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Tur (Pigeon Peas) Outlook

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About BIG



- Our Mission is to develop and expand a diversified & innovative fully-integrated sustainable value chain that impacts, benefits & strengthens the livelihood of smallholders in Africa alongside delivering sustainable commercial returns.
- We are focused & committed to development and value addition in Africa, we will achieve this by investing and operating projects that have a direct economic & social impact for our employees and their families, as well as smallholders and other value chain participants.
- This approach will ensure sustainable benefits to all stakeholders.



BIG - Business Overview



Bajrang International Group (BIG) operates via three core business verticals, with each having synergy value for the Group.

**Agro
Cluster**

**Sourcing,
Processing &
Trade**
(Domestic & International)



**Packaging
Cluster**

**Bag Production &
Packaging Reducing
Post-harvest
Wastage**



**Construction
Cluster**

**Engineering &
Construction**





Global Pulses Outlook



Particulars	% CAGR	Volume (MT)
Global Production	2.6 %	90-92 Mn
African Production	4.1 %	20-22 Mn
India Production	3.9 %	23-24 Mn
Global Exports	4.0 %	11-12 Mn

- The Global Production is not directly in line with the Global Exports. (Traded Volumes)
- Indian import of pulses has gone down from 5.6 million MT in 2017-18 to around 840,463 MT in 2021-22 (Apr-Mar)



African Pulses Market



- In terms of volume, pulses export from Africa is negligible compared to Canada, Russia, Myanmar & Australia. Still it plays a major role when it comes to export of Pigeon Peas, Green Grams & Desi Chick-Peas.
- Total Pulses Export out of Africa is around 1 – 1.5 million MT. The commodity wise breakup is as under:

Product	Origins	Volume (MT)
Pigeon Peas	Malawi, Mozambique, Tanzania, Kenya, Uganda & Sudan	400k-500k
Chick Peas	Sudan, Ethiopia & Tanzania	300k-400k
Green Grams	Tanzania, Kenya, Uganda & Ethiopia	150k-200k



Indian Import Statistics – Pigeon Peas (Out of Africa)



Pigeon Peas import into India country wise is as stated below :-

Country	April 2021-March 2022 (Qty in MT)	April 2022-Nov 2023 (Qty in MT)
Mozambique	320,349.84	198,925.14
Tanzania	191,724.72	76,786.33
Malawi	59,179.41	37,590.64
Sudan	49,719.64	23,165.06
Uganda	6,862.70	240.00
Kenya	375.00	-
Total	628,211.31	336,707.17



Impact on African Pulses post Government Policy Changes



- Compared to the developed nations, African pulses are produced by smallholders using their conventional method of growing and harvesting and have managed to maintain their importance in the Indian Pulses Market even though the volumes are relatively small.
- Restrictions imposed by GOI on import of pulses has changed the dynamics & the production of Pigeon Peas has dropped in Tanzania, Kenya & Uganda as farmers struggle to find a market whereas the production of Malawi & Mozambique has gone up due to bilateral agreement between the Governments of Mozambique & India and the cross-border trades between Mozambique & Malawi. However from last year 2022, GOI has removed Pigeon Peas from restricted items list and allowed to import freely.
- We recommend that Pigeon Peas should be permanently removed from the restricted commodity items list as it does not compete with Indian farmers in any manner nor that they can double/triple the production overnight (unlike Russia, Canada, Australia & other developed economies). Hence, GOI should not have any fear with regards to African Imports into India and competition with Indian farmers.

Thank You

