

AUSTRALIA ORIGIN PULSES

THE PULSES CONCLAVE
JAIPUR, INDIA

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Agenda

- Australia, a large producer and exporter
- Production, trends and grower intentions.
- Market dynamics, price movements
- Weather issues
- Australian Main Pulses Crops :
Desi Chickpeas, Kabuli chickpeas, Faba Beans,
Dunpeas, Red Lentils, Lupins

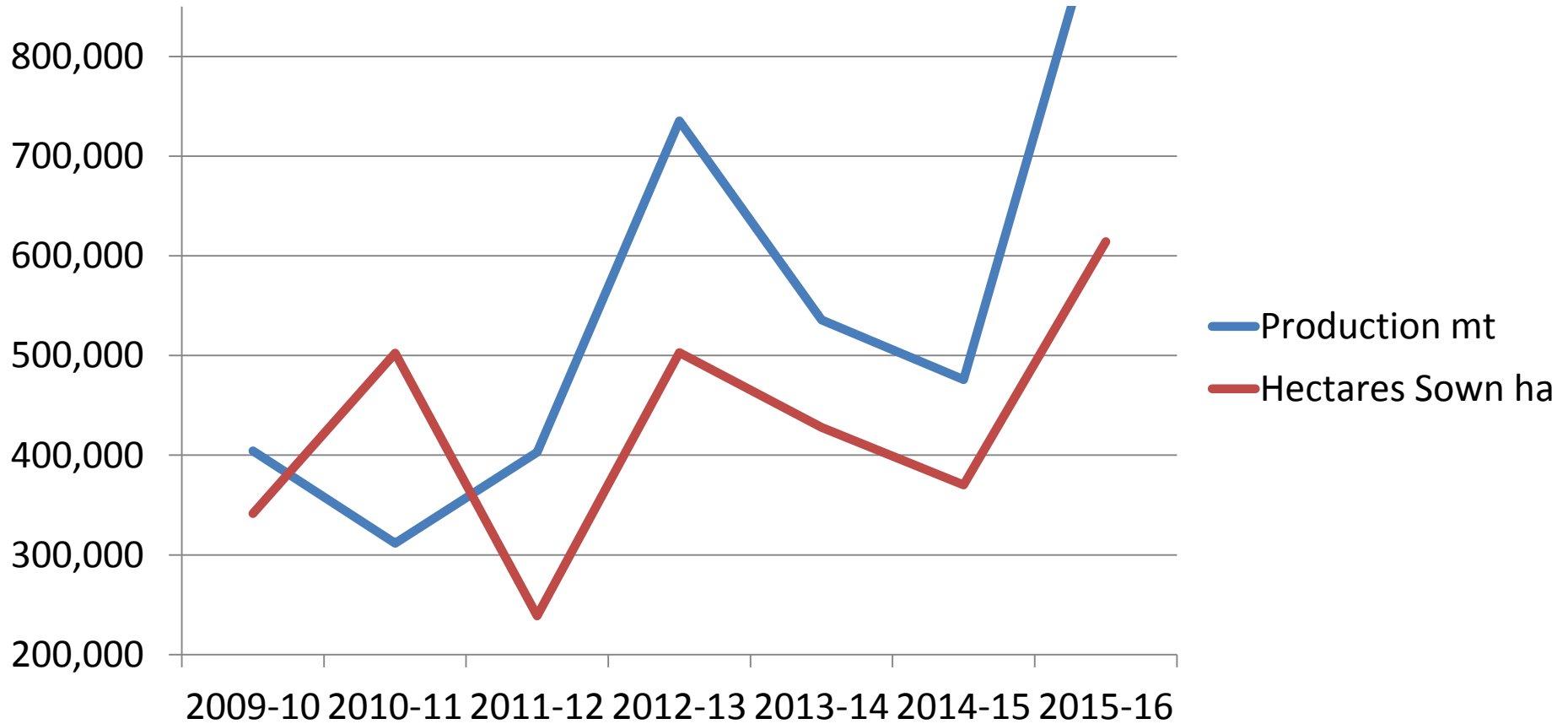


Australia – Desi Chickpeas

Year	Production MT	Hectares sown HA
5 Year Avg : 2009-2013	473,935	380,520
2013-14	735,300	503,000
2014-15	475,900	370,150
2015-16	969,800	614,300
2016-17 (*Est)	1,200,000	800,000

- 2016 expected planting up, with potential production in excess of 1 million Mt. 2016 figures are best estimates.
- Walgett and CQ regions may step up to boost planting and thus production. Yield of 1.40 mt/ha can improve.
- Current remaining 2015 stocks of 140,000Mt

Australia – Desi Chickpeas Area Planted vs. Production (Yield)



Australia – Kabuli Chickpeas

Year	Production MT	Hectares sown HA
2014-15	41,600	54,950
2015-16	43,200	47,000
2016-17 (* Est)	45,000	50,000

- Relatively smaller crop.

Australia – Faba/Broad Beans

Year	Production MT	Hectares sown HA
5 Year Avg : 2009-2013	278,892	163,820
2014-15	290,500	188,200
2015-16	415,700	306,700
2016-17 (* Est)	400,000	300,000

- Of above 2015/16 production, 24,600MT was Broad Beans.
- Main markets Egypt, and Middle East

Australia – Field Peas (Dun Peas)

Year	Production MT	Hectares sown HA
5 Year Avg : 2009-2013	335,133	276,850
2014-15	273,300	237,500
2015-16	204,500	238,100
2016-17 (* Est)	280,000	250,000

- Follows price structure of Canadian Yellow peas
- Kaspas dunpeas command a premium

Australia – Lentils

Year	Production MT	Hectares sown HA
5 Year Avg : 2009-2013	192,390	140,740
2014-15	232,300	189,000
2015-16	258,200	232,100
2016-17 (* Est)	300,000	225,000

- 2015-16 production down due to dismal yields in Victoria : 0.50mt/ha (100k ha produced 50k MT lentils)

Australia – Lupins

Year	Production MT	Hectares sown HA
5 Year Avg : 2009-2013	618,599	482,190
2014-15	563,100	442,600
2015-16	606,680	489,700
2016-17 (* Est)	600,000	450,000

- Albus Lupins production in 2015-16 was 52,000 MT of the total.
- WA produces more than 75% of Angustifolious Lupins.
- Pulse Australia recognises conducive growing conditions of Lupins and is promoting this in IYP 2016.



Estimate of Stocks

AUSTRALIA (MT)	CARRY FORWARD	PRODUCTION 2015-16	EXPORTS UNTIL DECEMBER 31, 2015	REMAINING STOCK AS ON JAN 1, 2016
DESI CHICKPEAS	5,000	969,800	736,618	238,182
LENTILS	2,000	258,200	65,528	194,672
LUPINS	290,000	606,800	72,000	824,800

SNAPSHOT – Desi Chickpeas

- India, Pakistan remain very short in supplies.
- ME (UAE) Imports 100,000MT annually, Bangladesh 140,000MT
- Australia expected to harvest a record crop of upto 1.20million tonnes.



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