



Department of
Primary Industries

State of play for Pulses in Southern NSW- a local and global prospective

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Acknowledgements & outline

- NSW DPI & GRDC for funding pulse research
- My southern growing pulse team
- What are pulses
- Pulses in the farming system
- Domestic and export markets
- 2015/16 NSW DPI Survey of pulse industry

Pulses

- In Australia grain legumes are generally referred to as 'pulses'. The term 'pulse' is derived from the Latin pulse meaning 'dry seed or grain that can be made into a thick soup or pottage'
- The six major pulse groups grown in Australia are chickpea, faba/broad bean, field pea, lentil, lupin and mungbean.
- Pulses are a adaptable grain that can be grown in a low input agricultural system.

Why are Pulses in the farming system

- Excellent break crop for cereal crop rotations
- Weeds, diseases, insect pests different to cereals
- Grain legume- fix nitrogen from air for use & residue
- Stubble residues break down quickly
 - And has grazing value for mixed farmers
- Relatively low input crop



Pulse trends in southern NSW

A glimpse at the global market

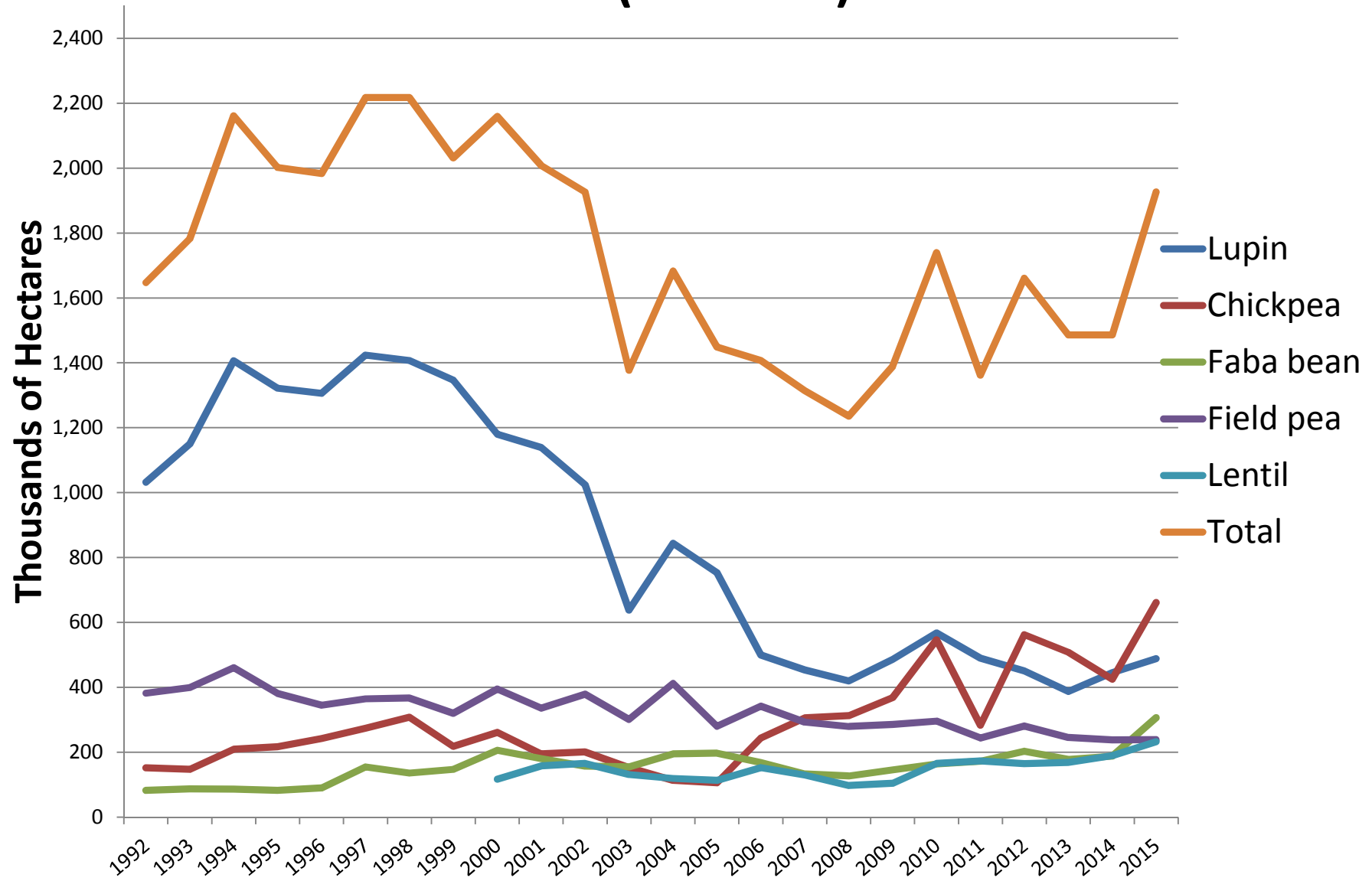
- Pulse total global production around 60 to 70 million tonnes
- India produces 12 to 18 million tonnes of pulses a year and consumes 16 to 17 million tonnes
- Canada and Australia are generally the biggest exporters
- Canada presently produces up to 5 million tonnes a year
- Australia can produce around 2.5 million tonnes (incl. 1m of chickpea)
- Australian export market driven by seasonal conditions and prices in India and Middle East (influenced by drought/monsoon conditions) ***

Australian Pulse Situation

- Export and domestic markets available for human consumption for many pulses (Lentil, chickpea, Faba bean)
- Export market dependant on seasonal conditions overseas
- Main domestic market is stock feed (for protein)
- Aquaculture expansion in Asia driving demand (lupin, fabas)

Australian Pulse Crop (all species) Area (hectares)

Source: Pulse Australia



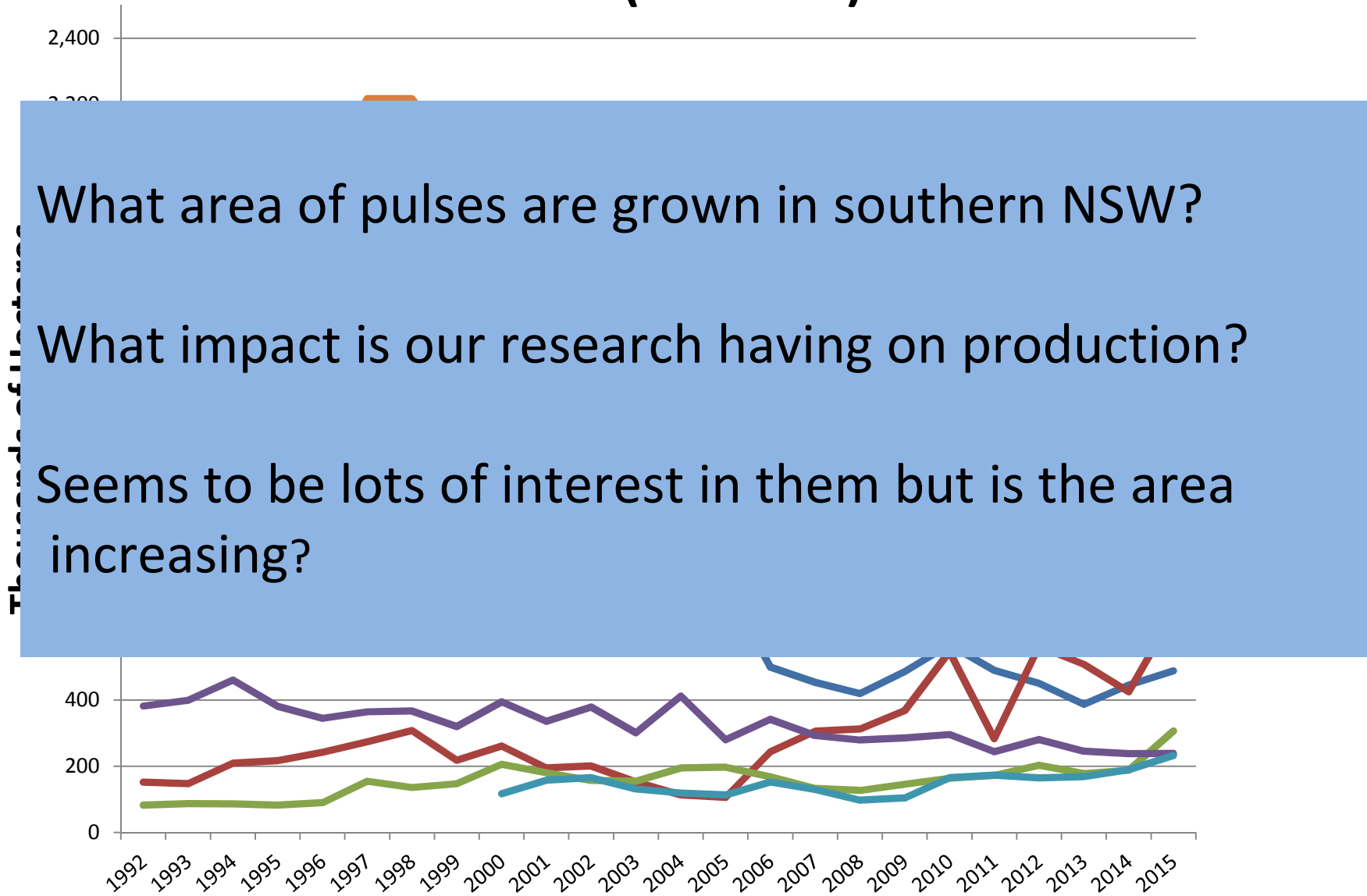
Australian Pulse Crop (all species) Area (hectares)

Source: Pulse Australia

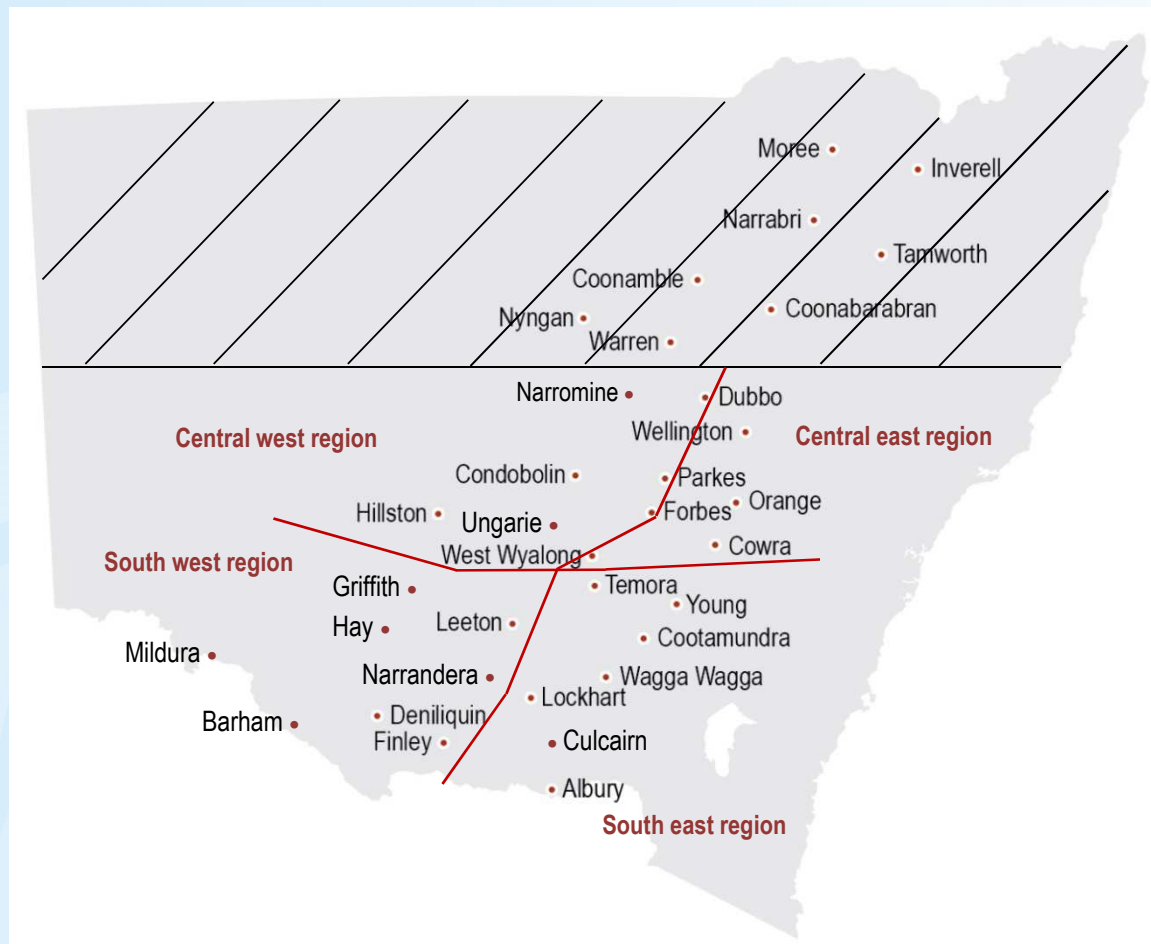
What area of pulses are grown in southern NSW?

What impact is our research having on production?

Seems to be lots of interest in them but is the area increasing?



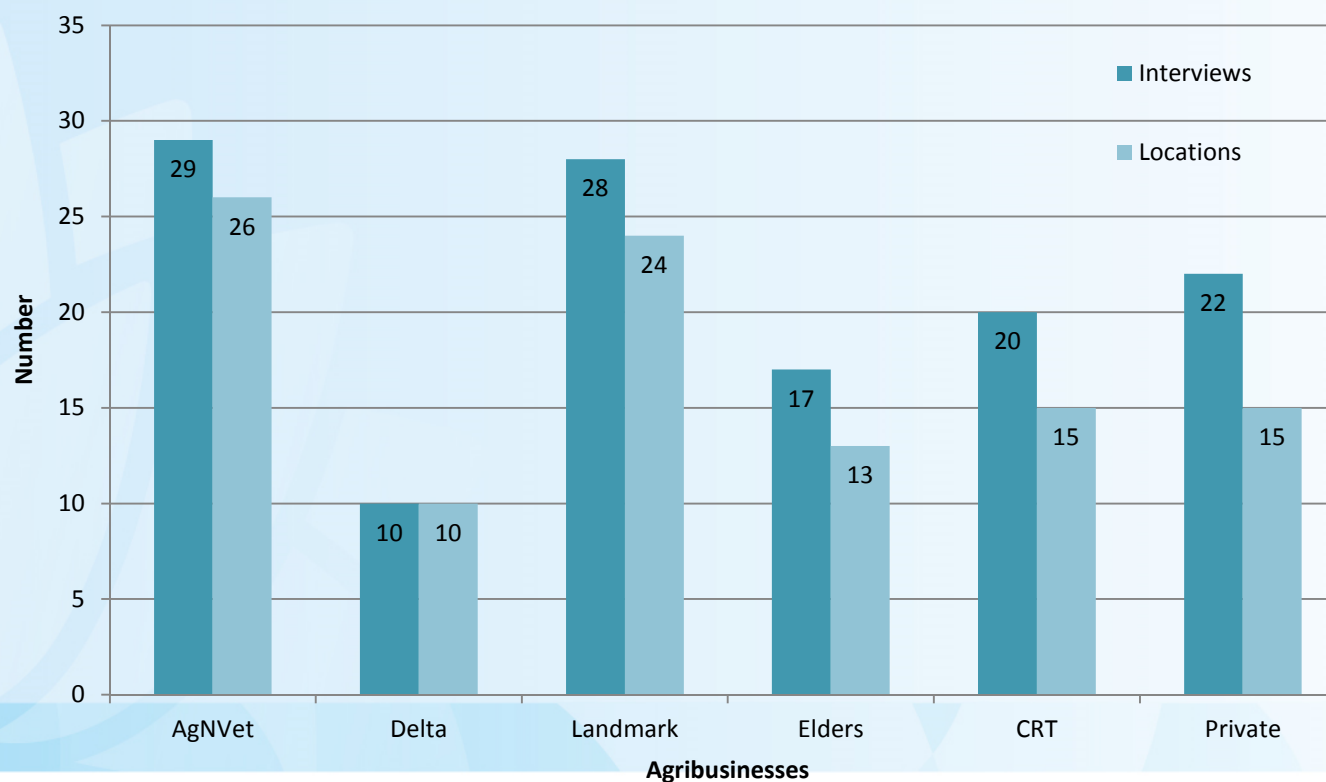
Pulses at a local level (Sth NSW)-survey approach



124 phone Interviews, 57 towns/regions

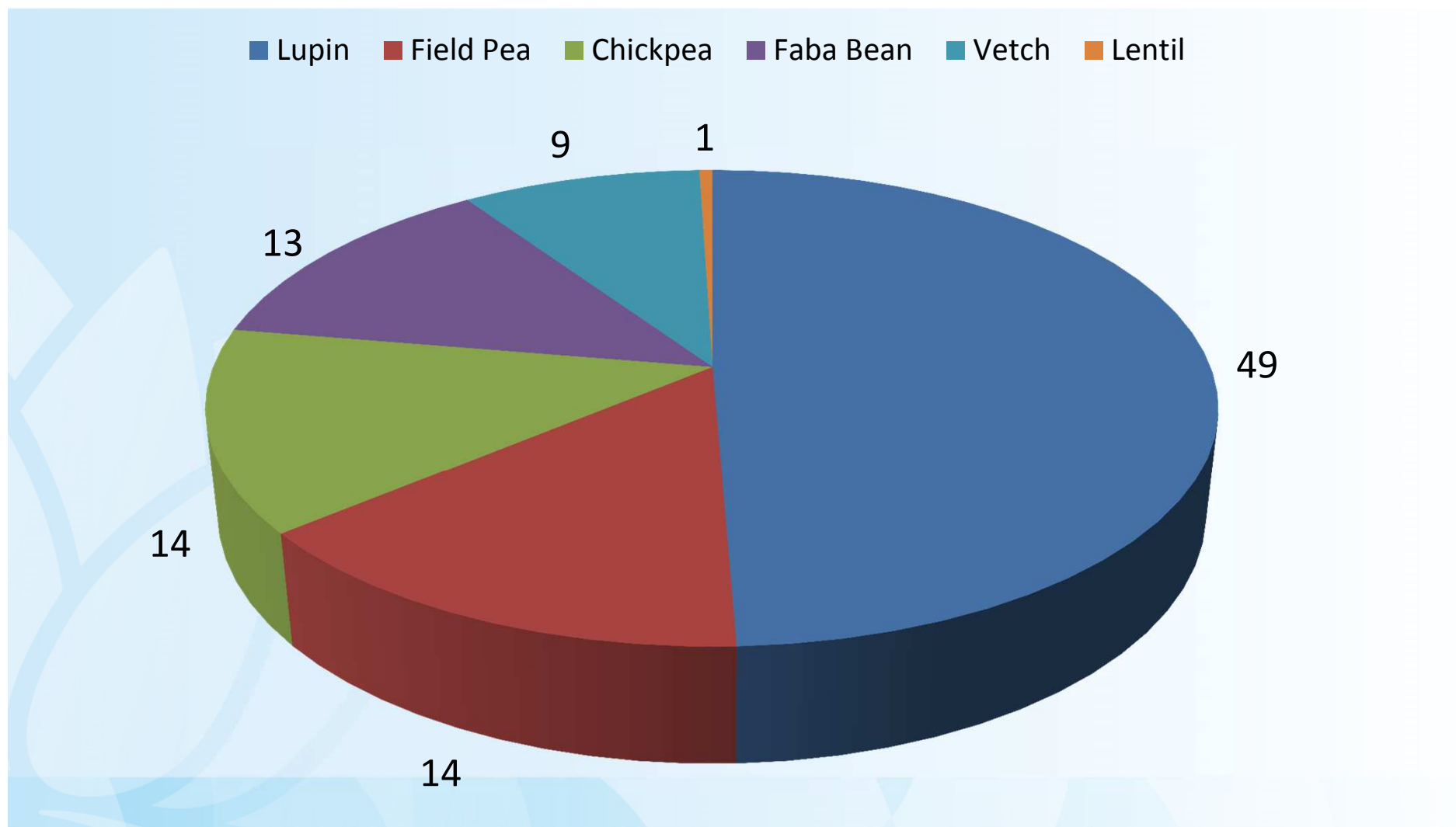
Agronomist groups surveyed	Number
Commercial agronomists (AGnVET, CRT, Delta, Elders, Landmark)	102
Private agronomists	22
Total	124

Survey questions	
Question 1	Interviewee details
Question 2	Pulse area 2015, area (ha), yield (t/ha), dominant variety? Pulse area 2016 – increase, decrease, no change?
Question 3	Pulse-management issues NSW DPI should be addressing?
Question 4	Do you want to see the results of the survey?
Question 5	Other agronomists we should contact to survey in your area?
Question 6	Do all your growers use inoculants?

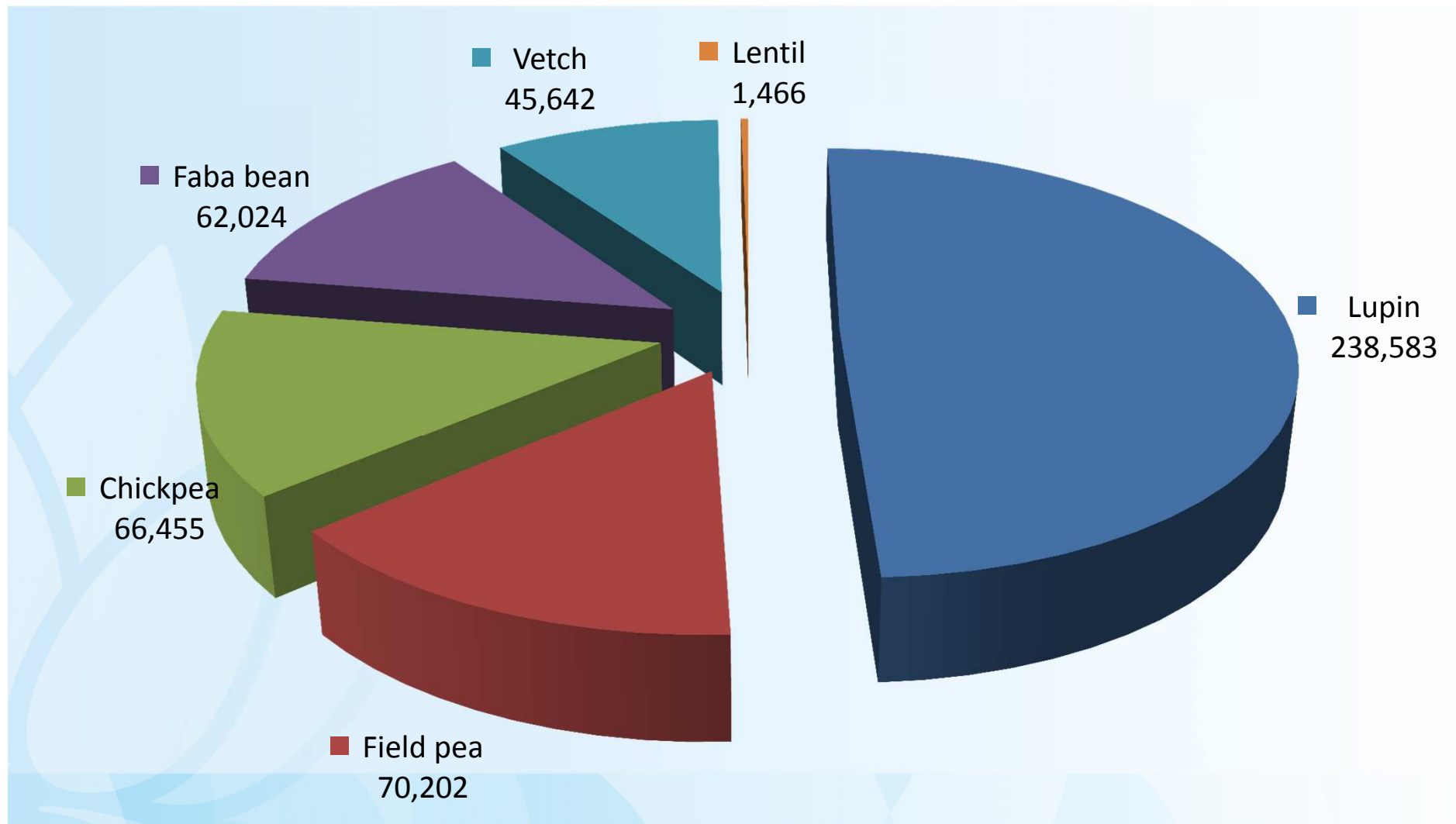


Pulse trends in southern NSW

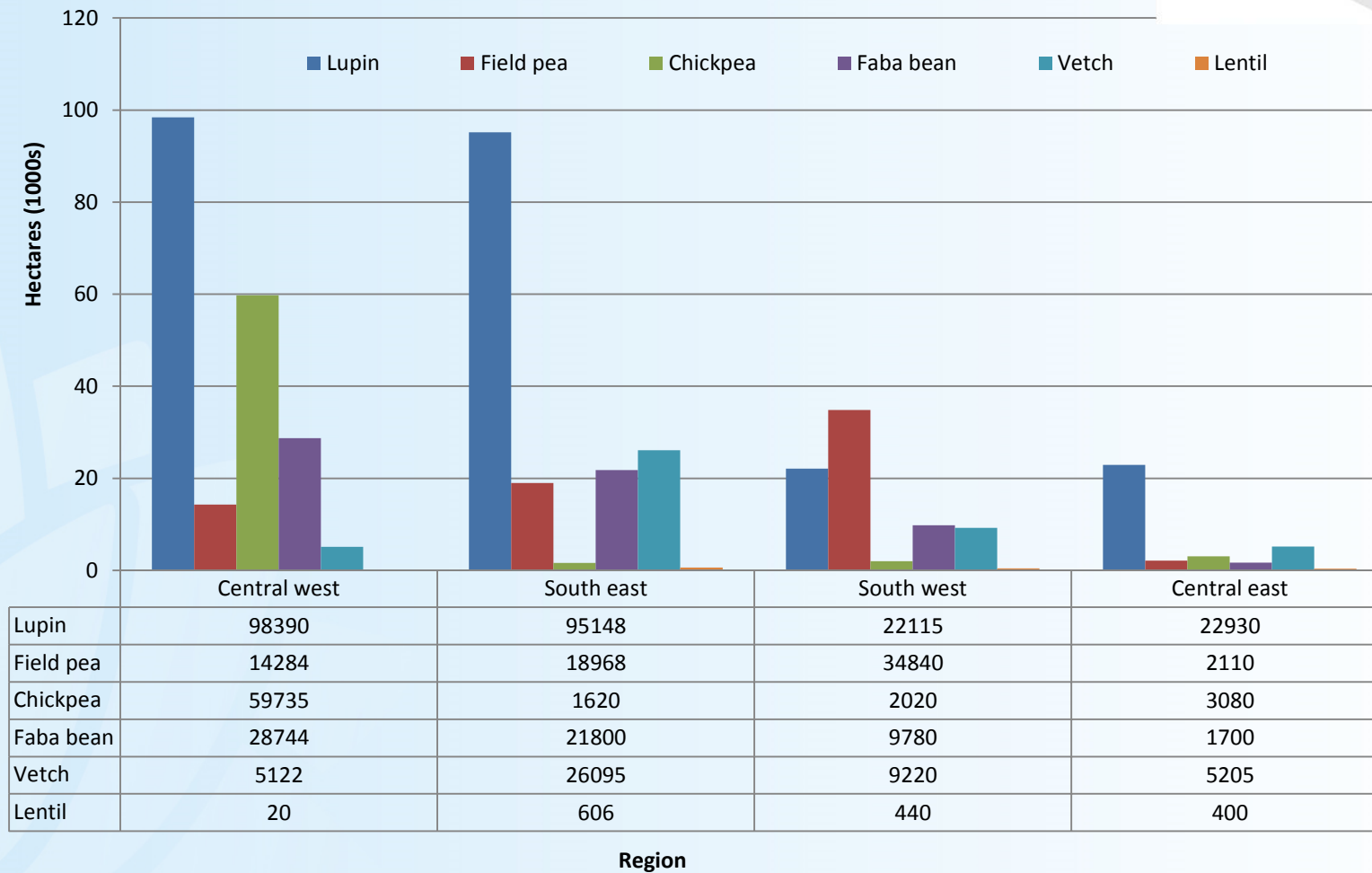
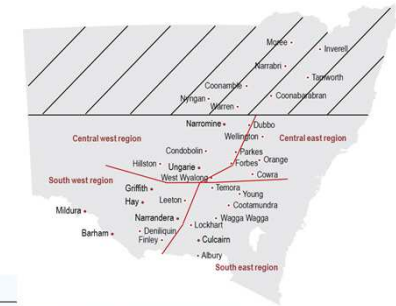
Break down % of pulse crops in Sth NSW 2015



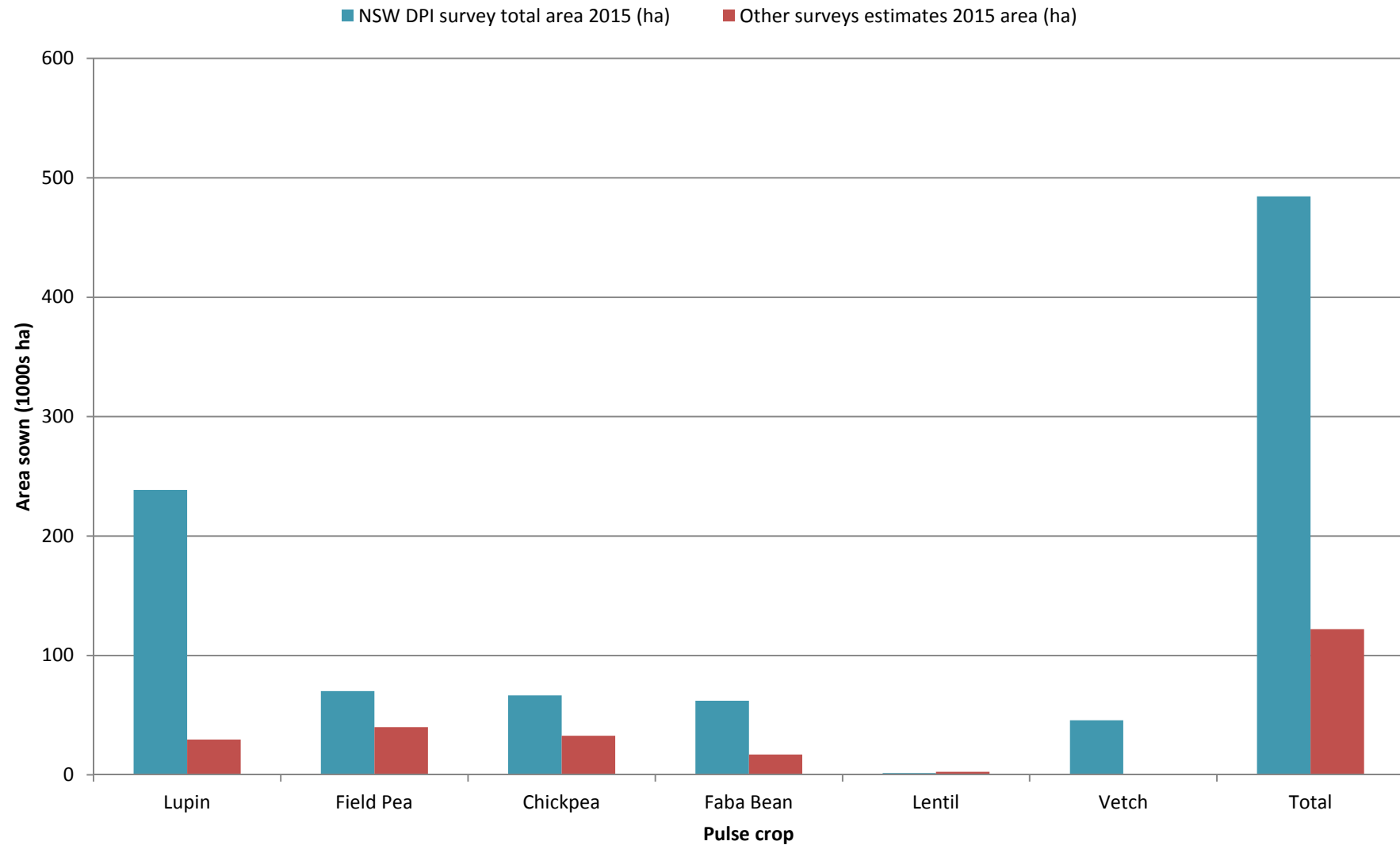
Overall pulse area (ha) in southern NSW 2015



Breakdown of crops x region

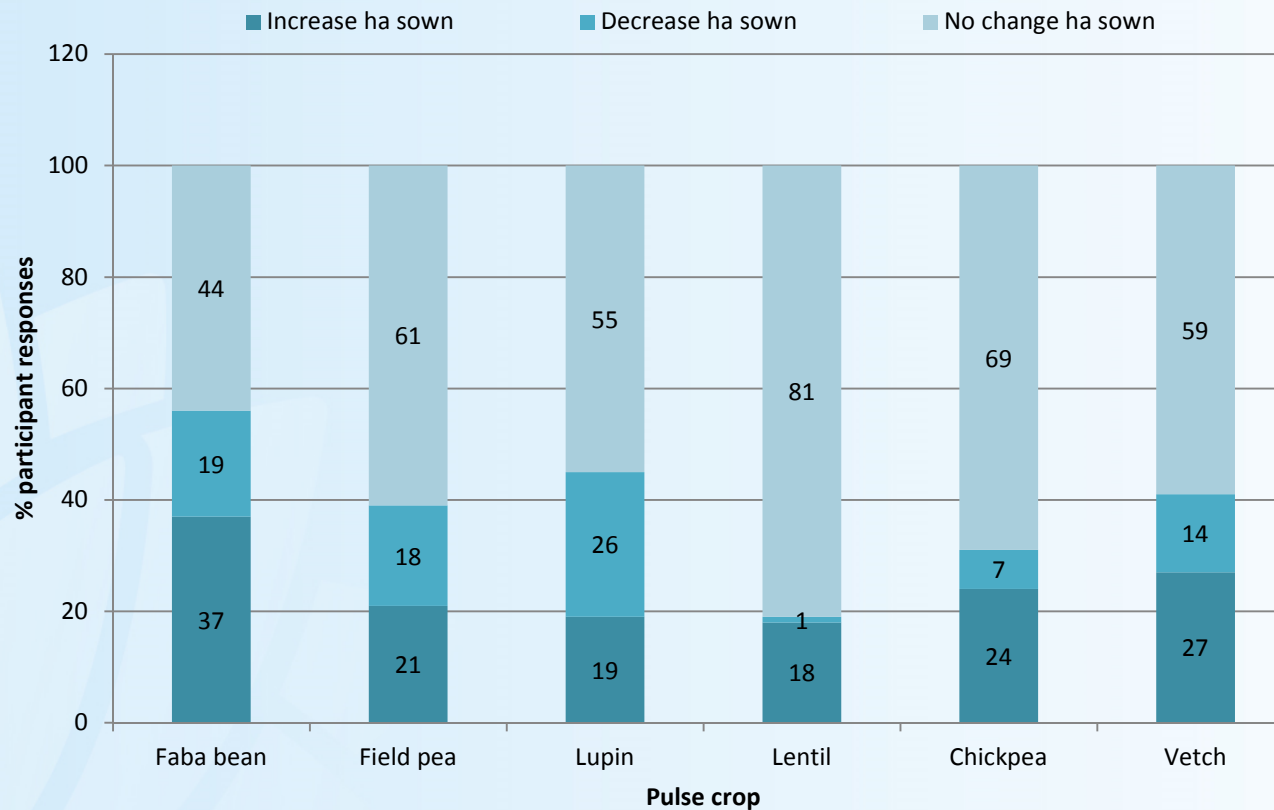


Comparison to other industry estimates

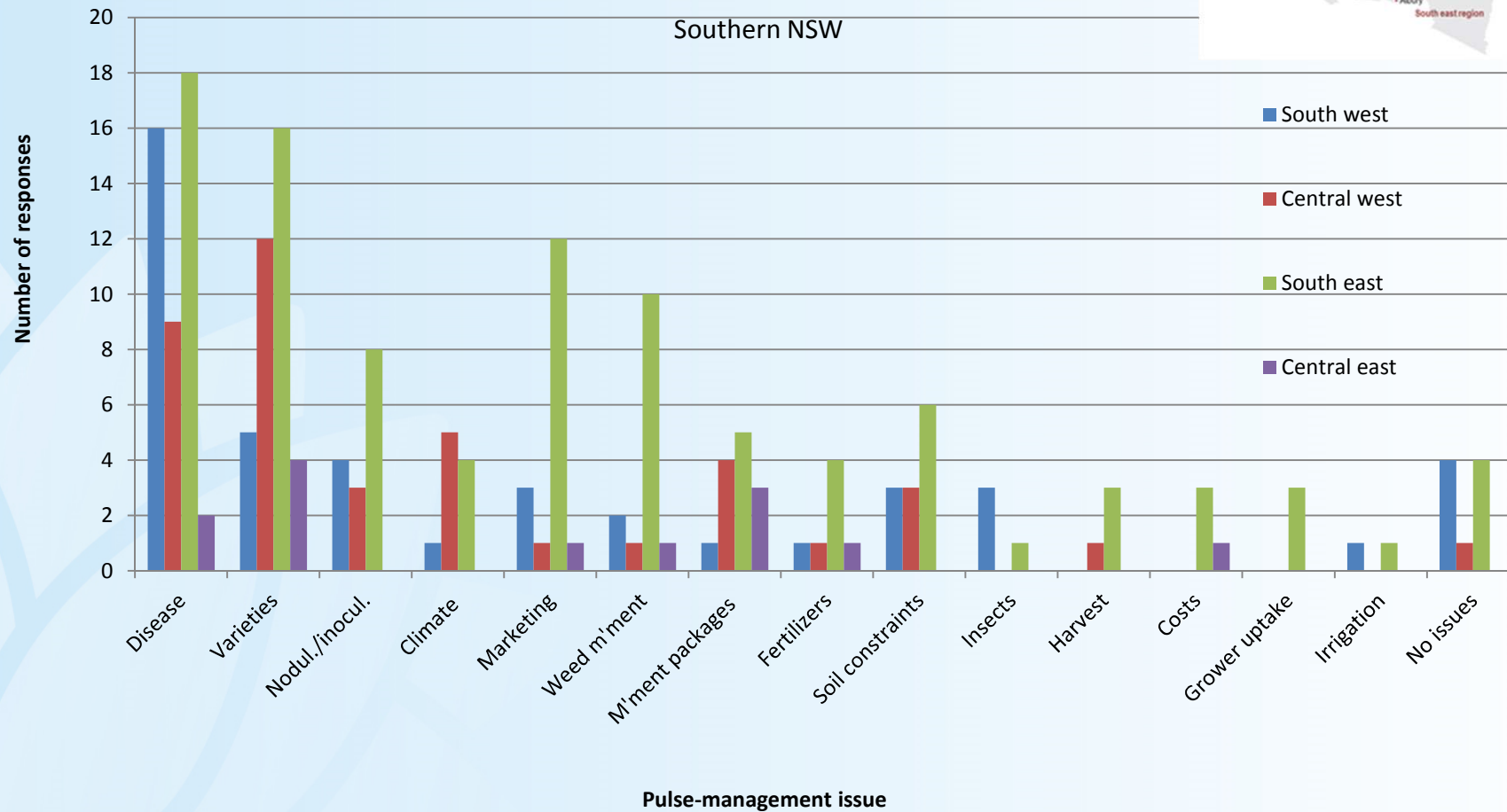


Estimated total crop areas of southern NSW is 2.8-3.0million hectares

Variation from 2015 to 2016



Challenges of pulses



Conclusion

- Significant lupin area – 50% of pulses in sth NSW
- Main challenges for pulses are:
 - Variety management
 - Disease management
 - Weed management, inoculation, marketing
- Larger area of pulses grown than previous estimates
 - more grain retained on farm
 - Domestic uses and feedlots
 - Grain not delivered to bulk handlers

- Thank you