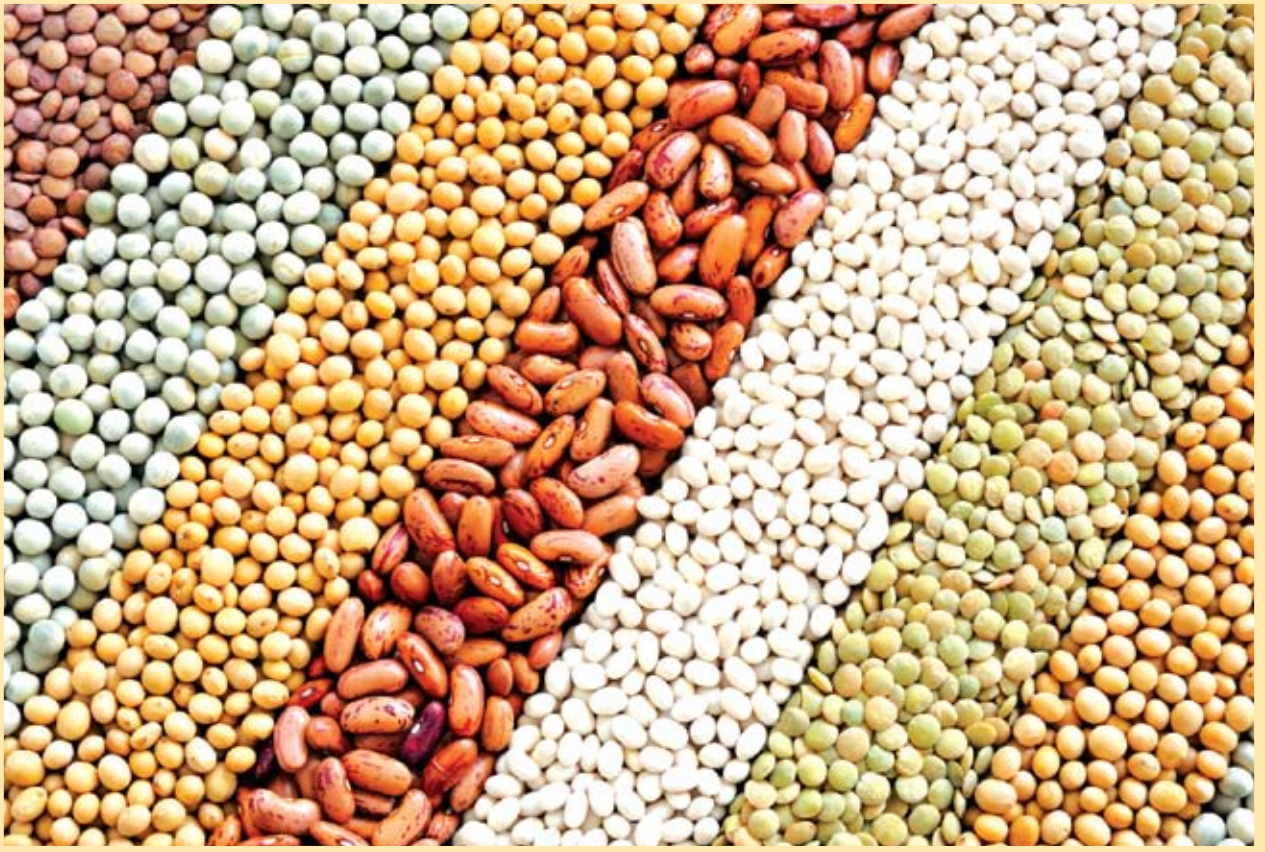




भारतीय कृषि एवं खाद्य परिषद्  
INDIAN COUNCIL OF FOOD AND AGRICULTURE

# INDIAN PULSES MARKET



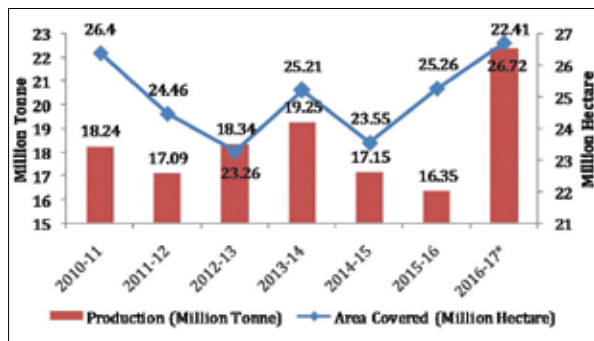
# Indian Pulses Market

India is the largest producer, importer and consumer of pulses, accounting for 25% of global production from 35% of global area under pulses. However, the productivity of pulses in India is 755 kg/ha, whereas in the USA and Canada it is as high as 1,900 kg/ha. The pulses in India are grown in semi-arid areas which face high rainfall variability adding to high instability and low productivity. Best parcel of lands with irrigation facility is usually reserved for other crops by farmers.

## INDIAN PULSES MARKET – PRODUCTION ANALYSIS

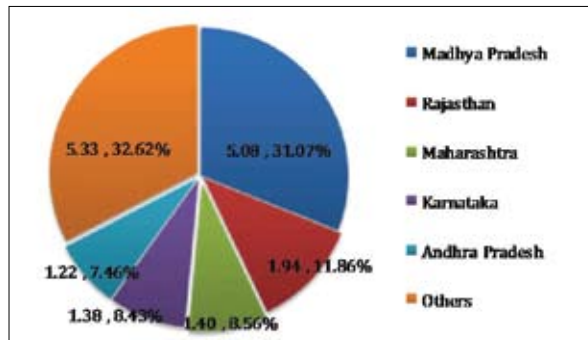
Although, being one of the largest pulses crop cultivating country in the World, pulses' share to total food grain production in India is only about 6%-7% in the country. The total share of pulses to total food grains basket in the country in terms of area, production and productivity was 19.62%, 16.55% and 84.48%, respectively during 1950-51.

## AREA COVERED AND PRODUCTION OF PULSES IN INDIA



Source: MOSPI

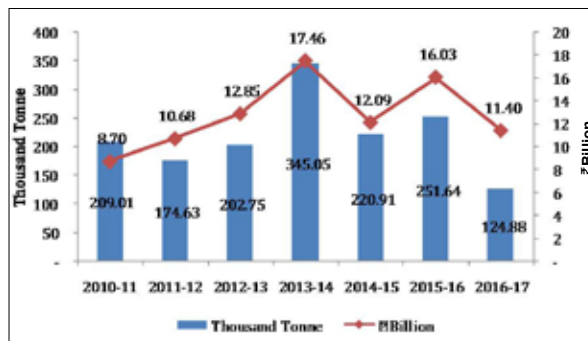
## PRODUCTION OF PULSES IN INDIA BY STATES; 2015-16



Source: Ministry of Agriculture and ICFA Analysis

This trend continued till 1960-61 and started declining from 1970-71 (after green revolution) due to no breakthrough in production technology of pulses in comparison to other commodities of foodgrains. Deceleration of contribution of pulses to total food grains prompted the Ministry of Agri-

## PRODUCTION OF PULSES IN INDIA BY 2015-16



Source: Ministry of Agriculture and ICFA Analysis







culture & Farmer's Welfare to vigorously pursue the NFSM-Pulses during the Eleventh plan (2007-08 to 2011-12) and was continued during Twelfth Plan (i.e. 2012-13 to 2016-17).

There has not been any significant increase in area and production during 1950-51 to 2009-10, however, significant growth in area and production has been recorded since 2010-2011. With the increase in infrastructural and irrigation facilities/resources, the pulses get marginalized treatment pushing them to another poor and marginal land piece. The major states producing pulses in India are Madhya Pradesh, Rajasthan, Maharashtra, Karnataka and Andhra Pradesh.

### INDIAN PULSES MARKET – EXPORTS ANALYSIS

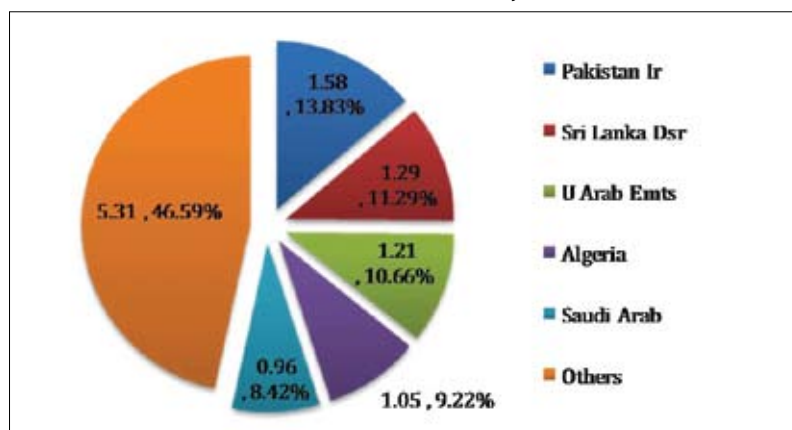
Pulses export has increased from approximately 34 thousand tonnes in 1992 to 124.88 thousand tonnes in 2016-17. However, the trend in the exports from India during 2010-11 to 2016-17 has been fluctuating, in terms of both value and volume. This may be attributed to various reasons such as unstable production pattern in India during the period and fluctuations in the foreign exchange market.

Moreover, India is the largest pulses processor, as pulses exporting nations such as Myanmar, Canada and Australia, do not have adequate pulses processing facility. The reason is that these countries do not have much domestic consumption of pulses and therefore, they have never attempted to develop domestic processing industry. Due to this India re-exports a considerable amount of pulses.

### IMPORT ANALYSIS

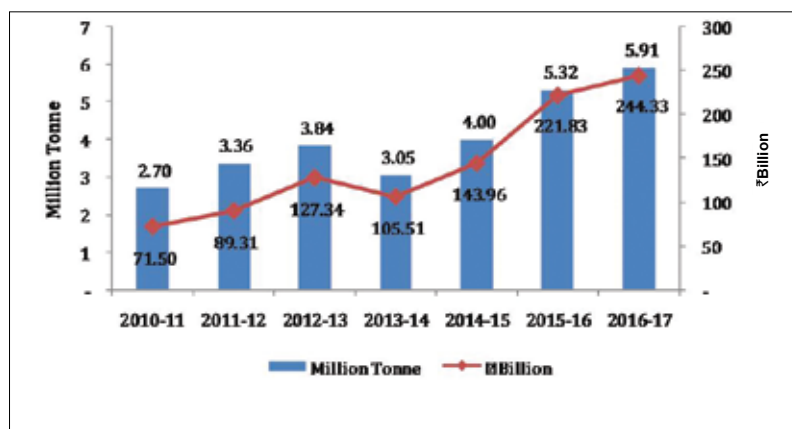
The increasing mismatch between production and consumption of pulses has resulted in larger imports of pulses in recent years. The country was importing merely 0.17 million tonnes

### INDIAN PULSES EXPORTS BY COUNTRIES; 2016-17



Source: APEDA

### PULSES IMPORTS BY INDIA



Source: Indian Institute of Pulses Research and APEDA

of pulses during 1980–81, which has increased fast to 5.91 million tonnes in the year 2016–17. The import of pulses has grown at compound annual rate of 10.07% per annum since 1980–81, while the production has merely increased at 2.04% per annum during the corresponding period. Total pulses imports were just 1.6% of total pulses production in India during 1980–81, which has presently rose to about 26.37%.

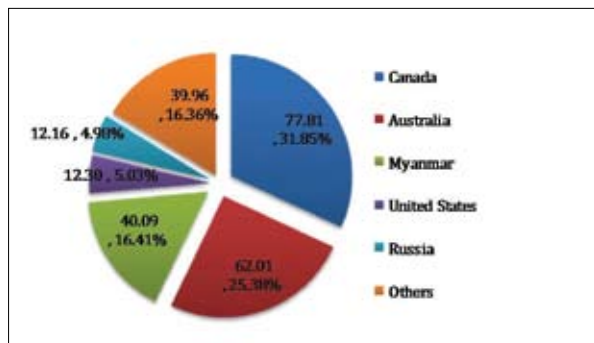
To augment the supply of pulses to poor masses under the current scenario, supply through public distribution system will not only distribute pulses to poor at affordable prices and enhance nutritional security, but will also lead to stabilize prices and boost the farmers through assured procurement.

The dependence on imports needs to be reduced gradually over time by stepping up the domestic production of pulses supported with appropriate long-term strategies. The major countries exporting pulses to India include Canada, Australia, Myanmar, United States and Russia.

### INDIAN PULSES MARKET BY TYPES

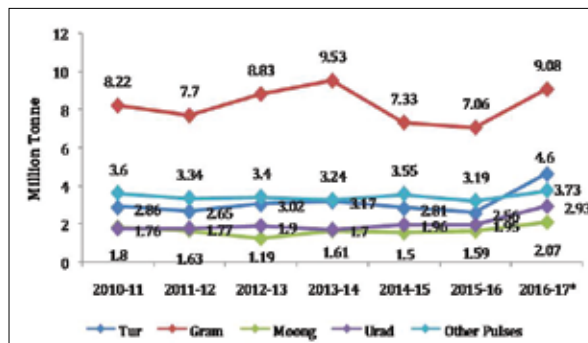
The area under pulses has declined in north India, while it has expanded in central and south India. The regional area shift is more conspicuous in case of Gram. Tur and Gram are the major pulses cultivated in India, together accounting for about 53% of total area under pulses and contributing to 63% of the total pulses production.

### PULSES IMPORTS BY COUNTRIES; 2016-17



Source: APEDA

### PRODUCTION OF PULSES BY TYPES IN INDIA



Source: Ministry of Agriculture

Production of Gram was 4.94 million tonnes during 1972-73, which has increased to 9.08 million tonnes during 2016-17, an increase of 1.36% per annum, mainly on account of about 50% increase in yield. The area under Gram has declined during 1980s and 1990s and witnessed negative growth rate in area, with the impressive growth. The decline in area under chickpea was mainly due to substitution with high-yielding varieties of cereals particularly in Punjab, Haryana, Rajasthan, Uttar Pradesh, Bihar and West Bengal. However, area under Gram started increasing only from 2006-07, mainly on account of higher adoption of improved short-duration and wilt-resistant varieties in central and South India, particularly in Andhra Pradesh and Karnataka.

Instability in area, production and yield has increased over the time in case of gram, Tur and total pulses.

This implies that yields continued to remain unstable and volatile, as these crops have been grown under rain-fed conditions and on marginal lands. Further, pulse crops are highly susceptible to pests and disease infestation.

Chickpeas contribute the single largest share in India's export basket of pulses registering 62.16% share in the total pulses export during 2016-17. The major export destinations of Chickpea include Pakistan, Algeria, Turkey, Sri Lanka and United Arab Emirates. However, India imports chickpea from Australia, Russia, Tanzania, Myanmar and USA.

Peas form a major share in the total import of pulses. The major countries from where India imports peas include Canada, Russia, USA, France and Lithuania. Though, Sri Lanka DSR, Nepal, Ukraine, USA and Bangladesh are the major export destinations.

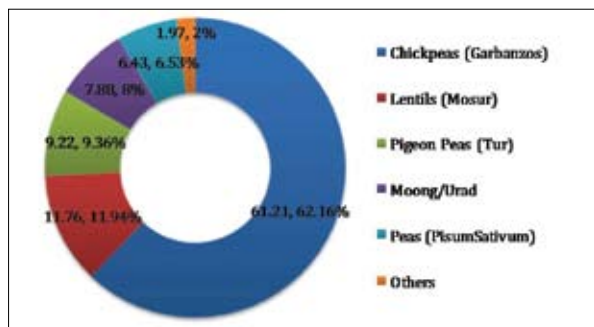
Australia and Russia are the ma-

to those domestically produced, low freight rates, and relatively fast delivery.

India has the world's largest pulses sector, producing and consuming diverse pulses. Since majority of the consumers in India have low incomes, their reliance on pulses as a key source of protein is high. Slow growth in production of pulses in India compared to population growth has resulted in increasing demand-supply gap and in turn rising prices and declining per capita consumption in spite of growing pulse imports. Pulse production remains unattractive to Indian farmers because of the relatively low productivity of pulses coupled with preference and policy support to cereals particularly to wheat and rice.

Moreover, the lack of an assured market is one of the major issues in the poor performance of pulses. Government procurement for supply through public distribution system and as part of mid-day meal schemes and welfare programmes would provide adequate marketing support to growers. An improvement in production technology of pulses aiming towards yield improvement and resource conservation can certainly reduce the cost of production and in turn prices may lead to balancing nutritional intake by reducing disproportionate use of cereals in the consumption basket. ■

### INDIAN PULSES EXPORTS BY TYPES; 2016-17\*



Source: Commodity Report on Pulses, March 2017  
Note: \* means April 2016 to December 2016

major suppliers of chickpeas to India. Large share of pulses, including urd bean, mung bean, pigeon peas is imported from Myanmar. Importers favor Myanmar because it offers varied pulses with qualities similar



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