GRAINS RESEARCH UPDATE

New and emerging markets for pulses

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GRDC
GRAINS RESEARCH & DEVELOPMENT CORPORATION
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One organisation delivering key functions

- Grains Australia is an **initiative of GRDC.**

- We streamline **key functions** for the Australian grains industry and its customers under **one organisation**.

- Through these key functions, we **strengthen competitiveness and profitability** for the grains industry.

We take a "Team Australia" approach.

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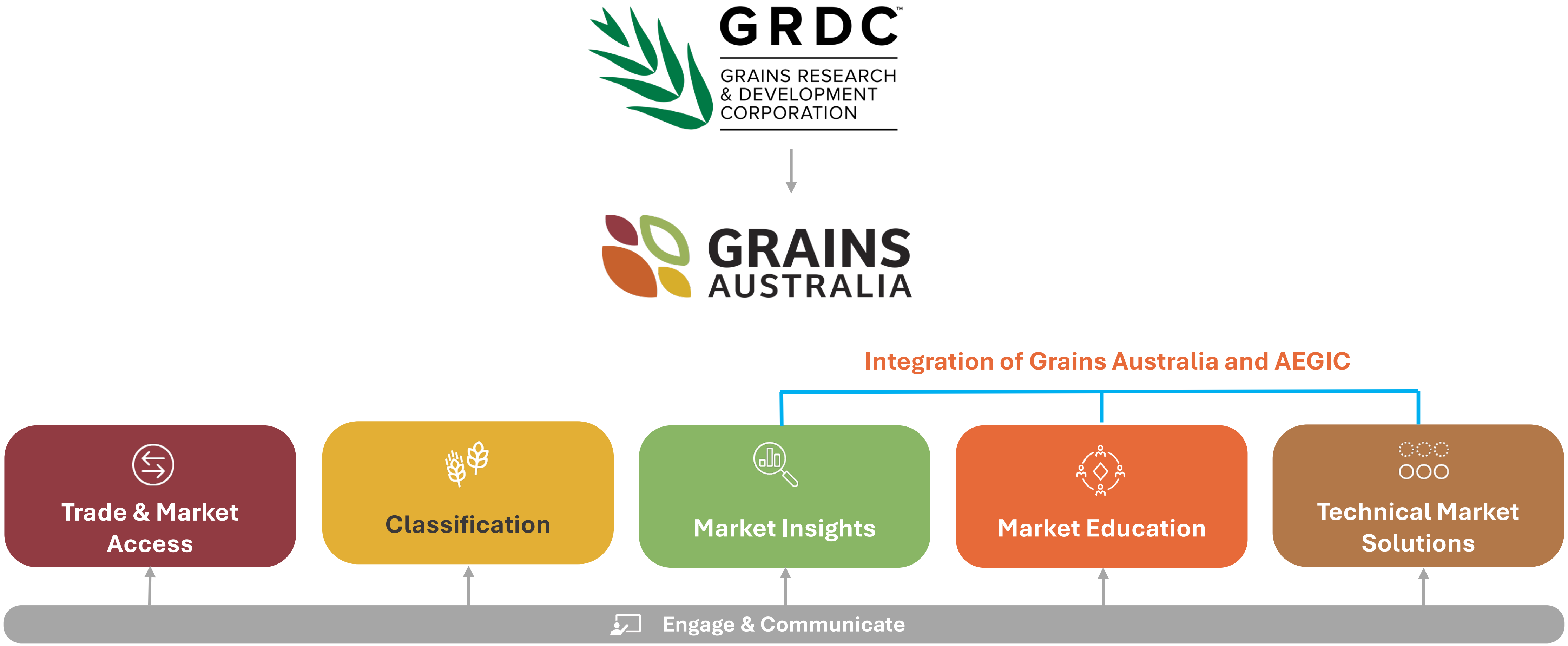
Our key functions



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Integration of Grains Australia and AEGIC

- AEGIC’s key functions unified and strengthened within Grains Australia
- One single, integrated organisation
- More targeted and aligned
- Enhanced efficiency = better value for growers and industry

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Take-home messages for Australia’s pulse industry

- Supply pulses that match the quality and end-use needs of specific markets.
- Australia’s pulse export offering should be able to flex with end-market policy cycles (e.g. India).
- Position faba beans and field peas for the growing protein and feed markets, while protecting premium food markets.
- Focus on quality and risk, and consider traceability and sustainability.

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Current pulse markets

Where do Australian tonnes go now?

Lentils – diversified food markets

Red lentils dominated by India and Bangladesh

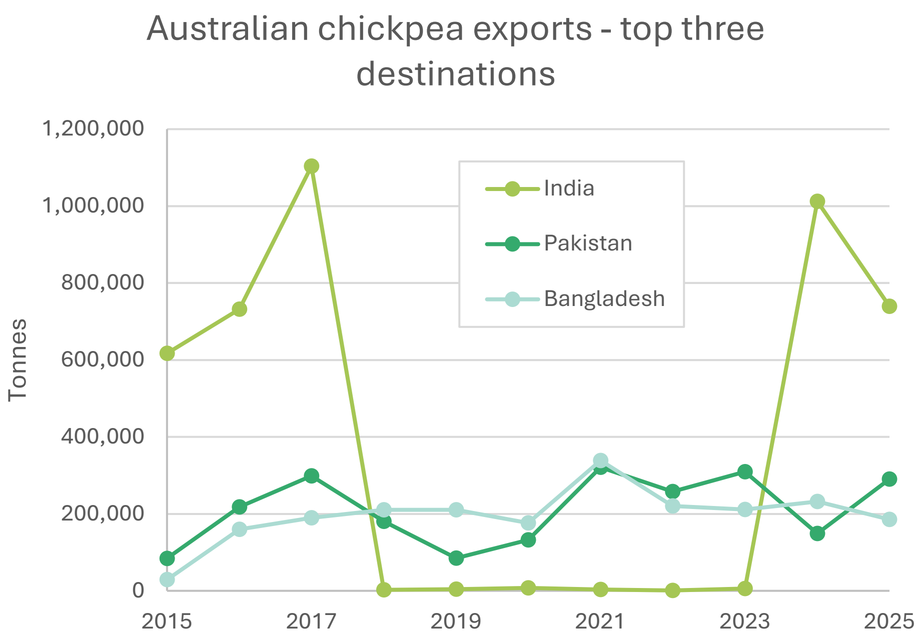
- India and Bangladesh together buy about 70% of Australian lentil exports.
- Sri Lanka, Egypt, the Middle East and smaller Asian markets are steady, smaller buyers that provide market diversification.
- Australian domestic lentil use is small; nearly all tonnage targets export food markets.

Note: 2025 is incomplete - Jan to Nov only

Chickpeas – India drives the big swings

Desi dominate, kabuli are a smaller but important niche

- Desi chickpeas go mainly to Bangladesh, Pakistan and India for dhal, besan and whole seed use.
- Kabuli chickpeas, around 50–60,000 tonnes a year, supply Pakistan and Middle Eastern hummus and canning markets.
- Indian production and tariffs determine whether Australian exports are minimal or exceed 1 million tonnes.



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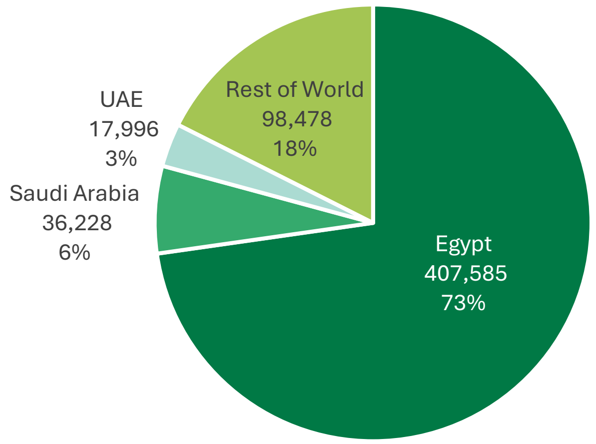
Faba beans – Egypt plus South-East Asia

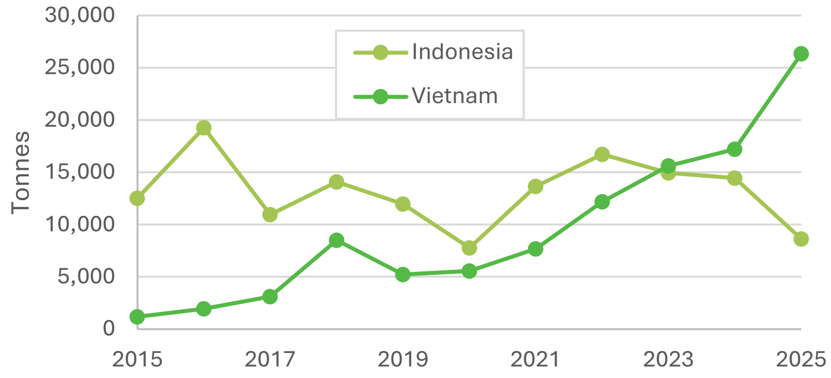
Food staple with growing aquafeed demand

- Egypt imports roughly 0.5–0.6 million tonnes a year for foul mudammas and falafel.
- Other MENA markets buy smaller but steady volumes for canning, foul and snacks.
- Indonesia and Vietnam now import 20–35,000 tonnes annually, mainly for aquafeed and snack foods.
- Within Australia, faba beans are used in sheep, dairy, poultry and aquaculture rations and for emerging protein ingredients.

Australian faba bean exports - top three destinations (tonnes)



Australian faba bean exports- Indonesia and Vietnam



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Field peas and lupins – feed and niche food

Changing dun peas

- Field pea export volumes are modest
- China has overtaken traditional field pea food markets including Bangladesh, Sri Lanka, Malaysia and India.
- Global demand growth is driven by yellow peas for fractionation and feed, where Canada and Russia dominate.
- Around 30% of lupins are used domestically in intensive livestock rations, with exports mainly to into South Korea and Netherlands .

Note: 2025 is incomplete - Jan to Nov only

How are these markets changing?

Volatility, new users and policy shifts

Chickpeas and lentils – volatility and diversification

India plus steadier South Asian demand

- Indian tariffs on chickpeas and lentils can change quickly, effectively turning trade 'on' or 'off'.
- India’s goal of pulse self-sufficiency means imports surge mainly in poor production years.
- Bangladesh and Pakistan are more stable buyers and will likely remain dependable importers.
- For lentils, many smaller importers in MENA, Asia and the Americas help spread risk for Australian exporters.

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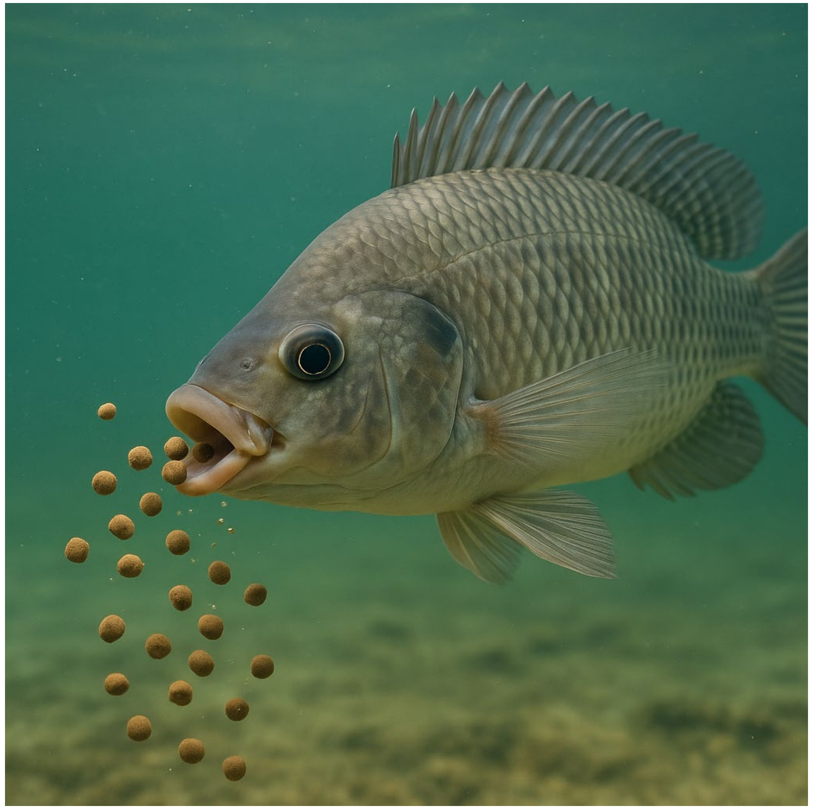
Faba beans, field peas and lupins – protein and feed growth

Aquafeed, fractionation and market access

- Yellow pea protein industries in China and North America are now major drivers of global pea trade.
- Faba beans are gaining roles in aquafeed and in protein concentrates and isolates in Australia and overseas.
- Lupins are increasingly recognised as a sustainable plant-protein source for both feed and food.
- Tariffs and protocols still matter – lentils benefit from reduced tariffs into India and chickpeas have an unrealised tariff advantage into China.



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What the markets want and need

Specifications that really drive value

Food markets – quality and consistency

Seed size, colour and milling yield

- South Asia and MENA pay premiums for **seed size, colour, low damage** and **tight, clean seed** coats.
- Bangladesh prefers **plump 'football-shaped' lentils** and bold, **even-sized desi chickpeas** that split cleanly.
- Egypt rewards **medium to small, light-coloured faba beans** with minimal staining or insect damage.
- Kabuli hummus and canning markets require **large, uniform seed** with good hydration and skin integrity.

Feed and plant-protein markets – functionality and reliability

Protein, anti-nutritionals and sustainability

- **Feed buyers** focus on protein content, energy density and anti-nutritional factors relative to soybean meal.
- **Aquafeed manufacturers** need predictable pellet performance, digestibility and reliable year-round supply.
- **Plant-protein processors** look for functional traits such as solubility, gelation and flavour, with low off-flavours.
- Some buyers are starting to ask for **traceability and sustainability** metrics alongside physical quality.

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