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Dear friends,

Greetings from India Pulses and Grains Association!

It is my pleasure to welcome you to India's pink city Jaipur for the third edition of THE PULSES CONCLAVE. The Pulses Conclave, thanks to your unstinted support year after year, has become Asia's and probably the world's largest international conference for the Pulses Trade and Industry.

As most of you must be aware, the General Assembly of the United Nations unanimously declared 2016 as the International Year of Pulses (IYP 2016) and over 32 countries across the globe have joined hands to celebrate it. Each of these countries is hosting a series of activities this year with a focus on increasing production and consumption of pulses as well as increasing awareness of the nutritional value of pulses among the masses.

In this issue of our Souvenir, we have articles on the International Year of Pulses by eminent personalities like Mr. Ban Ki Moon - Secretary General of the United Nations; Mr. José Graziano da Silva - Director General of the Food and Agricultural Organization (FAO); Mr. Huseyin Arslan, President, Global Pulse Confederation to name a few. I am sure you will find these interesting. I would like to thank Ms. Robynne Anderson of Emerging Ag for her help and support in sourcing these articles.

Friends, India Pulses and Grains Association (IPGA) is leading the IYP 2016 initiative in India and we have planned a host of activities for IYP 2016. The focus of our activities across India are going to be increasing production and yield as well as generating awareness of the nutritional value of pulses among consumers.

One of the key objectives of IYP is to re-ignite the love and passion for Pulses among the younger generation. With this in mind, we kicked-off the year with a Pulse Food Innovation Contest across India that was co-hosted with McGill Centre for the Convergence of Health and Economics (MCCHE), Canada and the Government of Saskatchewan. The students of catering colleges from across India have created some amazing pulse-based food products and it would unfair not to share some of the best with you.

Along with this Souvenir, you will find a book titled 'FLAVOURS OF THE FUTURE' which is a compilation of the recipes that made it to the top 20 including the recipes of the Zonal Finalists. We are hosting the National Finals at Jaipur during The Pulses Conclave 2016 and will be announcing the National Winner at the Conclave. However, as we see it, they all are winners and we thank them all for their whole-hearted participation. I am sure you will try these recipes and get a flavour of what the future holds!!!!

Health has become a real issue and this has indeed put a lot more responsibility on culinary institutes. Chefs have to be experts and at the same time be role models. So as a part of this contest, we invited students from catering colleges and food technology institutes from across India to create nutritious yet innovative pulse based foods supported by a sustainable marketing plan. The response, I must say, was phenomenal! The enthusiasm of today's youth and their willingness to experiment with food is amazing and we could see that in all the recipe's that we received. The last couple of months have been an interesting journey for the IPGA team as it embarked on path of discovery – new trends, new ingredients that could facilitate innovations in pulses recipes.

I take this opportunity to thank all our sponsors and advertisers for their support to make this Conclave a great success!

Warm regards

Pravin Dongre
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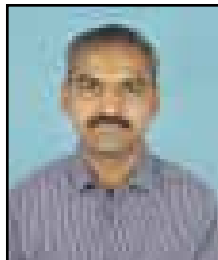
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Secretary-General's message for launch of the International Year of Pulses 2016

Ban Ki Moon,

Secretary General of the United Nations

From the remarks for the launch of the

International Year of Pulses

It is my pleasure to greet this inaugural event of the International Year of Pulses.

Thanks to the initial efforts by the Governments of Turkey and Pakistan, and the agreement of the General Assembly at its 68th session, the international community will celebrate the benefits of pulses in 2016.

The UN Food and Agriculture Organization (FAO) has been mandated to facilitate the implementation of the Year, in collaboration with Governments, relevant organizations, and all other stakeholders including the private sector.

The International Year 2016 is a great opportunity to raise awareness of the benefits of pulses as the world embarks on efforts to achieve the newly adopted Sustainable Development Goals. The Year's theme -- "nutritious seeds for a sustainable future" -- highlights the contribution pulses can make.

Pulses can contribute significantly in addressing hunger, food security, malnutrition, environmental challenges and human health.

Pulse crops, such as lentils, beans, peas and chickpeas, are a vital source of plant-based proteins and amino acids. Despite strong evidence of the health and nutritional benefits of pulses, their consumption of pulses remains low in many developing and developed countries. The International Year can help overcome this lack of knowledge.

Pulses also have a positive impact on the environment owing to their nitrogen-fixing properties, which increase soil fertility. Much work needs to be done to end hunger and provide food security and nutrition for all. One concrete, promising opportunity lies with pulses.

Let us join forces to raise awareness of the benefits of pulses.

Let us promote commitment and concrete action by all relevant actors within the UN system, farmers' organizations, civil society and the private sector, and make the International Year of Pulses 2016 a success.

*[© FAO] [2015] [Secretary-General's message for launch of the International Year of Pulses 2016]
[<http://www.un.org/sg/statements/index.asp?nid=9234>] [2015-12-15]*





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Exploring the Pulses of India in Africa

Rune-Christoffer Dragsdahl, PhD fellow,
University of Copenhagen, Denmark



Many see East Africa as a last frontier for significantly expanding the global production of pulses. Since India is the world's biggest producer, consumer and importer of pulses, it is no surprise that many Indians are engaged in expanding the production and trade of pulses in various East African countries. A new research project aims to shed light on the dynamics of these 'Indian pulses' in Mozambique and Ethiopia.

While India is experiencing falling water tables and increasing climate change impacts on agriculture, the population is expected to rise from 1,3 billion to possibly 1,7 billion by 2065 (UNPD 2012). Furthermore, India still has 214 million chronically undernourished citizens (FAO 2013).



Pulses are a staple providing most Indians a key protein component of their food. On average, an Indian consumes 15 kilos of pulses a year (Chandrashekhar 2013), which makes India by far the world's largest consumer of pulses. Although India is also the world's largest producer of pulses, it has to import about 3 million tonnes (mt) of pulses annually to meet domestic demand (The Hindu 2014). Imports are predicted to increase in the future (GOM 2015), and analysts argue that India's supply of pulses is becoming "a silent emergency" (Gopalakrishnan 2009). Since 2006, the Government of India has several times extended a temporary ban on the export of pulses, a ban which in April 2014 was extended "till further orders" (The Hindu 2014).

At a summit in New Delhi in 2010, India's Food and Agriculture Minister Sharad Pawar asked the delegates to consider the "*viability of Indians leasing land abroad for growing pulses and exporting it back to India*", while praising those Indian agricultural entrepreneurs who had already attempted growing lentils in Africa (Rowden 2011).



BRAZILIAN LEADER IN EXPORT OF PULSES



- Brown Eye Beans
- Cowpeas
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- Light Speckled Kidney Beans

- Castor Beans
- Split Beans (Red and Black)
- Pigeon Peas
- White Corn



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There is indeed a lot of potential of establishing new connections, and strengthening existing ones, between several African countries and India through pulses. Importantly, such connections may not only improve the supply of pulses to India and the world; they also have the potential to improve food security, nutrition, soil fertility and environmental sustainability in the countries where the pulses are produced. Seen in this light, pulses are not just any commodity. Compared with other resources extracted from Africa, they are perhaps more likely to create a win-win situation.

In the spirit of the UN International Year of Pulses 2016, I am currently working on a cross-disciplinary research project in Mozambique and Ethiopia. It is an explorative on-the-ground fieldwork, which follows the pulses from the production at both small and large farms, through middlemen and traders, to East African ports, where they are shipped across the Indian Ocean or to other destinations. While the key interest of the research is the links to the biggest producer, consumer and importer of pulses – India – the project is also taking place in a context of an interest in substituting meat with pulses in rich countries, where consumers are increasingly concerned about health, animal ethics and the environment.

The research project is taking place for 10 months (it is still ongoing) along the value chains of pulses; e.g. among all those who are involved in the production and trade of pulses: Farmers, workers, merchants, entrepreneurs, investors, government officials, relevant organizations, etc. The project is following the pulses, in all senses of the word. Due to time constraints, however, the project only follows the pulses until they reach the harbor from where they are shipped abroad.



Indian pulses in Mozambique

India's connections with Mozambique date back to at least the late 15th century, and with 20.000 inhabitants having Indian origins, Mozambique is the country of mainland Africa with the third largest Indian diaspora. Indian merchant families have for centuries controlled most of the trade along the East Coast of Africa, including Mozambique (Bastos 2005). They began working as commercial middlemen between Mozambican farmers and national and foreign export firms, and later Indians established their own import/export firms in Mozambique. After the liberalization of the Mozambican economy in the 1980s and 1990s, the practices of Indian businessmen became increasingly transnational, directly involving India (Bastos 2005). Today, virtually all agricultural traders in Mozambique are either Indian or, at least, South Asian.

Mozambique has 9 million undernourished citizens; 37 % of the country's population (FAO 2013). With 75 % of the people in Mozambique depending on agriculture for their



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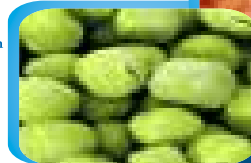
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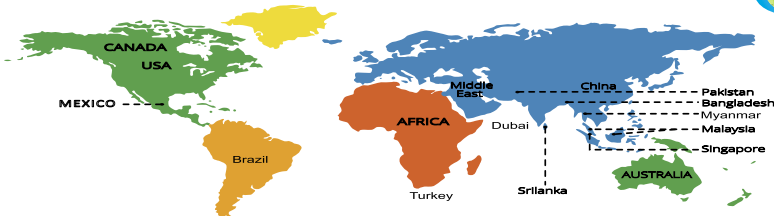
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livelihoods and 70 % of the population living in rural areas, agriculture is the most important sector for the development of Mozambique's economy (FAO 2014). According to the World Bank, Mozambique is one of the countries in the world with the largest potential for increasing agricultural production: Only around 15 % of the arable land is cropped (World Bank 2010).

In this situation, it is interesting to note the different qualities of the crops most commonly produced by smallholders and later exported. Two of the most prominent Mozambican export crops are sesame and pigeon peas. While sesame is entirely a cash crop, pigeon pea is both a cash crop and potentially a staple food for poor Mozambicans.

When I first spoke to representatives from the Mozambican Government in December 2014, they said pulses were not very important export crops. They barely mentioned pigeon peas. However, as little as 9 months later, the Mozambican Government published a report (GOM 2015), written by a team of both national and international experts, praising the inherent qualities of pigeon peas and emphasizing the huge gap between demand and supply in India – stressing how that gap is bound to increase in the future.

One of the interesting characteristics of pigeon peas, notes the above mentioned report, is that it is very well suited for poor smallholder farmers. Competition from large-scale commercial farms is considered unlikely. However, smallholder farmers are of course careful about choosing what to grow. Just because a Government report highlights a golden future of pigeon peas, that alone will most likely not convince farmers.



When tur dal prices soared in India in September, October and November 2015, this by implication effectively tripled the prices paid for raw pigeon peas to smallholder farmers in Mozambique. Nonetheless, most of these farmers have learned from past experiences that prices are volatile and may change dramatically from one year to the next. It was very clear among all the smallholder farmers, whom I spoke to, that they had absolutely no idea about where the pigeon peas, which they were producing, finally ended up. They had no clue about the demographics and food culture of India. In short, they had no solid knowledge base for ascertaining whether growing more pigeon peas in the upcoming years would be a safe choice or a risky bet.

Pulses are one of the main exports from Mozambique to India; approximately 60,000 tonnes a year and growing steadily. Almost all of these pulses are pigeon peas (the remainder being a small, but also growing, amount of mung beans). Compared to production in India, this amount

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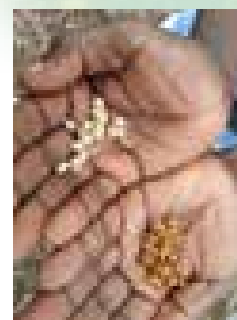
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may seem small. But Mozambique has, perhaps to a larger extent than any other country in the world, the potential to multiply this amount. In fact, it is difficult to see India meeting its future demand for tur dal without the help of the smallholders of Mozambique.

Mozambique has until now seen very limited foreign direct investment from India in agriculture and only a fraction of these investment projects include the cultivation of pulses (currently mung beans). This might change in the future. But currently the production of pulses in Mozambique seems to be in the hands of smallholder farmers.

Indian pulses in Ethiopia

India's connections with Ethiopia are not dominated by a large, and for centuries business-oriented, Indian diaspora as in the case of Mozambique. Although a few Indian companies were established decades ago (the oldest one century ago), most of the people in Ethiopia with Indian origin arrived much more recently. The majority of them are working as researchers and teachers at universities, the rest are engaged in various forms of business activities of which agriculture is just one.



While pulses exported from Mozambique are only consumed to a quite limited extent within the country, in Ethiopia some of the exportable pulses are consumed to a very large extent by the Ethiopians themselves. This applies to chickpeas and red lentils in particular – for the latter, there is even an export ban on both raw and processed products.

Pulses feature prominently in the diets of many Ethiopians. Almost half of the population are Orthodox Christians, and there are between 150 and 250 fasting days a year, depending on the particular religious practices followed, where only vegetarian (in fact vegan) food is consumed. Pulses play the dominant role in fasting food. Chickpeas and red lentils are the preferred pulses, however due to increasing prices many Ethiopians substitute these for other pulses such as fava beans, field peas and even grass peas.

The largest export commodity from Ethiopia to India is pulses. Some of this is chickpeas, but it is to a very limited extent, as Ethiopia is not yet very competitive within the sector of chickpeas. However, it is the ambition of the Ethiopian Government that the country will eventually export both chickpeas and red lentils competitively. Currently, the main pulses exported to India are red kidney beans; however, the production and export of mung beans is increasing. While chickpeas and red lentils are grown in the highlands, where the climate is more suitable for them, but which are also densely populated, mung beans can be cultivated in the lowlands, where there is less population density. These are also the areas which the Ethiopian Government prefers to lease to foreign investors as a means to develop the land and increase export revenues.



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India is the largest agricultural investor in Ethiopia, both in terms of the number of projects and the size of projects. Hundreds of thousands of hectares have been leased to Indian companies, who have together invested approximately 2 billion USD in Ethiopia. Furthermore, Indian-managed trading companies are present in Ethiopia, processing both for the domestic market and for export.

There are approximately hundred other Indian agricultural investments in Ethiopia, which are progressing year by year and already exporting e.g. mung beans to India and the world market. Some are also developing seeds for pigeon peas, which apart from feeding the demand in India could also help improve food security in Ethiopia due to their drought-resistance.

This article has presented some general background information about the pulses connections between India, Mozambique and Ethiopia, together with some preliminary findings from my own work on the ground. The full research project will be completed in November 2017. I would like to extend my special thanks to the Observatorio do Meio Rural in Mozambique and ILRI/ICRISAT in Ethiopia for hosting me as a guest researcher.

The author can be contacted at srq153@hum.ku.dk.

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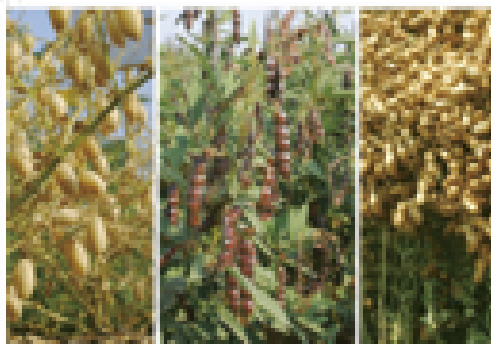
- Battles biotic constraints in an integrated way, including breeding for resistance as well as the judicious use of biological, crop management and chemical-control method.
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Progress on Pulses

**Message from Mr. Huseyin Arslan,
President, Global Pulse Confederation**

2016 is the year of the pulse. Already, we have seen the impact of the International Year of Pulses, with major events occurring around the world since the launch at the United Nations' Food and Agriculture Organization in November, 2015. Since then, we have reached millions with messages about the importance of pulses for sustainable healthy diets. Literally in one day – on January 6th - PulseFeast reached 21 million people via twitter and 141 events were held around the world in 36 countries.

The New York Academy of Sciences hosted a special event on pulse nutrition at the Sackler Institute to kick off the year, and since that session, it has galvanized a discussion between nutritionists and plant researchers that could foster long-term collaborative benefits for the crop.

Major launch events have occurred in Australia, Canada, Ethiopia, France, Myanmar, Netherlands, Turkey, Singapore, UAE, UK, and the USA with more slated to follow. It has been my honour to attend many of these great moments. At each, I am struck by the new enthusiasm and spirit of joint effort that is now pervading the pulse sector. In just a few months, we have already achieved many of our targets for the year, including the social media reach that my firm, AGT Food and Ingredients, sponsors for Global Pulse Confederation.

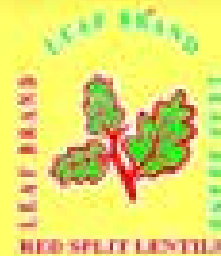
Now we have this excellent convening of the Pulse Conclave organised by IPGA. We thank them for their leadership, including Pravin Dongre, Executive Vice-President of the Global Pulse Confederation and President of IPGA. There could not be a more important time to be discussing pulses in India. As the world's biggest producer and consumer of pulses, we need sharp focus on the ways to support production, trade, and consumption of pulses in the subcontinent.

Global Pulse Confederation welcomes the announcement of the Indian government to proactively improve and support their pulse sector. Yields need improvement, pulses need to be valued in a policy context with the same effort placed on cereals and dairy, plus trade policy will improve with a long term prospects of feeding India and all nations. We hope all governments will look at their policies regarding pulses and find means to put pulses on an equal footing with other crops.



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As an example, recently, we conducted a survey with the assistance of the many organisations involved in the Productivity and Sustainability committee. A collective effort to add the total research funding for all 13 pulse crops came to USD \$177 million annually. Compare this to billions spent on corn research and trait development and you can appreciate why pulse crops are sometimes called “orphan crops”. They are a large bundle of crops that offer an invaluable source of protein to mankind and yet they get far less than a tenth of the funding they deserve.



We hope the International Year of Pulses will tackle these discrepancies head on. This is the year to kickstart research funding into pulses, to create policy environments that respect their benefits to sustainability, that solve trade issues so we can deliver pulses where they are needed, and highlight their role in a nutritious diet.

We need to work lockstep with the farmers who grow them so that

the supply keeps pace with demand from a growing world. The accessibility of pulses is part of their success and cannot be lost. The rewards for growing pulses should be a fair living and a good return in the sustainability of the farm. It is true in all parts of the sector, but it starts with them.

Together we hope to create an agenda for pulses that provides long term connections inside the sector. The pulse value chain has never worked so closely together as it has right now – breeders, farmers, traders, processors, regulators and consumers are teaming up jointly in ways that are unprecedented. The challenge is whether we have come together for a moment or whether we have fostered a new environment for long-term collaborative efforts. I hope it is the latter. It is in our hands to build relationships and processes that will last past 2016 to link all parts of the pulse industry to better make the case for the role of pulses around the world.





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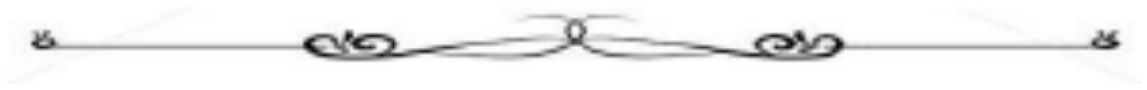
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It will take strong, outspoken leadership to get pulses their due. They are part of everyday meals in India and they should be a part of everyday meals in all cultures. Complacency has allowed other sources of protein to seem more “trendy” or a sign of upward mobility, when pulses have always been at the heart of digestive and planetary well-being. The idea of “progress” can be turned full circle, where younger generations see pulses as a part of a healthy, responsible way to live.

We need to re-ignite the passion for pulses. I hope you will join our efforts @LovePulses and find your own way to contribute this year and beyond.



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NEW RECORD HIGHS AS WORLD CELEBRATES PULSES

Brian Clancy, Stat Publishing

Coincidentally with the International Year of Pulses, seeded area and production of pulses for human consumption markets are expected to set new records in the world's major net exporting nations.

This is a simple reflection of strong movement and unusual price strength relative to grains and oilseeds. Farmers in Canada are now receiving record high prices for yellow peas, as well as green and red lentils. Growers in Australia also saw record high prices paid for desi chickpeas and red lentils during the closing quarter of 2015.



International trading levels for most classes of pulses are still below their historic highs. But this has not changed the fact that prices are unusually high relative to grains and oilseeds. That is a critical fact because the three crop categories compete for land use, with farmers tending to emphasize those which generate higher average returns per hectare relative to their other choices.

World Lentil Production Forecast				
(metric tons)	5-year Average	2014	2015	2016
Canada	1,946,800	1,987,000	2,373,000	3,072,000
Turkey	406,200	345,000	426,000	479,000
United States	215,600	156,000	239,000	320,000
Australia	278,800	242,000	272,000	366,000
Other	1,856,000	1,865,000	1,630,000	1,669,000
World	4,703,400	4,595,000	4,940,000	5,906,000

□

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This is obvious in Canada, where the gross income potential for pulses this season are much higher than they have been in recent years when compared to the income potential of canola, durum, wheat or barley. Lentils are putting in the best performance in Saskatchewan. Yellow peas come in behind lentils in Saskatchewan but are considered the best overall crop in Alberta in terms of income potential in 2016-17. On the other hand, the income potential of green peas and chickpeas have fallen below what farmers expect to see relative to wheat, durum, barley and canola.

As it stands today, Canadian farmers should seed at least 4.6 million acres or 1.86 million hectares of lentils. Many market participants believe if grower bids remain at current levels, plantings will push past five million acres or two million hectares.

This has changed the topic of the new crop lentil debate from area to yields. Many market participants argue that this year's expansion cannot happen unless there is an influx of new growers, seeding them on land used to grow lentils last year, and/or using marginal land. This has markets convinced yields will not reach their full potential.

The recent five-year average yield for Canadian lentils is 1,464 pounds per acre or 1,620 kilograms per hectare, which is 140 pounds or 157 kilograms higher than the last crop. It is too early to assert that yields will be anything other than average. If yields are at their recent five-year average, Canada will harvest a record 3.07 million metric tons of lentils. Weather remains the key yield risk.

The current El Nino weather event is expected to remain in place through the spring. Forecasters believe it will be immediately followed by La Nina. Such major and rapid changes in major weather events makes it more difficult to say what kind of weather this will bring to the Prairies during seeding and the harvest period.

Of greater significance to markets is the fact that La Nina is normally associated with above average monsoon rains in India. The country has suffered two below average monsoons in a row, which has resulted in unusually strong demand for red lentils, field peas, and desi chickpeas. If this year's monsoon is average or better, land in kharif season pulses and yields would be expected to rise. Similarly, land in rabi season crops would probably increase in 2017.

Demand through the balance of the year will be affected by last year's monsoon failure and this winter's smaller than hoped rabi season pulse area. The implication is the 2016-17 marketing campaign could get off to a strong start, with significant volumes of pulses moving to the Indian subcontinent from harvest through November. If India's pulse production rebounds in 2016-17, import demand would likely slow after the first quarter of 2017.



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World Field Pea Production Forecast				
(metric tons)				
	5-Year Average	2014	2015	2016
Australia	303,800	290,000	225,000	300,000
Canada	3,363,000	3,810,000	3,201,000	3,993,000
United States	614,000	778,000	829,000	978,000
France	598,400	576,000	618,000	830,000
Russia	1,591,200	1,492,000	1,654,000	1,671,000
Other	3,983,200	4,007,000	3,833,000	4,032,000
World	10,453,600	10,953,000	10,360,000	11,804,000

Land in field peas is also expected to top four million acres or 1.62 million hectares for a potential four million metric ton crop. It would not be surprising to see 4.2 million acres or 1.7 million hectares sown in Canada this year, though markets think the increase will be smaller because prices have not performed as well as lentils in Saskatchewan, Canada's most important pulse producing region.

Demand from India will be a key factor during the last half of the calendar year, with markets hoping China will pick up any relaxation that might occur in Indian demand during the first half of 2017. Significantly, exporters started selling 2016 crop lentils and peas earlier than usual. Asking prices are discounted to spot markets. This encourages buyers to only buy enough old crop pulses to cover short term needs and try hard to avoid carrying product over into the new crop shipping positions.

RECORD EXPORT PACE IN LENTILS AND DESI CHICKPEAS

It is worth noting that international trade in lentils maintained a record pace between harvests in the northern hemisphere and the end of November. Exports clearances in the August through November period from the world's three largest export producers -- Canada, the United States and Australia -- totalled 1.519 million metric tons, a massive increase over the 988,408 shipped during the same four-month period last season.

Export trade was dominated by Canada, which shipped a record 1.36 million metric tons (metric tons) of product during the first four months of its 2015-16 marketing year, compared to almost 830,000 metric tons during the same period last year. Shipments from the United States have also started the 2015-16 marketing year at a record pace. Clearances between August and November totalled 114,124 metric tons, up from 109,521 metric tons last season. By contrast, shipments from Australia were down, reflecting tight old crop inventories. Its new crop shipping campaign starts in November, with clearances during the month the second best on record at 26,443 metric tons.



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World Chickpea Production Forecast				
(metric tons)				
	5-Year Average	2014	2015	2016
Australia	767,400	690,000	979,000	983,000
Turkey	478,000	450,000	429,000	451,000
Mexico	172,200	160,000	147,000	129,000
India	8,290,000	9,530,000	7,170,000	8,563,000
Other	2,529,100	2,613,000	2,405,500	2,471,800
World	12,236,700	13,443,000	11,130,500	12,597,800

The increase in world trade is being fueled by unprecedented pulse import demand from India accounting for almost half of world demand in the August through November period. The surge in demand is a simple reflection of two consecutive below normal monsoons and a severe reduction in the 2015 Rabi season pulse harvest. Significantly, demand is expected to remain strong through much of 2016 as India braces for another poor Rabi season harvest and another possible reduction in its lentil harvest.

Lentils are not the only pulse experiencing unprecedented demand. Australia started its 2015-16 marketing campaign by shipping record quantities of chickpeas to India and other destinations during November. Total export clearances for the month set a single month record of 465,131 metric tons (MT), almost double the previous high of 239,552 MT set in December of 2012.

Confirmation of the pace of pulse exports between August and November has focussed attention on India's pulse import needs through the first half of 2016. Seeding of this year's Rabi season pulse crops were on pace with last year through the first week of January. That suggests total area will be well below the recent five-year average and significantly less than hoped. On the other hand, comments about seeding progress suggest land in gram or Desi Chickpeas is up over last year, with farmers opting to plant the pulse instead of other grains because of higher than normal daytime temperatures and drier rabi season growing conditions.

Even so, markets remain confident India will continue to import unusually large quantities of pulses for much of 2016. As much as the current emphasis seems to be on desi chickpeas, the country remains a price conscious buyer of pulses, which should see continued strong demand for yellow and green peas, which remain the most competitively priced pulses available for human consumption.

The current focus on desi chickpeas is resulting in a rapid draw-down in available supplies on world markets at a time when Pakistan is also expected to face a significant shortfall in supplies on its domestic market. The implication for Australia is that the 2015-16 season





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should end with limited residual stocks while land in the pulse will likely increase in response to strong prices and movement.

LITTLE EXCITEMENT IN DRY BEANS

The only pulse category showing limited excitement so far this season are dry edible beans, which started the 2015-16 marketing campaign on a relatively quiet note, with product available from growers and processors aligned with the short term needs of the market.

Dry bean exports from the United States during the first quarter of its 2015-16 marketing campaign are down 9% from last year at 117,363 metric tons. Most of the decline is accounted for by white beans, with pea bean shipments down 23% at almost 43,000 metric tons and great northern bean export clearances down 61% at 5,149 metric tons. By contrast, pinto bean exports more than doubled to 19,800 metric tons for the September-November period and black beans rose 9% to 13,925 metric tons.

While optimism over Mexican import demand is rising in the face of continued worries about production levels in that country, first quarter gains in exports were not driven by that country. Instead, the increase in pinto exports was accounted for by the Dominican Republic and Haiti, with exports to Mexico down 400 metric tons at just 1,517. Opening season black bean imports by Mexico were little changed at 10,096 metric tons; while shipments to the Dominican Republic soared from 50 to 2,334 metric tons between September and November.

In the case of white beans, declines were led by falling shipments to Canada, Western Europe and Algeria. This was especially evident in great northern beans, which face increased competition from Argentina and Egypt both in terms of price, available supply, and buyer preference. This is expected to see shippers in the United States focus on domestic markets and efforts to convince the federal government to buy surplus stocks.

SUMMARY

In summary, world pulse seeding and production will be up this year unless there is a weather disaster. Even so, prices should start the 2016-17 marketing campaign on a strong note because of demand stemming from a second consecutive short Rabi crop in India. However, they could weaken after December if this year's monsoon is closer to normal and Rabi seeding increase substantially for harvest in 2017.



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Dr Mahmoud Solh,

Director General of the International Center for Agricultural Research in the Dry Areas (ICARDA)



Four-year old Kakuli from a village in Nadia district in West Bengal, India, typically eats rice with a bowl of lentil for mid-day meal. While rice provides calories, lentil is the main source of protein and essential minerals for many growing children in this part of the world. The bowl of lentil though has been diminishing over the past 20 years – a worrisome trend.

In India, 43 percent of children under five are underweight and almost half have stunted growth. Anemia or deficiency of iron afflicts 69 percent of preschool children and over 55 percent of women, which negatively affects pregnancy outcome and physical and cognitive development.

Micro-nutrients, like iron, zinc, and vitamin A, although required in small quantities, are responsible for vital functions of the human body. Yet more than two billion people worldwide suffer from micro-nutrient deficiency – a condition that goes unnoticed even in the affluent countries. Commonly known as “hidden hunger”, their deficiency causes low birth weight, anemia learning disabilities, increased morbidity and mortality rates, and low work productivity. The condition is of epidemic proportions in the developing world, glaringly so in South Asia and sub-Saharan Africa where high levels of poverty and limited access to diverse food options aggravates the situation. [Every second pregnant woman and about 40 percent of preschool children are estimated to be anemic.]

Pulses are part of traditional diet in many developing countries, particularly in South Asia, Africa and Latin America, where they play an important role as a major source of macro- and micro-nutrition. Along with 23% protein content on average, which is twice more protein compared to wheat and thrice that of rice, pulses are also rich in iron, potassium, magnesium and zinc.

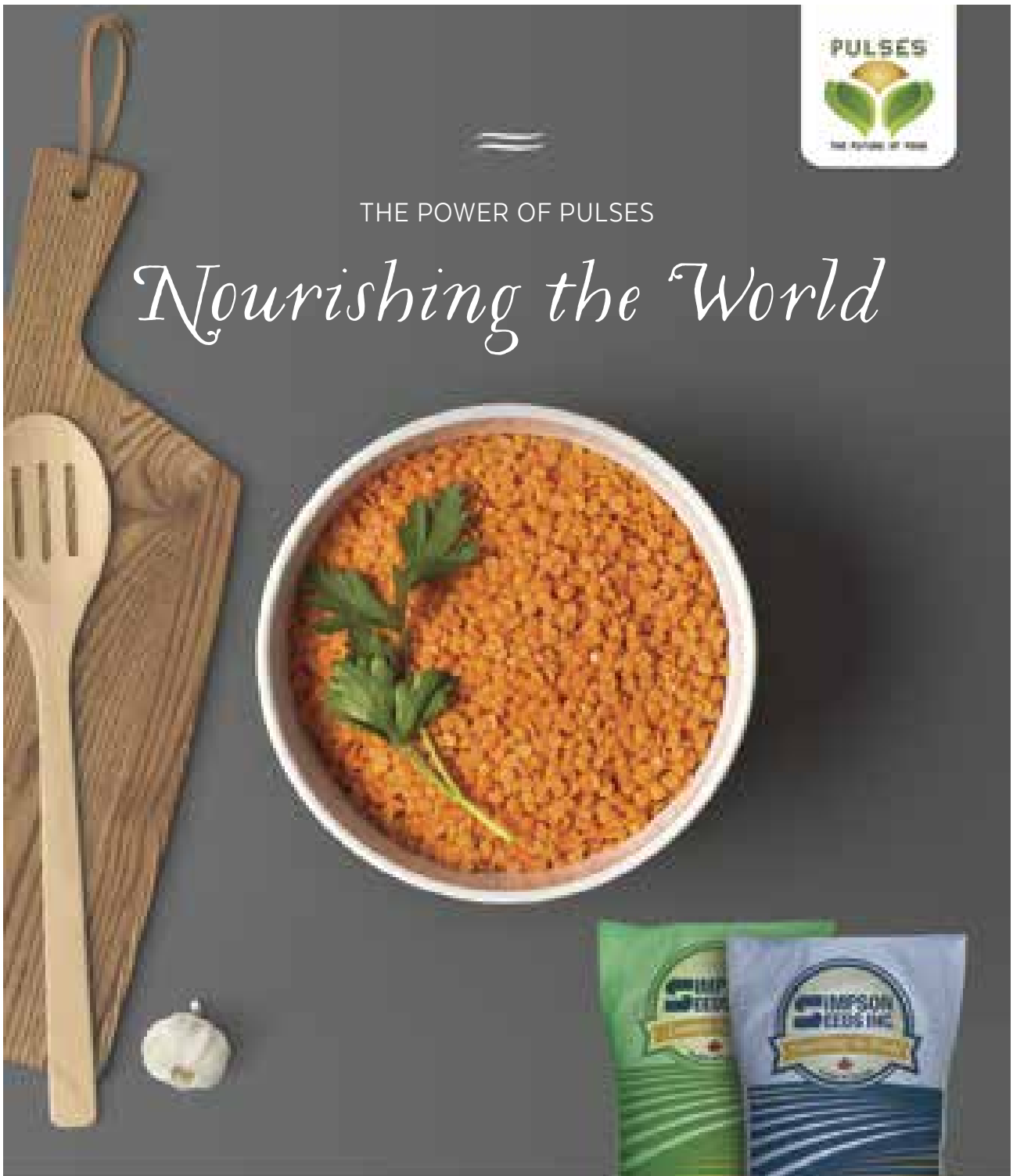
Crop science and research has further demonstrated an even higher potency of pulses in alleviating micro-nutrient deficiency. Scientists at the International Center for Agricultural Research in the Dry Areas (ICARDA) analyzed more than 1700 accessions of lentil germplasm, breeding lines, cultivars, and wild relatives for their micronutrient content and found the iron content to vary hugely from 43 to 132 parts per million (ppm) and the zinc content from 22 to





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96 ppm (read Science Matters). The lentil varieties with higher iron and zinc concentration can intensify the intake of micro-nutrients as part of routine traditional diets.

Several micro-nutrient intense lentil varieties screened by the scientists have been released by national programs in India, Bangladesh and Nepal. ‘Pusa Vaibhav’ variety of lentil, containing 102 ppm iron, is doubling up iron content and contributing to reducing anemia in Bihar, Uttar Pradesh and Madhya Pradesh states of India. Similarly, Bangladesh released ‘Barimasur-8’, which is providing 25 percent more of iron and 60% more of zinc to the farmer families. The fortified lentils have already reached more than 1.2 million farmers in the region.

Reviving the pulses diet, however, is a challenge of our times. Thanks to the Green Revolution, we saw global intensification of cereals with high yielding varieties from the 1970s to mid-1990. It dramatically improved their abundance addressing world hunger. However, it had a fallout – micronutrient-rich foods such as pulses got neglected and even replaced.

In India, the productivity of pulses saw a mere 12.2 percent increase from 1966 to 2009 as against the 162.6 percent increase in yield of wheat, not to mention the dramatic reduction in cultivation area for pulses. Farmers switched to cereals with the advent of Green Revolution technologies, further promoted by government subsidies for cereals. A concurrent drop in pulses consumption was inevitable. The annual pulses consumption per capita has dropped by roughly 28 percent in poor and rural households and by an even steeper amount of 37 percent in rich households over the past two decades.² The trend of cereal mono-cultures has also been detrimental to soil productivity since pulses replenish the soil through atmospheric nitrogen fixation.

With the designation of UN’s 2016 International Year of Pulses, it’s time to change that and put more pulses back in – both on our plates and in the fields.

Giving millions of children like Sunil a chance at healthy and normal development is an easy fix well within our reach – an opportunity we cannot afford to not avail. Pulses not only complete a diet providing both macro and micro-nutrients but also make the soils healthier for sustainable food production – making the deal even sweeter.

(Endnotes)

1 http://oar.icrisat.org/6812/1/26_Policy_BriefIndia%20_2013.pdf

2 <http://www.slideshare.net/southasia-ifpri/ifpri-changing-consumption-pattern-of-pulses>





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COMPANY PROFILE



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We invite all Importers/ Exporters and Pulses Trade in particular to get in touch with our concerned persons. For further details, kindly contact our following personnel:-

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- 2] Vidhwaji P. Shendge 9769581113—(Director)
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The Pulse of the Drylands

Dr. David Bergvinson,

Director General - ICRISAT

As the world adapts to climate change, crops once termed ‘orphan crops’ are now attracting attention, especially dryland pulses like pigeonpea and chickpea that have been ICRISAT’s mandate crops for more than four decades.

These climate-smart crops help smallholder farmers in arid and semi-arid regions of the world withstand weather variability, require less water, enrich the soil and are packed with nutrition. These crops provide more nutrition per drop not only for humans and livestock but for soils as well through their nitrogen-fixing properties. Over the years, ICRISAT and its partners have selectively enhanced pulse productivity through the application of modern breeding and screening techniques to increase resilience and nutrition, and to develop modern varieties and their associated production practices.

Pulses are what we call ‘Smart Foods’ – good for you, good for the planet and good for smallholder farmers. Pulses like chickpea and pigeonpea will contribute towards the new Sustainable Development Goals to reduce poverty and hunger, improve health and gender equity, promote responsible consumption and adapt to climate change.

Why pulses are climate smart

Survive weather fluctuations: Pulses like chickpea can withstand temperatures in desert-like regions that experience significant difference in day and night temperatures; pigeonpea crops destroyed by unseasonal rain still have the potential for a second flush to produce a good harvest.

Improves soil health: Pulses enrich soils by fixing nitrogen and also increase soil microbe diversity. The leaf droppings provide green manure and in severely eroded soils these crops help conserve top soil and rejuvenate degraded land.

Efficient use of water: In many parts of Africa and India, chickpea is planted during the dry season in dried-up farm ponds or rice fallows and the crop survives on residual soil moisture. Pigeonpea is sown mainly as a rainy-season crop and grown to maturity in the subsequent dry season on residual soil moisture.

More nutrition per drop: In a country like India, pulses play an important role as they are the main source of dietary protein. The protein in one glass of pulses equals two glasses of milk. Chickpea has the highest protein bioavailability among pulses. The high dietary fiber in pulses lowers risk of diabetes, heart ailments and gastrointestinal diseases. Pulses also provide substantial amounts of micronutrients (vitamins and minerals) such as Vitamin E, Vitamin B6, folic acid, iron, potassium, magnesium, calcium, phosphorus, sulfur and zinc.





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Chickpea and pigeonpea are great sources of iron, manganese and zinc and can play a key role in countering iron deficiency anemia – a serious health issue that ranges from 50-70% in women and children, with pregnant women being the most susceptible¹.

Diverse food basket and extra income: Pulses are ideal for on-farm diversification. As an intercrop with cereals and other crops, pulses bring in extra income for farmers and at the same time increase the yield of the main crop. In Kade, Ghana, pigeonpea in the cropping cycle resulted in over 100% increase in maize grain yield. Crop rotation not only enriches the soil for the following crop but also makes profitable use of land that might have otherwise been left fallow.

Diversified uses: Chickpea green leaves are used as a leafy vegetable that is superior to spinach and cabbage in terms of mineral content. The green immature seed is used as a snack or vegetable. Selling green grains is highly profitable as these are sold at a higher price than dry grains. The split dry seed and its flour are used in a variety of food preparations.

Pigeonpea also lends itself to various uses. The leaves and forage are high in protein and are largely used as fodder. The stalks are used for fencing, thatching and preparation of baskets. They make for excellent firewood as the calorific value of stalks is about half that of the same weight of coal. It is also used as a shade crop in cocoa and vanilla plantations in Nigeria and South Asia respectively.

Work @ ICRISAT

ICRISAT works with partners along the whole value chain of pulses in an integrated manner to create a win-win situation for the farmer, consumer and the planet. This is in keeping with our belief that all people have a right to nutritious food and better livelihood and also in line with the Sustainable Development Goals.

ICRISAT is making tremendous progress in modernizing and leveraging tools to better utilize genetic diversity. After publishing the genome sequence of chickpea and pigeonpea in Nature Biotechnology in 2012 and 2013, respectively, we are working on completing the resequencing of 3,000 chickpea accessions to better utilize the rich genetic diversity that exists within these crops. While over hundred varieties have been released with partners using traditional breeding tools, we have embarked recently on forward breeding that involves utilization of a select set of markers to accelerate the incorporation of traits that are important for farmers to manage climate change and improve nutritional security.

1 Indian National Science Academy. 2011. Micronutrient Security for India: Priorities for Research and Action



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Innovations for a better world.



ICRISAT and partners have been successful in developing cultivars that are high-yielding, drought tolerant, disease resistant, short duration (as short as 75-80 days) lines and hybrids custom-made for specific regions of the world based on the preferences of farmers and consumers.

Currently research is focused on developing climate-smart cultivars suitable for mechanical harvesting, inter-cropping with cereals and able to improve soil health. We currently use less than 2% of the existing genetic diversity in chickpea and pigeonpea. Hence, there exists tremendous potential to increase the productivity and resilience of these crops using modern tools to expand the use of natural diversity in gene banks.

On-farm practices like intercropping of cereals with pulses and crop rotation to improve soils and increase yields have been tested on farmers' fields with positive results. Farmers are also introduced to ridge planting and broadbed furrows to better manage water and soil. In the case of pigeonpea, ratooning techniques to support zero tillage have been developed to minimize soil erosion under increased incidences of intense rainfall events.

Working along the value chain

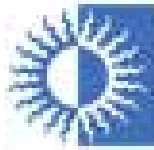
The holistic approach of ICRISAT (see diagram) shows how we work along the whole value chain of pulses. Crosscutting issues such as empowering women and youth and mainstreaming nutrition will ensure pulses contribute significantly towards achieving the Sustainable Development Goals.

A few examples to illustrate how we go about our work.

Analyzing key problems and opportunities helps create win-win situations for farmers. The expansion of chickpea growing areas by as much as 80% in the rice fallows of Prakasam district in Andhra Pradesh, has benefited smallholder farmers. Pigeonpea used as land cover to manage soil and water in China helped reverse soil erosion and land degradation and at the same time provided quality fodder for cattle.

In North Malawi, crop improvement and seed access transformed the lives of smallholder farmers. Farmers who grew high-yielding certified seeds of new varieties helped build up a robust seed distribution system. Farmers in Southeast Asia, especially women, demonstrated how diversifying farms and adopting best management practices resulted in increased incomes.

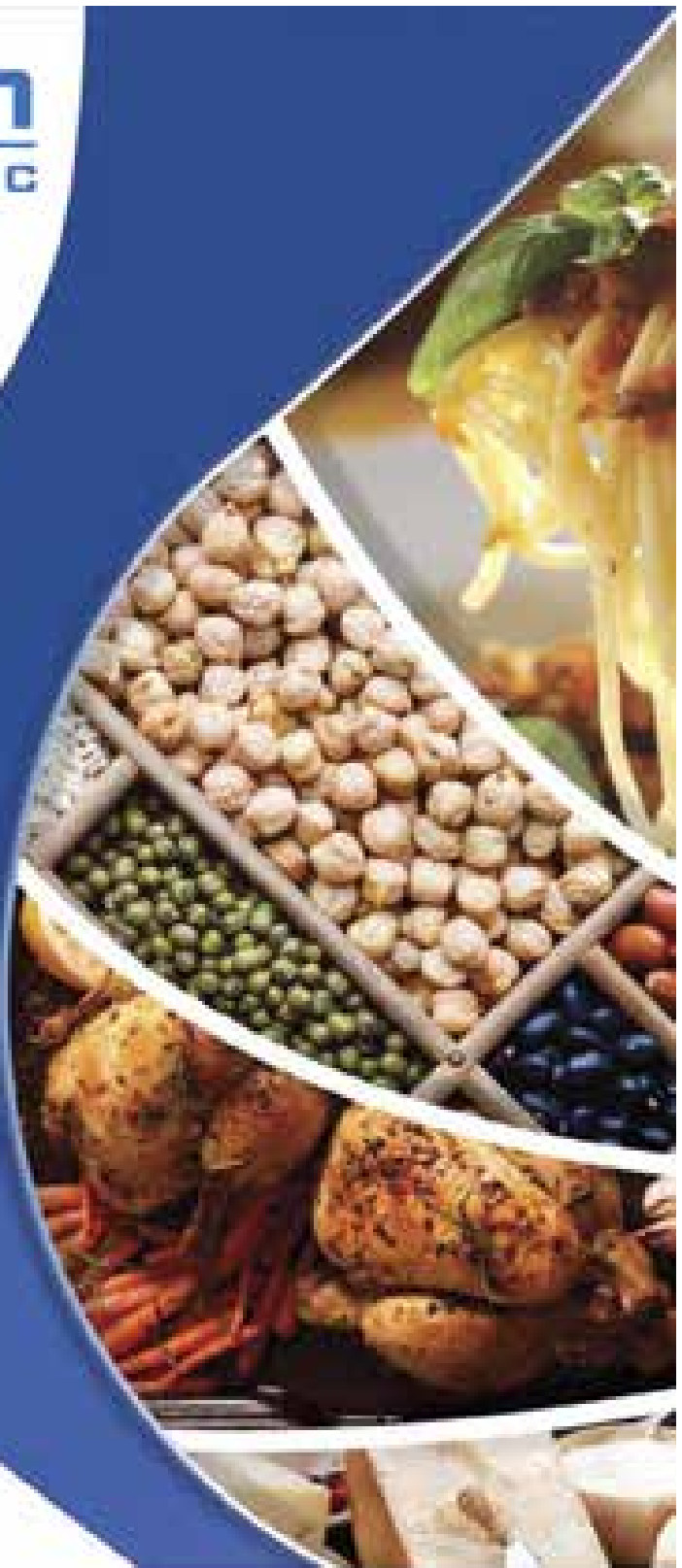




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Intercropping with pulses, planting improved cultivars, practicing ridge cultivation, integrated pest management, fodder production for livestock, forming self-help groups for raising finances and trainings on improved farm practices and seed storage helped women in these regions improve their incomes, self-confidence and control over household assets.

Introducing processing and facilitating market access in Rajasthan, India, helped women generate more income. Split pigeonpea (dal) fetches a higher income and is part of the staple diet in many Asian countries. Women's groups were provided dal mills and trained to operate the machines. The dal sold in local markets helped double their profit. The sale of husk as fodder and pigeonpea stalks as fuel helped them earn an additional US\$ 308 per ha. Seeing the revenues, many young women in the village were willing to take up pigeonpea cultivation and operate dal mills.

Driving market development plays a crucial role in making agriculture profitable. To understand legume value chains in Tanzania, a pigeonpea value chain assessment survey revealed that Tanzania is now the fourth largest supplier in the world². Besides being an important cash crop for Tanzanian farmers, it is also widely consumed and thus, contributes to improving nutrition security. The incorporation of improved varieties and management practices was reported to almost quadruple revenue from pigeonpea production.

Working hand-in-hand with local governments, public and private sector

Decreasing amounts of pulses on farmers' and consumers' plates is a cause for concern in developing countries. In India, pulses are in short supply resulting in rising prices. Achieving self-sufficiency in pulses production is a priority of the Indian government and ICRISAT and partners have responded with a detailed plan for increasing pulse production to 30 million tons by 2020.

ICRISAT works together with local governments in Asia and sub-Saharan Africa, national agricultural research systems, agricultural universities, international and national donor agencies, agribusiness entrepreneurs and private agribusiness companies to empower farmers through demand-driven science and innovation.

In the countries that ICRISAT is working in, country strategies have been drawn up to optimize pulse productivity and profitability for smallholder farmers, especially the dryland tropics where the impact of weather variability is most acute. For us, demand-driven innovation is the driving force to realize the full potential of pulses to achieve nutritional security while staying within the ecological boundaries of the planet through more nutrition per drop.

² http://faostat3.fao.org/browse/rankings/countries_by_commodity/E Accessed 2 Jan 2016



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Indian Pulse Sector – Crying for Policy Attention

G. Chandrashekhar

Pulses are in the news these days and for all the wrong reasons. In the last quarter of 2015, pulse prices escalated to unconscionably high levels wholly unaffordable for large sections of consumers in India, especially the financially under-privileged. The international media termed it the 'pulse shock' and the local media panned the government for its failure to quickly contain the price rise.

India's pulse crop year runs from September to August with two harvests. The price spurt followed two back to back bad harvests. The first harvest that suffered was Rabi 2014-15 crop comprising mainly chana or desi chick pea. This crop usually accounts for 40-50 percent of the country's total annual pulse harvest. Chana crop was devastated by unseasonal rains and hailstorm during March/April 2015. The crop loss was to the extent of Two million tons.

Six months later, Kharif 2015-16 pulse crops was hit by El Nino induced dry conditions. Although kharif planted area was One million hectares higher than in the previous year, yields suffered due to prolonged dry conditions during July-September months. In particular, pigeon pea (tur/arhar), the major pulse crop of kharif season suffered.

Despite continuing large scale imports, prices at the wholesale and retail levels went through the roof. The huge differential between wholesale and retail prices – often as much as 30-40 percent - exacerbated the situation for the household consumers. The government directed one of the parastatal agencies to import 5,000 tons to augment domestic supplies, a laughable quantity or pittance considering that the annual shortage was 5.0 million tons. Suspicion that some market participants indulged in speculative inventory-building resulted in precipitate government action. The rest, as they say, is history.

Clearly, the pulse shock has been in the making for many months. Look at the following data:

Table: India's Pulse Production (million tons)

Year	Kharif	+	Rabi	=	Total
2012-13	5.91		12.43		18.34
2013-14	5.99		13.25		19.25
2014-15	5.63		11.57		17.20
2015-16	5.56	

Note: The production target for 2015-16 is 20.05 million tons comprising Kharif 7.05 ml.t. and Rabi 13.00 ml.t.

(Source: Government of India, Ministry of Agriculture)



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Many pulse exporting countries produce the crop with India as the target market. They closely monitor the Indian market conditions and happily jacked up their export prices knowing fully the tightening supply situation in India. Also traditionally, August, September and October are months with a series of festivals when demand for all food products including pulses rises manifold.

So, a combination of lower domestic production, festival demand, weak currency and higher international prices led to a spurt in domestic pulse prices. Consumer interests were hurt because of the huge differential between wholesale and retail prices. Retail margins can be as much as 40%.

This is the genesis of the dal price shock. Rising ‘futures prices’ of chana (traded on the commodity exchange) was a clear indication of rapidly tightening supplies; yet, policymakers chose to ignore the signal for long. When retail prices skyrocketed and went out of reach of common consumers, there was government intervention and policy action was so severe that many are yet to recover from the shock.

Clearly, the price spike was not unforeseen, nor was it unforeseeable. It was in the making for some time. I would call this a ‘failure of commercial intelligence within the policymaking circles’ and lack of consultation with the trade and industry.

On their part, the importers did their best to contract for large quantities; but as is well known, northern hemisphere harvests take place in Aug/Sept which means they could not meet rising Indian demand in time.

I have said it in the past and will say it again – the Indian pulses sector deserves sound policy support. As such, there’s hardly any policy for pulses. This crop is not given the status and treatment it actually deserves.

Many may recall the pulse price spike of 2007 when the government went berserk and imposed draconian restrictions like stock limits, restricting exports, suspending futures trading (tur and urad) and so on. We do not seem to have learnt any lesson from the dal crisis of 2007.

The government needs to formulate a stable pulse policy. The policy should encompass production, processing, consumption and trade. I would say, as a crop, pulses have not received adequate policy support, research support and investment support (unlike rice and wheat). Growers need more remunerative prices and assured marketing outlets. Consumers deserve protein rich pulses (economical source of vegetable protein) at affordable prices.

The association – India Pulses and Grains Association – calls itself the apex body of the





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country's pulse trade and industry. It must prove its claimed status by its conduct. IPGA has the moral responsibility to work closely with the government in shaping an appropriate policy for the pulse sector with a long-term perspective that will advance the interests of growers, consumers and industry.

To be recognized as a progressive trade body, the association must go well beyond mere imports and routine domestic trading to pursue bigger objectives such as achieving increased self-reliance, promoting value addition, enhancing dal milling efficiency and delivery of protein rich pulses to the nutritionally needy. The Indian pulses sector has the potential to become globally competitive; but huge initiatives are necessary in national interest. Hope the association has the vision and courage to rise to the occasion.

From April to December 2015, India's pulse imports aggregated 4.0 million tons. Projected arrivals during the first quarter of 2016 are an estimated 1.2 million tons taking the annual total import to 5.2 million tons. This is higher than 4.6 million tons imported in 2014-15.

Despite sharply lower domestic production, in financial year 2015-16, India's imports have risen by about 600,000 tons only. India is a price conscious market. Clearly, there is consumer resistance at higher price levels and therefore, demand compression.

e n d s

(Views are personal. The author is Economic Advisor, Indian Merchants' Chamber and Member, SEBI Commodity Derivatives Advisory Committee). He can be reached at +919821147594 or gchandrashekhar@gmail.com)



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The World Loves Pulses in 2016!

Hakan Bahceci

Chairman of GPC's IYP Committee,
Member of the International Steering Committee of IYP
CEO Hakan Foods

What an amazing year to “Love Pulses”. Four years ago, we were dreaming of the opportunity to draw attention to the unique role that pulses could play in addressing society’s needs, and the things that can be done to unleash this potential. It could not be more thrilling to see a year now dedicated to pulses. This could not have been achieved without the tireless work of Turkey and Pakistan.

Pulses have great potential to help eradicate hunger, and tackle many chronic health conditions, such as obesity and diabetes. With over 800 million people globally suffering from acute or chronic undernourishment and two billion people overweight leading to health problems linked to obesity, the International Year of Pulses will allow us to demonstrate the integral role these nutrient-dense foods have in global food security and nutrition.

Pulses are a fit for the developed and developing world. 2016 is a time to move these crops back to the central role they require. We call for more funding for pulse breeding, more attention to research and innovation, and policies that provide consistent signals on the importance of pulses. The global reality of the refugee crisis is a serious example and pulses are part of the World Food Programme food basket. How can we help equip WFP with the resources to meet the humanitarian crisis?

There are many, many plans underway, not only by the private sector but also with the contributions of more than 20 partner organisations. Together we share a vision for the year and have been working since the declaration to identify more than 100 activities on pulses happening all around the world in the months to come.

The year started in November with one of our first event. The Sackler Institute for Nutrition Science and Bush Brothers & Company held a conference titled “Little Beans, Big Opportunities: Realizing the Potential of Pulses to Meet Today’s Global Health Challenges”. This inaugural conference looked at the contribution of pulses in healthy and sustainable diets, examined how pulses can make significant impacts on public health, and explored opportunities for enhancing these benefits broadly through food system innovations.

Looking ahead at the many exciting events coming up, I am happy to say that we will see many regions host key moments of the year. For example in February, in the same month as we meet in Jaipur, the Feed the Future Lab of USAID and their partners are organizing the



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Pan African Legumes Conference, which will highlight the important role of pulses in Africa.

Beans are also one of the most important protein sources in Latin America and the Caribbean. We want to recognize the importance of the Regional Conference Central American Cooperative Program for Crops and Animal Improvements in April. This conference will cover regional strategies for food security, mitigation and adaptation to climate change.

Indeed, partners are organizing high profile activities to celebrate pulses and their relevance to food security, nutrition, health and sustainability in all corners of the globe. There are 11 signature events occurring in every FAO region throughout 2016.

Thanks to the UN, to FAO and the Rome Based Agencies in particular, we expect IYP to be a catalyst for a momentous change in the health, nutrition, and sustainability of diets around the world. Please join us in Loving Pulses in 2016.





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Launch of the International Year of Pulses 2016

José Graziano da Silva,

Director General of the Food and Agricultural Organization (FAO)

From the remarks for the launch of the International Year of Pulses

The slogan for 2016 is “International Year of Pulses, Nutrition Seeds for a Sustainable Future”, to highlight the importance of this type of seeds as food for human beings and feed for animals. It will be a great opportunity to raise awareness of the benefits of pulses in the context of the Sustainable Development Goals. Pulses can contribute significantly in addressing hunger, food security, malnutrition, and environmental challenges.

Lentils, beans and chick peas, among other pulse crops, have been an essential part of the human diet for centuries. But their nutritional value is not generally recognized and is frequently under-appreciated. Pulses contain up to 25 percent of protein, which means two and three times more than wheat and rice, respectively. They also are significant sources of dietary fibre and are rich in minerals and B-vitamins, all of which play a vital role in health.

Pulses also contribute to revitalize soils. Including pulses in intercropping farming systems, and cultivating them as cover crops, enhances soil fertility and reduces dependency on chemical fertilizers, by fixing nitrogen and freeing phosphorous.

Pulses are important for the food security of large proportions of populations, particularly in Latin America, Africa and Asia, where they are part of traditional diets and are often grown by small farmers, most of them family farmers.

World production of pulses has increased by over 20 percent between 1990 and 2013. However, their consumption has seen a slow but steady decline in both developed and developing countries in the same period. The Near East/North Africa region is the only region where per capita consumption of pulses has increased.



Preparations for the International Year of Pulses, 2016, are well under way: the International Steering Committee consisting of FAO Members, representatives from the Rome-based Agencies, Farmers' Organizations, civil society, and private sector has been actively working since April this year, with the support of FAO technical divisions, to ensure proper planning of the celebrations throughout 2016.

Pulses have a crucial role in sustainable food production and healthy diets and, above all, for their contribution to food security and nutrition. Therefore, it is not only our duty, but also our primary responsibility to raise awareness of the benefits of pulses for humankind.

I urge governments, farmers, the private sector, civil society organizations, academia, researchers and other non-state actors to join us in this task during 2016.

[© FAO] [2015] [Launch of the International Year of Pulses 2016] [<http://www.fao.org/about/who-we-are/director-gen/faodg-statements/detail/en/c/344549/>] [2015-12-15]

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Agriculture and Food Security: Where research can make a difference

Dr. Kevin Tiessen

Remarkable progress has been made over the past 10 years in decreasing the proportion of poor and hungry people in the world. However, feeding an estimated 9 billion people with safe and nutritious food by the year 2050 remains a challenge for agricultural research, development and policies – especially given the challenges of climate change, increased demand, and volatile prices.

In particular, we need to develop and scale up innovations specifically suited for the nearly 800 million small-scale farming families globally – to increase the sector’s productivity and gradual transition toward economically viable small and medium-scale farming, especially in South Asia and Africa.

One of the ways of achieving food security is through focused and practical research. We see clear evidence that science and research can increase both food supply and play a key role in the fight against poverty. The World Bank has shown that agricultural growth is twice as effective as non-agricultural growth in reducing poverty. That is because most of the world’s poor live in rural areas.

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At Canada's International Development Research Centre (IDRC), our goal is to invest in knowledge, innovation, and solutions to improve lives and livelihoods in the developing world. Bringing together the right partners around opportunities for impact, IDRC builds leaders for today and tomorrow and helps drive change for those who need it most.

Our commitment to supporting agricultural and food research makes sense. Canada has long been a major player in food and agricultural research, and now we are expanding our field of agricultural and nutrition research activities. We are moving beyond the traditional “stars” of food research — the grains such as wheat, rice and corn — to “orphan crops” that have been too often overlooked, but are of vital importance to the world's poor.

These orphans include pulse crops, millets and a host of other local cereal, vegetable and fruit crops.

As we meet this week in Jaipur – during the International Year of Pulses – we should note that pulses were considered orphan crops in Canada just two decades ago, with low production and receiving relatively minimal research attention. However, advances in agricultural sciences and a vibrant international market have turned the Canadian pulse sector into a major world player.

Given this, it is not surprising that pulse crops have figured prominently among our current portfolio of projects.

Pulses are staple foods in many regions of the world, diversify income and food sources for the poor in developing countries. They are rich in micronutrients and a key source of protein (much cheaper than animal protein).

Many pulse crops grow well in dry conditions and can provide a hedge against the negative effects of climate change—a major concern in India and throughout South Asia, where many of the world's poor reside.

Unfortunately, despite their clear benefit, pulse production remains stagnant, and often declining, in the very countries that consume them the most and where population is growing the fastest.

In our minds, this remains a key challenge for the pulse sector. What is blocking farmers, especially small-holders growing crops on 1 to 2 ha of land, from expanding production? What will it take to see voluntary uptake of these crops? How can the private sector become more involved? And, where can research help?

In the academic world, we often argue about whether basic or applied research is more important. In my opinion, it's a bit of a moot point.





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We need to harness the power of both scientific and farmer-based knowledge to develop the right crops, tools, techniques, and expertise for smallholder farmers and their communities.

Many smallholder farmers already have extensive knowledge of what works and what does not, drawn from generations of farming under challenging and changing circumstances. Often what is most needed is simply a boost to supplement their ongoing efforts, such as access to affordable technologies, to new techniques that have been proven in similar circumstances, or to markets and information.

Unfortunately, there remains relatively little plant research targeted to pulse crops in many Asian countries. That means farmers have trouble finding good quality seed, difficulty coping with crop diseases, and face challenges in maintaining productivity.

So the question that we are currently asking, where do we go moving forward? With the world's population projected to increase by several billion over the next four decades, the need for agricultural support, investment, research and sustainability becomes all the more urgent. This is a huge challenge as well as an opportunity for our ingenuity.

I pose this question to the attendees of this Conclave - what are the key Research-for-Development issues that we need to tackle in the next 5 to 10 years if we are to increase pulse production in India and South Asia? Why are pulse crops often a difficult “sell” to smallholder farmers? What are the bottlenecks that we need to address? What are the fastest and most effective ways to take research products to scale?

Part of the answer may lie in the knowledge that as the world continues to urbanize, the current commercialization of small-scale farming will continue – that is a fact. This will require research that is market aware. This is what small-scale farmers want, and what urban consumers need.

It is also becoming clear that we need to pay more attention to the incentives, options and desires of poor rural people in our work, including a solid grasp of the economics of it. Labour-intensive systems, especially those that lock poor people into back-breaking manual labour for low returns, are simply not feasible options.

To accelerate impact, and to ensure that research breakthroughs benefit as many people as possible, we need to find ways to involve the private sector.

Admittedly, for over a decade, IDRC's programming has not focused much on private sector collaboration – but recent trends have shown that we can position ourselves to effectively engage with the private sector.

We are now more systematically approaching the topic of private sector collaboration. We are building on a modest base of knowledge, experience and promising new programming.





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Dr. Kevin Tiessen is a Senior Program Specialist at the International Development Research Centre. He is a soil scientist with expertise in agronomy, food security, and long-term protection of soil and water. In 2010, Dr. Tiessen joined IDRC Ottawa as the program coordinator of the CA\$124 million Canadian International Food Security Research Fund (CIFSRF) – a joint program of IDRC and Global Affairs Canada. The Fund is in its second phase and has supported 39 large agriculture and nutrition research-for-development projects in 22 countries across Africa, Asia, Latin America and the Caribbean. Since 2015, he is based in IDRC's Regional Office for Asia – located in New Delhi, India – where he leads IDRC's regional programming in Agriculture and Food Security.

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Outgrower Agreements-

A new opportunity in Pulses from Africa?

Dr. Kulkarni

Farming in the sub Saharan Africa needs strong vertical linkage to be a part of the bigger value chains. The access to inputs and markets that they lack, can be achieved through the Outgrower schemes, a new type public-private partnerships (PPPs). The Outgrower agreements have started to become an important policy initiative in many countries, especially the G8's New Alliance.

Farmers and small scale producers often look forward for such schemes as the partner company can provide them with inputs and production services. The type of seeds, the farming practices and the overall knowledge transfer helps their farming incomes to rise by opening up new markets and access to new technology. The out growers are aware about the pricing mechanism, as the buyers and sellers agree on a price that is attractive to both. This also allows the out growers to avoid mono-cropping system and their reliance on credits for inputs also goes down.

The buyer, on the other hand can be sure of the quantities, and the quality attributes. This is a much better option than going into commercial farming and making huge capital investment. For processors, it is much cheaper than investing in commercial farming. It also allows them to have a better control over sourcing. They can be more confident about the control over quality, timing, traceability and other issues. This will also enable them to diversify the production risk by spreading the sourcing over a wider area.

Sometimes, contract farming is misunderstood as Out grower scheme. Though, the majority of the contract farming projects that are undertaken are actually out-grower schemes, contract farming is a much broader word.

Out grower schemes can be in different ways. It can be an adhoc informal scheme or a highly coordinated system. In the Ad Hoc arrangement, the farmers and buyer have a very loosely bound agreement, more of a procurement agreement. It is not backed up by any firm enforceable contract. The buyer simply indicates the quality and price that he is interested to buy. The out growers invest in the production and finally sell the output to the buying firm.

However, in the highly organized system, the involvement of the buying firm is much higher. The farmer coordination is high and the buyer provides detailed technical advice to the Farmer/ Farmer groups. They also get involved in providing inputs and credit facility. The buyers handle the post harvest handling and storage. The system is managed through a formal contract.



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Should outgrower agreements be used in Pulses- Pulses is a crop that has a big potential in Africa. India, on the other hand has an ever increasing market for the pulses. It's becoming evident year by year that the imports of pulses will only grow. The rising per capita income and the stagnancy of yields and acreage, has led to a growing import market in India. Exporter to India is mainly Canada, Myanmar, Australia, along with others. However, imports from Africa are rising. Example can be taken from Tanzania, from where, India imports about 7-8% of its chickpeas, 27-28% of pigeon peas and about 4% of moong/ Urad. Similarly, the imports from Kenya, Ethiopia and other African countries are also rising. More imports from Africa will diversify India's exposure and also allow a better price negotiation.

The demand for pulses has recently caught the attention of several farmer based associations in east African countries. Recently, Gerald Massila, CEO of East Africa Grain Council, an Agri industry body from East Africa stated It is recruiting over 100,000 growers to raise production to meet the volumes of pulses that India wants to import from Kenya. Similar interests are shown in countries like Tanzania, Ethiopia, Mozambique, and Malawi. However, since pulses are not a priority crop in many of these countries, the knowledge base of pulses cultivation is not available. This makes the supply of pulses erratic and quality aspects get compromised. The pulses importers have been making frequent visits to these countries, but the structured trade mechanism has not been established.

The option of Indian farmland investments in pulses production in Africa is also sometimes considered. However, the Indian experiment with commercial farming in Africa has not been very encouraging. The Indian corporates have moved into commercial agriculture with large scale farm acquisition, with an objective of getting to commercial agricultural production. Companies like S&P, Tata, Karuturi global, Neha International, Ruchi Soya have taken farmlands and tried their hands into commercial agriculture. However, we are still waiting for a success story to emerge from this sector.

When the pulses importers and the traders from India look at Africa as a potential source for the supply, the option of vertical integration and commercial farming does not excite.

Then can Out grower scheme be an option. Some of such experiments have been seen. Recently, Uganda-based agro-commodity trading company Farmers Centre (U) Limited (FCL) and Imara International , an India based company signed a memorandum of understanding (MoU) that is estimated to be worth 5 million USD. Under this MOU, FCL has agreed to supply green moong beans and pigeon peas to Imara. Though this is MOU based transaction, and does not completely fall under the structured out growers scheme, still it's a very impressive beginning.



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There are similar interests on the other side as well. A farmer group in Kenya, representing about a million farmers from different counties of Kenya want to sign a supply agreement with Indian pulses importers. They want to target a output of 200 thousand tons of pignon peas and other pulses. The farmer group is strongly organized and wants the Indian partner to sell them quality seeds and inputs and help them with technical advise This will be a back to back agreement to buy the production. This is again only one of such interested groups.

To make this arrangement a strong business model, there is a need of some important steps to be taken by the policy makers in the African countries. There is a need of strong legislative support to enforce contracts under such agreements. The pulses importers are also not sure about the costs that they may have to incur under this arrangement. This will make it important that some incentive or benefits is provided to attract partners. Things like tax break or subsidy by the government based on volumes mobilized through the small holders may attract partners from India.

However, while providing the legislative framework, it will be important to ensure that the buying companies do not control the market and the small holders get their share of power in the process so that the market is fair and transparent.

What should be the policy consideration for such arrangements in pulses sector?

There are several considerations that the governments have to include while developing a policy for the sector. The policy will be a important tool to attract large scale investment in the pulses sector, both financially and technically. The pulses importers and processors from India should find it attractive to make such investments. Issues like tax benefits for import of inputs and equipment, export permissions should be considered. Further, It is Important to have representation of the out growers or the small holders in the relationship. It will be important for the governments to ensure that the adequate representation of the small holders' interests and apprehensions is accommodated through the policy. The policy to promote organization of the small holders into small business units is more required. The price is the most important factor in this relationship. Typically the prices of pulses fluctuate significantly and this needs to be addressed through the policy. The mechanism of price determination and price to be finally paid needs to be transparently addressed. Lastly, the comfort in the relationship will arise only with the enforcement of the contracts under this arrangement. Hence, a efficient legal system for contract enforcement will be a must. To achieve this, there can be a legal enactment to cover this arrangement and proper regulations must be developed. This legal structure should address the enforcement and competition clearly and fairly.





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This can be initiative that the government of India can undertake as a diplomatic assignment. After the impact of pulses prices on various socio political issues in the recent past, the government has more than one political and social reason to take keen interest in the sector. The Government of India, through a bilateral Agreement can help the supplying country to develop a enabling policy environment. Such agreements can boost the confidence of Indian importers about permission for export and contract enforcement.

The scope for production and export of pulses in Africa is high and it can be a important trading partner to India. The rising pulses prices in India will need diversification and a more broad based trading mechanism to open the market. In such situation, an enabling environment for Indian importers and processors to set up outgrowing agreements in Africa can be a path breaking initiative. This will not only lead to more exports to India but also allow the pulses industry in India to expand and export to third party countries from Africa. The production potential of Africa and the technical expertise of India can create a new paradigm in South South Cooperation. No better time than the International Year of Pusles!

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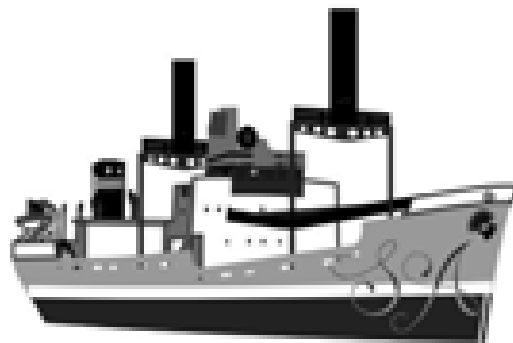
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Role of China in pulses industry

Dr. Kulkarni

The growing population and the economic performance for the past few years has kept the world guessing about china's role in the market for any product in the world. However, recently, China's economic growth has slowed down. The growth rate in 2015 was 6.9%, much below the recent average. The Chinese authorities describe it as stable. Further, the projections for 2015-2019 periods suggest an economy value in excess of 15 trillion dollars by 2019.

The slowdown in China has affected the areas like investment, retail sales and industrial output, one industry that kept growing is the Food Industry. In 2014, the revenues from the food industry in China were an estimated 2 trillion USD. This is the impact of the massive urbanization, which has spurred the demand for the packaged food. This industry will continue to grow over the years as the population of 1.3 billion, the rising middle class and the urbanization will keep the demand for better and healthier food rising. This will also have an impact on the food habits and demand of type of food.

One industry that has seen the impact is pulses. China had become the net exporter of pulses, where as it has now turned into a net importer. China's annual grain and feed production has less than 1% share coming from Pulse and as a result, this sector does not receive any production support from the government. As per estimates, China's pulses production for year 2014-15 (October to September) was around 4 million tons. However, lower export prices have kept the production of beans lower. The prices of Black Beans were at around 4000-4100 RMB per ton in November 2014, as against 5000 RMB per ton in the previous season. This led to the traders holding on to the stock and the prices going further down. As a result, the crop for next year was lesser.

China in early 90s started the export of beans. It was low quality but cheaper beans. This led china to be a major player and an exporter of kidney beans, green mung beans, adzuki beans. The economic growth, growing domestic demand and the changing dietary pattern led to the reduction of exports except for kidney beans that china still plays a major role.

China has also been a consumer of pulses like Dry peas. China started importing the peas in early 1990s and since then has continued doing that. This has only increased over the years and the changing dietary patterns have added to its demand.

The demand from the food processing sector, like the processors for vermicelli and the



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protein producers keeps this demand higher. Some new factories were commission by China in past years. In addition, some have been upgraded. This expansion of production capacity for starch for Vermicelli and Pasta has led to the increase in demand for dry peas. The carry over stock last year kept the imports low to a level of 700-800 thousand tons, but in long term it is expected to rise.

The sources that china imports from are Canada and USA. The industry is expanding, but not with a very rapid pace. In addition to the Dry Peas, the import of Green Gram is also increasing in China. The increase in demand for dry snacks and packaged food has also contributed to the rise in demand.

However, the chines pulses industry is less organized as compared to other crops. The pulses industry is dominated by small holder producers with small parcels of land. Hence it is not very efficient. The industry also is not a priority industry for the government. The support of other crops poses a challenge for pulses in china as the acreage can be diverted to crops like vegetables or Corn.

The role china used to play in the global pulses industry is reversing. The export of black bans to brazil is still there, but the rising costs and the factors associated with their domestic production as well as Argentinian crops keeps China's export uncertain. China may see itself as a major importer, then being a exporter soon. The Kidney beans is finding a new market as local packaged food manufacturers are using local chines beans for their canned products. The Chines consumers still have not embraced the nutritive value of pulses and still, the pulses do not find its way into traditional chines food. But, with the urbanization, and more and more people becoming aware of healthier foods and western food culture picking up, the demand for pulses will rise. This may not be sudden, but slowly china is making its way into the list of major importers.



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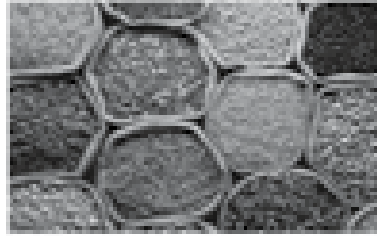
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