



Australia's Place in the World Pulse Trade

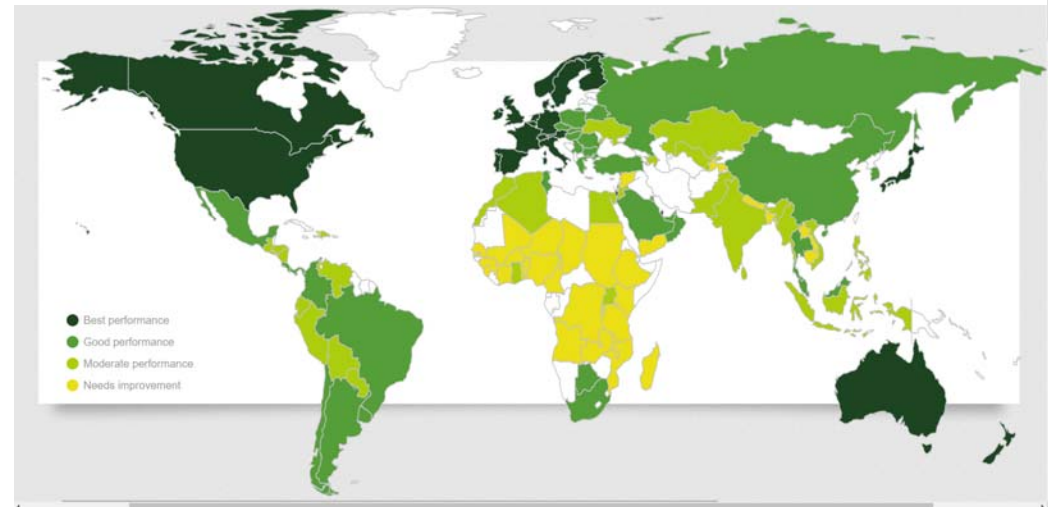
Future of pulse production and consumption
CSU- FGC November 28, 2016



Australia & Food Security

- Affordability
- Availability
- Quality & Safety

1 United States	86.6
2 Ireland	84.3
3 Singapore	83.9
4=Australia	82.6
4=Netherlands	82.6



The
Economist

Intelligence
Unit

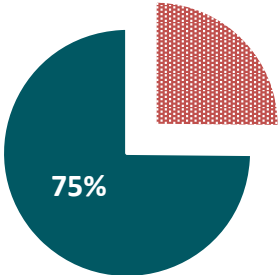


Working to grow the value and sustainability of the Australian pulse industry.

Grain Surplus

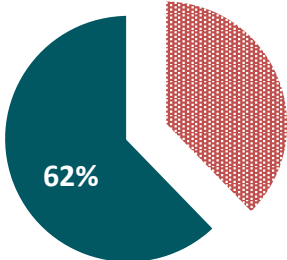
(5 years to 2013/14)

Wheat



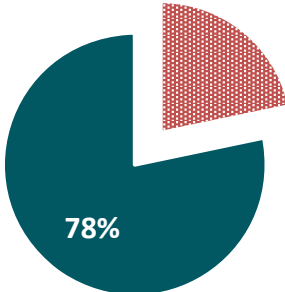
■ Domestic ■ Surplus

Canola



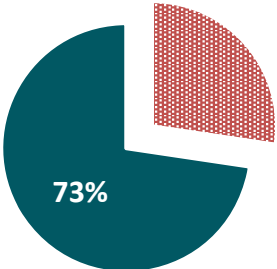
■ Domestic ■ Surplus

Total Pulses



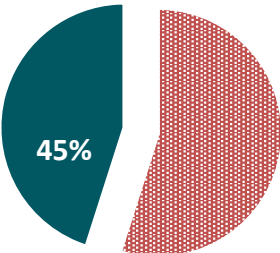
■ Domestic ■ Surplus

Barley



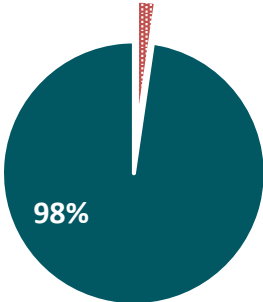
■ Domestic ■ Surplus

Sorghum



■ Domestic ■ Surplus

Food Pulses



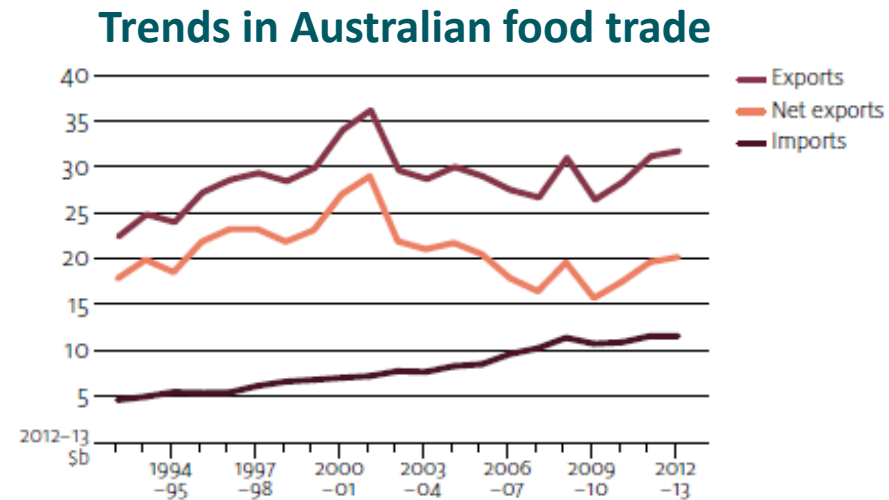
■ Domestic ■ Surplus

Source: Australian Bureau of Statistics (2014a)



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Australian Food Imports and Exports



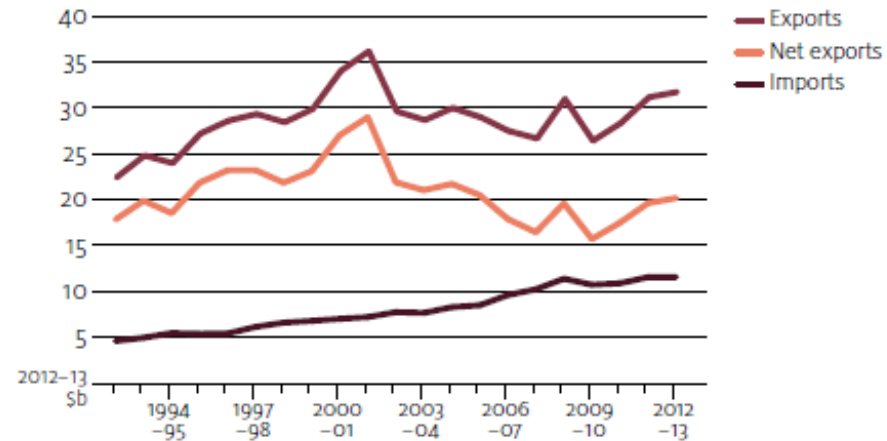
Source: Australian Bureau of Statistics



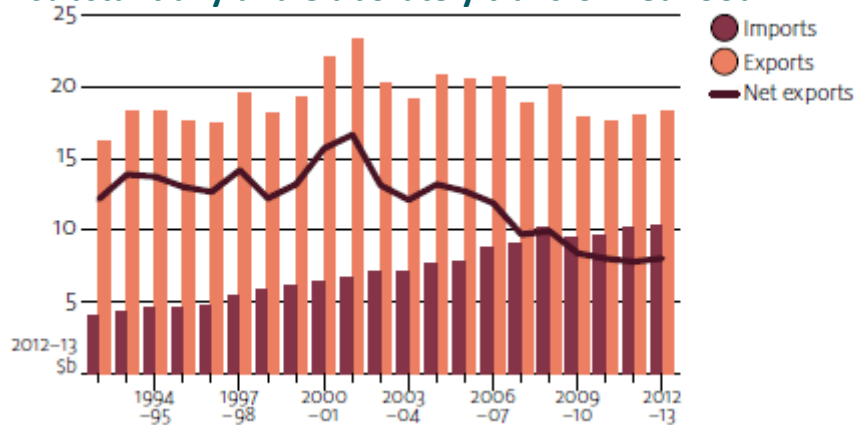
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Australian Food Imports and Exports

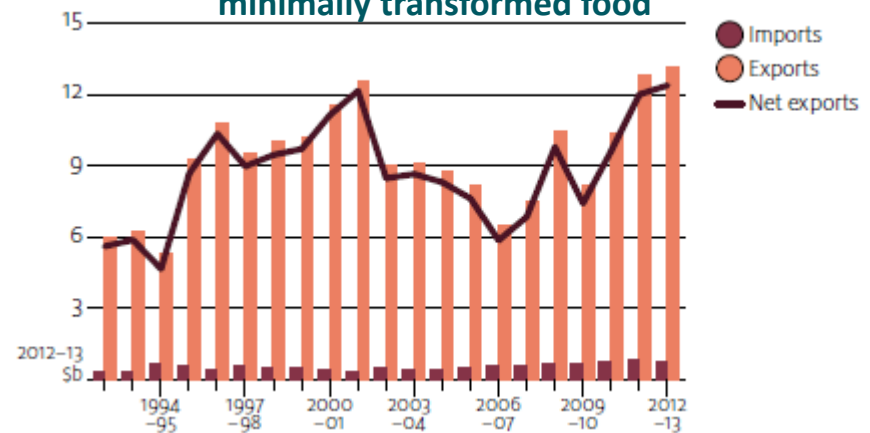
Trends in Australian food trade



Exports, imports and net trade, substantially and elaborately transformed food



Exports, imports and net trade, minimally transformed food

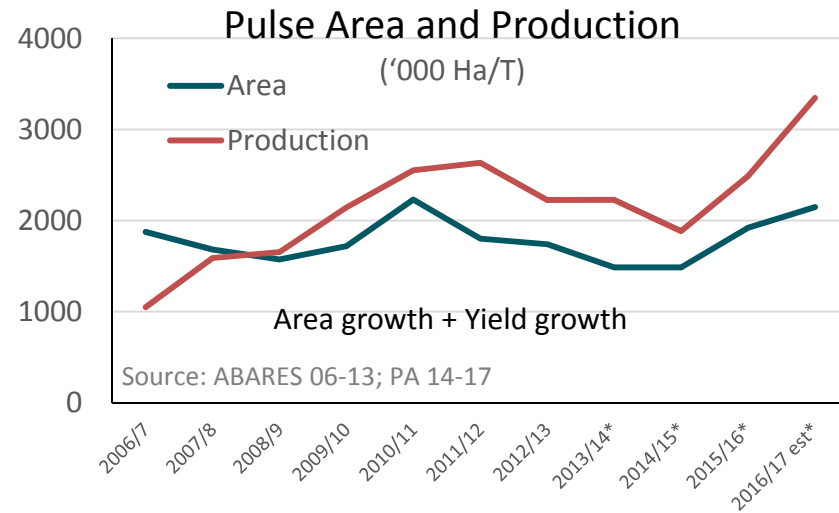


Source: Australian Bureau of Statistics (2014a)



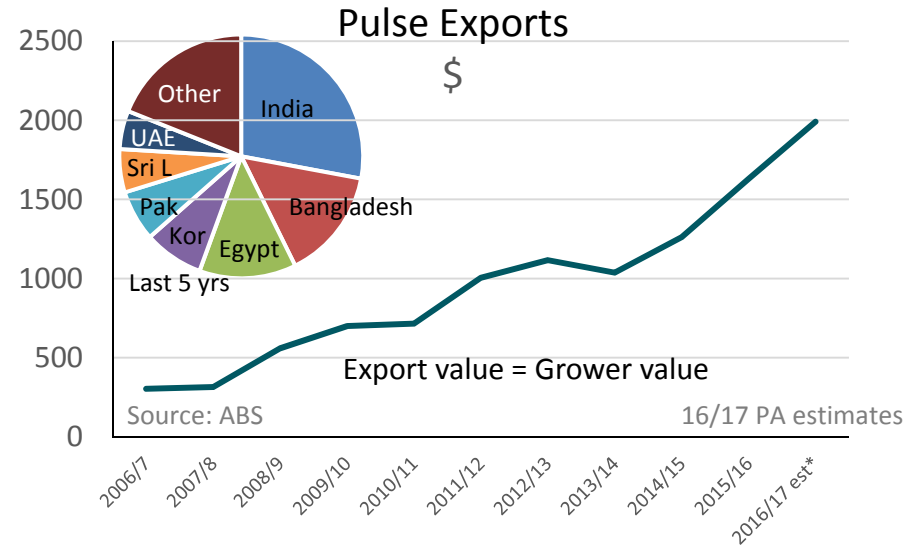
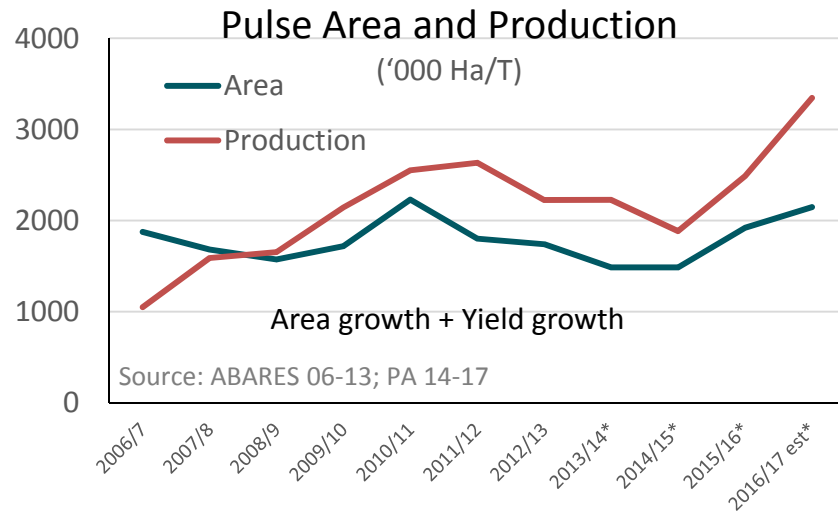
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Pulse Industry Dashboard



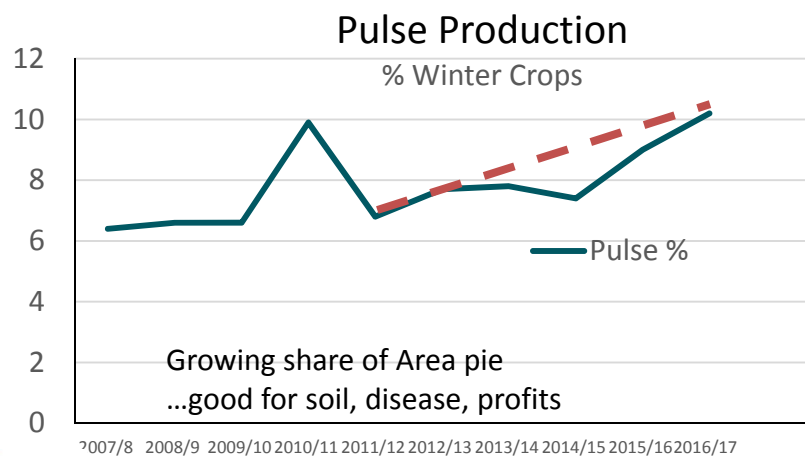
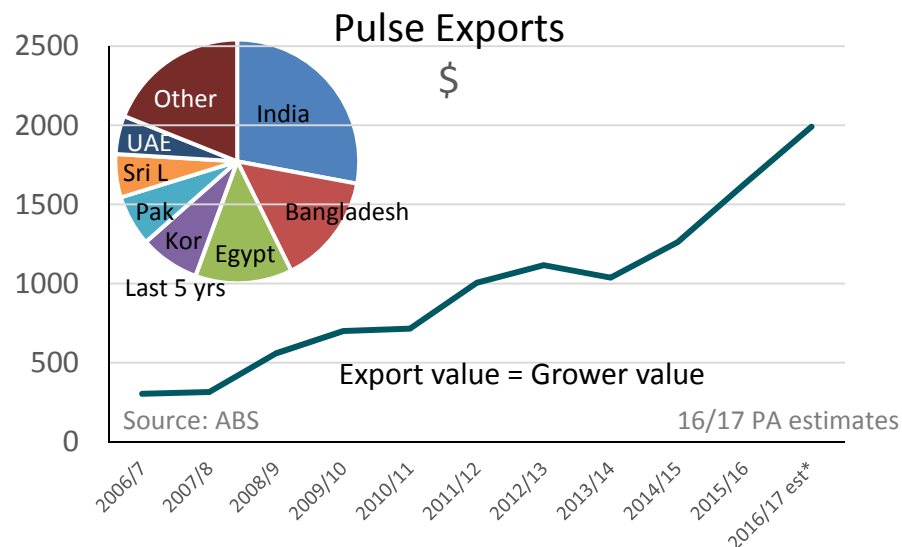
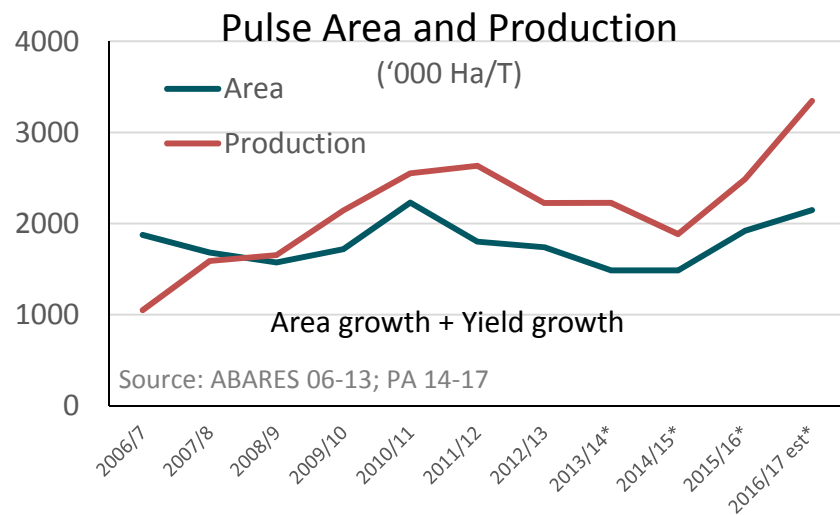
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Pulse Industry Dashboard



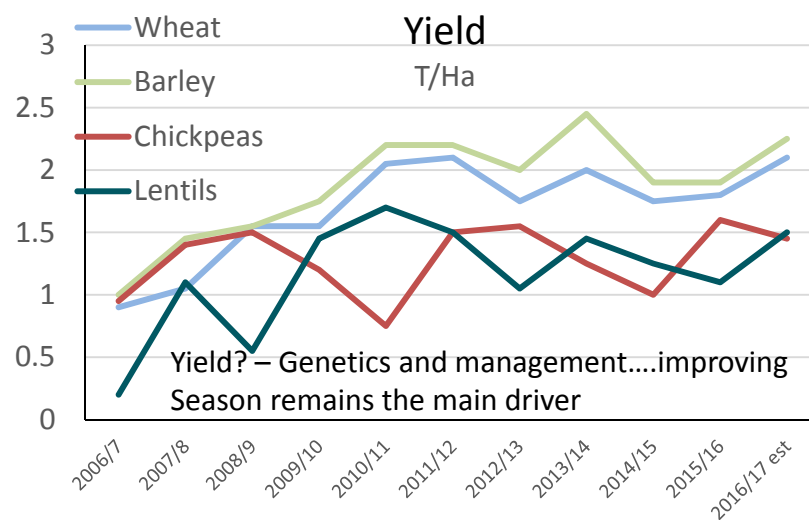
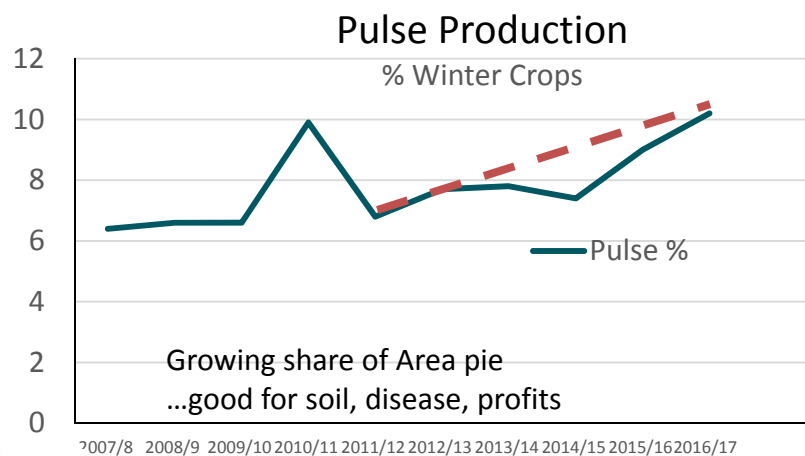
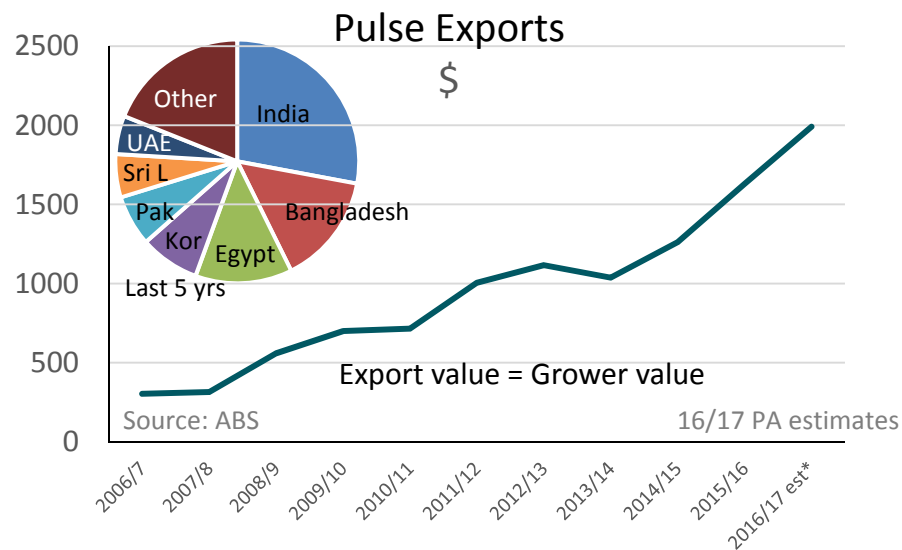
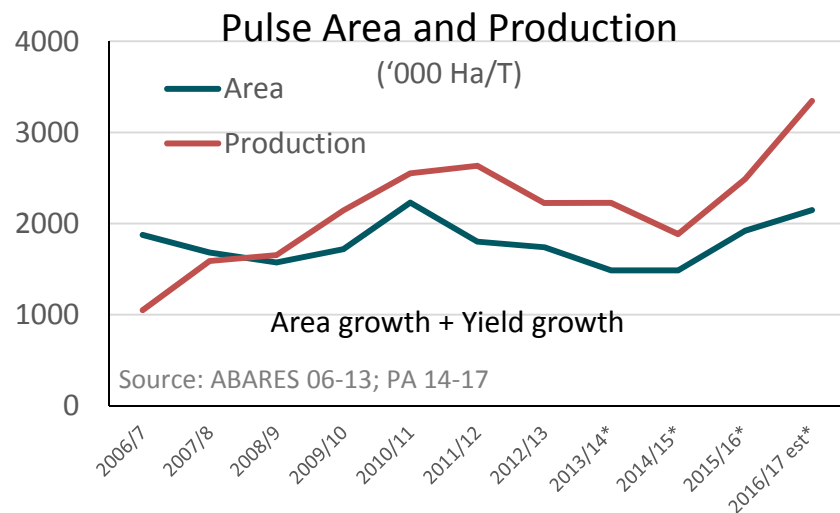
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Pulse Industry Dashboard



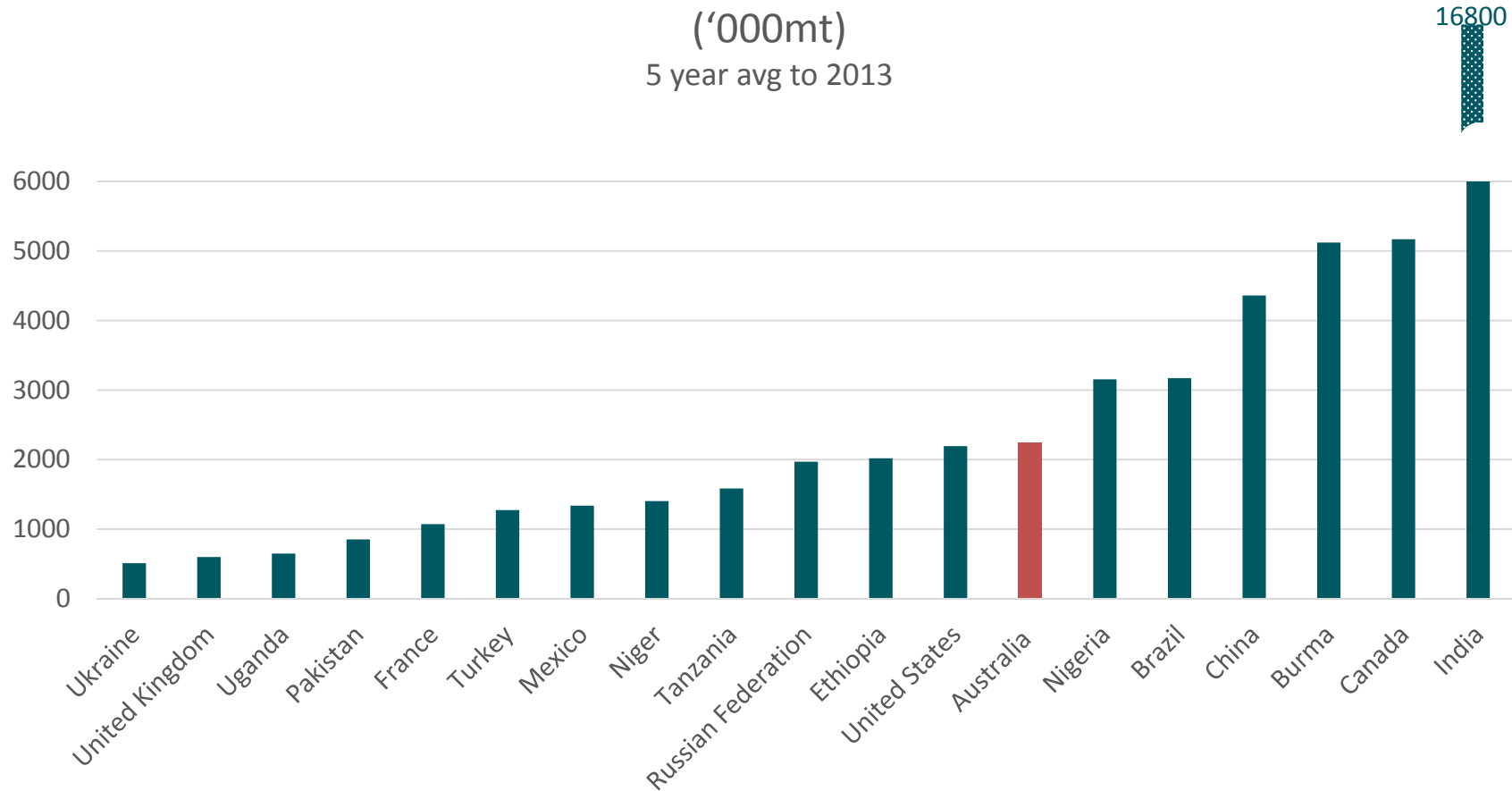
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Pulse Industry Dashboard



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Global Pulse Production

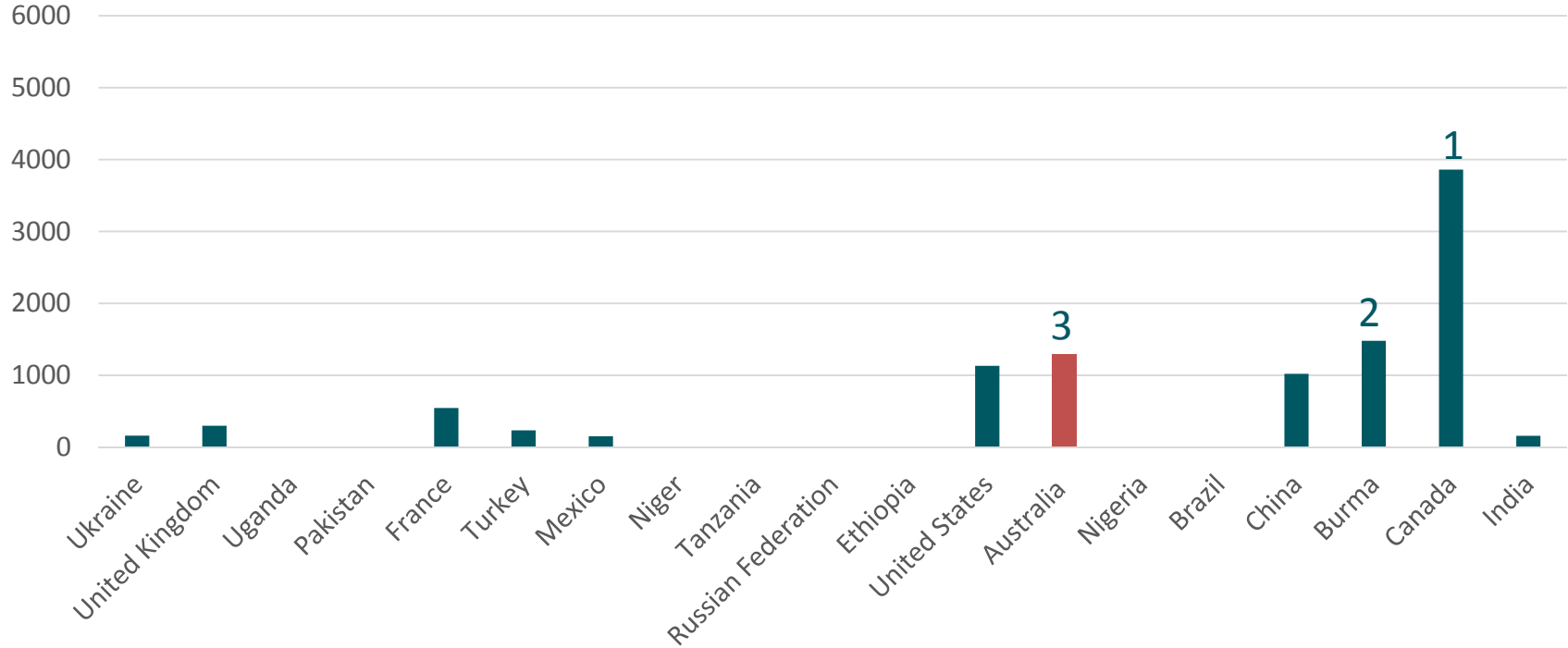


Source: ABARES

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Global Pulse Exporters

(‘000mt)
5 year avg to 2012

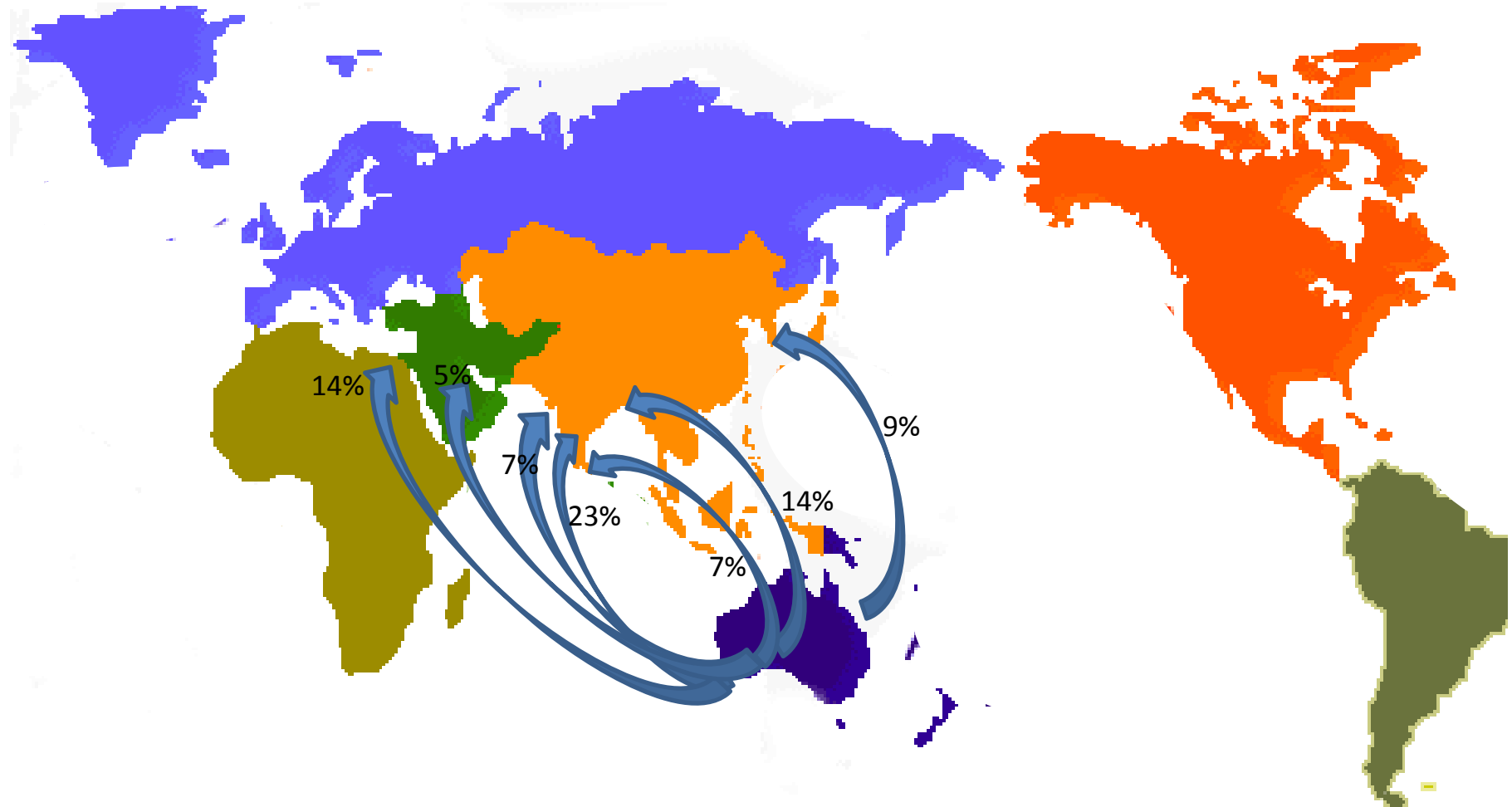


Source: ABARES

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Australian Pulse Export Flows

(5 years to 14/15)



Source: ABARES



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Future for Australian Pulses

PROS	CONS
Agronomically suited	Pulse Price Volatility
Close to market	Price relativity to other options
Fits with rotation	R&D Investment lags opportunity
Long term demographic/social growth	
Tighter competitive set (vs cereals/oilseeds)	



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