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Dear Colleagues

At GPC, we are preparing for the “Pulses 2017 Convention” in Vancouver, Canada, early July with “The Future of Food” as the convention theme.

Why are pulses the future of food? This is a question that many not familiar with pulses are beginning to ask as the activities by GPC and others through IYP 2016 to promote pulses and their benefits continue to be part of the mainstream media conversation. Why are pulses the future of food?

Over the next three decades it is expected, by the United Nations, that the global population will grow by 2 billion people to almost 10 billion. The most significant growth is expected in growing global population and emerging middle classes in countries such as China, India and Brazil. This population growth is expected to increase total food consumption by up to 70% by 2050 according to UN-FAO (food and Agriculture Organization).

Population growth in this way will put significant strain on current food production and distribution systems. Pulses are a good source of protein, a key nutrient for large numbers of the world’s populations, especially in developing nations will invariably be part of this solution. It has been for this reason that GPC, through our various activities related to IYP as well as initiatives around tariff/non-tariff trade barriers, market access, research into production and varieties to improve and increase pulse production and education and awareness, has been focused so much on the state of the pulse sector globally.

Pulses will be part of the solution to produce, as the UN FAO estimates, the same amount of food in the next 30 years that has been produced in the last 10,000 years of civilization.

This is a daunting task, but we are confident that our pulse sector is up for playing a major role in this solution to focus on nutrition, food security, health, wellness and sustainability in developed nations as well as high nutrient demand resulting in increased demand from food manufacturers for pulse ingredients and healthier end-products in developed nations.

Why are pulses the future of food? Pulses 2017: The Future of Food and the various panels and noted speakers in Vancouver will help us all explain what we in the pulse sector all know – pulses are good for us and good for the world in so many areas.

We look forward to seeing all of our friends and colleagues in Vancouver.

Mr. Huseyin Arslan
President, Global Pulse Confederation
‘TOGETHER WE STAND - DIVIDED WE FALL’

By Martin Chidwick
Red River Global Ingredients

1971

On a hill top in Italy, young people from all over the world assembled to bring a message of harmony from the Coco-Cola bottlers. “I’d like to teach the world to sing in perfect harmony, I’d like to buy the world a coke and keep it company. (That’s the real thing) ...(Coke is what the world wants today)” .......Millennials among us...perhaps check it out online.

2016

The IYP aims to “heighten public awareness of the nutritional benefits of pulses as part of a sustainable food production aimed towards food security and nutrition.” A global initiative backed by the General Assembly of the United Nations. Switch coco -cola for pulses. “I’d like to teach the world to sing in perfect harmony, eat more beans and peas and little red things (lentils), in perfect harmony”.

2017

“Globalization is a fact of life” says Austrian Minister for European and International Affairs, Sebastian Kurz, in UN General Assembly speech. “The more the world connects, the more responsibility we have to not look away from what happens elsewhere, and the more we become globalized, the more interest we should have in working for stability and prosperity in other parts of the globe”, he added.

In a CNN studio recently, Facebook CEO Mark Zuckerberg reveals his company’s new mission statement, “To give people the power to build community and bring the world closer together”. Connecting people online isn’t enough. "We realize that we need to do more. It is important to give people a voice, to get a diversity of opinions out there, but on top of that, you also need to do this work of building common ground so that way we can all move forward together”.

Zuckerberg had earlier in the year penned “Building Global Community”- a near 6000 word document. He wrote "Today’s threats are increasingly global, but the infrastructure to protect us is not. Problems like terrorism, natural disasters, disease, refugee crises and climate change need coordinated responses from a worldwide vantage point. No nation can solve them alone. A virus in one nation can quickly spread to others. A conflict in one country can create a refugee crisis across continents. Pollution in one place can affect the environment around the world. Humanity’s current systems are insufficient to address these issues".
JULY

So you ask- what has all this to do with the pulse trade? Earlier this week, a highly respected trader said to me, “The pulses market is completely and utterly, unestablished”. News of imploding values and possible nearby oversupply in the world’s largest consumer and producer of pulses, India, has reverberated through much of the industry. The catching up of overpaying growers from the inducements of the fall of 2015 for 2016 crop of lentils and peas, has also caught up to the market. The growth of ‘global’ supply of competitive pulses has also begun to hit home.

One only has to look at the development of pulse crops in South America and Eastern Europe, to say nothing of Eastern Africa and the changing dynamics of Myanmar, and better crops from Australia, to register that supply is increasingly a global production base, and that North America and N W Europe have challenges to their influence.

Conversely, exponential growth in pulses, especially chickpeas (check out the world of humus....), and peas for protein (have you been watching the companion pet trade?) have helped assuage some of the ‘globalized’, competition as North America finds increasing off-take at home. But it runs deeper yet still.

CONFUSION

Globalization. One world. The disciples of this movement have been dealt some severe blows. The perceived protectionism of the Trump administration and the Brit-exit or Brexit have undermined the ‘speed of ascent’ to the summit of the One World. The confusion of philosophies, the embracing of old taboos as now the new norms by some nations in (mostly) the west, have confounded some of the world’s leaders to say nothing to various adherents of different faiths.

Against this background, the social pressure on governments to keep half an eye on the health of the globe and the other half on their own people, has become excessive and pervasive to sovereignty. How does a market emerge and economy grow, if it is immediately shackled by the "global interests" of those who have "arrived"? How does a voice at the International table get received by others at the same table if the fundamental philosophies of life are so at odds?

Do we really have the grace to hear each other, and respect one another’s views without being labelled 'bigot' or worse? (A student of fake news and vitriolic rhetoric in the North American political arena will give the reader some clue how that is going....).

CONSEQUENCES

We are in danger of evolving away from our heritage of oneness. The joy of ‘family’ and of a shared vision, so well captured by last year’s global promotional drive.

We have a trade that often times is cynical in its dealings. Today we sell. Tomorrow the market is up. We ship that sale, (we know we will get shipped!). Maybe we don’t. Maybe we ask to have shipment delayed. Maybe we walk on contract. Maybe we buy in at cheaper levels. Repercussions for both the supply market and the demand aspect of the market.

It only takes one, to behave like this, and the ripples are impactful globally. Painful to read, isn’t it? But adherents of these ‘aide” to trade are not clever.

The memories of those previously ‘wounded’ by such behaviour are long. (I had a broker from a certain destination tell me of the unpunished fiscal pain, a named, for my ears only, company had caused in 2014. So incensed are the buyers that they wanted him to solicit offers from the protagonist, so they could exact retribution by defaulting....).

CONCLUSION

Well run, well managed, well informed participants are always a welcome addition to the pulses industry. There are many companies who have poured body and soul into building first class operations, trade and /or asset based. Why should they be compromised by less scrupulous behaviour, be it buyer or seller?

Why should the small family owned companies that many of us know and love, have their operations be compromised by the pressure of shippers acquiescing to renegotiated contracts to others in their market, when the whole essence of the buyer with integrity, is just that. Integrity.

As an industry, TOGETHER WE STAND. We owe it to the globe and to each other. Dan Buettner , (a National Geographic Fellow and New York Times bestselling author) has researched what he calls the 'Blue Zones' of our world.

He has discovered that beans are the cornerstone of every longevity diet in the world. "A cup a day (sorry Pulse Challenge!), repeat, a cup a day" is his conclusion.

We are blessed to be dealing with a precious product, and a globe changing one. In harmony, we can make an impact that overshadows the boundaries and prejudices of the world. A healthy body, it is said, leads to a healthy mind.

_As an industry.......TOGETHER WE STAND._
Launched of GPC Pulses Contract #1 at Vancouver Convention, July 2017

At our upcoming Convention in Vancouver July 10th-13th, GPC will be launching GPC PULSES CONTRACT #1, a new contract for the international trading of pulses, modelled on the widely used Gafta Contract No. 88, with adjustments reflecting the customs and practices of the international pulse trade.

Every delegate attending the Convention will receive a hard copy in their delegate welcome bag. All GPC members will be able to freely access e-copies on our website www.globalpulses.org with effect from July 13th, to coincide with the Convention launch.

There will be a plenary session to explain the new contract at 15.40 – 17.00 on Tuesday July 11th, with presentation made by Co-Chairs of GPC Contracts Committee, GPC President Huseyin Arslan and Andrew Jacobs.

Our colleagues from Gafta will join our Expert Panel for Question & Answer session, where delegates can raise questions and obtain clarifications.

A key advantage to adopting GPC Contract #1 is the introduction of powers invested in our GPC Executive to discipline Defaulters of Awards of Arbitration, a power that has not existed until now. In future, parties who conclude contracts using GPC Pulses Contract #1 but who default on an Award of Arbitration can, at the discretion of GPC Executive, be suspended or rejected from GPC membership, precluded from attending GPC Conventions & events, with GPC membership being actively informed of such disciplinary measures taken.

GPC’s By-Laws and Code of Ethics are being updated to reflect the Disciplinary powers invested in the GPC Executive.

We look forward to this important milestone in the development of GPC as we will soon be able to trade pulses on our own contract reflecting the customs and practices of our trade.

Join us in Vancouver and be amongst the first to adopt this new contract.
East African Pulses round up for 2017

East Africa Pulses profile- In Africa, pulses are found mainly in East Africa. Countries such as Tanzania, Malawi, Ethiopia and Mozambique have been the traditional producers, whereas Sudan is a new entrant. The introduction of pulses of African origin into India goes back several years, when the State Trading Corporation, along with a few private traders brought them to India.

East Africa exports pulses like Pigeon peas, Green Mung beans, Kidney beans and Chickpeas. Pigeon pea is exported from Tanzania, Mozambique and Malawi, whereas Chickpea is exported from Tanzania and some from Ethiopia. Moong is exported by Kenya, Tanzania and Mozambique.

Country wise status report: The huge pulses import from India has acted as a catalyst for many projects in East African nations to promote production of pulses.

The increasing export of pulses to India in 2014 and 2015 led to traditional producers increasing their acreage and adopting new types, and also, some new entrants like Sudan have joined the pulses bandwagon. However, the collapse of market in 2016 has led to a confused state for producing countries in Africa. Here is a quick round up of the market situation and outlook for 2017 crop.

Tanzania- As a major producer of pulses like Pigeon pea and Chickpeas in the region, Tanzania will continue to dominate the supplies this year as well. However, drought has been announced this year which is seen affecting the output. In addition, the price collapse of past year and the non-availability of seeds has reduced the supply expectation by about 25-30 percent.

Despite the delay in the sowing due to drought in both the producing areas- Dodoma/ Sindiga as well as Arusha/ Babati. The supply, as a result, is also expected to be delayed and reach the market by September.

Ethiopia- This origin has been a pulses producer and exporter for a good number of years. However, not much of export is directed towards India. The major items of export have been White Pea beans, Red Kidney bean, field pea, chickpea (Desi and Kabuli). Some quantity of mung beans are also exported. A lot of Indian buyers have been trying to look for red Lentils and Chickpeas in Ethiopia. However, the export of red lentils is banned from Ethiopia.

Due to good rains in the region, the production was up by 10 to 15 percent on an average. Ethiopia is expected to produce about 120 to 130 thousand tons this year. The harvesting of pulses happens in October to November in Ethiopia.

Kenya- Though Kenya is not a major player in supply of pulses, with 10-12 thousand tons of Pigeon peas and about 40 thousand tons of Mung beans; however, the country is expecting drought this year and the pulses production is expected to be about 15-20 percent less. We can see a supply of about 25 to 30 thousand tons of pulses exported this year.

Malawi- Malawi has been a major supplier of Pigeon peas to India. The average export of pigeon peas from Malawi is between 80,000 – 100,000 tons. This year the production is expected to be a bit low and range between 75,000 and 80,000 tons. There has been excessive rain in some parts that has affected production. The supply is expected to arrive by end-august / early- September.

Conclusion: Overall, East African countries, particularly Tanzania, Malawi and Ethiopia have seen a significant rise in production and overall supply is at a higher level. Together, Tanzania, Mozambique and Malawi supply about 400,000 to 500,000 tons of pigeon peas to India. This is expected to grow by 15 percent this year. However, the current tailspin of prices has put almost all the exporters and producers in a confused state in Africa.
Prospects for Myanmar Pulses

Pulses in Myanmar are normally grown immediately after the harvest of the main rice paddy crop in the delta region. They are also grown as the monsoon crops in the central plains.

Monsoon paddy harvesting, threshing, and subsequent land preparation are thus a crucial labour bottleneck affecting the amount of residual moisture available to the pulse crop.

Soil type also plays into this equation, with heavier soils taking longer to drain before planting of pulses is possible but then subject to the risk of drying out and cracking before grain formation.

Land allocation between the two main pulses, black gram/Urad and green gram/moong, depends on farmers’ perceptions of profitability, relative prices and risk preferences. Black gram is seen as the more robust crop, less susceptible to moisture stress and especially to insect damage. Green gram is perceived as more vulnerable and therefore needing careful, regular insect pest management. But green gram prices are higher than black gram, and the crop is seen as potentially more profitable for farmers who can supply working capital for inputs and manage the risk.

In 2017 the pulses production in Myanmar is around 1.5 million MT comprising of major items namely Urad, Toor, Moong and Chana.

Black Gram/Urad: The current price is around USD 630 FOB Yangon which is last three year’s bottom level. Strong buying interest may come at these levels depending on Indian sowing data and impact of Monsoon.

Pigeon Peas/Toor: The current price is around USD 470 FOB Yangon which is last five year’s lowest level. Indian buyers are cautious in buying, keeping in mind Indian bumper production and expected African crop in August.

Green Gram/Moong: The current market price is around USD 1100 FOB Yangon because of strong buying from China.

Chickpeas/Chana: The current market Price for Chickpeas is around USD 1050 FOB Yangon.

About 70 percent of all pulses are grown during the winter season with yields ranging between 0.7 -1.3 metric tons per hectare

Myanmar is the leading country in pulses production among ASEAN nations, most of the pulses grown in Myanmar is for export. The total export of Myanmar Pulses for 2016 is USD One Billion.

The average export of Pulses from Myanmar is 1.2 million MT via ocean transportation and 2.0 million MT through the land borders (mainly to China). Almost 80 percent of the export via ocean transport is to India.

The Indian market demand/supply plays a pivotal role in Myanmar Pulses production, pricing and export.

Pulses production depends on the international prices at the time of sowing, as farmers may shift towards substitute crops which generate better returns. The current prices will have negative impact on sowing of Toor and Urad. Growers may opt for sugarcane and cotton instead of Toor, groundnut and sesame instead of urad. We can expect good sowing in Moong and Chickpeas.
Second phase of pulse promotion launched in North America

By Pulse Canada

June 27, 2017

In many markets, awareness and consumption of pulses are part of consumers’ daily lives. That isn’t the case for the vast majority of North American consumers. Although North American pulses are exported to over 150 countries, domestic awareness and consumption of pulses in the USA and Canada is relatively low.

Pulse Canada has joined forces with the American pulse industry to increase pulse consumption and utilization by the food industry in North America.

On June 21st, Pulse Canada, the American Pulse Association (APA) and the US Dry Pea and Lentil Council (USDPLC) jointly launched the Half-Cup Habit, a year-long campaign encouraging American and Canadian consumers to eat a half-cup serving of pulses three times a week.

The Half-Cup Habit is the second phase of a multi-year strategy to increase domestic consumption of pulses in the US and Canada. The first phase of the strategy was launched in January 2016 with the start of the International Year of Pulses.

It lasted until June 2017 and focused on generating widespread awareness of pulses through earned media, social media, online advertising and partnerships with over 300 consumer influencers. These marketing efforts achieved a combined total reach of over 4 billion.

During the first phase of the promotion strategy, consumers were also encouraged to take the Pulse Pledge, a ten-week commitment to eating pulses once per week. Over a million consumers visited the Pulse Pledge website, www.pulsepledge.com, and 59,000 consumers took the Pulse Pledge.

The second phase of pulse promotion in North America will focus on deepening consumers’ commitment to eating pulses. The Half-Cup Habit provides consumers with realistic targets for both quantity and frequency of pulse consumption. The half-cup serving size is recommended based on scientific evidence that half a cup of cooked pulses provides high amounts of key nutrients including fibre, protein, folate, magnesium, iron, potassium and zinc.

media, digital advertising, North American consumers can sign up for the Half-Cup Habit by visiting www.pulses.org/nap. They will receive weekly resources including simple recipes and cooking tips.

The North American pulse industry aims to have 50,000 consumers sign up for the Half-Cup Habit and generate 2 billion impressions through online and earned media promotion. Early signs suggest these goals are achievable; over 3,000 consumers signed up for the Half-Cup Habit during the first two days of the campaign alone.

All Half-Cup Habit marketing materials feature the Pulse Brand, a logo developed by the global pulse industry to build consumer recognition of pulses and help consumers identify products containing pulse ingredients. The Pulse Brand was first unveiled to pulse industry members at the 2015 Global Pulse Convention in Las Vegas. It was used widely during 2016 to promote the International Year of Pulses, and was used on all marketing materials in the first phase of the North American consumer promotion strategy.

In addition to promoting the Pulse Brand through marketing materials, Pulse Canada is also working with the American pulse industry to encourage its widespread adoption by ingredient suppliers, food manufacturers and retailers.

Over 20 companies and organizations are currently members of the Pulse Brand, and the logo is being used on food products by AGT Foods, Princes Food and Drink, Weston Bakeries, Overwaitea and Hershey Co.

Pulse Canada believes that continued industry collaboration is key to achieving a long-term increase in global demand for pulses. Global and regional marketing initiatives such as the Pulse Brand and the Half-Cup Habit will help ensure that pulses have a bright future both in North America and around the world.
Moving toward Intelligent Packaging to Support 21st Century Premium Branding of Pulse Value-Added Food as Solution for Sustainable Development and Nutrition

Claire Sand, Gordon Bacon, and Laurette Dubé

Food-based solutions are pressingly needed to improve impact of agriculture investments on economic development and nutrition security in poor and middle income countries, as well as to contain the ever increasing healthcare costs and environmental challenges associated with modern diet and lifestyle around the world.

To accelerate progress, we have proposed convergent innovation to reinvent value addition and premium food brands for the 21st Century, in order to produce, promote and consume “safe, nutrition, sustainable, and enjoyable” food, more so than present status quo, for any product category and at any price point. Pulses, with their well-established benefits for human and environmental health and nutrition, afford rich possibilities in this regard, with early investment made in the global pulse brand for 2016 International Year of Pulses setting foundations.

This article, part of the series produced from the food convergent innovation webinar series, bring to bear the most advanced packaging science and technologies in supporting this movement. Packing interfaces at many levels.

This includes: logistics, diversion and fraud deterrence, food safety, B2B handling, sustainability, marketing, as well as, simplistically, extending the shelf life of pulses. Packaging is integral in achieving the modernization of traditional pulses as well as in enabling value-added pulses. Traditional pulse use as an ingredient can be enhanced with packaging. The CI format and value chain partnerships can be instrumental in integrating more pulse-based ingredients into food formulations.

This influence spans from transport to pulse actual use in food manufacturing. In the transport arena of the value chain, there is an increased need to reduce the economic impact of food fraud. Anti-counterfeit packaging assists in reducing diversion and fraudulent products. For example, color coded or patterned pallet shrink wrap and RFID tags assist with load security. Building tactic knowledge in the value chain also allows for a deeper understanding of the demanding production environment so that packaging solutions can be developed.

Manufacturers’ common needs include reducing labor, time, and cost and increased quality. Value can be added to pulse-based ingredients by translating this need into packaging solutions that enable rapid measuring. For example, premeasured amounts of pulse-based ingredients enrobed in degradable/edible packaging would allow the correct amount of ingredient to be added.

This reduces labor, time, and ingredient waste and increases product consistency. Since concerns over the ability of microbes to grow in moistened dry ingredients, sterilization of pulse-based ingredients within an ingredient package will become a critical need. Packaging can add value to traditional pulses used as ingredients in food formulations.

More sustainable packaging aligns with value-added pulses being generally more sustainable than protein alternatives. This links marketing and sustainability as well as the primary function of food packaging - extending shelf life - to form a CI-derived business strategy for value-added pulses. With 30% of food being wasted from farm to fork in urban and developed economies, packaging has a vital role in reducing the waste of value-added pulses and increasing overall sustainability. While more packaging generally reduces food waste by extending product shelf life, consumer perception is that packaging represents more of an environmental impact than food waste.

While this is not true for most food packaging, consumer perception has been difficult to sway. Regardless, by linking sustainable packaging to value-added pulses, the connection of pulses to sustainability becomes firmer. Sustainably packaging value-added pulses means a focus on use of recyclable packaging. Recycling and overall design for recovery allows the energy cost of raw
material extraction to be balanced out amount the number of uses the packaging experiences.

Use of recycled aluminum, for example, results in 95% less energy than using nonrecycled aluminum. Within a focus on recyclability, the use of polymers represents a challenge and opportunity. But, recyclable and recycled polymers can be used with value-added pulses and align with what these consumers expect in a value-added pulse product. Further non-oil-derived and recyclable polymers such as bPET (polyethylene terephthlate), bPEF (polyethylene furanoate), and bPTF (polytrimethylene furandicarboxylate) can be employed.

Life Cycle Analyses (LCAs) can assist in guiding package decision making. While recycled polymers are not approved for direct contact with “wet” foods, such as lentil soup, they are approved for use with “dry” foods such as lentil crackers. Unlike in ingredient packaging, degradable packaging is not compatible with value-added consumer packaging. This is because most value-added pulse products require oxygen and water vapor barriers and more sufficient mechanical strength than possible with truly degradable or compostable polymers.

To sustainably packaging value-added pulses and in alignment with CI, providing product protection and marketing to result in a controllable shelf life is essential. Packaging technologies that extend shelf life by reducing protein loss include active and barrier packaging. Intelligent packaging can also be connected with marketing strategies to provide consumer, retailers, logistical information as well as marketing information to communicate the value-added pulse message. This entails authentically and transparently evidencing the care taken along the supply networks for nutritional quality, environmental and natural capital sustainability, and the safety of each food.

It is now within reach through the revolution of Internet-of-Things (IoT) that is reshaping modern food supply chains and its consumer and market interfaces through the most advanced intelligent packaging. The powerful digital capabilities can be brought into the food innovation ecosystem to link branding upstream into everyday consumer habits and behaviors, and downstream to of all actors along supply chain and markets.

This will accelerate the ability of farm and food businesses to invent 21st century premium food brands that are superior to competition in terms of safe, nutritious, sustainable, and enjoyable quality at any price point. Spanning the full ecosystem, intelligent packaging can link consumer-facing quality signals with a pipeline of evidence based parameters for safe, nutritional, sustainable, and enjoyable food. This presents high potential for improving commercial and social impact of pulses value-added foods around the world.

Authors

Claire Sand
Based outside Minneapolis, Minnesota, Dr. Claire Sand runs Packaging Technology and Research, where she provides project based strategy, technology, consulting and coaching services to food and packaging companies. Since 2007, Dr. Sand has been an adjunct professor at Michigan State University and in 2015 assumed the role of contributing editor and packaging columnist for IFT’s Food Technology magazine. In her 30 plus year career, Dr. Sand has held a variety of roles across the food science and packaging spectrum. Her mission is to fundamentally change the world with packaging science that increases shelf life and reduces food waste. Prior to leading her own company, Sand’s experience ranged from basic research and development, academia, to strategic value chain analysis market research and marketing. Her portfolio includes working with Gerber - Nestle, Pillsbury- General Mills, Kraft Foods -Kraft Heinz, Dominick’s -Safeway, and research institutes in Germany, Colombia, and Thailand. Dr. Sand holds a doctorate degree in Food Science and Nutrition from the University of Minnesota and received both her master’s degree and bachelor’s degrees in Packaging from Michigan State University.

Gordon Bacon
Gordon Bacon is CEO for Pulse Canada and is also CEO of the Canadian Special Crops Association, an organization that represents processors, exporters and brokers of all pulses and special crops. Pulse Canada is the national industry association that represents growers, processors and exporters of Canadian pulses. The association’s mandate is to contribute to the profitability of the Canadian pulse industry by delivering innovative solutions that improve efficiencies and increase the value of pulse production, processing and marketing. When successful, Pulse Canada’s efforts will ensure that different market segments recognize pulses as healthy, sustainable and functional foods, leading to increased worldwide demand for Canadian pulses. Direction and funding for Pulse Canada is provided by Alberta Pulse Growers, Saskatchewan pulse Growers, the Manitoba Pulse Growers Association, Ontario Bean Growers, and the Canadian Special Crops Association. Before joining Pulse Canada 19 years ago, Gordon was Director of Market Development at the Canadian Wheat Board (CWB). He has also served as Senior Policy Advisor to the Minister of State, Grains and Oilseeds in Ottawa; and in various roles with federal and provincial departments of agriculture.

Laurette Dubé
Dr. Dubé is a Full Professor and holds the James McGill Chair of consumer and lifestyle psychology and marketing at the Desautels Faculty of Management of McGill University, Canada. Her research interest bears on the study of affects and behavioural economic processes underlying consumption and lifestyle behaviour and how such knowledge can inspire more effective health and marketing communications in both real-life and technology-supported media. She is the Founding Chair and Scientific Director of the McGill Centre for the Convergence of Health and Economics. The MCCHE was created to foster partnerships among scientists and decision-makers from all sectors of society to encourage a more ambitious notion of what can be done for more effective health management and novel pathways for social and business innovation.
Let’s start with the good news! The Plant Quarantine authority under the Government of India’s Ministry of Agriculture has notified that imported pulses entering the country can be treated with fumigant methyl bromide at the port of discharge till December 31, 2017; thus ending, albeit temporarily, an eerie suspense that created unsettled conditions in the trade.

Clearly, the relief is temporary, like in the past. Lasting solution will have to be hammered out among stakeholders keeping in view various aspects including environmental, economic, legal and political implications. Concerns of every section of stakeholders will have to be considered. Costs and benefits of decision will have to be evaluated. No easy, but doable if the stand is less rigid.

Indian Pulse Market:

In many ways 2016-17 will go down as an abnormal year for the Indian pulse market. Record domestic harvests (22.4 million tons) combining with record imports (6.6 million tons) have taken total availability of the protein-rich legumes to an unprecedented, and previously unimaginable, 29.0 million tons.

At one level, it surely demonstrates the ravenous appetite for pulses consumption in India which by itself is a positive sign; and at another, callous policymakers and excessive imports hurting domestic growers following an unprecedented price collapse.

Not just growers, even the pulse trade has suffered heavy losses. Many dal mills, importers and local traders have lost heavily following a rapid fall in values. Quite a few have gone bust. Huge inventory is now piled up in warehouses across the country with not many takers in sight. It is going to take an extended period of time before the trade steadies itself.

The emerging scenario is fraught with possibilities. As this writer has communicated over the last several months in different forums, India’s record harvest of 2016-17 is most unlikely to be repeated in 2017-18. Planted acreage will decline, so will production. This will be the result of growers’ disillusionment and anger over not getting remunerative prices.

The government has fixed a production target of 22.9 million tons comprising 8.75 million tons in Kharif season (planting June/July and harvest September/October) and 14.15 million tons in Rabi season (planting November/December and harvest March/ April).

The early planting reports for the upcoming kharif season are ominous. Pulses acreage is clearly slipping, as predicted by this writer. As of June 23, pulses were planted to only 600,000 hectares versus 900,000 hectares this time last year.

The normal kharif acreage for pulses is in excess of ten million hectares. Admittedly, these are early days to come to any definitive conclusion about eventual acreage and harvest size, but the initial trends could be a pointer to the shape of things to come.

The beneficiary in the pulse glut is India are the consumers. With a decent downward correction in wholesale and retail prices, consumers are able to access pulses at more affordable prices than before. Given the serious protein deficiency, rising consumption of pulses is a good sign.

From August to October India will celebrate a series of festivals when consumption of food in general and pulses in particular expands manifold. That can help reduce the burdensome inventory being nursed at present.

Indian agriculture in general and pulses sector in particular has faced the neglect of policymakers over the last many years. This now seems to manifest in farmers’ protests in different parts of the country seeking a waiver of farm loans. These protests have the potential to snowball into more massive nationwide agitation. In the event, the government will be forced to take unpalatable, and possibly avoidable, decisions that can distort the pulse trade. This is best avoided.

E n d s

(G. Chandrashekhar, Editor, The Pulse Pod, is a global agribusiness and commodities market specialist. Views expressed here are personal. He can be reached on +919821147594 and gchandrashekhar@gmail.com)
Ms June Arnold, Head of Policy, The Grain and Feed Trade Association (Gafta) represented the Global Pulse Confederation (GPC) in European Union Commission a few weeks ago with Indian delegation advocating for a solution regarding proposed restriction on use of fumigant Methyl Bromide (MBR). Ms Arnold reports:

Fumigating imported agricultural commodities, including cereals and pulses, with Methyl Bromide (MBR) at Indian ports remains uncertain as we wait for the Indian government's decision to see if an extension to the current derogation will be granted at the end of June.

Gafta and Global Pulses Confederation were invited to present the industry perspective during the EU Indian Plant Health Technical Working Group in Brussels on 17th May 2017.

June Arnold, represented Gafta and GPC and presented the current situation, export trends, impact and uncertainty for the trade in the short term and reminded Mr. Ashwani Kumars, Joint Secretary (Plant Protection), Ministry of Agriculture, Government of India, on the need for an extension of the current derogation beyond the 30th June to allow exports to continue to India and to find a more longer term solution using phosphine at point of export.

Dr Mueck representing Detia Degesch presented the technical case for the use of Phosphine illustrating large scale application since the 1930s, with data on global usage of Phosphine on cereals and pulses, and its worldwide use in over 150 countries on all continents. He went on to explain how the efficacy data proved the reliability of phosphine with registrations based on efficacy data provided for all types of treatment (commodities, empty spaces, ships, etc).

Phosphine has been considered to be one of the most viable alternative to MBR during the Montreal Protocol phase out process.

For the specific purpose of treating infested commodities in big volumes, there is no effective and economically sound alternative. The negative side effects of MBR which has been subject to a worldwide ban because of its negative impact on the stratospheric ozone layer and its potential as an occupational carcinogen were outlined. The technical case has been made in many different forum including the EU.

The Indian delegation mentioned that the government was continuing its assessment on phosphine as an alternative and an interim report was awaited.

On the more short term issue, we are feeling rather hopeful that a positive solution will be taken to extend the current derogation at the end of the month, but it is clear it will be a decision taken at the highest political level.
Pulse Australia Update

Making space for a bigger, stronger pulse industry!

As a recipient of this letter you are either already a member of PULSE AUSTRALIA, or if not, your business most likely benefits from the growth and vitality of the pulse industry, so please treat this as an invitation to become a member.

Why be a member of Pulse Australia? In short, because the benefits far outweigh the costs. Australia’s pulse industry is thriving; we are coming out of two successive record chick pea and lentil crops, record exports in both bulk and containers, strong regional businesses in pulse packing and processing, rail and road freight, and all the associated export-related activities at container terminals and ports.

At Pulse Australia, we are sticking to our four core pillars to support this growth for everyone in the supply chain. A glimpse of what we’ve been up to over the last six months:

This work by Pulse Australia is largely “unseen”, but it happens. It’s the lubricant in the pulse supply chain which everyone needs but often take for granted. Over the last few months our members have resoundingly told us they value the services of Pulse Australia, AND they want Pulse Australia to do more. More things like regional field days, a national conference, providing market intelligence and insights, working with the Australian government to reduce trade barriers of importing countries, advising shipping lines on crop forecasts and thus container requirements, etc, etc. To deliver these services, we need to grow the funding base and membership of Pulse Australia to include all who benefit from the above range of services through the supply chain. Today, this load is borne by too few members (about 30 to be precise, when most would say the numbers in the supply chain should be well in excess of 100 businesses) and there are too many “free-riders”.

The good news is that every existing PA member wants to stay and pay. They just want more of their friends and business partners to take up the challenge and join Pulse Australia to make it stronger – because without a Pulse Australia, everyone’s business will suffer. The directors of Pulse Australia (all volunteers) have committed to a membership drive to deliver what the members need to run their businesses. It means embracing membership from farmers ($500pa), regional merchants and processors, through to large traders and packers at $20,000pa – a model for fair sharing of the load to deliver what the members want. The more members, the lower the cost.

Member quotes:

“One late set of documents can cost me $30,000 in a day. Having Pulse Australia is the best insurance policy I’ve got!”

“Standardised, national Pulse Australia standards, means wherever I buy or sell pulses, I can trade with confidence on GTA contract terms.”

“Getting advice on what to spray at the right time, saved my chick pea crop.”

In recent weeks both myself and Pulse Australia CEO, Nick Goddard, have been visiting as many of our members and potential members as we can to:

1) thank them for their support and seek their continued membership in 2017/18 (which as I have said has been very, very encouraging), and

2) build a wider membership base from all businesses in the pulse supply chain. If we have not met up with you personally as yet, I apologise, but please accept this invitation to call us and become a member of the “pulse family”.

You may be familiar with one of our directors listed below, so please feel free to contact any of them for a discussion re membership. We want to hit the ground running on 1 July 2017, with our existing member base secure and on board, and a growing band of new members who benefit from Pulse Australia.

Feel free to contact either Nick or myself or the directors below to arrange membership for 2017/18.

Pulse Australia
Statement made by Brazil at the UN Food and Agriculture Organization meeting held on July 5, 2017 on International Year of Pulses 2016 and World Pulses Day

Mr. Chairman,

Brazil thanks Burkina Faso for the initiative to propose a World Pulses Day. As highlighted in the presentation, pulses are the cheapest source of protein, have fast growing and less environmental impact.

They are important food crops for the food security of large proportions of populations, particularly in Latin America, Africa and Asia, where pulses are part of traditional diets and often grown by family farmers. In Brazil, beans are a highly important staple food and an essential ingredient of our traditional cuisine.

An increased consumption of pulses would benefit developing and developed countries alike. There is enough room to increase production, consumption and trade of pulses both in Northern and Southern Hemispheres, while raising income-generation to smallholders and family farmers.

While the poor need pulses to overcome hunger, others could take them to address different forms of malnutrition, including overweight and obesity. In this regard, facilitate access to market is key to take most of the social, environmental and economic benefits of pulses.

Mr. Chairman,

Make pulses better known worldwide is our duty. As a big producer and consumer of beans, Brazil integrated the Steering Committee of the International Year of Pulses (IYP) and could testify the competent work done by FAO to promote them. To continue the legacy of IYP-2016, Brazil endorses the proposal to observe a World Day on Pulses on 10th February, as presented by Burkina Faso.

Thank you.
Roberta Lima
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