

Commodity Profile for Pulses-May, 2016

Contents

1. Pulses estimates for India (2015-16).....	2
2. Domestic Production of Major Pulses	2
3. Production of Pulses in India	3
4. India's export &import of Pulses.....	3
4.1 India's export of Major Pulses.....	3
4.2 India's import of Major Pulses	4
5. India's Trade Destination of Major Pulses for 2014-15	4
6. Movement of Domestic and International Prices.....	5
6.1 Chickpeas (Gram).....	5
6.2 Lentil (Masur).....	5
6.3 Tur (Arhar).....	6
6.4 Moong (Green Gram)	6
6.5 Urad (Black Gram)	7
7. Price movements of pulses in major domestic markets	7
8. Minimum Support Price (MSP)	8
9. Future Price of pulses.....	8
10. Trade Policy and Tariff Schedule	9
10.1 Export Policy	9
10.2 Import Policy	9

1. Pulses estimates for India (2015-16)

(Unit: Million Tonnes)

Table-1: Pulses Production, Trade, and Consumption of India				
2014-15	2015-16 **	Particulars	March-16	Sources
17.15	18.32	Production	17.06#	DES
4.58	4.10	Total Imports	5.79##	DOC
21.73	22.42	Availability	--	--
0.22	0.25	Total Exports	0.25##	DOC
21.51	22.17	Total Availability for Domestic Consumption	--	--

Source: Directorate of Economics and Statistics (DES), Department of Agriculture & Cooperation (DAC) and Department of Commerce (DoC)

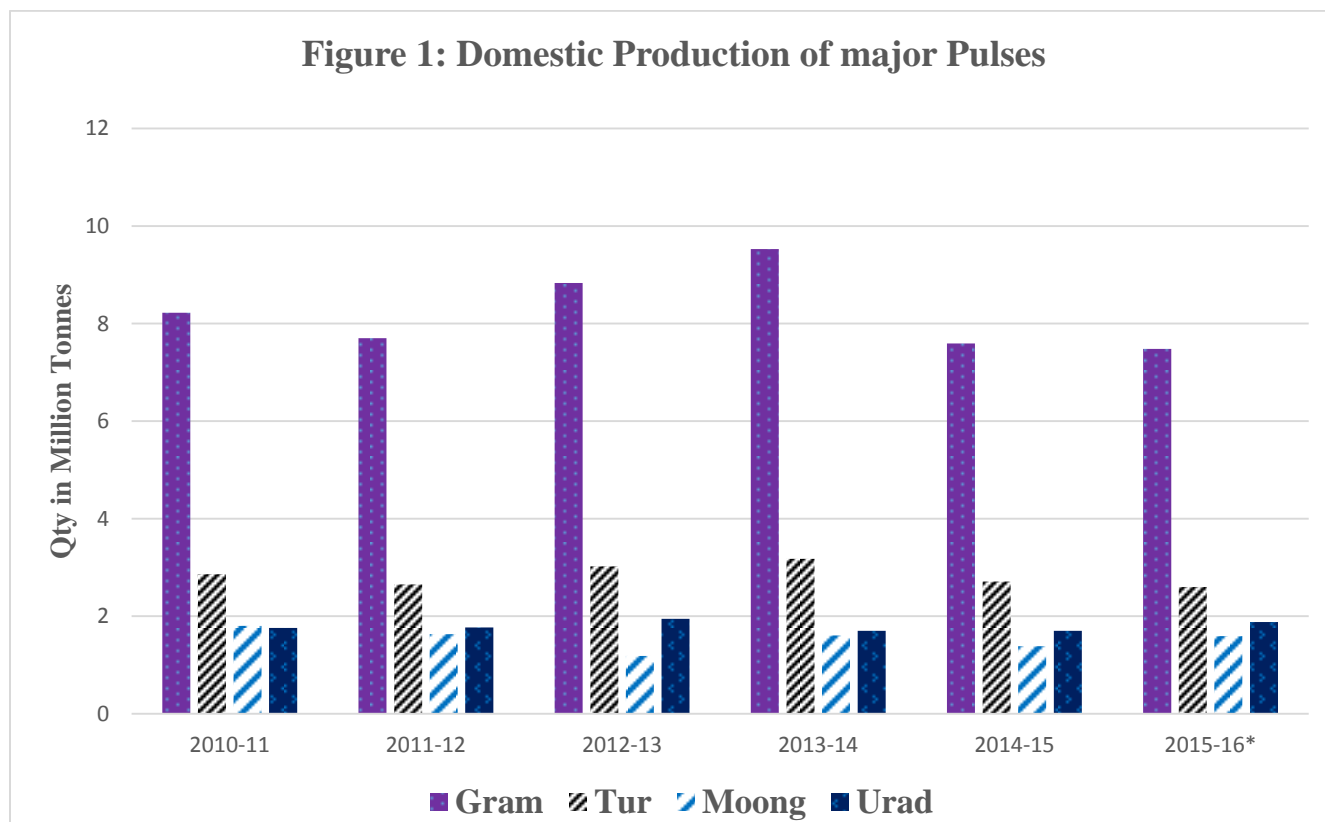
Availability: Production plus Total Imports; Total Availability for Domestic Consumption: Availability minus Total export.

** : For preparation of estimate for 2015-16, production, export and import are the last three years' average.

: Production estimates as per 3rd Advance Estimation for 2015-16.

: Export & import figures are for April-March, (2015-16).

2. Domestic Production of Major Pulses



Source: Directorate of Economics and Statistics (DES)

* As per 3rd Adv Est for 2015-16.

- Production of Gram (chickpeas) is the highest among all pulses produced in the country.

3. Production of Pulses in India

(Unit: Thousand Tonnes)

Pulses/Year	2013-14	Share in Total Production (%)	2014-15	% Share in Total production	2015-16*	% Share in Total production
Tur	3170.00	16.02	2810.00	16.38	2600.00	15.24
Gram	9530.00	48.17	7330.00	42.74	7480.00	43.84
Moong	1610.00	8.13	1500.00	8.74	1590.00	9.32
Urad	1700.00	8.60	1960.00	11.42	1880.00	11.01
Other Pulses	3780.00	19.11	3550.00	26.69	3510.00	20.57
Total Pulses	19780.00		17150.00		17060.00	

Source: Directorate of Economics and Statistics (DES)

*: Based on 3rd Advance Estimates for 2015-16.

4. India's export & import of Pulses

4.1 India's export of Major Pulses

(Unit: Thousand Tonnes)

HS Code	Pulses/Year	2013-14	Share in Total Pulses Export (%)	2014-15	Share in Total Pulses Export (%)	2015-16 (Apr-Feb)	Share in Total Pulses Export (%)
07131000	Peas (Pisum Sativum)	0.85	0.25	3.91	1.76	6.36	2.92
07132000	Chickpeas (Garbanzos)	333.82	97.18	190.23	85.64	186.97	85.82
07133100	Moong/Urad	1.66	0.48	4.25	1.91	6.01	2.75
07134000	Lentils (Mosur)	0.73	0.21	7.98	3.59	7.39	3.39
07136000	Pigeon Peas (Tur)	0.1	0.03	1.22	0.55	3.29	1.51
Total Pulses		343.5		222.14		217.86	

Source: Department of Commerce

- Chickpeas contributes the single largest share in India's export basket of pulses registering 97.18% and 85.64% share in the total pulses export during 2013-14 and 2014-15 respectively.

4.2 India's import of Major Pulses

(Unit: Thousand Tonnes)

HS Code	Pulses	2013-14	Share in Total Pulses Import (%)	2014-15	Share in Total Pulses Import (%)	2015-16 (Apr-Feb)	Share in Total Pulses Import (%)
07131000	Peas (Pisum Sativum)	1330.43	36.40	1951.97	42.57	2121.70	38.50
07132000	Chickpeas (Garbanzos)	276.13	7.56	418.87	9.14	992.53	18.01
07133100	Moong/Urad	624.12	17.08	622.88	13.58	534.03	9.69
07134000	Lentils (Mosur)	708.71	19.39	816.46	17.80	1232.77	22.37
07136000	Pigeon Peas (Tur)	465.61	12.74	575.22	12.54	422.76	7.67
Total Pulses		3654.78		4584.84		5510.73	

Source: Department of Commerce

- Peas (Matar) forms a major share in the total import of pulses.

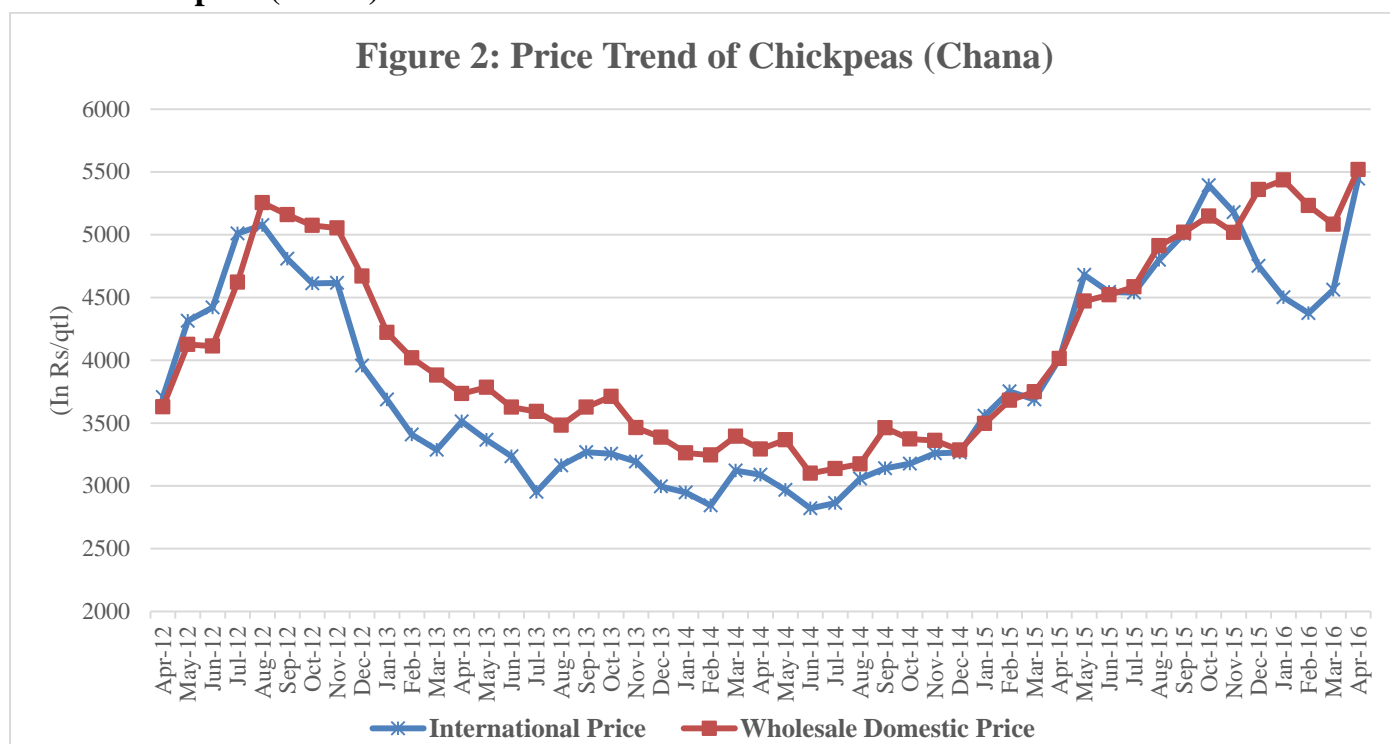
5. India's Trade Destination of Major Pulses for 2014-15

HS Code	Pulses	Top 5 Export Destinations	Top 5 Import Sources
07131000	Peas (Pisum Sativum)	Shri Lanka DSR (77.71%), Bangladesh PR (6.55%), Argentina (5.63%), Myanmar (5.12%), Nepal (2.73%)	Canada (78.80%), USA (10.07%), Australia (4.05%), Russia (3.78%), Ukraine (2.86%)
07132000	Chickpeas (Garbanzos)	Pakistan (33.06%), Algeria (14.42%), Sri Lanka (10.23%), U Arab EMTS (5.53%), Turkey (5.49%),	Australia (45.63%), Russia (38.93%), Tanzania (4.71%), Myanmar (3.23%), USA (2.40%)
07133100	Moong/Urad	USA (48.06%), Sri Lanka (25.70%), Singapore (4.73%), Malaysia (4.51%), UK (3.71%)	Myanmar (85.65%), Tanzania (5.60%), Uzbekistan (2.00%), Mozambique (1.45%), Kenya (1.44%),
07134000	Lentils (Mosur)	Myanmar (53.29%), Nepal (15.38%), Sri Lanka DSR (9.60%), USA (5.46%), Singapore (4.05%)	Canada (79.87%), USA (12.78%), Australia (7.03%), Nepal (0.13%), Myanmar (0.09%)
07136000	Pigeon Peas (Tur)	USA (50.94%), Nepal (32.29%), Canada (5.76%), Singapore (2.62%), UK (2.06%)	Myanmar (51.76%), Tanzania (20.68%), Mozambique (15.28%), Malawi (7.99%), Sudan (2.97%)

Source: Department of Commerce

6. Movement of Domestic and International Prices:

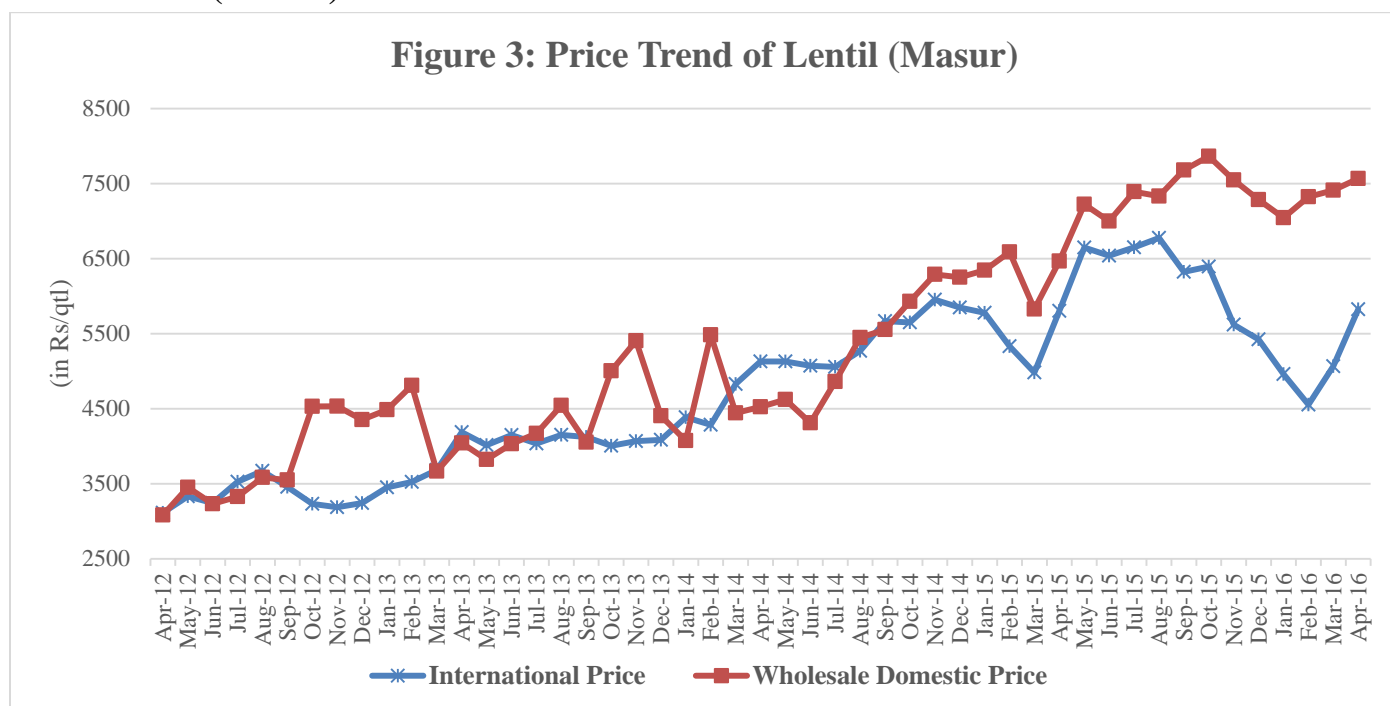
6.1 Chickpeas (Gram)



Source:-Department of Agriculture & Cooperation (DAC), Agmarknet, and Agriwatch

- The price for chickpeas have been higher in the domestic market than that of the international market since Dec, 2015.

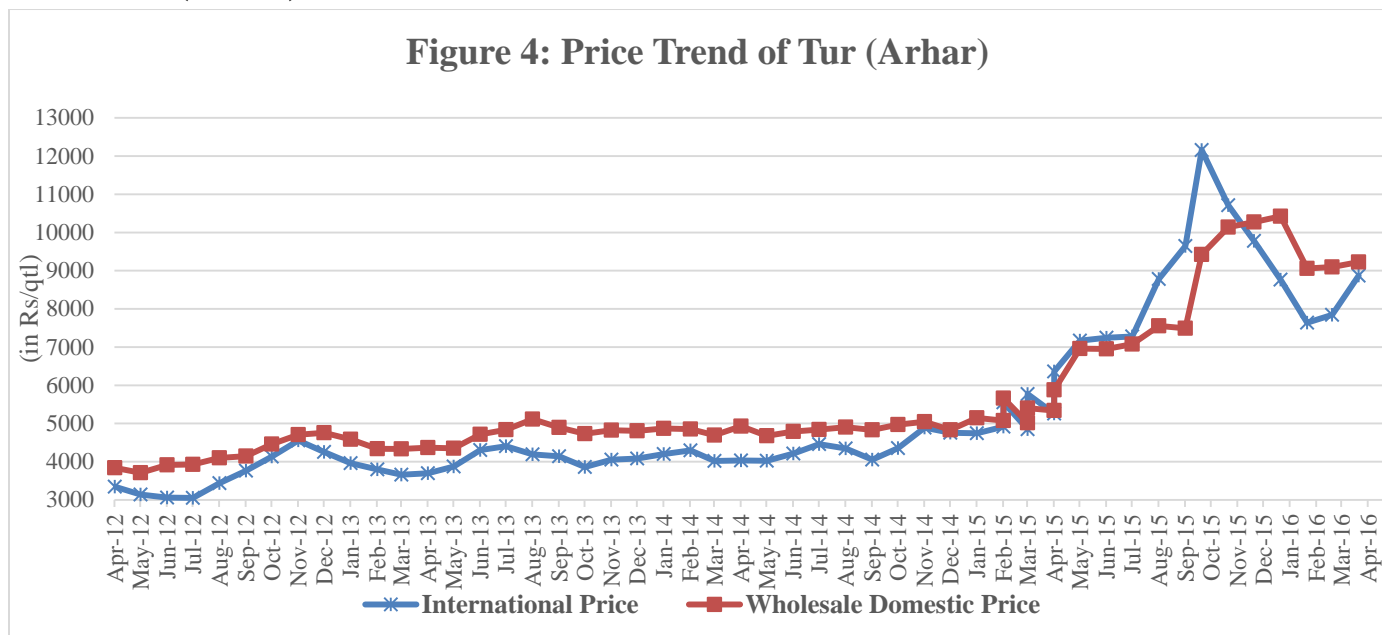
6.2 Lentil (Masur)



Source:-Department of Agriculture & Cooperation (DAC), Agmarknet, and Agriwatch

- There was a moderate to high price fluctuation for lentil (Masur Dal) in the domestic as well as in the international markets.
- The average domestic price was moderately high.

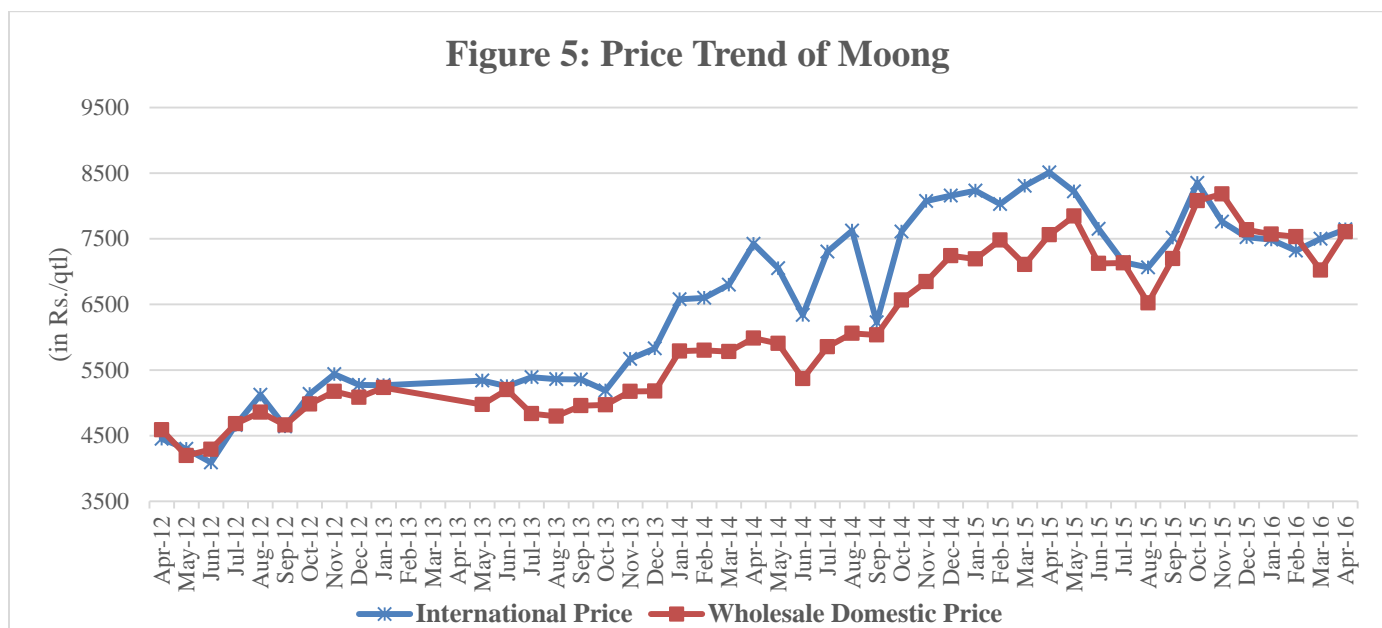
6.3 Tur (Arhar)



Source:-Department of Agriculture & Cooperation (DAC), Agmarknet, and Agriwatch

- The domestic prices for Tur (Arhar Dal) have been higher than that of international prices since December 2015.

6.4 Moong (Green Gram)

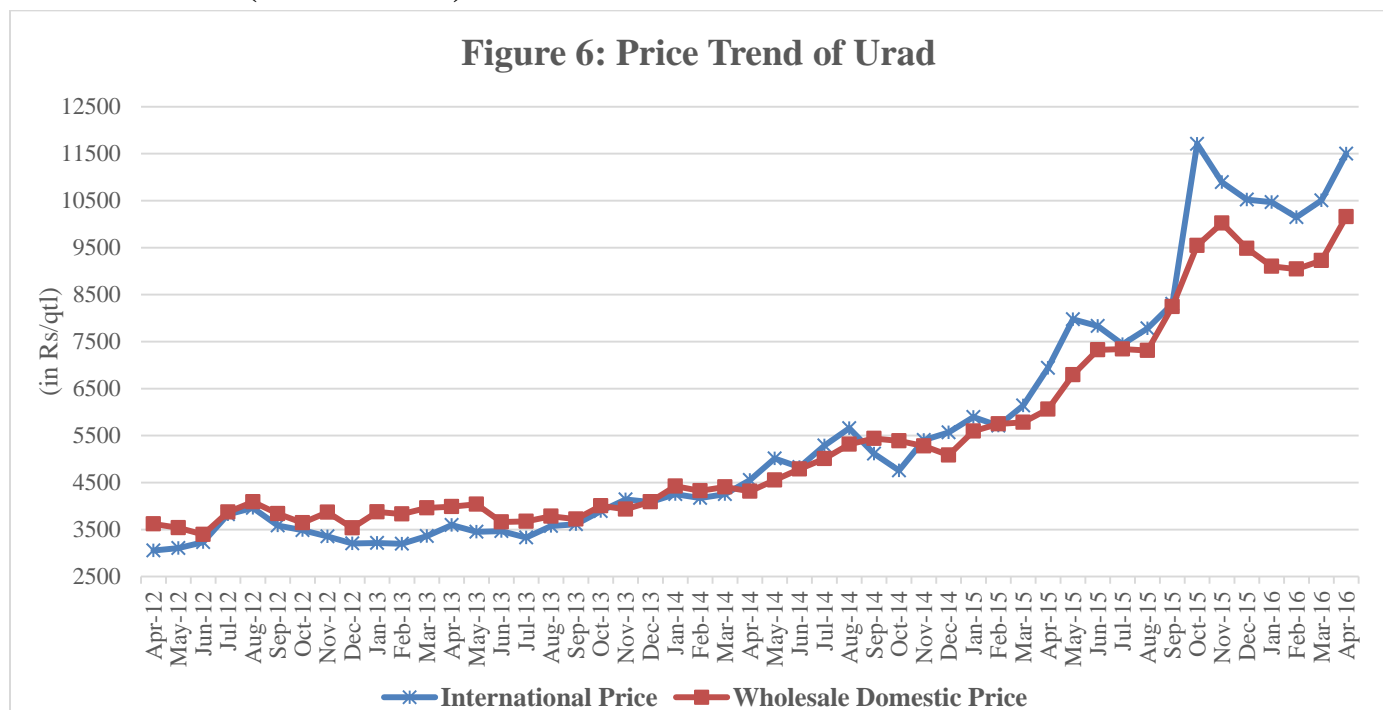


Source:-Department of Agriculture & Cooperation (DAC), Agmarknet, and Agriwatch

- The price fluctuations in the international markets were higher than that of in the domestic market. International prices for Moong Dal have been higher than domestic prices since September 2012 to Oct, 2015.

6.5 Urad (Black Gram)

Figure 6: Price Trend of Urad



Source:-Department of Agriculture & Cooperation (DAC), Agmarknet, and Agriwatch

- The international prices for Urad (Kala Dal) have been higher than that of domestic prices since Sept, 2015.

7. Price Movement of pulses in major domestic markets:

Major Pulses	Mandies	Apr-16	Mar-16	Apr-15	% Change (over previous month)	% Change (over previous year)
Chickpeas	Delhi	5336	4624	3916	15.40	36.26
	Indore	5361	4589	4005	16.82	33.86
	Bikaner	5038	4535	3836	11.09	31.33
Lentil	Kanpur	6401	5715	6012	12.00	6.47
	Delhi	6016	5434	5737	10.71	4.86
	Indore	5990	5143	5913	16.47	1.30
Tur	Gulberga	9186	8387	6765	9.53	35.79
	Kanpur	NA	7736	NA	NA	NA
	Amravati	9226	8309	6642	11.04	38.90
	Vijaywada	8790	7697	6387	14.20	37.62
Urad	Jalgaon	NA	NA	NA	NA	NA
	Jaipur	11774	9400	7170	25.26	64.21
	Delhi	NA	NA	NA	NA	NA
	Vijaywada	NA	NA	NA	NA	NA
Moong	Vijaywada	NA	NA	NA	NA	NA
	Indore	7300	6700	8121	8.96	-10.11
	Jaipur	7091	6940	8213	2.18	-13.66

Source: Agriwatch NA-Not available

8. Minimum Support Price (MSP)

(Unit: Rs/Quintal)

Pulses	2011-12	2012-13	2013-14	2014-15	2015-16
Tur	3200	3850	4300	4350	4425 [^]
Gram	2800	3000	3100	3175	3425 [#]
Moong	3500	4400	4500	4600	4650 [^]
Urad	3300	4300	4300	4350	4425 [^]
Lentil	2800	2900	2950	3075	3325 [#]

Sources: Commission for Agricultural Costs and Prices (CACP)

[^]Bonus of Rs. 200/quintal on Arhar, Moong and Urad and [#]Rs. 75/quintal on Gram and Lentil are payable over and above the MSP in 2015-16.

9. Future price of pulses

Contract Month	Chana future prices (Rs/Quintal)				
	05-May-16	04-May-16	Week ago 28 Apr, 16	Month ago 05 Apr, 16	% Change over previous months
16-May	5503	5431	5414	4884	12.67
16-June	5584	5527	5533	4961	12.56
16-July	5663	5609	5613	5055	12.03

Source: NCDEX

- Future price for Chana is expected to increase over the next three months as shown in the table 8.

Note:

- Except Chana, no pulses are traded in future in domestic markets.
- No pulses are traded in future in international markets.

10. Trade Policy and Tariff Schedule

10.1 Export Policy

- Under Advance Authorization Scheme, import of pulses is allowed for *export* after domestic processing and value addition (vide DGFT Public Notice No. 51 (RE-2013)/2009-14 dated 14th November, 2013)
- The prohibition on exports of Pulses is not applied to export of (a) Kabuli Chana and (b) 10,000 MTs of organic pulses and lentils per annum. Export of organic pulses and lentils shall be subject to following conditions:
 - Quantity limit shall be 10,000 Tonnes per annum;
 - It should be duly certified by APEDA as being organic pulses and lentils;
 - Export contracts should be registered with APEDA, New Delhi prior to shipment;
 - Export shall be allowed only from Customs EDI Ports.
 - (Notification No. 38 ((RE-2012)/2009-14 dated 31st March, 2014).
- Export of pulses to Bhutan have been exempted from any ban and without any quantitative restriction. (Notification No. 81 (RE-2013)/2009-14 dated 14th June, 2014.
- The export of pulses to the Republic of Maldives has been permitted for the years 2014-15 to 2016-17 as per the quantities given below:

(Unit: Tonnes)

Table 6: The export of pulses to Maldives	
Year	Export
2014-15	87.85
2015-16	96.63
2016-17	106.29

Sources: Notification No. 77 (RE-2013)/2009-14 dated 27th March, 2014

10.2 Import Policy

Import of pulses is free without any quantitative restrictions

Table 7: Import Policy				
HS Code	Commodity	Tariff Schedule		
		Bound Duty	Statutory Duty	Applied Duty*
0713 10 00	Peas (Pisum Sativum)	50%	50%	Nil
0713 20 00	Chickpeas (Garbanzos)	100%	30%	Nil
0713 31 00	Moong/Urad	100%	30%	Nil
0713 40 00	Lentil (Mosur)	100%	30%	Nil
0713 60 00	Pigeon Peas (Tur)	100%	30%	Nil

Source: Directorate General of Foreign Trade (DGFT), Department of Revenue and World Trade Organization (WTO)

* Duty free import of all pulses has been extended without an end date vide Department of Revenue's Notification No. 61/2015-Customs dated 30th Dec, 2015.
