



International Year of Pulses 2016

Market Update



Who are BEPA?

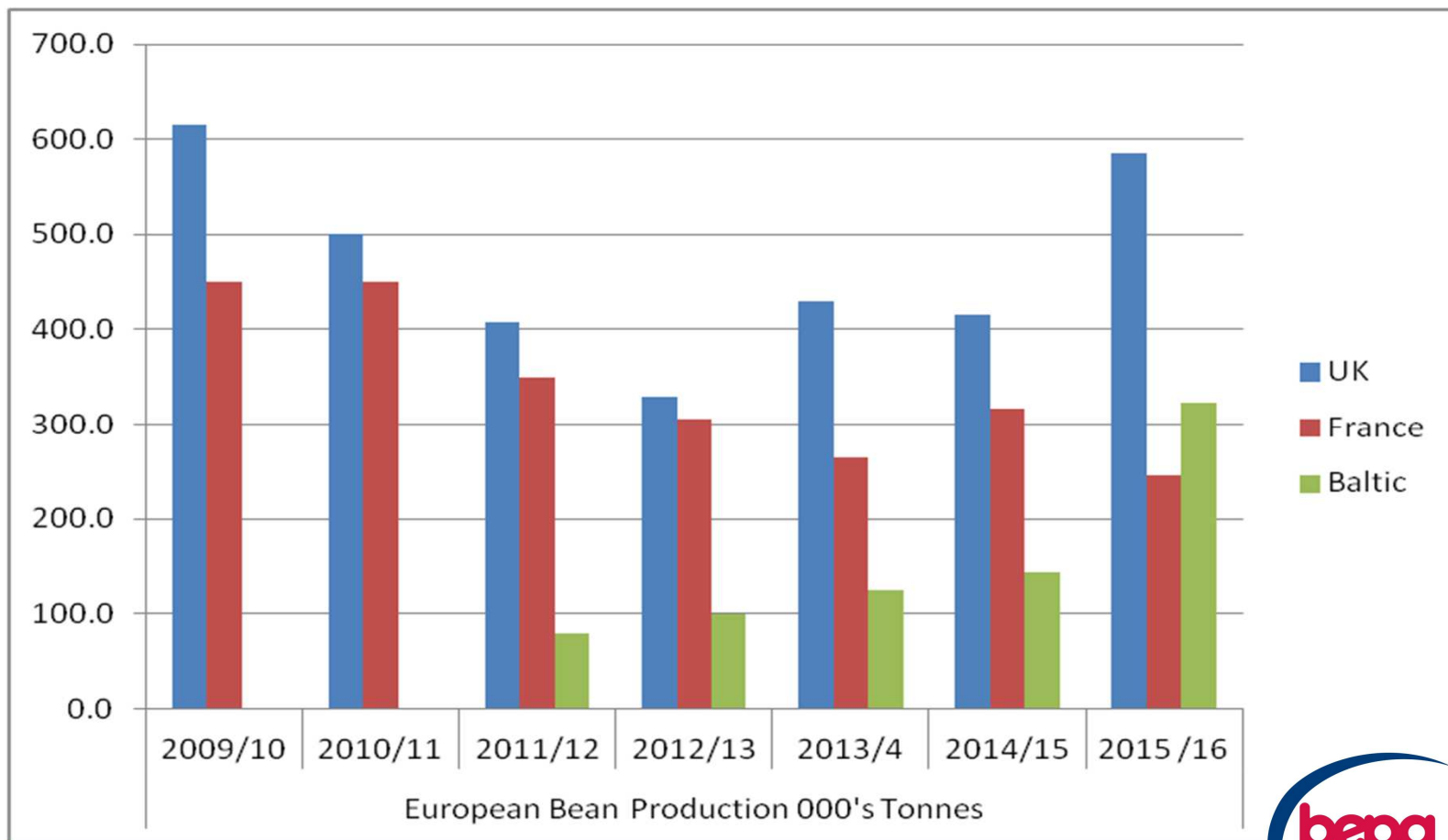
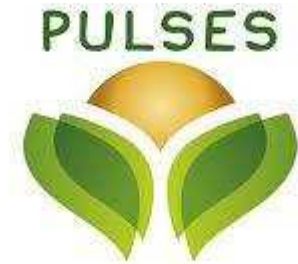


British Edible Pulse Association

- 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 Current Crop



Factors affecting EU bean acreage



Increases due to:

- CAP reform : EFA's and three crop rule
- Poor OSR values
- 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
- Market stronger in France for Yellow peas



UK Bean Supply and Demand



	2009/10	2014/15	2015/16
Prodn Winter	292	120	175
Prodn Spring	309	280	425
Imports	0	15	0
Supply	615	420	585
Feed UK	150	110	220
Seed /Farm	67	70	70
Export Feed	200	10	50
Export H Cons	175	220	260
Demand	590	415	600

UK Bean Markets



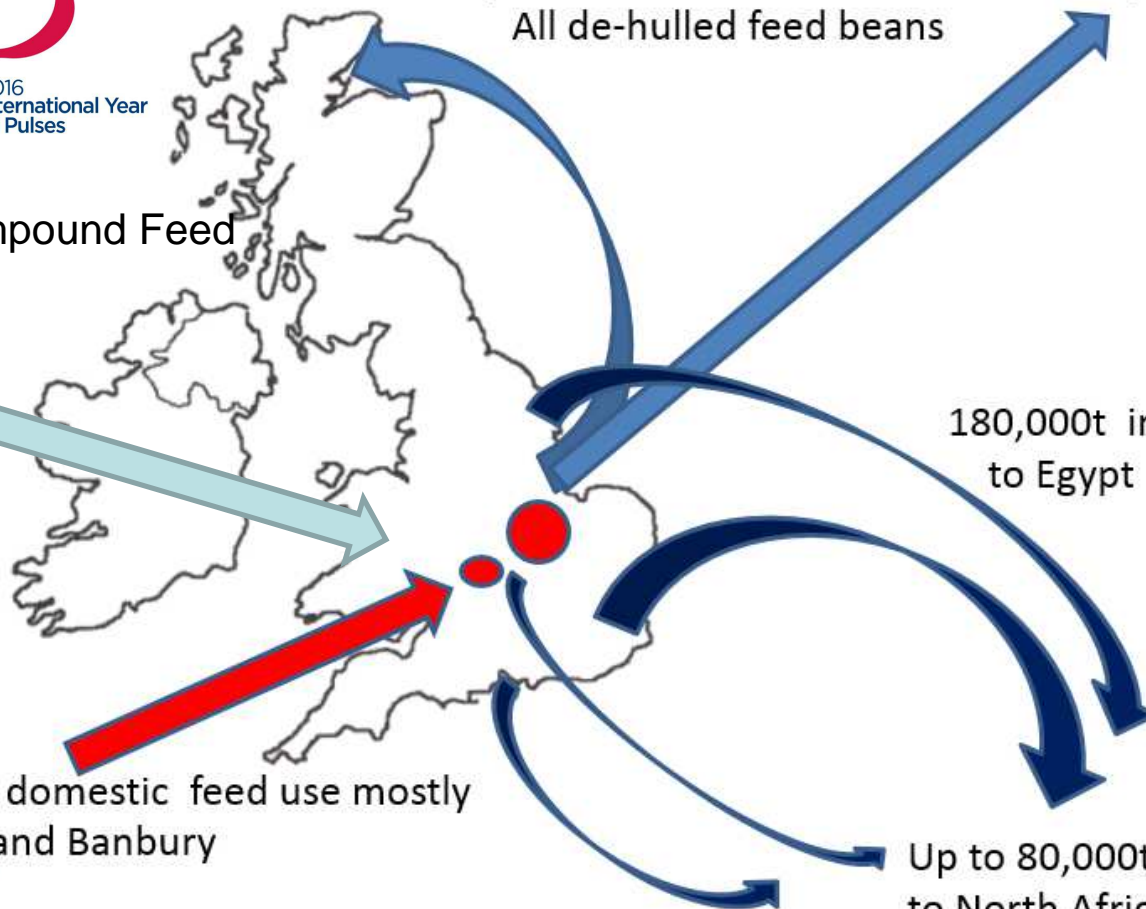
Ruminant Compound Feed
mills
100,000tns

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

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

180,000t in bulk vessels
to Egypt

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



- Alternative cheap raw material for animal feed reducing domestic feed bean demand
- A growing crop in the Baltic states
- Reduced portfolio of agronomy products to control weeds, disease and insect attacks
- Lack of dollars in Egypt
- A reversal in the decline of the French crop
- Changes in European policy?
- 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.
- Yields are improving with better varieties and improved agronomy advice
- Variable yield outlook. UK average is only 4.2t/ha

2016 Forecast +/- 5-10% on Peas and Bean in the UK



What's hot and what's not?

Large Blue Peas



- Demand for Large Blue peas has increased due to the fall in price on farm
- GBP weakened, making exports for competitive
- Fall in market has dramatically reduced seed price versus last 5 years
- Limited buyers for crop 2015 for top quality, which has reduced premium
- Some stock likely to carry through to crop 2016 keeping prices relatively consistent

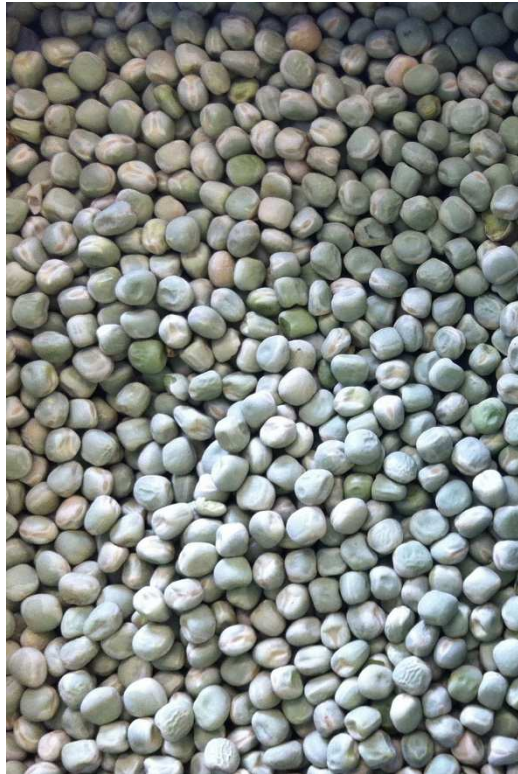


Marrowfat Peas

- Seed **SOLD OUT** for 2016 crop
- Buybacks secured early, at lucrative prices
- Demand and supply for 2016 and 2017 is looking very strong
- Marrowfat Peas only grown in 3 countries
- UK Quality is the best
- Customers are reluctant to change supply once secured

For 2017 – book early to avoid disappointment

Spot the difference...



Maximum 10% Bleached

What is the difference?

£50/t!!!



More than 20% Bleached

International Year of Pulses

-United Nations in New York

-FAO in Rome



- 6th Jan Launch around the world
- Main aims are to raise awareness of the benefits of pulses

Pulses promote bio diversity and are:

Nutritional - important health benefits

Sustainable - reduced water requirement & Nitrogen fixing

Affordable – A much cheaper alternative than animal protein

Versatile – Different pulses can be grown worldwide

A series of events are planned throughout the year around the world and in the UK to promote pulses.



IYoP UK calendar



- UK bean feast 6th January
- Celebrity Chef Rachel Green cooks with Marrowfat peas on 28th January at the East of England Showground
- Falafel festival 1st May Borough Market, London
- Cereals 2016
- Open Farm Sunday events
- Food & Farming Day 1st July
- Other events planned



IYoP Bean Feast 6th January 2016

- Gate Restaurant Islington
- 120 attendees
- All major retail buyers and pulse processors
- UK snack food manufacturers
- Food journalists and bloggers
- Focus Groups such as Celiac Soc, meat free Monday, Better Eating Alliance
- All about creating awareness



Falafel Festival: Chickpea or Faba bean?

Opportunity to demonstrate why UK beans make better falafel than chickpeas!



- Borough Market London
- Sunday 1st May
- 600 people Max
- Top Chefs compete to make the best falafel
- Judged by the crowd
- Bepa will have a pulse snack bar and mushy pea stall as well re UK pulse production ?



Engagement with the retail trade

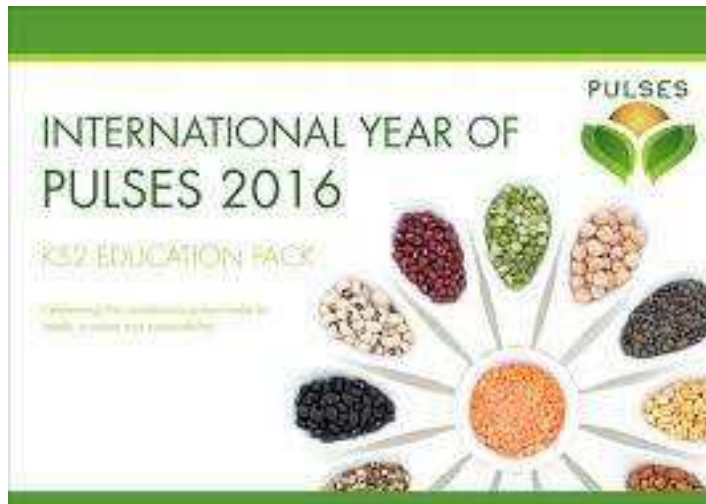


- Waitrose magazine January feature on IYoP plus recipes
- Princes Foods adopting the logo on key products
- Tesco looking at using Global Pulse Brand on own label
- Linkage between Tesco on line to IYoP consumer facing website
- Linkage to school education programme



Teachers tool kit available worldwide

www.tes.com



- Available via the Times Educational Supplement
- Aimed at 5-11 year olds
- Full teachers pack including
 - Lesson plans
 1. Introduction to pulses
 2. Health and Nutrition
 3. Cooking with pulses
 4. Growing pulses
 5. Pulses around the World
 6. Food security





Thank You – Any Questions?
