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WELCOME





Many Issues Facing Pulses Sector

- Conferences such as The Pulses Conclave help in facilitating dialog the issues facing the global pulses sector
 - Global oversupply and non-tariff trade barriers
 - Price volatility
 - Emerging players in production competing for a piece of global pulse trade
 - Environment, sustainable agriculture, food crisis, water shortages
 - Feeding a growing population





Pulse Sector Changing Dynamics

- Middle class is growing rapidly in India and other key consumption markets shifting dynamics of pulses supply
- Governments in all regions want to ensure smooth and profitable trade flows, but this cannot come at the expense of food security, availability of food in import markets nor at the expense of production and processing from export markets

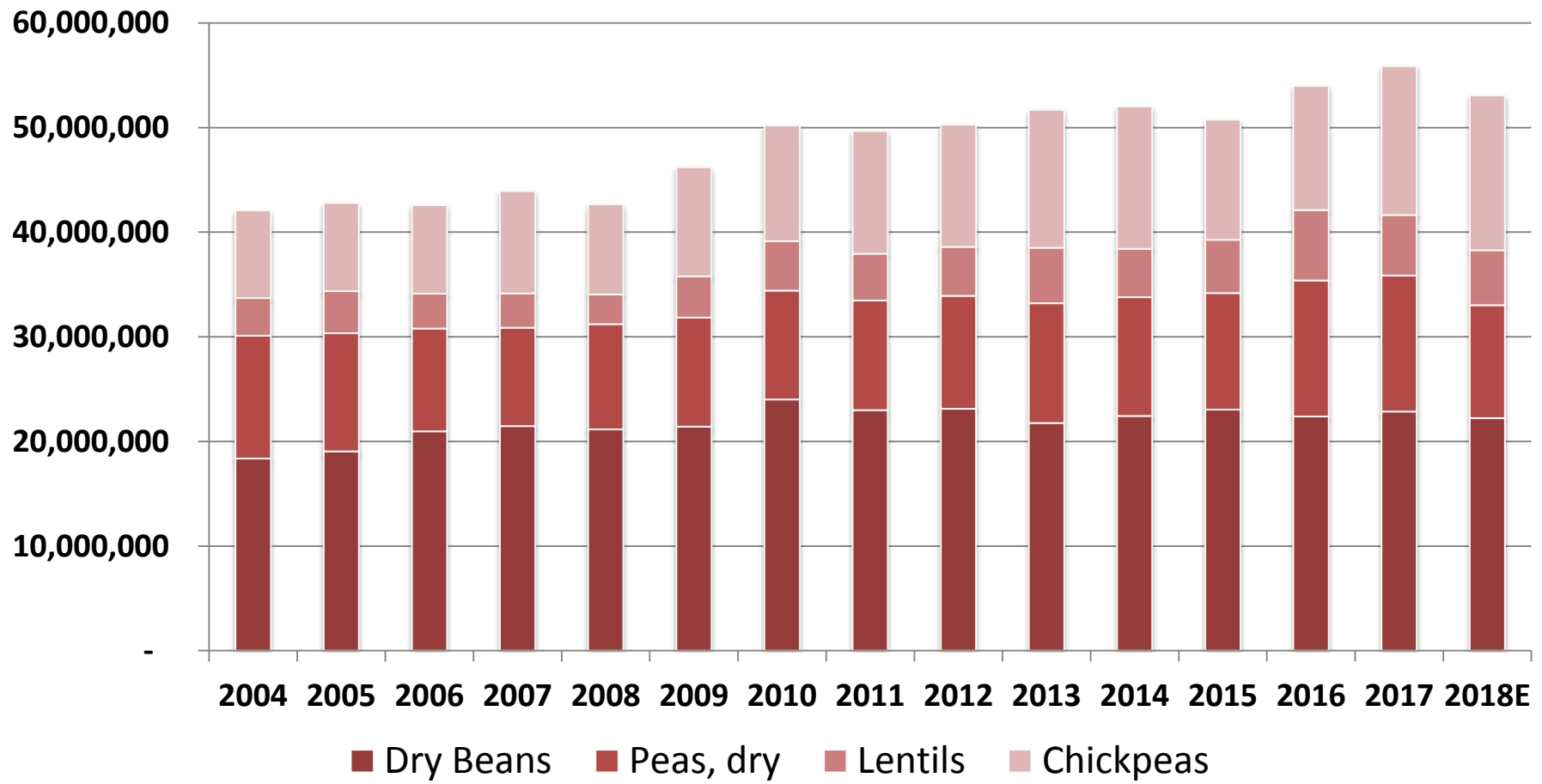


Balance Needs to Be Found





Global Pulse Production Is High



Source: UN FAO; StatsCan; USDA; Compiled by StatPub;



Global Supply/Demand by Pulse Type

(¹) 2016 data (²) 2013 data)

Lentils

Total Production:
6.7 million mt (¹)

Canada is the world's largest producer with its product primarily consumed in the export market

Lentil Supply and Demand (in mt)						
Rank	Production (¹)		Export (¹)		Import (²)	
1	Canada	3,233,800	Canada	2,456,123	India	679,662
2	India	1,055,536	Australia	896,851	Bangladesh	219,603
3	Turkey	365,000	U.S.A.	386,028	Turkey	199,476
4	U.S.A.	255,061	Turkey	227,000	U.A.E.	186,193
5	Nepal	253,041	U.A.E. (²)	43,074	Sri Lanka	151,129

Chickpeas

Total Production:
12.7 million mt (¹)

India is the world's largest producer and importer, with product consumed primarily in the domestic market

Chickpea Supply and Demand (in mt)						
Rank	Production (¹)		Export (²)		Import (²)	
1	India	7,818,984	Australia	550,567	India	538,329
2	Australia	874,593	India	400,562	Bangladesh	205,239
3	Myanmar	559,390	Russian Federation	180,039	Algeria	108,956
4	Pakistan	517,107	Mexico	113,577	U.A.E.	101,530
5	Turkey	455,000	Argentina	66,200	Spain	75,781

Peas

Total Production:
12.9 million mt (¹)

Canadian production is destined for export markets primarily India and China

Pea Supply and Demand (in thousands of mt)						
Rank	Production (¹)		Export (²)		Import (²)	
1	Canada	4,611,100	Canada	2,833,437	India	1,230,249
2	Russian Federation	2,199,489	U.S.A.	441,451	China	1,053,518
3	China	1,194,131	Russian Federation	336,090	Bangladesh	390,657
4	India	1,020,366	France	236,947	Pakistan	160,528
5	U.S.A.	782,388	Australia	174,885	U.S.A.	145,586

Beans

Total Production:
22.5 million mt (¹)

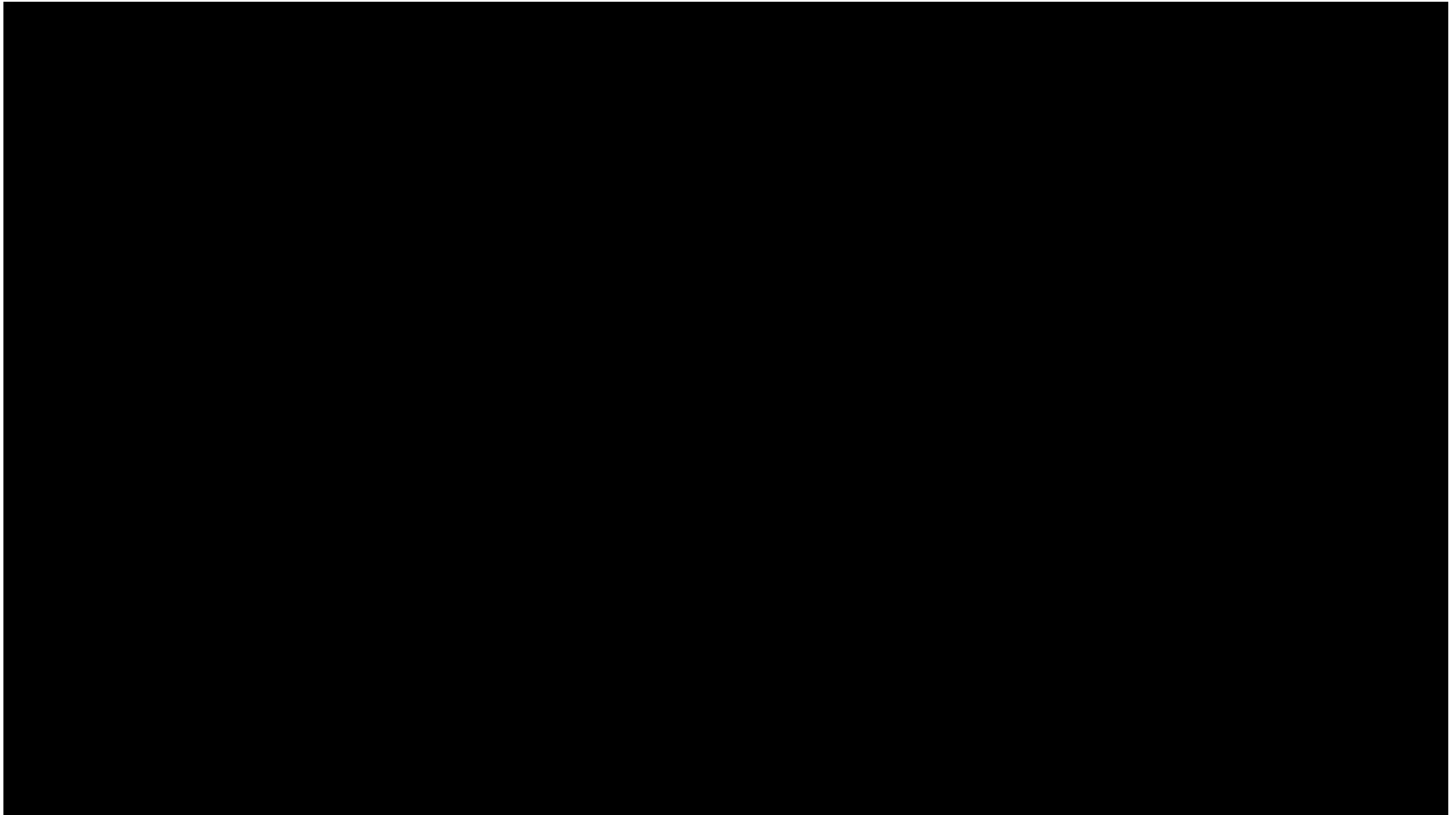
Primarily a domestic market; China is the only major producer supplying the export market

Bean Supply and Demand (in mt)						
Rank	Production (¹)		Export (²)		Import (²)	
1	Myanmar	5,189,977	Myanmar	1,370,000	India	885,754
2	India	3,897,611	China	800,872	Brazil	303,934
3	Brazil	2,615,832	U.S.A.	453,247	U.S.A.	135,233
4	U.S.A.	1,269,916	Canada	294,371	Mexico	134,494
5	Tanzania	1,158,039	Ethiopia	225,058	Italy	123,004

Source: UN FAO; StatPUB



Do you value water?





Pulses & Sustainable Agriculture

Plant Fixing Nitrogen

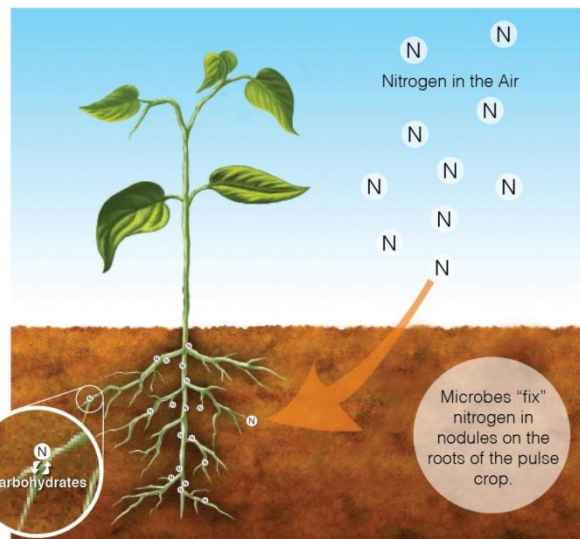
- Pulses produce their own fertilizer by fixing nitrogen

Lower Energy Requirement

- Pulses Use Less Non-Renewable Energy Relative to Other Crops
- 70% of the non-renewable energy used in cropping systems in western Canada is attributable to fertilizers

Increased Water Use Efficiency

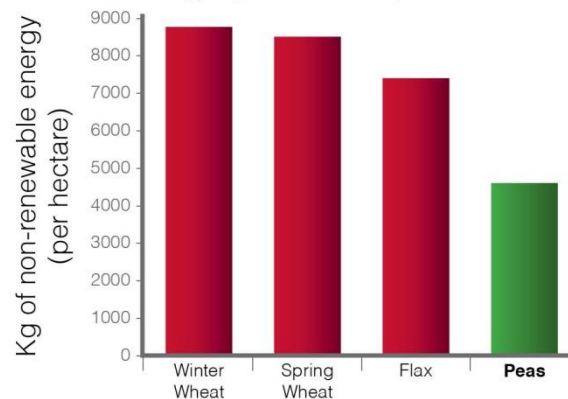
- 163 litres** of water required to produce 0.5 kg of pulses
- 7,030 litres** of water required to produce 0.5 kg of beef



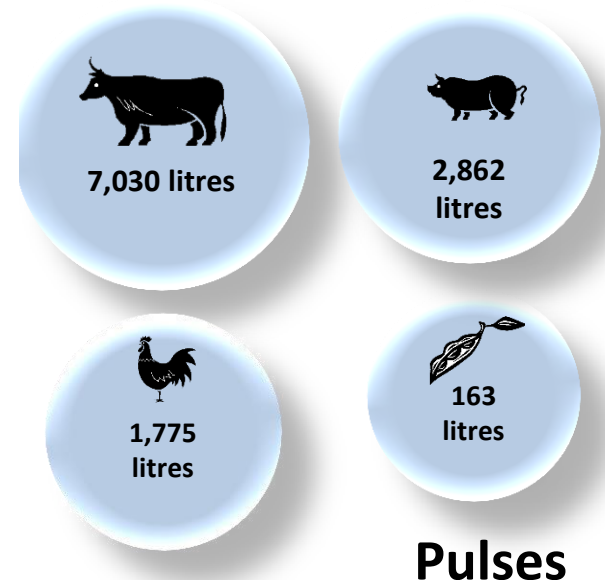
Pulse crop with root nodules

Greenhouse Gas and Energy

Pulses use half the nonrenewable energy inputs of other crops



Source: (Zentner et al. 2004)



Source: Hoekstra and Chapagain, *Globalization of Water*, U. of Twente, Waterfootprint.org National Geographic, April 2010



Food Waste and Loss

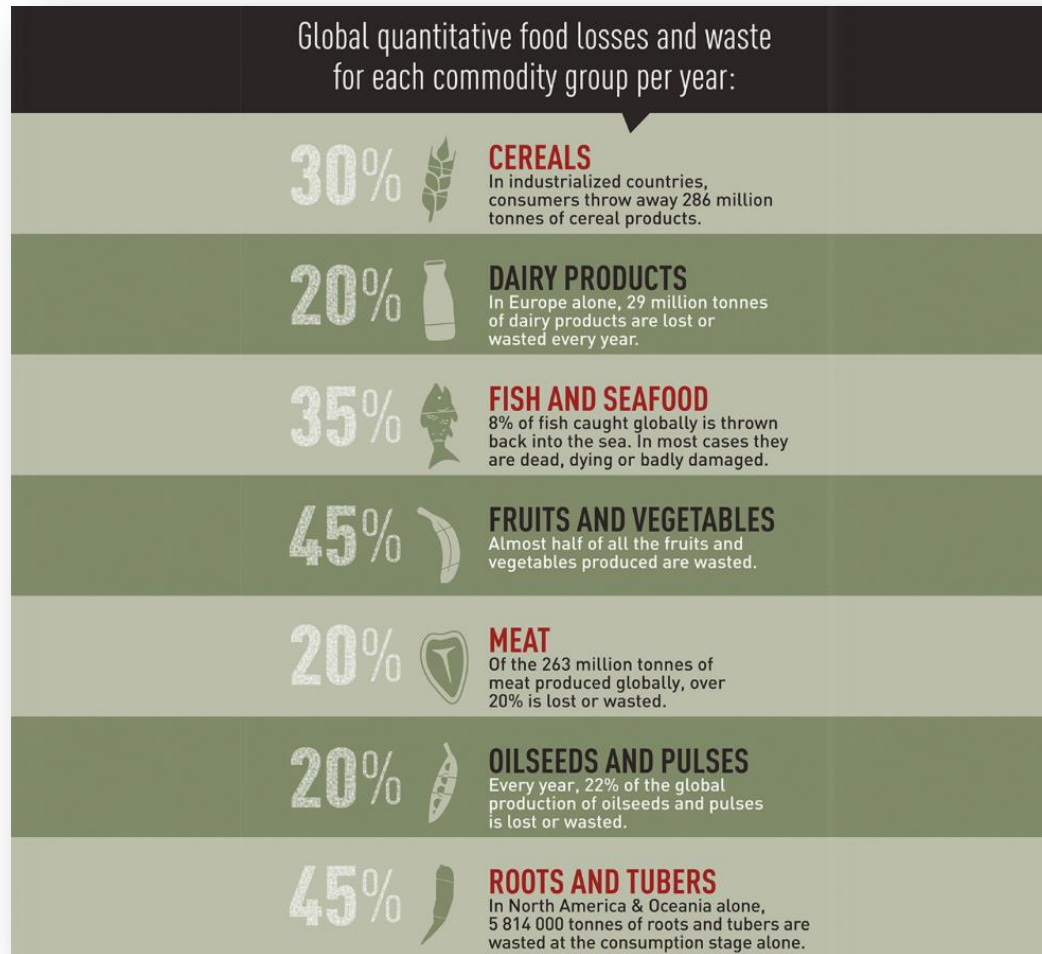
- Food waste is one of the major causes of hunger
- FAO study suggest that roughly **one-third of food produced for human consumption is lost or wasted globally,**
- This wastage amounts to
 - About 1.3 billion tonnes per year
 - Around \$2.6 trillion, including social and environmental costs,
 - Accounts for about 8 per cent of greenhouse gas emissions.
 - Around 795 million people around the world (1 in 9) remain undernourished
- United Nations has set a target to halve global food waste by 2030, as part of the Sustainable Development Goals adopted by all countries in 2015 and are promoting through the #ZEROHUNGER campaign



Source: UN FAO



Food Waste and Loss By Commodity



Source: UN FAO



Food Waste and Loss – Best Before vs Expiry

- Developed countries have an over emphasis on appearance of food resulting in significant waste
- Most food should not carry expiry date but best before date
- This is leading to waste of large amounts of food
- There is no need to dispose of food that is past date but still consumable
- As a result every year, consumers in rich countries waste almost as much food (222 million tonnes) as the entire net food production of sub-Saharan Africa (230 million tonnes).



Source: UN FAO



Future of Food Production?



We need to produce in the next **40 years** the equivalent of all of the food produced in the **last 10,000 years**.

Source: UN FAO



Key Messages and Conclusions on Pulses

It is clear that even though dried beans, lentils and peas have been around for centuries, they will play a fundamental role in our sustainable future and part of the solutions on food security, food supply, the environment and a wide range of societal issues .

1. Pulses are highly nutritious
2. Pulses are economically accessible and contribute to food security at all levels
3. Pulses have important health benefits
4. Pulses contribute to climate change mitigation and adaptation
5. Pulses promote biodiversity

