



International Year of Pulses 2016

Market Update



Who are BEPA?

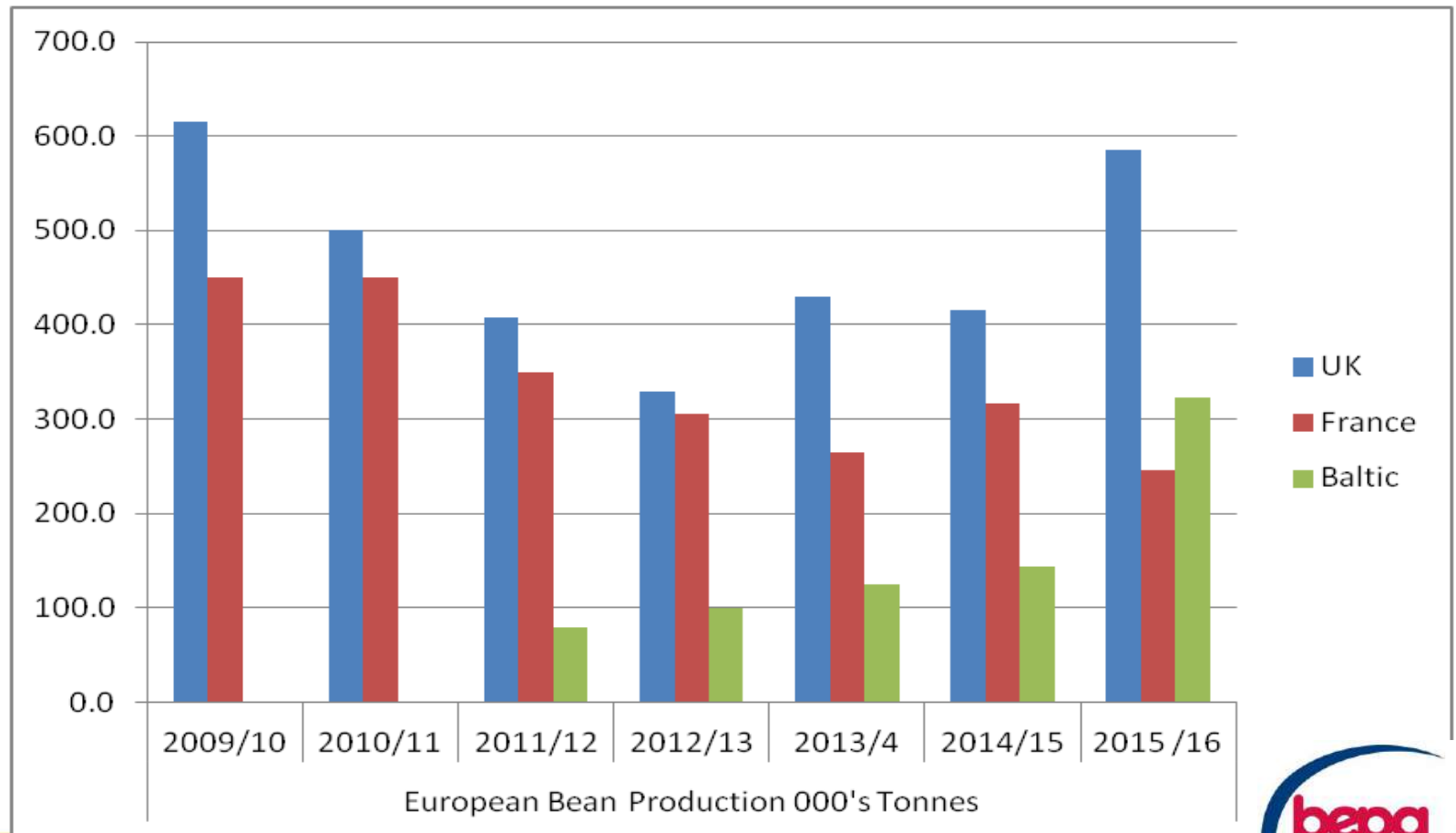


British Edible Pulse Association

- Processors
- Seed Breeders
- Exporters
- Traders
- Importers
- Compounders

Our main aim is to promote the growth of the UK pulse industry either through increased production or consumption of all types of pulses.

European Bean Production 2009/10 to 15/16





Bean Production 16/17

- UK Production:
250,000t Winter 350,000t Spring.

Poor Quality, Poor Yield:

France – no longer acceptable for HC.

UK – 70% of Springs and 80% of Winters unsuitable for HC

Yield 3.5/t Ha versus 4.0/t Ha last year

Baltics:

Bigger crop (250,000t) – price competitive, but quality not as good as anticipated.



Factors affecting EU bean acreage

Increases due to:

- CAP reform : EFA's and three crop rule
- Poor OSR establishment
- Increasing Black Grass issues
- Lack of alternatives

Decreases due to

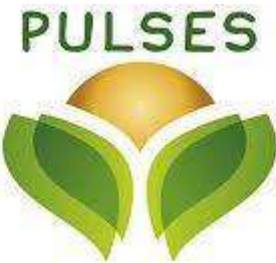
- Hot French summers reducing yield and size of bean
- Restriction in France on the timing and application of Bruchid sprays
- Lower yield in 2016 crop
- Politics – Brexit / Trump
- Exchange Rate (GBP/USD/EGP)





UK Bean Supply and Demand

	2009/10	2015/16	2016/17
Prodn Winter	292	230	250
Prodn Spring	309	415	350
Imports	0	0	0
Supply	615	645	600
Feed UK	150	240	220
Seed /Farm	67	110	100
Export Feed	200	70	60
Export H Cons	175	230	160
Demand	590	650	540



UK Bean Markets



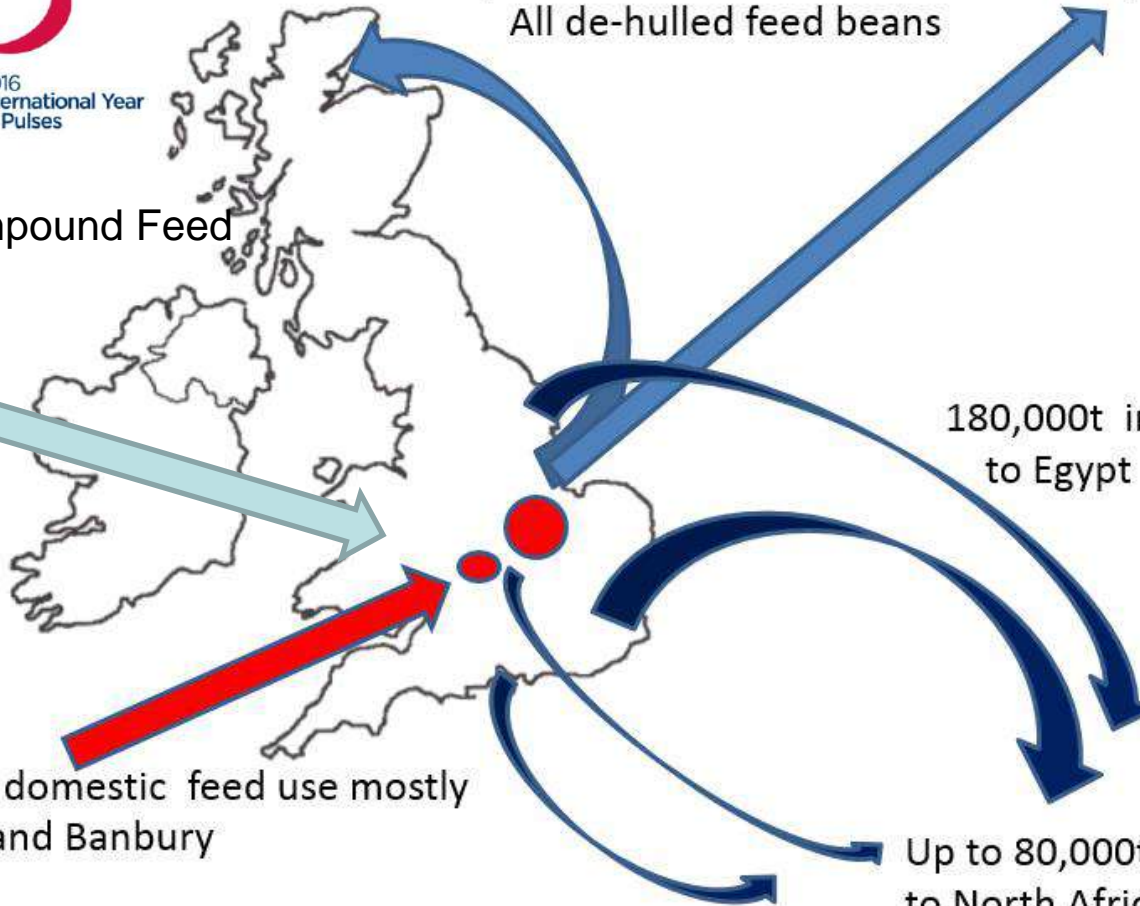
Ruminant Compound Feed
mills
100,000tns

Up to 35,000t to Scotland and Norway
All de-hulled feed beans

180,000t in bulk vessels
to Egypt

100,000t UK domestic feed use mostly
Chettisham and Banbury

Up to 80,000t in Containers
to North Africa





Quality: Is it Human Consumption?

- How many holes are acceptable?
- How many live insects inside are acceptable ?
- Are dark beans ok?
- The answer is: **Would you eat them?**



Challenges and opportunities facing the UK bean market



- Brexit – will this affect demand for worldwide use?
- A growing crop in the Baltic states
- Reduced portfolio of agronomy products to control weeds, disease and insect attacks
- Exchange Rates
- Poor quality due to weather conditions in the growing season and at harvest
- UK feed compounders buying beans give strong support for UK beans making a sustainable market
- UK spring beans are the No. 1 quality beans in Egypt. We need to continue promoting them.
- Cheap GBP = cheaper exports
- Variable yield outlook. UK average is only 4.2t/ha
- French crop no longer suitable for HC
- UK Feed beans now being asked for by feed users instead of Soya



Large Blue Peas

- Demand for Large Blue peas has increased due to the fall in the £GBP = cheaper imports
- Poor yielding crop – 3-3.2t/Ha, supporting values
- Stock likely to be tight until Crop 2017
- IYP encouraging sales for the future

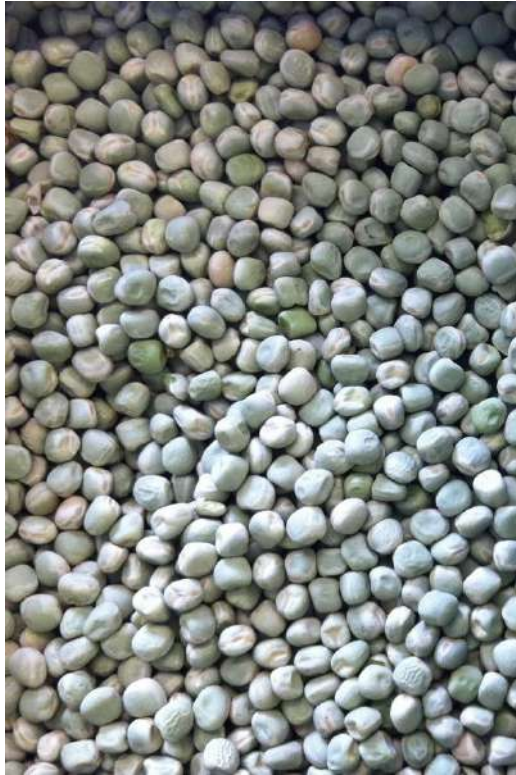


Marrowfat Peas

- Buybacks mostly secured, some available
- Demand and Supply for 2017 and 2018 is looking strong, but oversupply of Crop 2016 is putting pressure on price
- Marrowfat Peas only grown in 3 countries
- UK Quality is the best
- Customers are reluctant to change supply once secured

For 2017 – book now to avoid disappointment

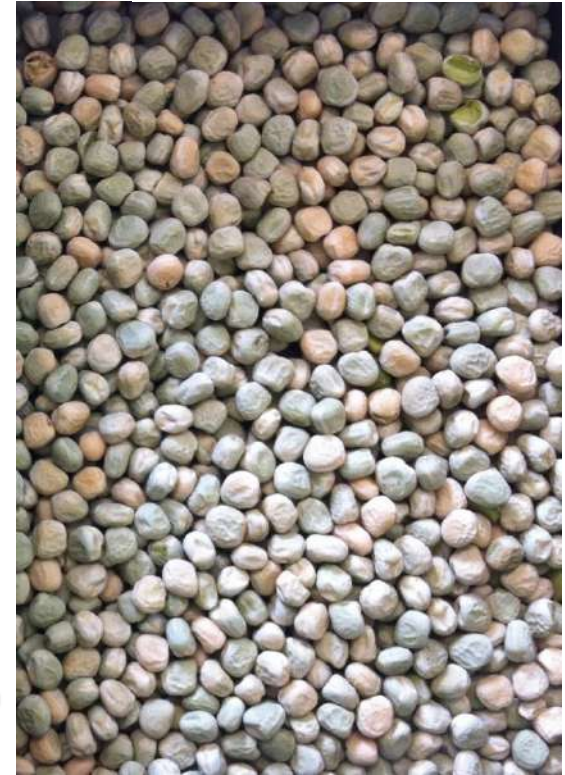
Spot the difference...



Maximum 10% Bleached

What is the difference?

£40-50/t!



More than 20% Bleached



2016

INTERNATIONAL YEAR OF PULSES

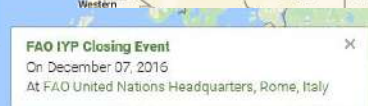
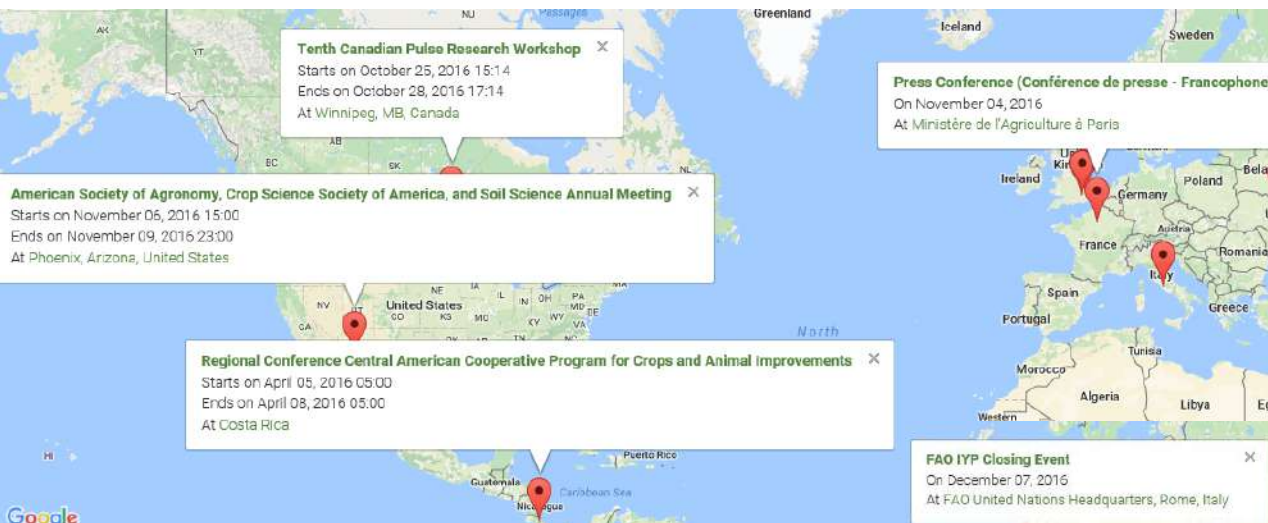


What is the International Year of Pulses?

The United Nations declared 2016 the International Year of Pulses.

The IYP aims to increase awareness of the many benefits of pulses, including their nutritional profile, environmental and sustainability benefits, affordability and potential to address global food security.





International events



British Politicians host IYOP event in Houses of Parliament

- ▶ The APPG on Agroecology for Sustainable Food and Farming's chair Kerry McCarthy MP (also Labour MP for Bristol East) hosted an exhibition with the British Edible Pulse Association (BEPA), which showcased the best of British pulse growing & production from across the UK. Farmers, producers and suppliers met with MPs and Peers to promote the health and environmental benefits of pulses.



Guests were also joined by cookbook author, chef, and European International Year of Pulses ambassador Jenny Chandler, who spoke about the nutritional and sustainability benefits of cooking with pulses. Following speeches, attendees tried UK-manufactured pulse snacks as well as a range of pulse canapes prepared by The Gate Restaurant, Islington, one of the top vegetarian restaurants in the country.





1 May 2016,
Borough
Market



The first ever London Falafel Festival:

- ▶ Featured four falafels from the chefs competing for the Golden Falafel Award.
- ▶ Moustafa El Rrefaey featured his signature Egyptian falafel made with fava beans, stuffed with charred aubergine and drizzled with beetroot and hibiscus tahini.
- ▶ Abdullah Amin presented his “Trilafel” – a beetroot falafel made with chickpea, black-eyed-bean and red lentil, served with three dips
- ▶ Uri Dinay showcased his acclaimed spiced chickpea falafel sandwich with crunchy cabbage, pickle and silky tahini.
- ▶ Louai Fares and Rasheed Muhammed of the street food kings Hoxton Beach introduced crushed falafel made with a 50-50 blend of fava beans and chickpeas.

Essex Schools Food and Farming Day



Held at Writtle College on 7th June 2016

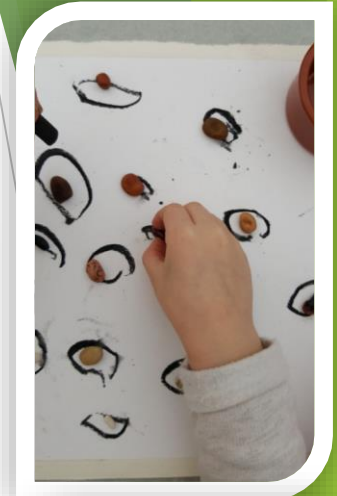
The aims of the Schools Country Food and Farming Day are to teach children where food comes from and the importance of agriculture and the countryside, through interactive learning experiences. 3000 primary school children visited this event.



The Bean Project – Victoria Brown (Artist)

In celebration of IYOP, Victoria Brown has been in residence in 3 schools, creating a new series of paintings titled 'The Bean Scrolls'. Thanks to support from BEPA, PGRO and Derby City Council, Victoria has been growing beans and creating bean artwork with children in schools.

The Bean Project started with studying the seeds and drawing in charcoal and pastels. Even the youngest children were very focused drawing the shapes and patterns on the different varieties of beans. Victoria and the children planted trays and pots of beans ready to observe their growth over the following months. Children visit the poly tunnels in groups to draw, plant, paint and dig, even the babies visit too.



PULSES TODAY

HEALTH & SUSTAINABILITY

Pulses continue to be consumed in traditional forms. In India, this means dals, sambar, idli, vada, laddu & pakoras. In Latin America, this means beans with rice and stews. In North America and Europe pulses are typically used in soups, chilis and salads.

NUTRITIOUS

RICH IN VITAMINS & MINERALS

Pulses are high in folate, iron and potassium

REDUCES RISK FACTORS FOR HEART DISEASE & DIABETES

- reduces cholesterol
- improves blood sugar control

SUSTAINABLE

Pulses improve the sustainability of agriculture and food production.

- Low carbon footprint
- Efficient water use
- Improve soil health
- Enhance diversity of farming



HIGH IN PROTEIN

Pulses are 20-25% protein, double the amount in wheat and three times the amount in rice

HIGH IN FIBRE

1/2 cup of pulses provides 7-17g fibre

Achievements of the Global Pulse Industry during IYOP?

- ▶ 600million social media impressions (target for year 2-40million)
- ▶ 6 million global social media engagements(website visits/downloads/retweets)
- ▶ 560 pulses events around the globe (such as in the UK Beanfeast/Falafel festival/Food matters etc)
- ▶ 1,800 plus media articles featuring pulses.
- ▶ Dietary guidance from governments in UK/Holland/USA/Canada to consume more pulses (Public Health England's 'Eatwell Plate' strongly recommends Pulses)
- ▶ In the UK sales of dry pack pulses 20% up and canned Pulses 7% up year on year.



Thank You - Any
Questions?