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AGRI
COMMODITIES

Pulses • Grain • Oilseeds • Spices • Feed

22/May/2021



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PULSES

Ukrainian and Global Market Prospects

FACING
THE FUTURE

18 INTERNATIONAL CONFERENCE

May 20-21, 2021

KYIV, UKRAINE





Pulses market in Pakistan. Demand and domestic consumption - is a growth projected?

- Pulses are the most important source of vegetable protein in Pakistan. They are cultivated on 5% of the total cropped area. Their use ranges from baby food to delicacies of the rich and the poor. Because of the population growth, demand for pulses is increasing day by day.
- Pakistan is the second largest importer of pulses in the Asian region. India being the market leader usually dominates market demand and prices trends but since couple of years the market was driven by Pakistan.
- Population of 220 million
- Annual consumption of Pulses of 1.7 million MT
- Per Capita Consumption of 7kg only
- Annual import of 1 million MT
- Fluctuation in exchange rate



Pulses market in Pakistan. Demand and domestic consumption - is a growth projected?

- The growth in import of pulses had been significant since Covid-19, and demand keeps increasing
- Pulses importers are price oriented rather than being quality or origination.
- Russian kabuli chickpeas, have replaced a lot of origins due to its attractive pricing and quality which varies lot to lot.
- Yellow peas is substitute of Kabuli Chickpeas whereas Kabuli Chickpeas is also substitute of Desi Chickpeas.
- Pulses Consumption raises usually from February uptil Month of Ramadan



Pakistan Pulses Production

Commodity	2016	2017	2018	2019	2020
Desi Chickpeas	300 K	300 K	350 K	350 K	250 K
Kabuli Chickpeas	60 K	60 K	75 K	30 K	30 K
Lentils	15 K	15 K	15 K	5 K	5 K
Yellow Peas	0	0	0	0	0
Black Matpe	0	0	0	0	0



Pakistan Pulses Imports

Commodity	2016	2017	2018	2019	2020
Desi Chickpeas	155 K	420 K	212 K	41 K	89 K
Kabuli Chickpeas	170 K	181 K	207 K	240 K	62 K
Lentils	127 K	96 K	89 K	86 K	150 K
Yellow Peas	217 K	206 K	200 K	150 K	219 K
Black Matpe	44 K	86 K	67 K	43 K	46 K



Imports of chickpeas and yellowpeas from Ukraine: demand outlook, is the quality satisfactory?

Commodity	2018/2019	2020/2021
Yellow Peas	56313	29682
Kabuli Chickpeas	21587	20884

- The demand of Pulses from Ukraine looks stable due to prices as compared to Turkish and Russian origin.
- However, the Ukrainian Quality Is preferable in local market as compared to Russian origin, which is more similar to Turkish Origin.
- The taste, colour, and size is acceptable which makes better cooking.

- Russian ypeas 171,203 MT, Canada 17,437 MT.
- Russian Chickpeas 29,580 MT.



Why chickpeas import volumes from Russia dropped by more than a half? ?

- Russian Kabuli Chickpeas imports were seen highest numbers in the year 2019 and 2020.
- Russian Kabuli Chickpeas is consumed as whole and splits only.
- Desi Chickpeas harvested in the month of April in Pakistan.
- Currently, due to low prices of Desi Chickpeas (Australia) was continuously imported and consumed as substitute of Kabuli Chickpeas.
- The local and imported desi stocks shall last uptill July / Aug after which we see more demand.
- Earlier, the Kabuli sales were slow, but due to price increase of all origins Desi and Kabuli Chickpeas, the demand have been increased suddenly locally, and less offers from origins.



Next year projections in the pulses sector of Pakistan.

- As India has been in market recently for Pulses, including Kabuli, Lentils and Desi Chickpeas, there is strong belief that Indian Gov, might give relief to importers and allow more pulses with less or no duty in coming year due to huge demand because of current on going flood and Covid-19 Situations.
- As India is market leader in Pulses, and Pakistan will follow buying if India comes, the market may further develop and support Importers.
- Due to Global Warming, the weather conditions in Pakistan and other Pulses originating countries might affect the demand and supply.
- Pakistan will remain in buying, like ever year, but the price plays the role.
- Eat Pulses, Support Farmers, and Stay safe from Covid-19

Thankyou for your time.

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