEY	9,968	ITALY	4,672
JAPAN	247	<b>INDIA</b>	<b>7,515</b>	<b>INDIA</b>	<b>4,604</b>
PHILIPPINES	204	ITALY	3,006	PAKISTAN	3,295
ITALY	159	LEBANON	2,404	ISRAEL	2,664
MEXICO	142	PORTUGAL	2,121	CANADA	2,424
GERMANY	139	PAKISTAN	2,330	LEBANON	2,065
SPAIN	127	COLOMBIA	1,622	TURKEY	1,843
BELIZE	97	CANADA	1,752	ALGERIA	1,718
COSTA RICA	82	UAE	1,232	PORTUGAL	1,623
NEW ZEALAND	81	ALGERIA	1,628	JAPAN	816
PANAMA	66	JAPAN	769	UK	780
<b>INDIA</b>	<b>61</b>	PERU	716	KOREA, SOUTH	696
TRINIDAD	41	NEW ZEALAND	425	PHILIPPINES	610
SWITZERLAND	40	PHILIPPINES	505	TAIWAN	539
Other Countries	276	Other Countries	3,261	Other Countries	3,705
<b>TOTAL Exports</b>	<b>3,115</b>	<b>Total Exports</b>	<b>54,522</b>	<b>Total Exports</b>	<b>41,992</b>

<b>DRY PEA SUPPLY/DEMAND</b>	<b>12 MOS JUNE 2014 - MAY 2015</b>	<b>12 MOS (est) JUNE 2015 – MAY 2016</b>
<b>SUPPLY</b>		
<b>Carry In 1 JUNE</b>	<b>112,000</b>	<b>141,432</b>
<b>Harvest Volume</b>	<b>778,145</b>	<b>829,311</b>
<b>Imports</b>	<b>232,145</b>	<b>125,000</b>
<b>Total US Supply</b>	<b>1,122,290</b>	<b>1,095,653</b>
<b>DISAPPEARANCE</b>		
<b>Exports</b>	<b>520,491</b>	<b>430,000</b>
<b>domestic food</b>	<b>267,312</b>	<b>340,000</b>
<b>domestic feed/waste</b>	<b>111,000</b>	<b>100,000</b>
<b>Total Domestic, ex seed</b>	<b>378,312</b>	<b>440,000</b>
<b>seed used</b>	<b>82,055</b>	<b>90,000</b>
<b>Total usage</b>	<b>980,858</b>	<b>960,000</b>
<b>Stocks-on-Hand (SOH)</b>	<b>141,432</b>	<b>135,653</b>
<b>SOH as % of US Supply</b>	<b>28.7%</b>	<b>12.38%</b>

<b>LENTIL SUPPLY/DEMAND</b>	<b>12 MOS JUNE 2014 - MAY 2015</b>	<b>12 MOS (est) JUNE 2015 – MAY 2016</b>
<b>SUPPLY</b>		
<b>Carry In 1 JUNE</b>	<b>120,100</b>	<b>23,722</b>
<b>Harvest Volume</b>	<b>152,726</b>	<b>239,318</b>
<b>Imports</b>	<b>49,482</b>	<b>45,000</b>
<b>Total US Supply</b>	<b>322,308</b>	<b>308,040</b>
<b>DISAPPEARANCE</b>		
<b>Exports</b>	<b>267,471</b>	<b>250,000</b>
<b>Total Domestic, ex seed</b>	<b>17,765</b>	<b>18,000</b>
<b>seed used</b>	<b>11,350</b>	<b>14,000</b>
<b>Total usage</b>	<b>296,586</b>	<b>282,000</b>
<b>Stocks-on-Hand (SOH)</b>	<b>23,722</b>	<b>26,040</b>
<b>SOH as % of US Supply</b>	<b>7.36%</b>	<b>8.45%</b>

<b>CHICKPEA SUPPLY/DEMAND</b>	<b>12 MOS JUNE 2014 - MAY 2015</b>	<b>12 MOS (est) JUNE 2015 – MAY 2016</b>
<b>SUPPLY</b>		
<b>Carry In 1 JUNE</b>	<b>31,000</b>	<b>34,564</b>
<b>Harvest Volume</b>	<b>127,370</b>	<b>114,445</b>
<b>Imports</b>	<b>37,512</b>	<b>45,000</b>
<b>Total US Supply</b>	<b>195,882</b>	<b>194,009</b>
<b>DISAPPEARANCE</b>		
<b>Exports</b>	<b>45,076</b>	<b>42,000</b>
<b>Total Domestic, ex seed</b>	<b>105,552</b>	<b>125,000</b>
<b>seed used</b>	<b>10,720</b>	<b>12,500</b>
<b>Total usage</b>	<b>161,318</b>	<b>179,500</b>
<b>Stocks-on-Hand (SOH)</b>	<b>34,564</b>	<b>14,509</b>
<b>SOH as % of US Supply</b>	<b>17.64%</b>	<b>7.48%</b>

*Thank you.*