

PULSE *FORWARD*

DRIVING THE FUTURE OF FOOD SYSTEMS



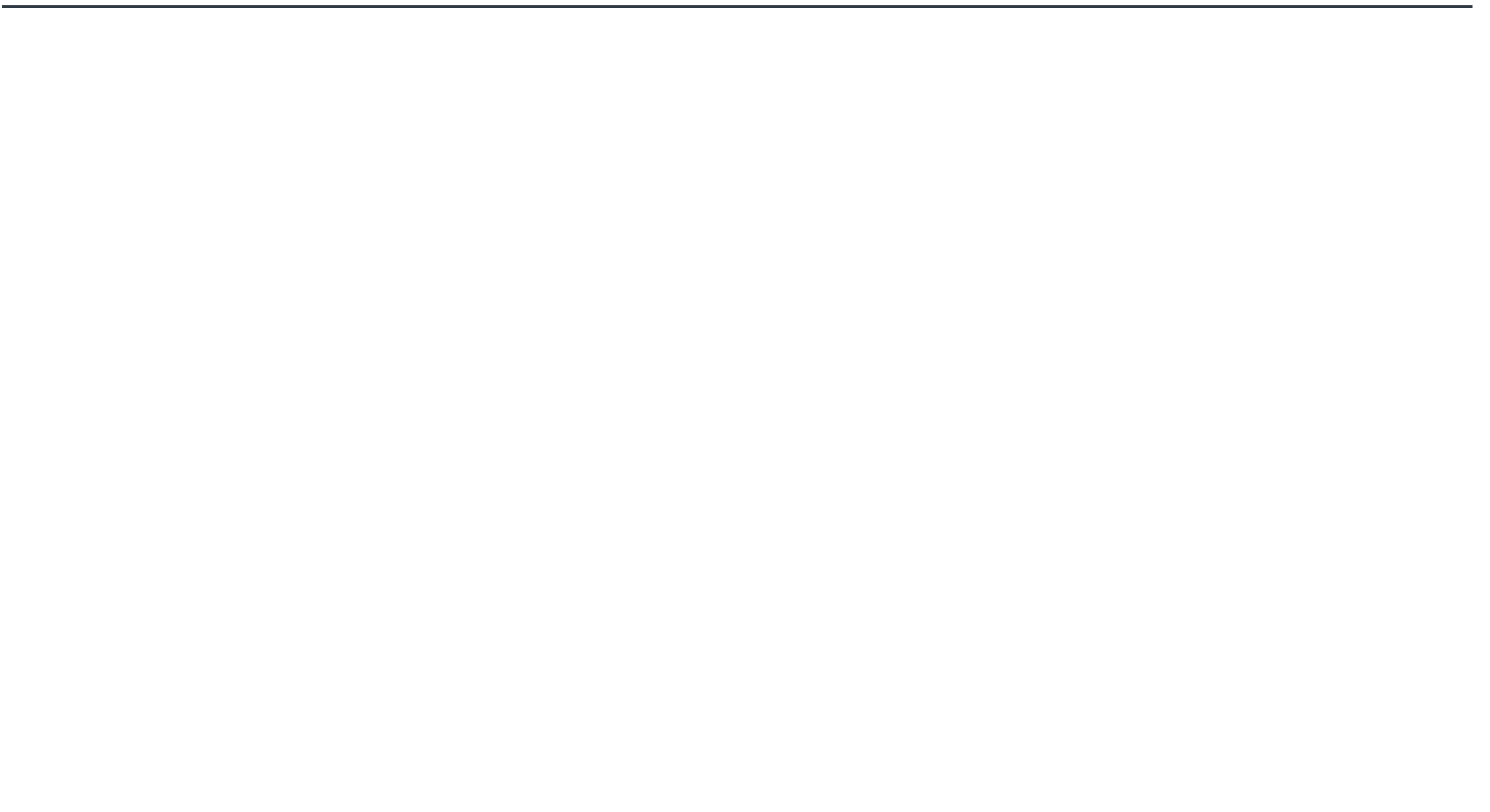
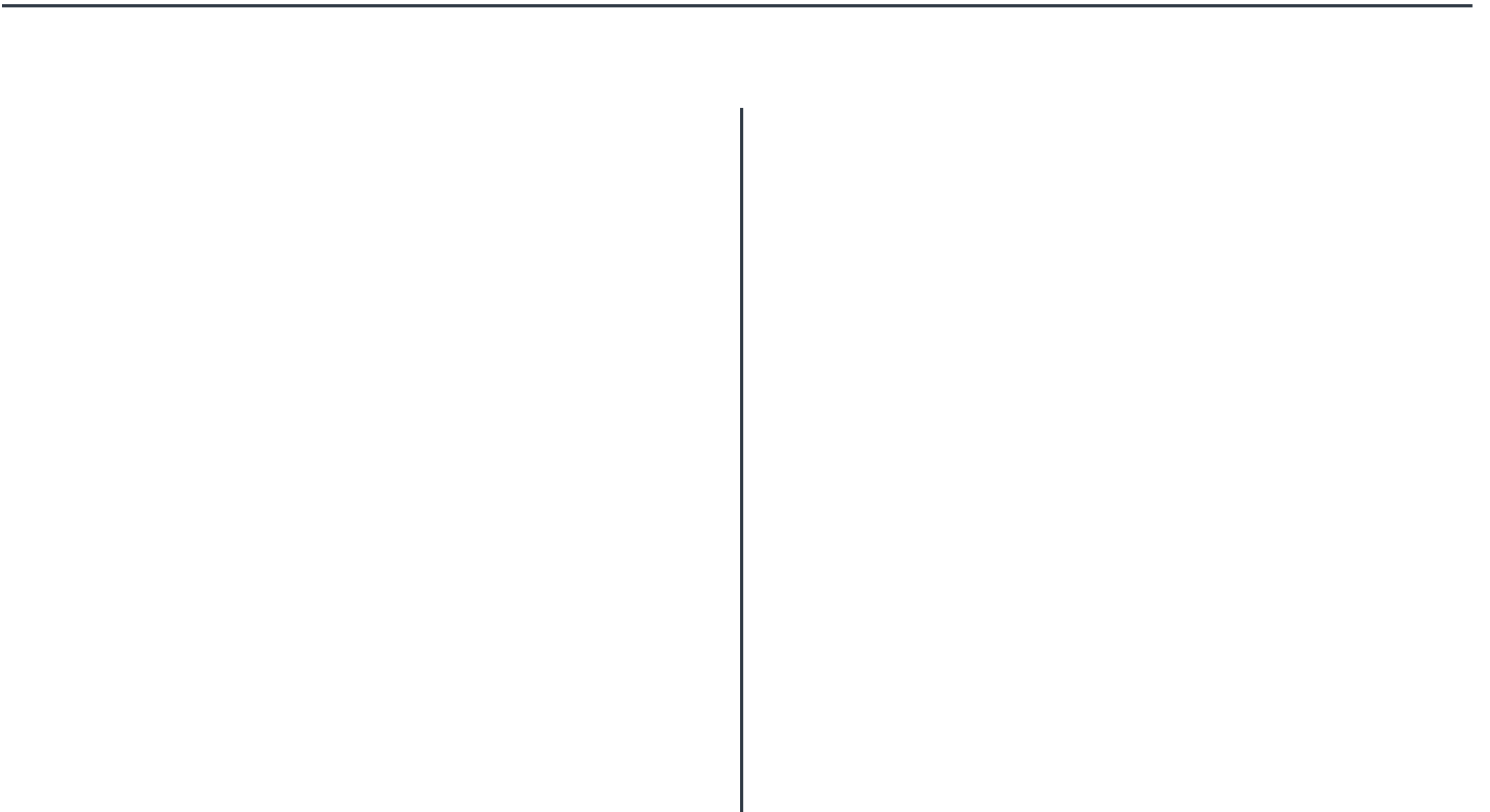
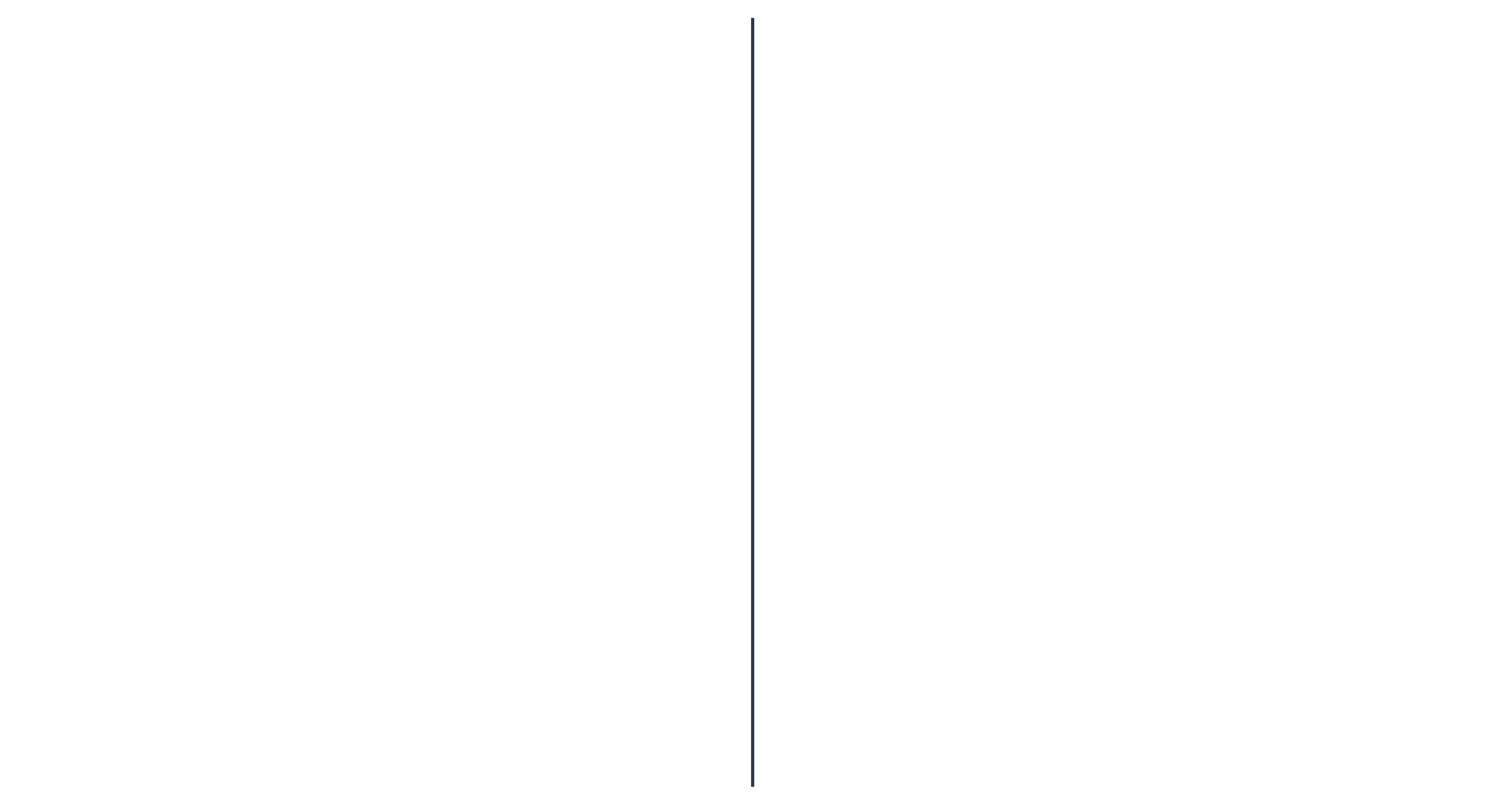
IN JUNE IT'S ALL ABOUT THE NEW PLAYERS

ISSUE

#10

JUNE

2024





Contact us!

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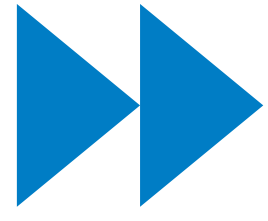
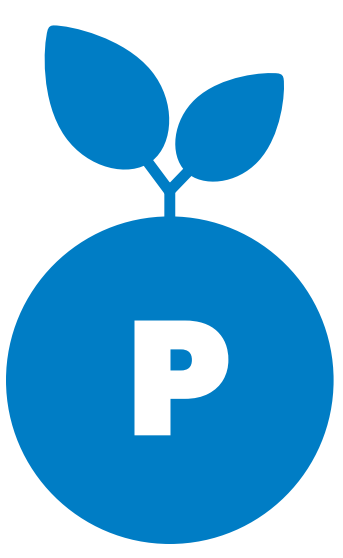


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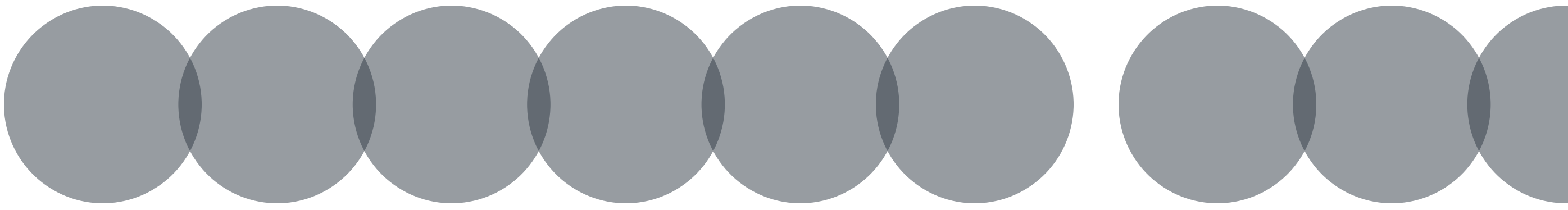
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SPOTLIGHT

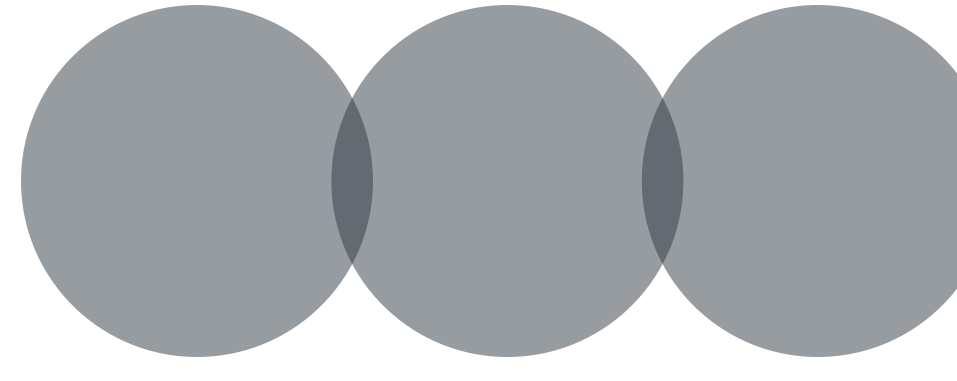
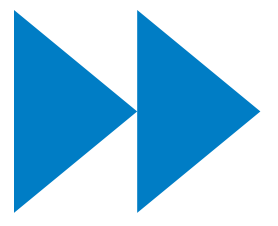
India's new urad supplier in 5 key facts



1

Demand/supply gap in India.

Local production in India cannot meet consumer demand for black matpe (urad), leaving a gap for imports which has historically been filled by Myanmar. The Pulse Atlas puts India's annual consumption of black matpe at 2.8 MMT for 2024 and production at 1.9 MMT, 900 kMT short of self-sufficiency.



2

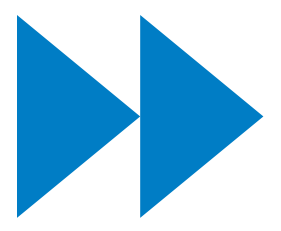
Tariff-free imports of black matpe.

To tackle the growing inflation of pulses prices (which hit 16.8% in April), the Indian government has extended tariff-free imports of black matpe until March 31, 2025. However, logistical complications in Myanmar as well as the risk of supply concentration have led India to look at diversification.

3

Brazilian deal sought in 2023.

India turned to the vast farmlands of Brazil last year to encourage farmers to produce black matpe. Speaking to The Economic Times in May 2023, Rohit Kumar Singh, Union Consumer Affairs Secretary at the time, confirmed that talks with the South American



producer were “in an advanced stage.”

4

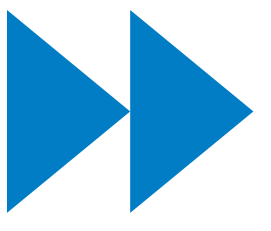
Brazilian imports set for 2024.

As a result of the negotiations, imports of Brazilian urad into India are set to jump tenfold this year. Bimal Kothari, Chairman of the India Pulses and Grains Association (IPGA) explained: “We expect at least some 50,000 MT of black matpe coming from Brazil this year from June/July.”

5

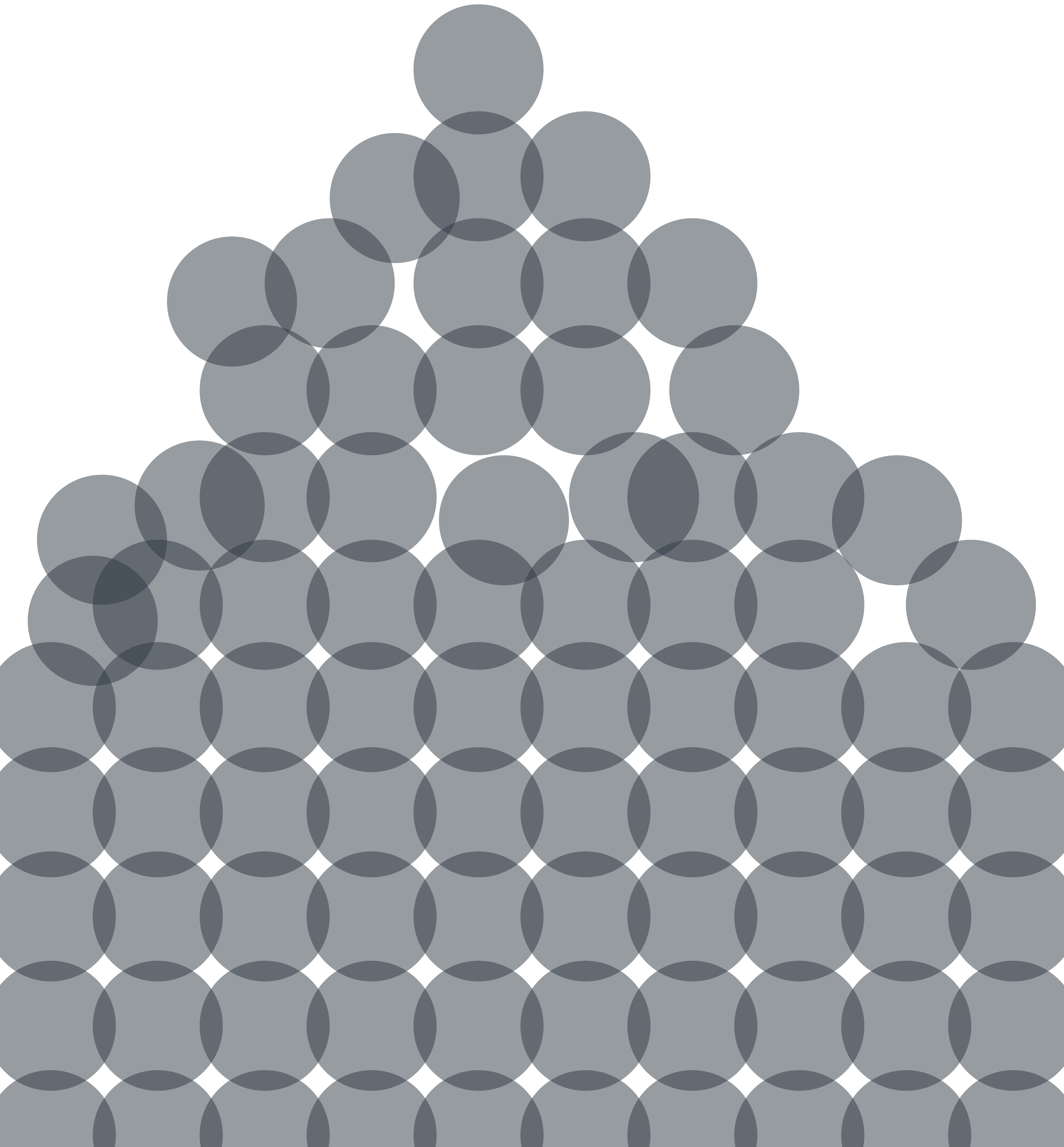
Myanmar will be key to prices.

With monsoons expected to arrive in Myanmar over the next month and internal cash flow issues to potentially ease post-election, the IPGA predicts a boost for black matpe exports and

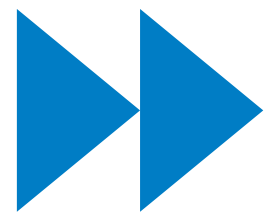


SPOTLIGHT

shifts in Indian prices as a result. Prices into India have remained mostly stable in May, hovering between \$1050-\$1085 FAQ and \$1130-1180 SQ.







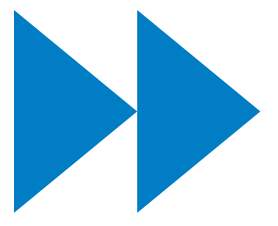
FOOD FORWARD

A pulse- powered pizza cheese

It melts. It stretches. And, crucially, it's tasty. A new alt cheese, crafted specifically for pizzas, showcases the versatility of faba beans and the innovative role they play in the plant-based food landscape.

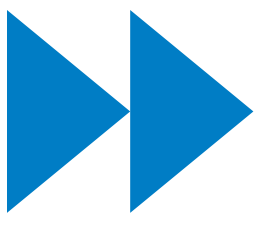
BY MARIANA FUSARO

3 MINUTE READ



The global vegan cheese market is heating up. Valued at \$1.4 billion in 2023, it is projected to expand at a CAGR of over 16% until 2030, according to a recent report — dedicated entirely to the non-dairy cheese market — by analytics and consulting firm GlobalData. The astounding rise of this sector has been accelerated by the continuous innovation within the plant-based food industry in the last few years. Advancements in food technology, in fact, have enabled the creation of premium products, amplifying the market's appeal not only to consumers who prioritize planet and health-conscious dietary choices but also to food enthusiasts and culinary experts. This is precisely where the story of

Please fits in. It all began when a husband-and-wife team from New York City started experimenting with plant-based ingredients at home with the goal of creating a vegan cheese that could melt perfectly on pizza. (The “biggest pain point” when they switched to a plant-based diet, they claimed, was “life without pizza.”) As they documented their culinary quest on social media, enquiries about their homemade pizza creations came pouring in, and it became evident they had something good cooking. With the help of a food startup incubator they learned how to structure their business, ultimately deciding that developing a product that they could sell to pizzerias, rather than opening their own space, was the best way to have greater



FOOD FORWARD



“Pleese is what happens when a New Yorker ditches dairy but can’t live without pizza”, says co-founder Kobi Regev.

impact. And so they did.

Pleese, the creation of Kobi Regev and his wife, Abev, is made with faba bean protein. It is soy-, gluten-, sesame-, and lactose-free; contains no nuts, and is non-GMO and Kosher. What's more, it has caught the attention of US chefs because of its taste, texture and functionality across different applications, from lasagna to quesadillas. From a culinary standpoint, what sets Pleese apart from other plant-based cheeses is its ability to stretch just like dairy-based cheese

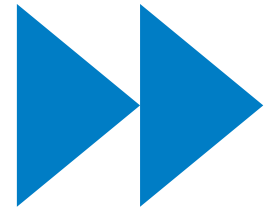
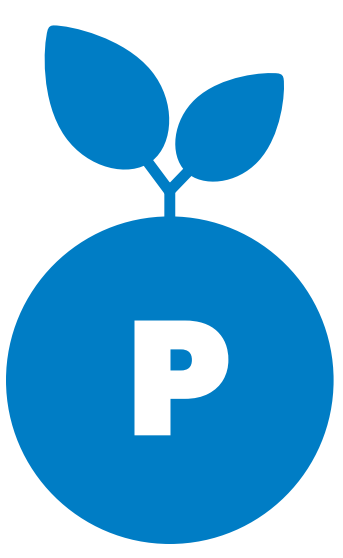
Pleese is totally nut-free and allergen safe, and, unlike potato or almond cheese, it has texture and personality.

and, of course, its smooth melting consistency on pizza.

“We used to do everything from scratch when we were making it in our home kitchen. Now, in our facility we use a faba protein powder that you can rehydrate. We work with a Canadian company and are also experimenting with some Australian ones,” explains Kobi. “In very general terms, we use the exact same machinery used for dairy cheese – without dairy, which to me has been fascinating, knowing that we can reduce the amount of water and land used to create the same product that everyone craves. It doesn’t have as much saturated fat but we use a combination of fats, liquids, and powders. And there are a lot of little nuances involved... Literally, we dialed it

back and forth so many different times just to get it right.”

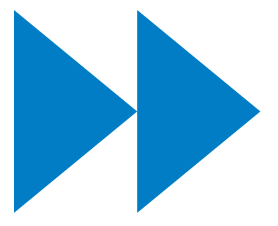
According to GlobalData’s report, growing health consciousness and a preference for eco-friendly consumption are the main forces driving the increasing interest in the plant-based cheese market. But for vegan food lovers, getting to a point in food history where they can enjoy their fair share of premium products is likely a key driver, too. And the star at the heart of the menu can still be the humble old faba bean. ◀▶



UNDER THE LENS

Want to get the full scoop on Russian peas?

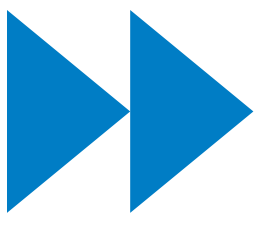
**Join GPC's free online event, the
Russia 2024 Pea Crop Update
on Wednesday, June 26 at
12pm GMT.**



UNDER THE LENS

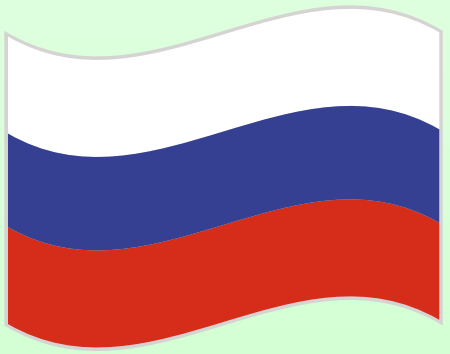
In this concise, dynamic roundtable discussion, attendees will get an exclusive glimpse into the minds of some of the biggest exporters in the Russian pea trade. Join moderator Will Watchorn, Global Head of Pulses at Viterra as he talks to panelists Ivan Basov of Top Grain and Tareq Awad of Fruitimpex, asking them the most pressing questions on the industry's lips... With the Russian pea harvest just around the corner and demand strong on all sides, they'll be discussing recent weather and yield expectations, export volumes out of the main ports, domestic feed demand and competitiveness, prices, and much, much more!

This is an interactive webinar and all attendees will have the opportunity to



UNDER THE LENS

ask our panelists questions live. If you can't join on the day, the webinar recording will be available exclusively to GPC members on our website. ◀▶



RUSSIA 2024

PEA CROP UPDATE



SPEAKER

IVAN BASOV

Top Grain



SPEAKER

TAREQ AWAD

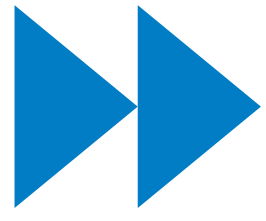
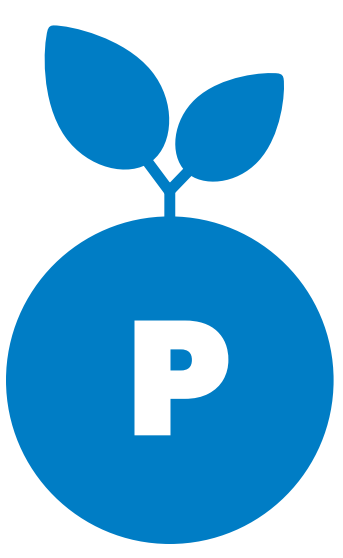
Fruitimpex



MODERATOR

WILL WATCHORN

Viterra

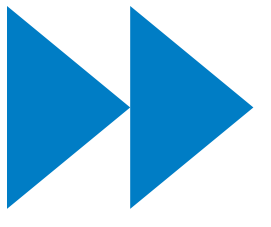


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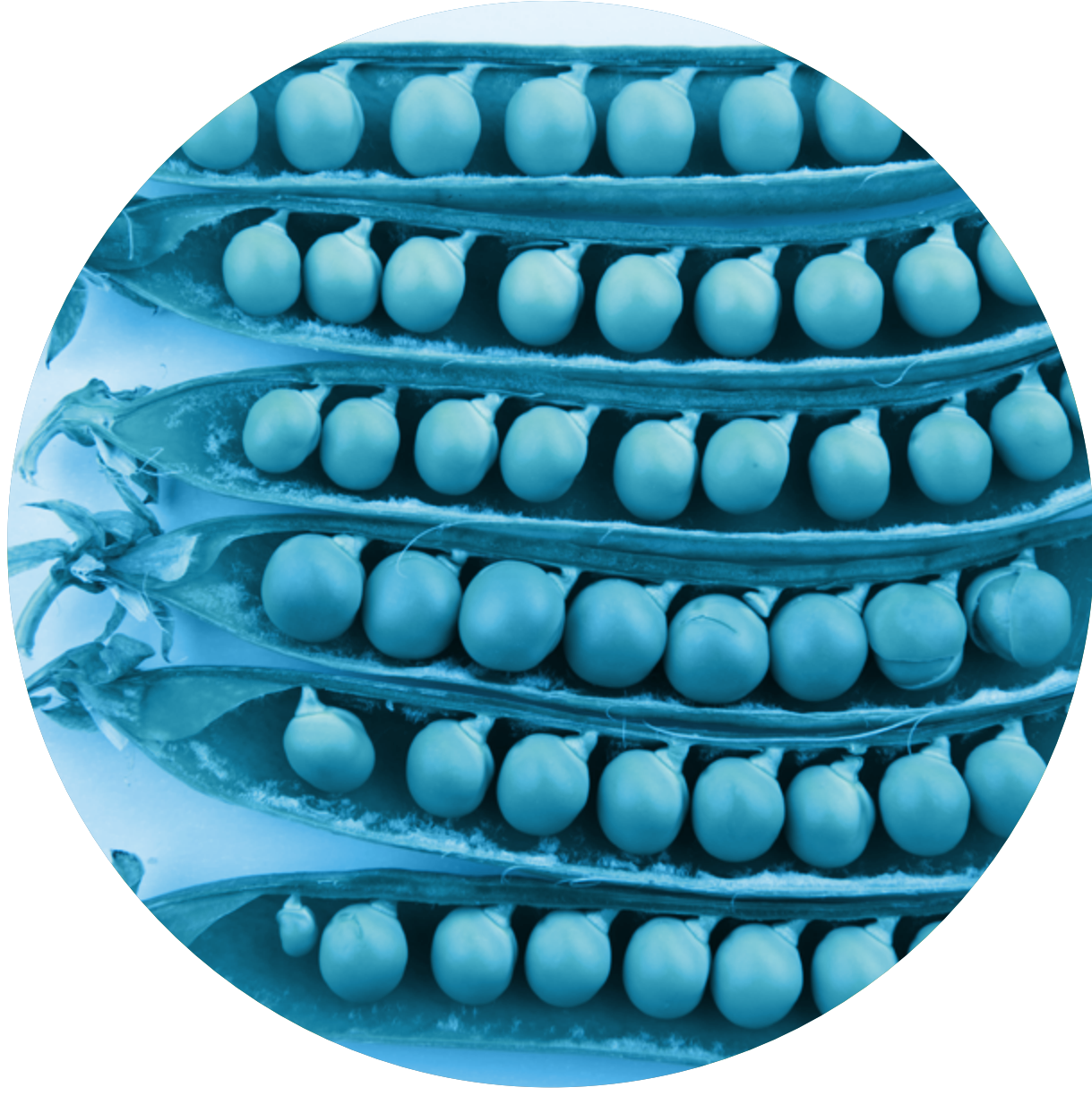
Hitting the headlines

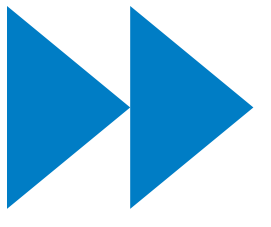
Pea production, exports and stocks around the world dominated trade news this month.

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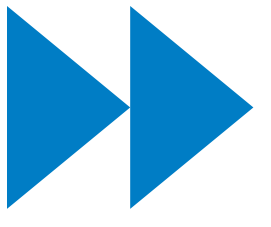
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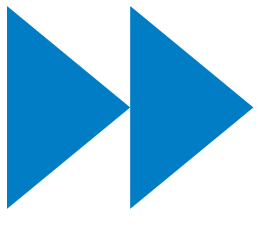
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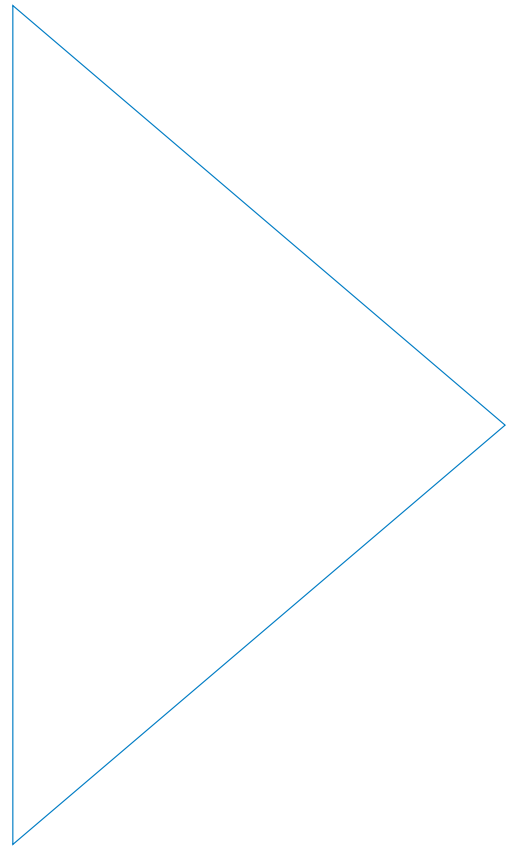
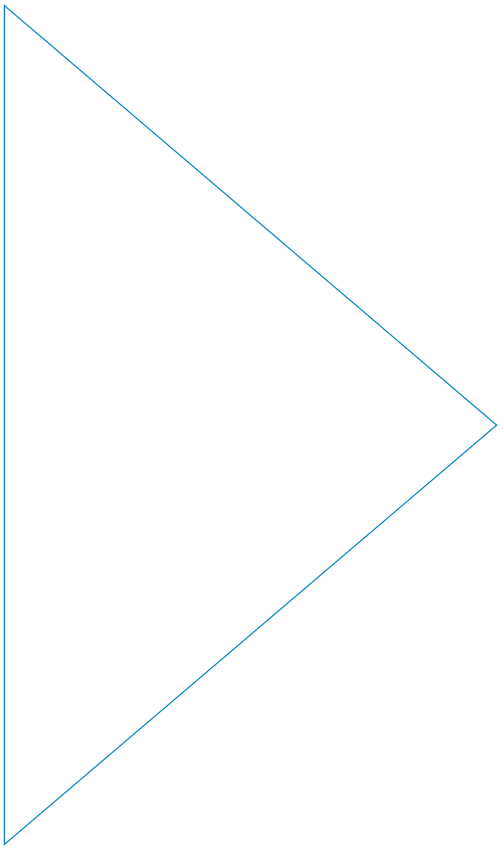


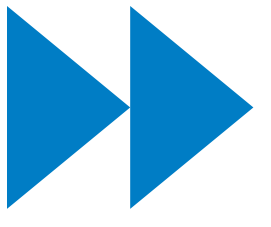
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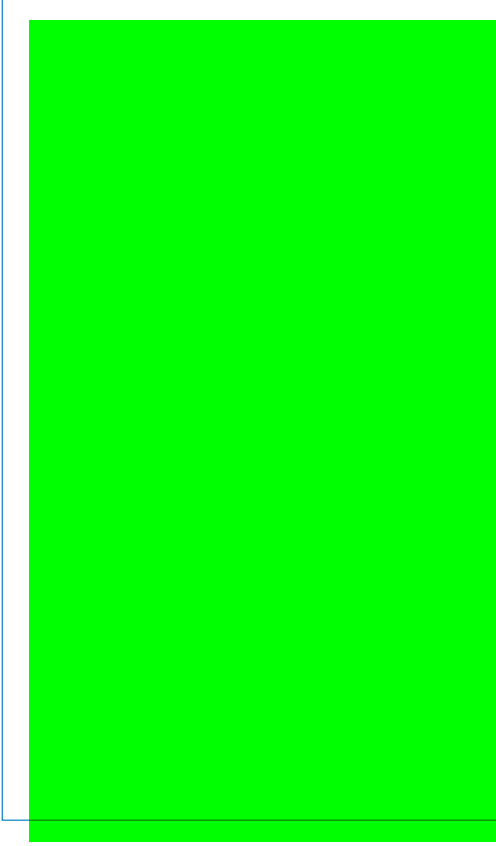
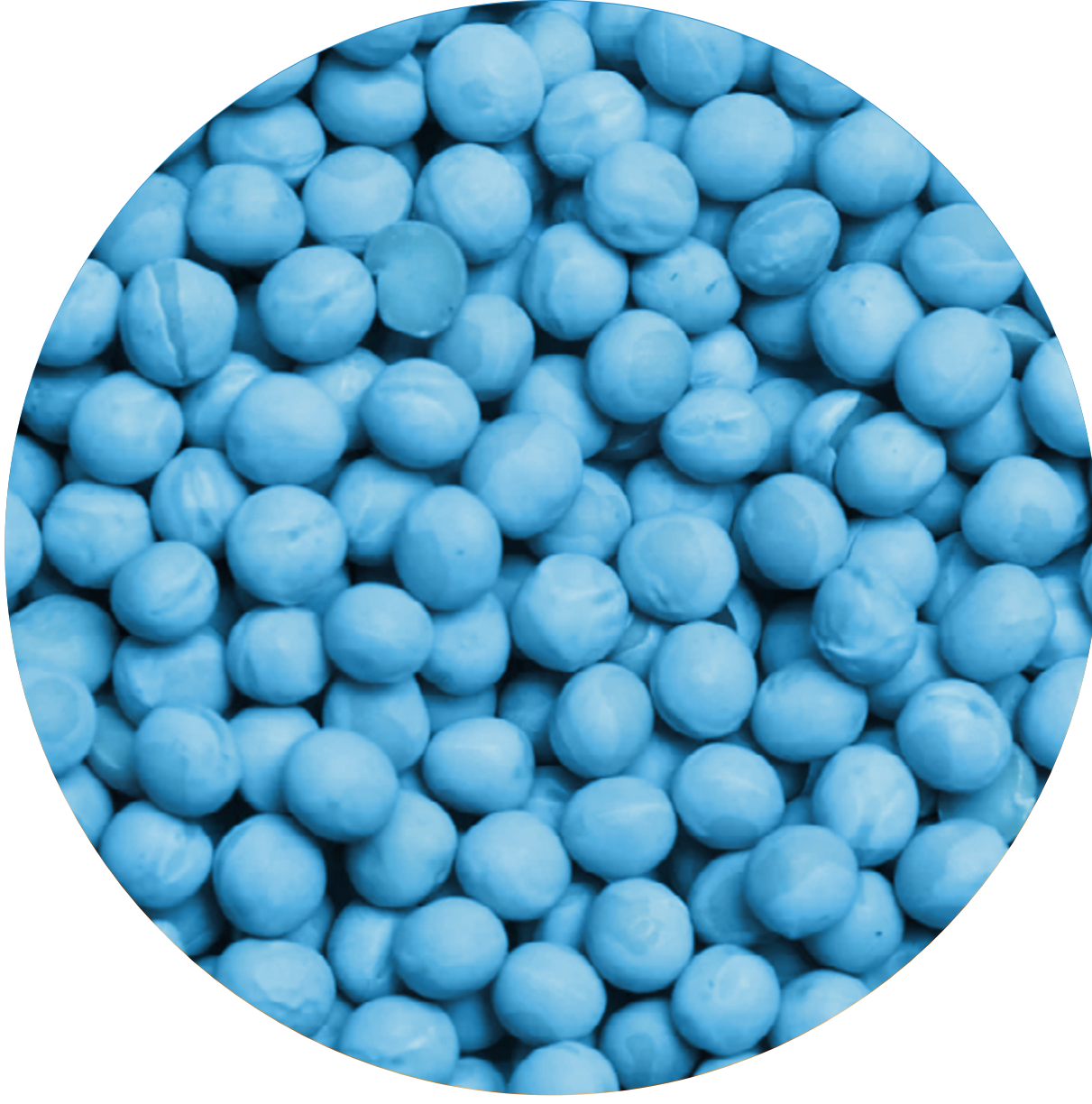
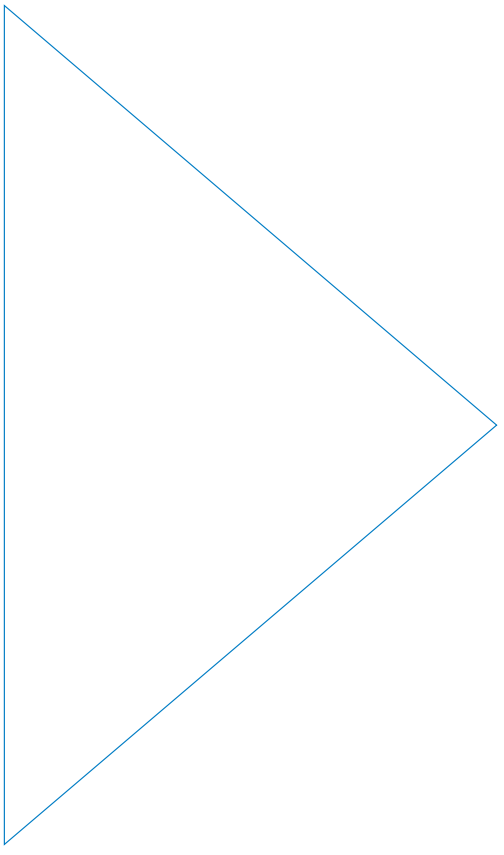


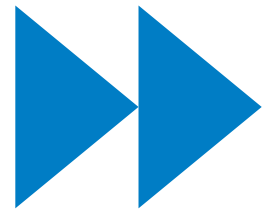
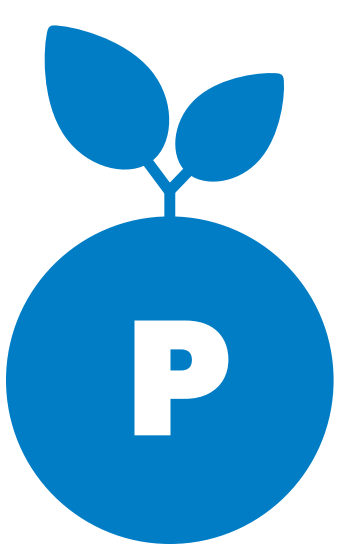
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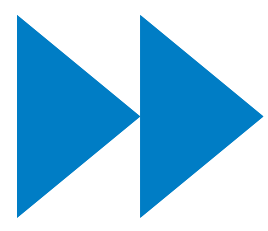




PULSES & BEYOND
RABOBANK

“There’s a way to go for pulses to commoditize”

Lara Gilmour speaks to Vito Martielli and Michiel Teunissen, Senior Analyst, Grains & Oilseeds and Global Head of Agri Commodities, Trade & Commodity Finance at Rabobank about why they’re increasingly interested in the pulses industry.

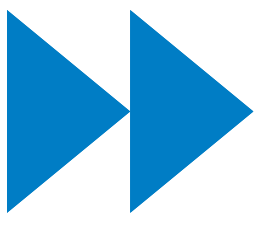


Why is Rabobank turning its attention to pulses?

(MT) It's come in the wake of increasing discussions around carbon and climate. Agriculture is the second largest emitter after the energy sector and Rabo wants to take responsibility in improving this. Arguably, agriculture could become net positive and pulses have a role to play in the food system transition. The bank started an alternative protein strategy group last year to accelerate this shift to sustainable agrifood systems and that's why we went to the GPC convention in Delhi to learn more and look for opportunities to participate.

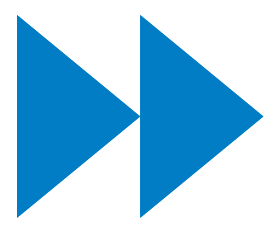
What did you learn at Pulses 24?

(MT) My takeaway was that when



“From a demand point of view, Africa will become the most important region in the coming decades.”

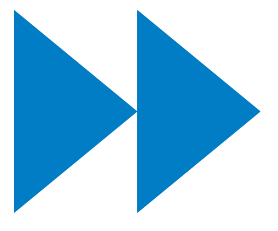
Vito Martielli



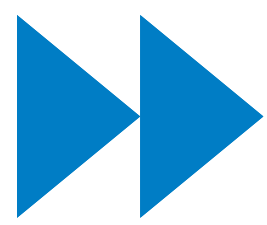
PULSES & BEYOND
RABOBANK



“Agriculture is the second largest emitter after the energy sector and Rabo wants to take responsibility in improving this.” **Michiel Teunissen**



it comes to facilitating trade, these are markets that are still in development; the barrier to entry is higher than to other products. There is a definite lack of transparency in pricing, which makes it more difficult for us to establish value and build products and services. The market is very fragmented. For example, you can split the pulses market in two where you have certain crops that are basically captive for the Indian market, which represents the risk of an offtake concentration. And then you have the more globally traded pulses, which act more like commodities but still have very unclear pricing, certainly at a global level. To me, that means there's still quite a way to go for



IN NUMBERS

› Rabo is a cooperative bank started 125 years ago by a few Dutch farmers. a Strong farming heritage with food and agri is in its DNA. It looks at agriculture as a value chain, from farm to fork

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› Supports smallholder farmers in 46 countries

.....

› Operates out of 7 locations worldwide including Kenya, Brazil, the USA and Europe

.....

› The research department comprises 160 people

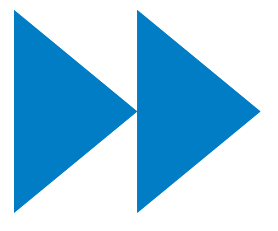
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› €114.8 billion in loans to the food and agri sector world

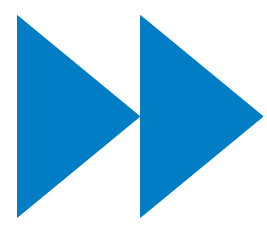
these products to commoditize, which makes it more difficult to bring liquidity to the market and make it easier and cheaper as a result.

Can you comment on the potential of the African continent in the food systems transition?

(VM) From a demand and demographic point of view, Africa will become the most important region in the coming decades. We are building on our capabilities on pulses in Africa but it's still a new area for us. We have done reports on the 'staples': vegetable oil, wheat, etc., which are all growing. We are also seeing more differentiation of the diet: there are going to be some enormous urban areas in the coming decades and it



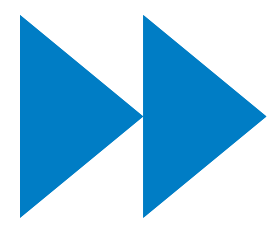
will drive changes in diet so we could see an increase in pulses consumption as a key source of protein. It's possible that in the future African pulses will be consumed more domestically and we will definitely be looking more into what can be produced locally. One surprising aspect we're seeing is that some countries in Sub Saharan Africa, like Zambia and Zimbabwe, can produce wheat with yields as high as in the EU. It's important to understand the current farming picture and how it will evolve; improving local knowledge is key to boosting domestic production. I know this to be true for grains and oilseeds but my gut feeling for pulses is there's more work, research and analysis to be done there. But it's a very promising market from a demand



perspective and potentially for production, too.

What about barriers to trade out of Africa?

(VM) One of the key challenges is logistics and infrastructure, particularly connecting the ports inland. Zambia, for example, is huge and can produce a lot of commodities but it is landlocked. Most of the time, the logistical cost is a barrier to imports and so it can be a future challenge for exports. That's an area where there is more work and development to be done. You can produce in a very competitive way but then if you have to spend an additional 30-40% on transport, it doesn't work. It's a key bottleneck.



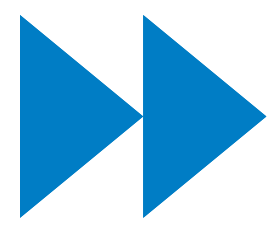
(MT) There is potentially a role to play for the merchants in organizing that, which we haven't really seen so far.

Tell me about investor appetite into agrifood systems in Africa.

(MT) Everyone acknowledges the future demographic growth and the fact that it should arguably translate to economic growth and stability. But, in general, the story hasn't evolved much in the last ten years and it's still perceived as a high risk market. Many of the big merchants are heavily invested but not actively participating yet. We have a presence in Africa because we're seeing more and more stability, particularly in East Africa. We know the growth will come and we are committed to the continent.

Are there strategies involved to mitigate the risk or is it still in an exploratory phase?

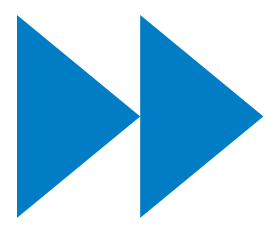
(MT) We have certain solutions in place around trying to drive local production of food staples, particularly around smallholder value chains; we're trying to see if we can create more scale. That's a story that doesn't always resonate with local politics because more scale means less farmers but we believe the minimum size of a farm should grow a little more in order to become more efficient. Unfortunately, in times of economic stress, the local currency in emerging markets tends to suffer and that tends to go at the expense of their ability to import staple foods. Rabo is actively engaging with international bodies to



see how we can break that negative spiral as well as looking at how we can get commercial banks aligned to improve and stabilize global access to staples.

Vito, can you share some insights into pulses' role in feed markets in Europe?

(VM) For peas, feed is a very important outlet in the EU. It will be crucial to see how the new Commission will deal with the Green Deal after the European elections and what the implications will be at the farming level. Likewise with the EU protein strategy, we need to improve self sufficiency in oilseeds and pulses and it will be interesting to see how this will trigger additional domestic production. The bottom line

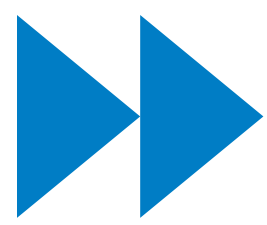


RABOBANK'S 5 PRIORITY TRANSITIONS FOR SUSTAINABLE AGRIFOOD SYSTEMS

1 Get high-input ag back in balance with nature by maximizing regenerative opportunities.

2 Build a food system that uses ecological processes to thrive by protecting and restoring nature.

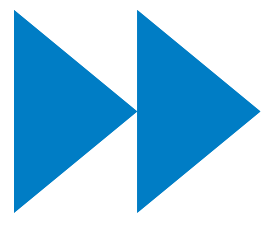
3 Promote a balanced, sustainable diet for everyone; strive for a healthy balance in diet and food systems by diversifying the protein supply.



4 Optimize value chains to use fewer resources while feeding everyone by reducing food loss and waste.

5 Make the food system more farmer-centric by supporting rural communities and strengthening rural livelihoods.

“We need pulses in Europe. We need them for our deficit of protein ingredients for feed, to meet the demands of changing human diets and from an environmental point of view. They tick a lot of boxes.”



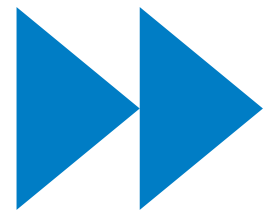
is: we need pulses in Europe. We need them both for our deficit of protein ingredients for feed and to meet the demands of changing human diets, (i.e. plant based meat and dairy substitutes) and we need them from an environmental point of view. Pulses tick a lot of boxes and I'm very positive about this!

If we look at the next 5-10 years, what does the pulse industry need to do to unleash its potential as a supercrop for the future?

(VM) From a research point of view, we need to understand the full pulses supply chain: when and where there are areas of growth on both the demand and supply sides. Then, the next step for us is to map out the key

suppliers, consumers and traders for each segment. The Pulse Atlas and the Pulse Pod weekly newsletter, for example, were key drivers for us to become members of GPC. I believe that more consolidation of knowledge, information and resources will be what helps to supercharge the industry.

(MT) In my opinion, to drive the pulses industry at scale and to attract investment in the coming years, what's needed is more transparency and predictability in terms of supply and offtake. That's what will make it easier for us to start looking at how best to bring capital. ◀▶



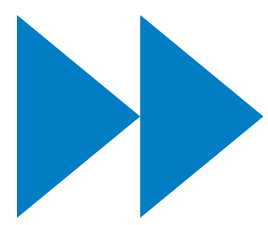
THE BIG PICTURE

Unfair share

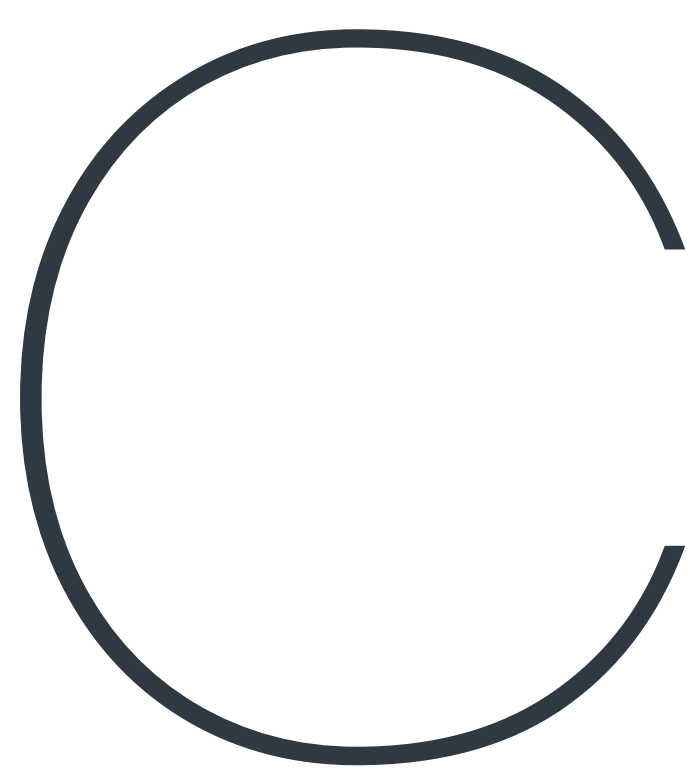
BY SONIA SHARMA

10 MINUTE READ

Despite being a relatively low emitter of greenhouse gasses, Africa is disproportionately affected by the climate crisis in comparison to other regions such as North America, Europe, and Asia, with key factors like socio-political issues, water scarcity and ecosystem vulnerability contributing to



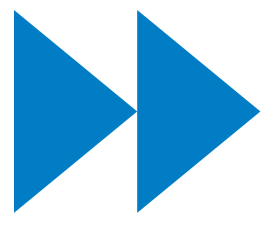
the impact. We explore the scope of the problem and the solutions that can be brought to the continent.



Considering the low levels of GHG emissions it contributes compared to other regions, Africa

receives an unfair share of negative consequences from global warming. On top of this, it only receives 3% of global climate finance, with new research stating that the flow of climate adaptation finance to Africa must increase up to tenfold by 2035 to meet the deepening effects of the crisis.

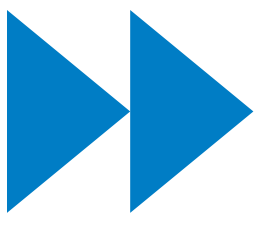
Dr. Agnes Kalibata, President of AGRA



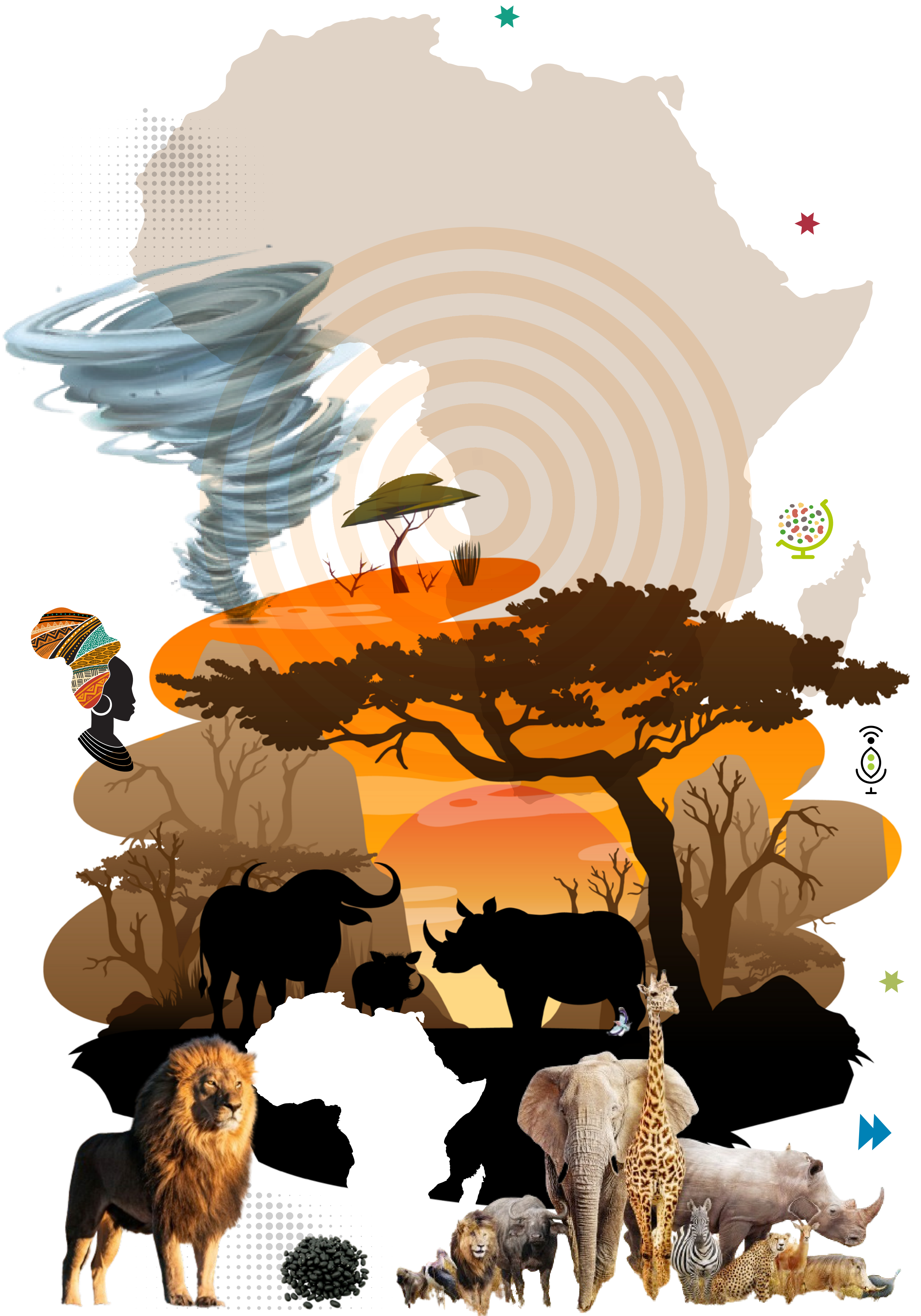
– an African led and Africa based institution that puts smallholder farmers at the center of the continent’s growing economy – said “Africa’s biggest challenge is the frequency and ferocity of climate change. Climate change on top of the RUC (Rural-Urban Continuum) is going to have dire implications on food security in the months ahead.”

Hazardous conditions

Due to its geographical, environmental, and socio-economic characteristics, Africa is particularly vulnerable to extreme weather events. The continent is susceptible to perennial droughts, heatwaves, severe floods, and cyclones, such as those recently seen in Mozambique,

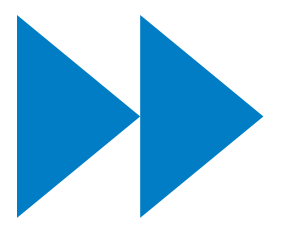


THE BIG PICTURE



Malawi, Zimbabwe and Nigeria, which can have devastating effects on agriculture and subsequently threaten staple foods, water resources, and infrastructure. For a region where 20% of the population is projected to be facing chronic hunger, it is not an understatement to point out that the climate crisis could prove fatal. Yale Climate Connections found that East Africa has suffered its worst drought in 40 years, and of Africa's 30 deadliest climate events ever, six have taken place in the past two years.

International cooperation and support to build resilience and promote sustainable development is needed, because without investment of approximately US\$1bn a year until 2035, the continent could lose out on

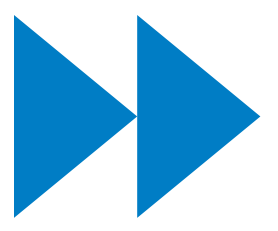


as much as \$6tn of economic benefits within the next decade, according to research by the Global Center on Adaptation (GCA). “No country should be forced to choose between eradicating poverty, building climate resilience and honoring its debts, but right now that is what is happening,” said the former UN secretary general Ban Ki-moon, now chair of the GCA. Rising temperatures in Africa are also reducing agricultural output with the International Monetary Fund stating that each increase of 1°C correlates to a 3% decline. The organization also forecasts crop yields in sub-Saharan Africa to fall by 5 to 17% by 2050 – this is despite a rapidly growing population, with smallholder farmers already struggling. “The most

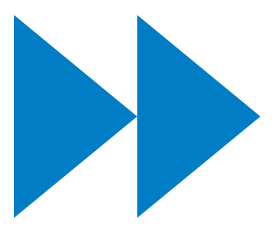
vulnerable are the most affected by climate change and the knock-on effect on food security. These include smallholder farmers and especially women and other marginalized and disadvantaged groups, such as the youth” said Kalibata.

Potential solutions

In addition to these climate hazards, many African countries have limited resources and capacity to adapt to the impacts of climate change. Weak infrastructure, inadequate healthcare systems, widespread poverty and corruption exacerbate the challenges posed by climate-related disasters. In order for there to be a tangible solution, Amath Pathé Sene, head of the Africa Food Systems Forum said:



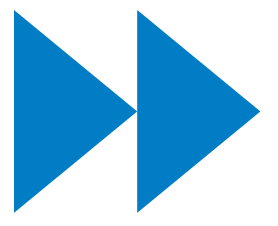
“Change can only come with capital from the private sector.” However, so far unclear pricing and regulation and confusion over what is defined as a “climate solution” have kept most big investors away from climate adaptation in Africa, explains Sene. But with the UN World Food Program saying that 170 million people in sub-Saharan Africa will face severe hunger this year, climate disaster is outpacing innovation, with delicate crops such as wheat, rice and maize often failing under these unpredictable conditions. Chiedozie Egesi, project director of the Next Generation Cassava Breeding Project and adjunct professor of plant breeding and genetics at Cornell University said even traditional crops such as millet and cassava



THE BIG PICTURE

will need to be bred into tougher strains. “All parties (developed and developing countries, and many relevant stakeholders such as the private sector) have responsibilities they need to commit to, and must be willing to be held accountable,” Kalibata said. “Developed countries, for example, need to deliver on their promise of more financial and technological flows to countries that

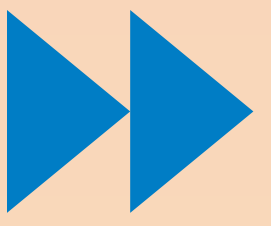
“With the UN World Food Program saying that 170 million people in sub-Saharan Africa will face severe hunger this year, climate disaster is outpacing innovation, with delicate crops often failing under these unpredictable conditions.”



do not have it.” Kalibata went on to underline the need to fix inequalities and non-responsiveness in market systems and institutions and pointed out that there are multiple, integrated ways to enhance climate change adaptation and mitigation for small scale farmers that can minimize the climate crisis. “Over 70% of emissions in the agricultural sector come from energy intensive and carbon releasing operations. Reducing our carbon footprint means a rethink, and/or minimizing of industrial agriculture in crop and livestock systems, reducing excess use of agrochemicals and finding renewable energy sources to power the sector.”

Integrated landscape management and regreening for carbon seques-

tration and climate mitigation are two other possible solutions. “Investment in forest management, reforestation and agroforestry systems, particularly in Africa, where the vegetative cover is in decline, would be critical to address climate-related challenges.” Kalibata explains that only around 4% of land in the region is currently irrigated. “This is not necessarily due to physical water scarcity” she explains. “Rather, the main constraint of irrigation is economic water scarcity, i.e., investments in the management of water resources are not substantial enough to meet water demand, and farmers do not have the financial means to exploit water resources on their own. Irrigated agriculture is



THE BIG PICTURE

1°C

INCREASE IN TEMPERATURE

CORRELATES TO A

3% DECLINE

IN AGRICULTURAL OUTPUT

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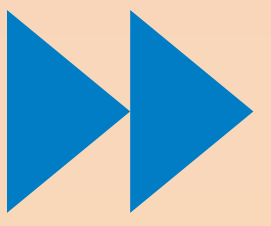
5–17%

THE PREDICTED FALL IN CROP

YIELDS IN SUB-SAHARAN

AFRICA BY 2050





THE BIG PICTURE

US\$6 TN

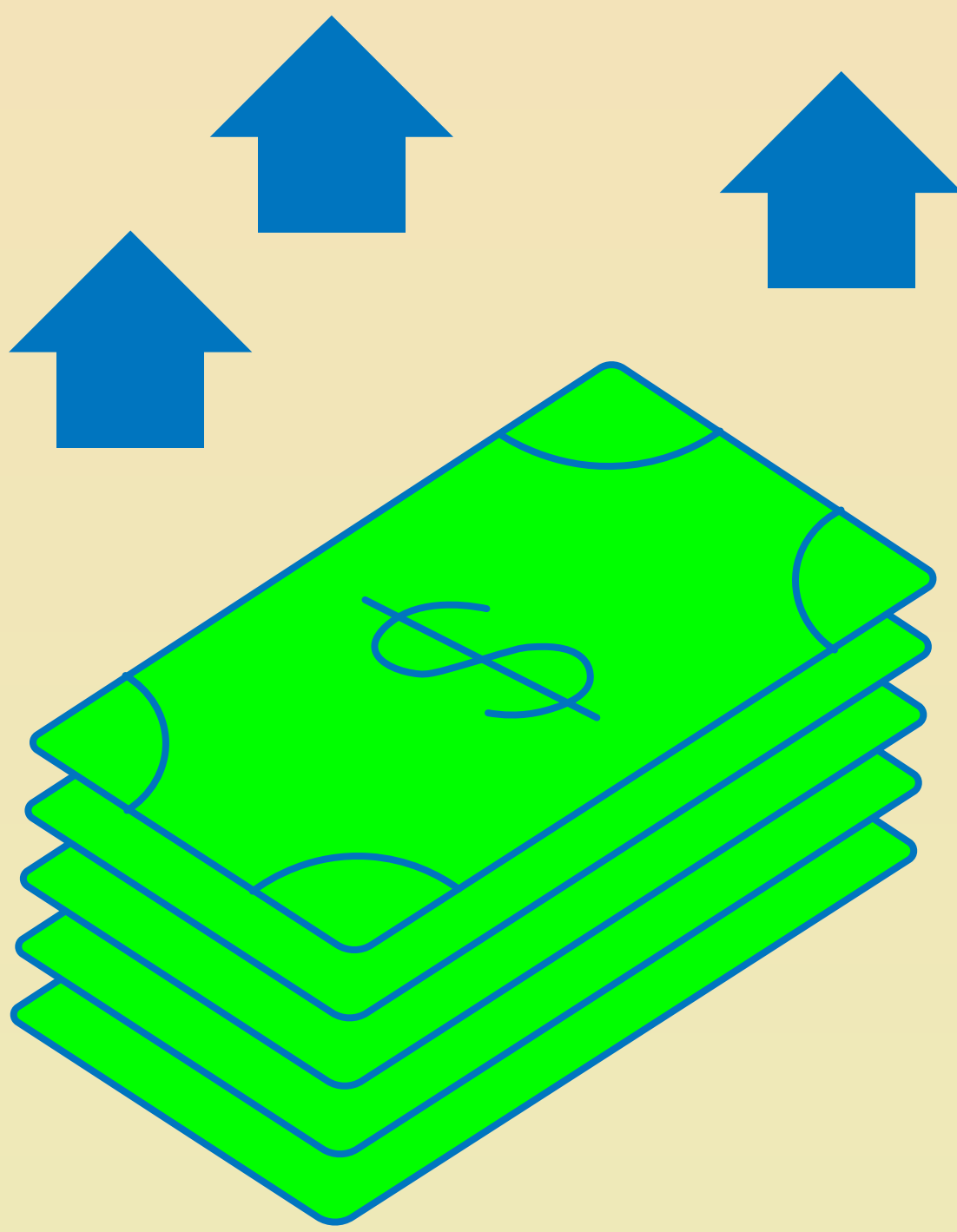
OF ECONOMIC BENEFITS

COULD BE LOST BY THE CONTINENT

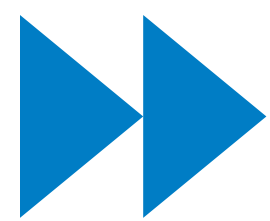
WITHIN THE NEXT DECADE, WITHOUT

INVESTMENT OF **US\$1 BN**

PER YEAR



SOURCES: International Monetary Fund,
and Global Center on Adaptation
(GCA).



becoming an increasingly important intervention towards managing climate variability, meeting the demands of food security, employment and poverty reduction." A move towards indigenous, resilient and nutritious crops of Africa could be another avenue, as so far R&D has mainly been focused on maize, wheat and rice, which together account for about 50% of the global calorie supply. Indeed, there is potential for African pulses, particularly beans, to be part of the climate solution through the development of more resilient varieties, such as Kenya's nyota, developed by the Kenya Agricultural and Livestock Research Organization, in partnership with the global bean

program of the Alliance of Bioversity International and CIAT through the support of the Pan-Africa Bean Research Alliance (PABRA). PABRA members have released more than 650 new, more resilient bean varieties, many of which are also more nutritious and have shorter cooking times. Improving domestic bean production through the development of such varieties is critical in building sustainable agrifood systems, says PABRA Director Jean Claude Rubyogo, because “it increases supply to the market while reducing the need for imports — stabilizing prices, and making beans both more available and more affordable.” Farmers who adopted nyota beans

improved yields by over 200% even under erratic weather conditions, harvesting 1,800 kilograms compared to a typical production of around 500 kg.

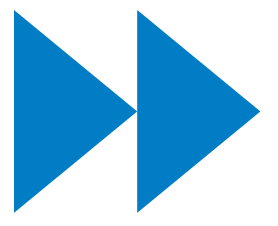
Looking ahead

Africa is home to diverse and sensitive ecosystems, including forests, savannas, and coastal areas, which provide services such as carbon sequestration, biodiversity conservation, and water regulation. However, these ecosystems are increasingly under threat from deforestation and habitat degradation, leading to loss of biodiversity, soil erosion, and reduced resilience to environmental stressors. Investment in clean energy will

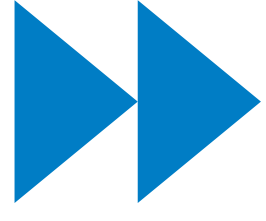
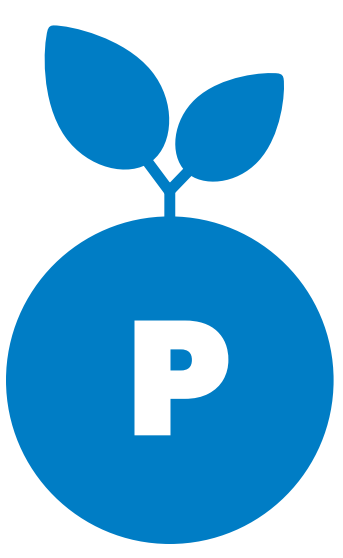
catalyze a move towards alternative climate solutions and reduce the dependence on fossil fuels, with solar and wind energy sources attracting investment in Africa.

The Kenyan president, William Ruto and other African leaders are looking for business solutions, calling for global carbon taxes and financial reform to free up additional climate funding, and pushing for debt relief for African countries. "Africa's carbon footprint remains small and a complex interplay of needs and responsibilities is a daily challenge but it should not lead to a deadlock. We must be alert to the fact that they can sometimes blind us to the bigger picture" said Ruto.

Overall, while Africa contributes



relatively little to global greenhouse gas emissions, it is suffering a monumental impact due to climate change. Hameed Nuru, director of the World Food Program's African Union office said "We live in desperate times and need desperate, urgent, immediate measures." With vulnerable populations at an increasingly greater risk the message from Nuru is loud and clear: "The time is now. Tomorrow cannot wait." ◀▶



SATELLITE VIEW

Up and comer

BY LARA GILMOUR

4 MINUTE READ

Uzbekistan is gaining importance on the global green mung bean scene and traction in the Chinese market. Farkhod Rakhmatullaev, CEO of the country's biggest exporter discusses production, exports and grower sentiment.

Could you start by sharing more about the mung beans you export from Uzbekistan?

Mung beans are a primary product in Uzbekistan, with production capacity increasing significantly from 8,000MT in 2016 to 180,000 MT in 2023. In the same year, total exports of Uzbeki mung beans reached 154,000MT, with Sofia Agro exporting 22,500MT, making us the largest mung bean exporter in Uzbekistan. We are expecting around 190–200,000 MT of production in the new season.

Tell us about your main export destinations.

Approximately 90% of our mung bean exports go to China, our primary export destination. Additionally,

Turkey, Pakistan, and Afghanistan are consumers of Uzbeki mung beans.

What motivates Uzbeki farmers to grow mung?

Local farmers are motivated to grow pulses like mung beans due to several factors. Firstly, the short growth cycle of 80-100 days allows them to be cultivated between wheat and cotton seasons without competition. Additionally, pulses require less water than crops like wheat, making them ideal for Uzbekistan's arid climate. Strong demand from East and Southeast Asia also makes pulses financially attractive for farmers.

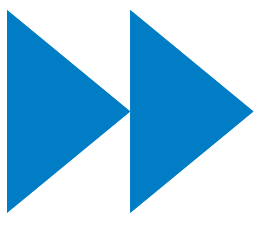
How does Sofia Agro handle logistics and transportation for

exporting pulses to different regions, particularly to China?

Being a double land-locked country, Uzbekistan faces transportation challenges. We utilize a combination of train and sea routes to transport containers to China, passing through neighboring countries or via the Russian port in Vladivostok, depending on the destination.

Can you provide insights into future plans and goals for expanding your pulse export business?

Our goal for 2024 is to maintain and surpass our 2023 export volume, reaching around 30,000MT by year-end. Additionally, we aim to increase exports to South Korea and Japan and introduce new pulse varieties like

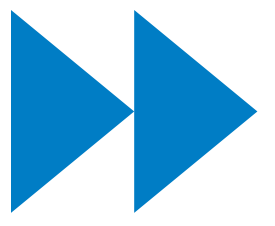


ABOUT

› Sofia Agro produces more than 1,000 tons of agricultural products every month, which undergo 7 stages of cleaning, increasing the efficiency of its work up to 99.9%

.....

› The company's specialists have been working in the field of cultivation and production for more than 10 years, as well as cooperating with farmers



adzuki bean to Uzbekistan.

What is the outlook for this year's mung production in Uzbekistan?

What is the sentiment of farmers regarding mung production?

Due to water and weather issues, many farmers are transitioning to pulses like mung beans. Government initiatives to replace cotton areas with fruits and beans further support this trend. I predict an increase in bean and pulse production in the coming years due to climate changes and growing demand.

How is Chinese demand for mung beans evolving, and what opportunities does this present for Uzbeki producers? Are there any

changes in the way the Chinese consume mung beans?

Chinese demand for mung beans continues to rise, with a focus on high germination rates and sprouting grades from Uzbekistan. This presents significant opportunities for Uzbek producers, especially with China shifting towards sprouting-grade beans.

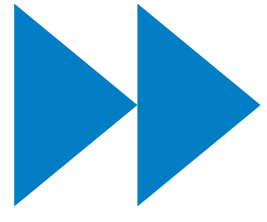
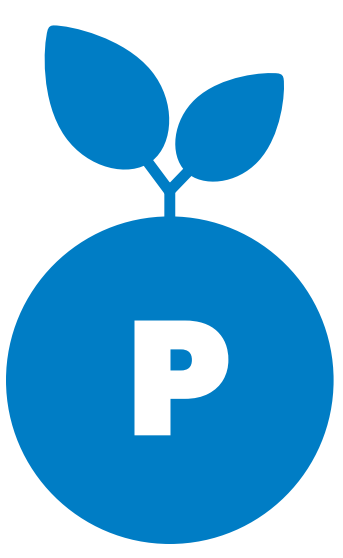
With which regions do you face the most competition in mung exports, and how do you plan to meet the challenge?

The main competitors for Uzbek mung beans include Myanmar and Australia, each with its own growing season. To address this competition, we focus on maintaining quality, meeting

market demands, and optimizing production processes. The main advantage of Uzbeki GMB is its high germination rate (above 95%) and naturally slightly bigger size (starting at 2.8 mm to 5 mm) compared to its main competitors. However, high transportation costs from Uzbekistan to the main global ports makes Uzbeki GMB less competitive.

Are there any new or emerging markets you're seeing?

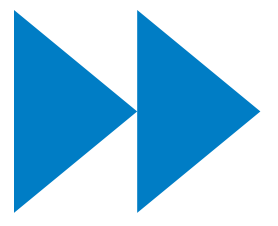
While China remains the primary market, we aim to explore opportunities in South Korea, Japan, and potentially expand volumes in Iran, Afghanistan, Pakistan, and Turkey. ◀▶



FRACTIONS: A STORY IN 4 CHARTS

Desi chickpea markets reawaken

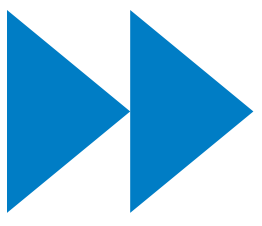
Pulse Atlas data on price and production map out the story since the removal of Indian import tariffs.



1 >

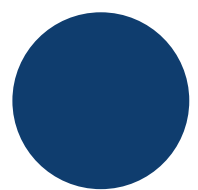
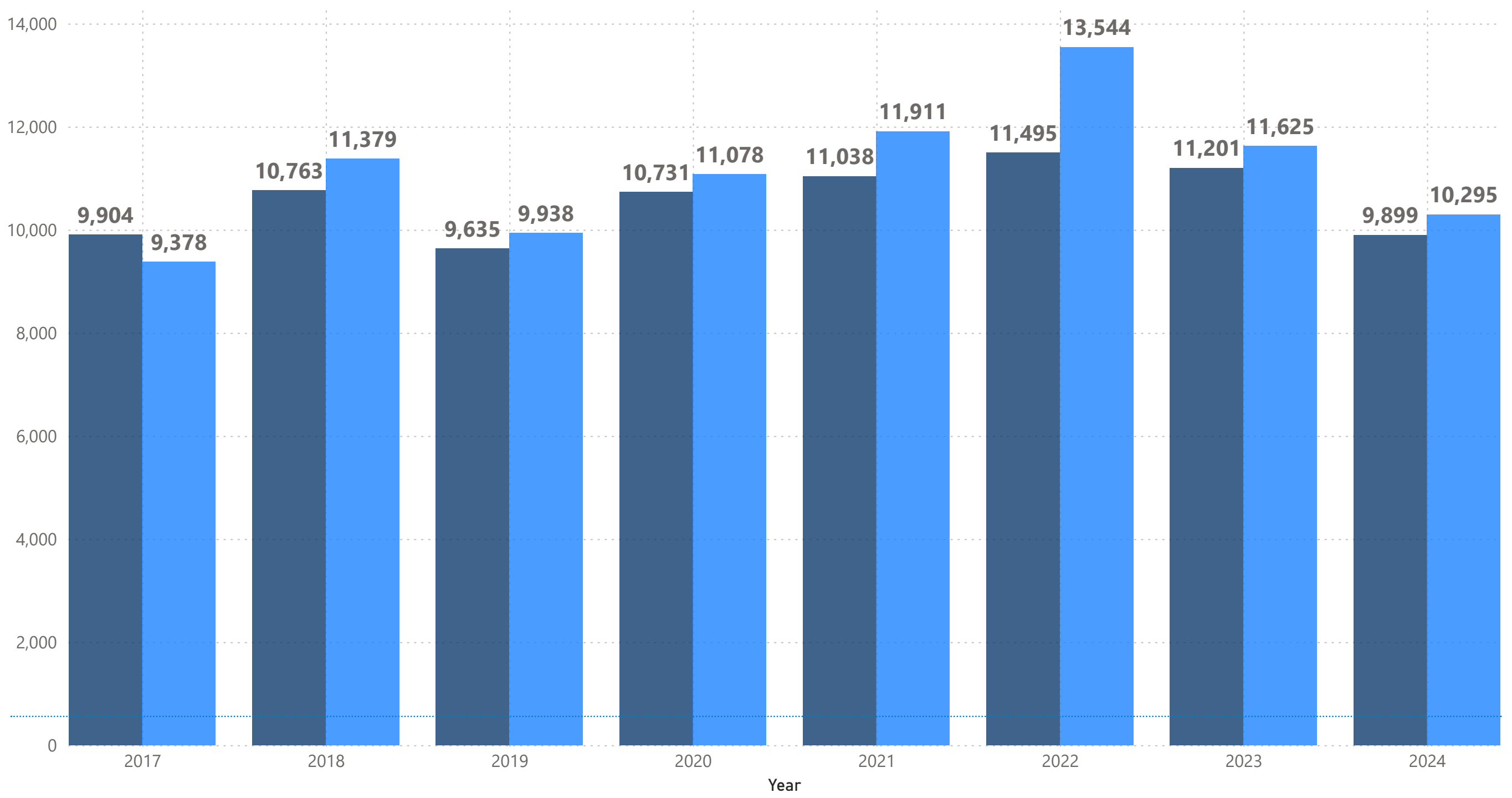
INDIAN PRODUCTION

Indian desi chickpea production has fluctuated only slightly over the last eight years, averaging 11.1 MMT. Production peaked at 13.5 MMT in 2022, when a relatively strong yield of 1.18 t/ha provided a bumper crop. Average desi yield over the last five years has been 1.07 t/ha, ranging between 1.03 t/ha and 1.18t/ha. Based on a yield of 1.04 t/ha, this year's production is predicted to fall to around 10.3 MMT in 2024 – a drop of 24% YoY. This would put desi production a full 7.5% below the eight-year average and 12% below the five-year average of 11.7 MMT.



1 > Indian production

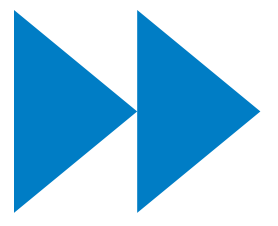
AREA HARVESTED AND PRODUCTION BY YEAR – INDIA



AREA HARVESTED (1,000 HA)



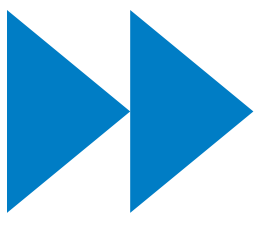
PRODUCTION (1,000 MT)



2 >

PRICES

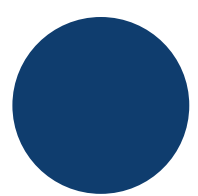
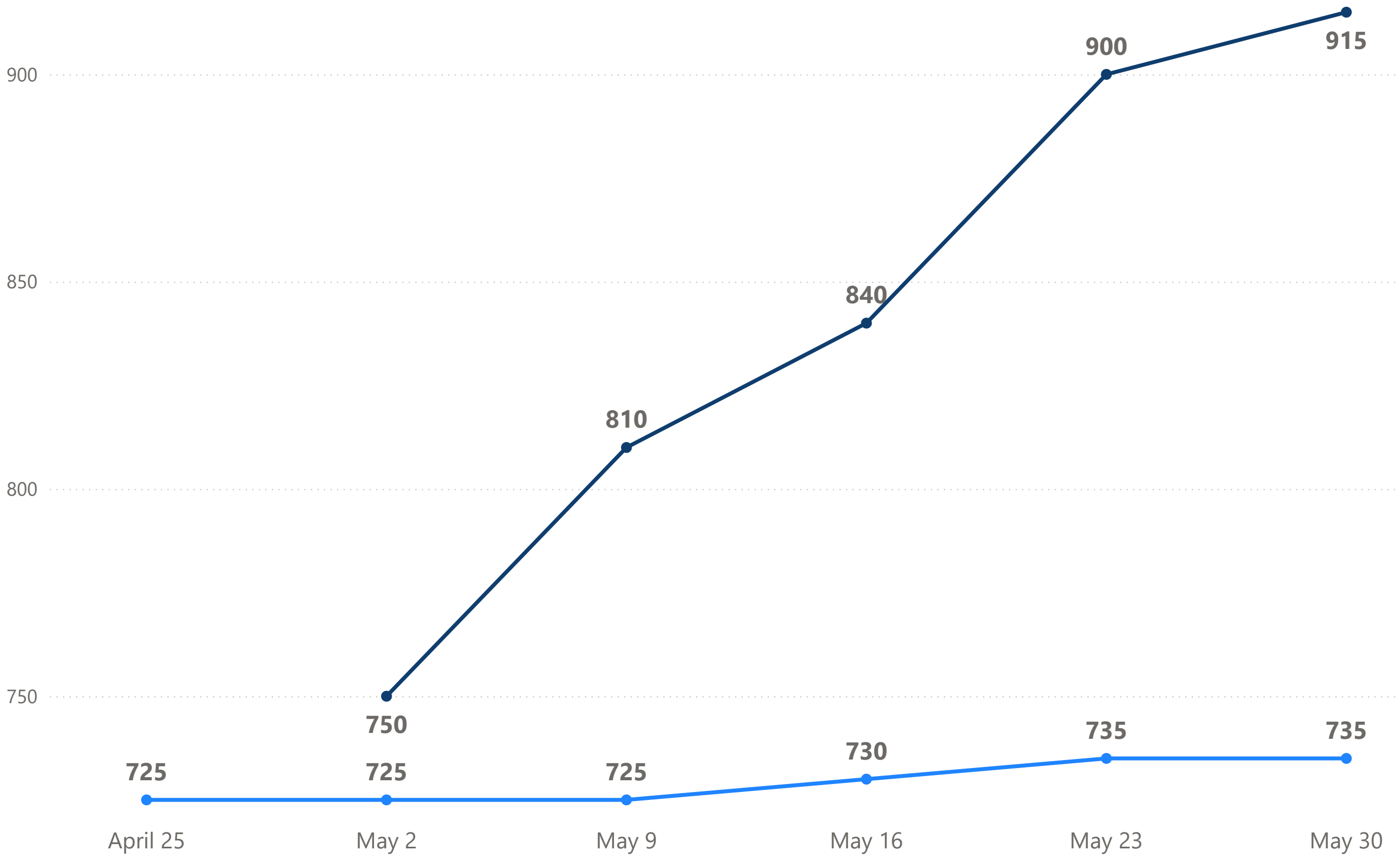
Just before Australian seeding began, India lifted the import tariff on desi chickpeas to improve stocks and cover domestic demand – Navneet Chhabra explains: “The Indian government tends to lift tariffs in October to get stock in at harvest time. It is lifting the tariff now to signal to the global farming lobby to increase chickpea acres.” Australian desi prices shot up in the first month after the tariff was lifted, rising between 11-13% for destinations in India, Bangladesh, Pakistan, and the UAE. Prices to India reportedly reached over 1000 AUD, providing an incentive for Aussie growers.



2 > Prices

AUSTRALIA TO INDIA – PRICES BY PULSE TYPE

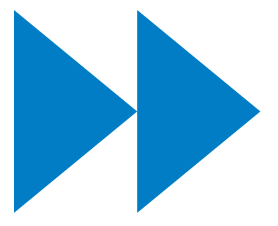
USD – CNF Basis – June / July shipments



DESI CHICKPEAS



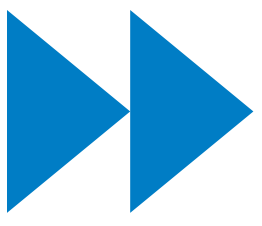
RED LENTILS (NIPPER TYPE)



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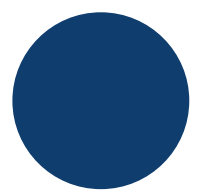
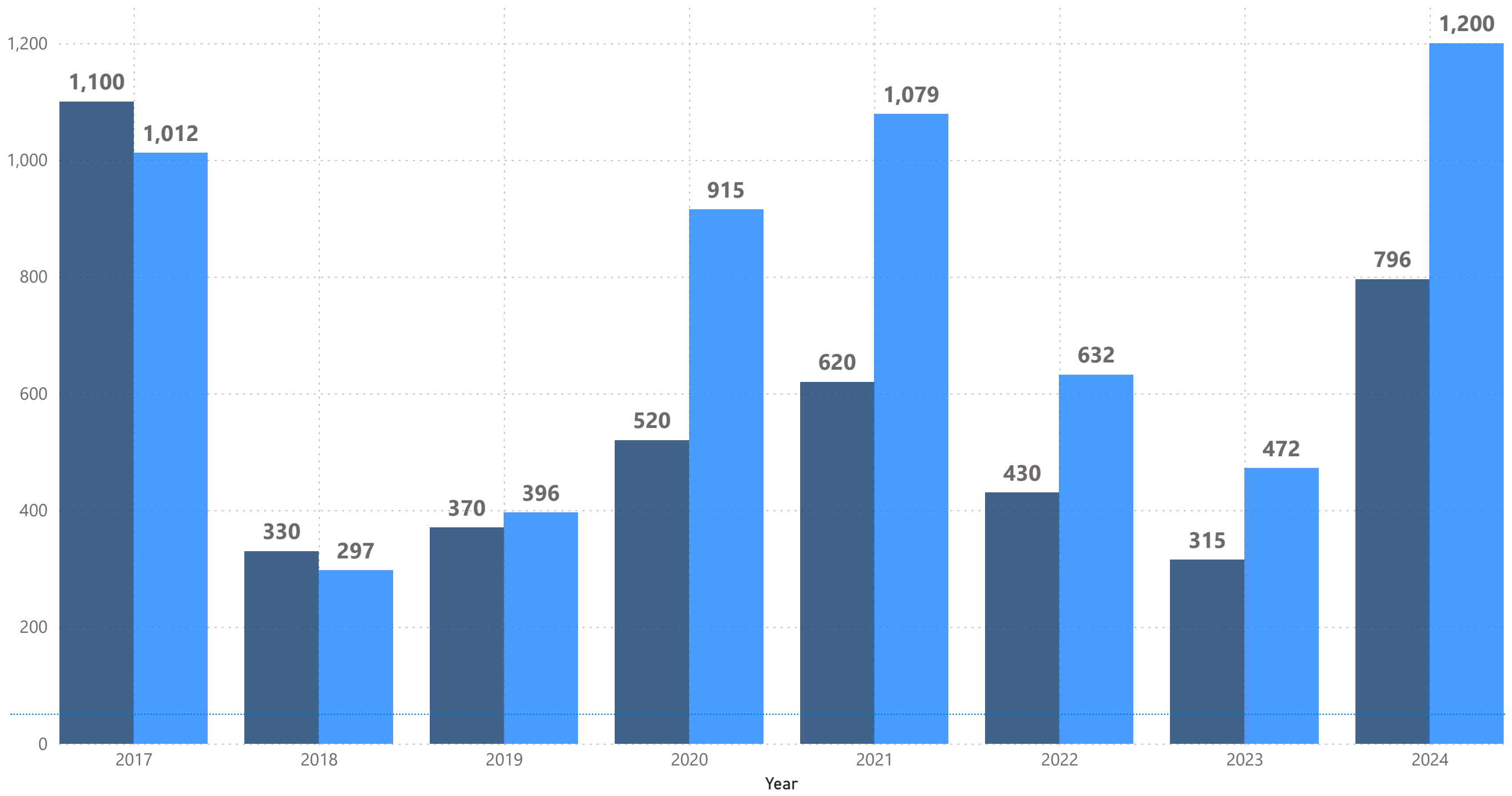
AUSSIE PRODUCTION

Australia hopes to become the world's largest producer of desi chickpeas in 2024 with a projected YoY jump in acreage of 153%, which could lead to a production of around 1.2 MMT, creating significant supply for Indian demand. Strong yields will depend on climate – Australia has seen low yields in recent years with both 2017 and 2018 seeing yields drop below 1 MT/ha. Pulse and grain trader Inari Australia has stated that increased acreage and the recent 'phenomenal' weather in Queensland and New South Wales could see a desi crop 'between 1.0–1.5 MMT.'



3 > Aussie production

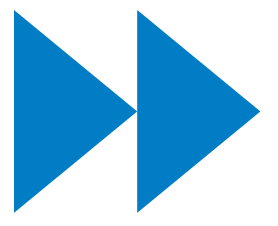
AREA HARVESTED AND PRODUCTION BY YEAR – AUSTRALIA



AREA HARVESTED (1,000 HA)



PRODUCTION (1,000 MT)

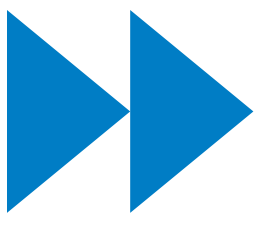


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TANZANIAN PRODUCTION

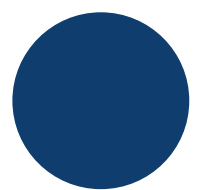
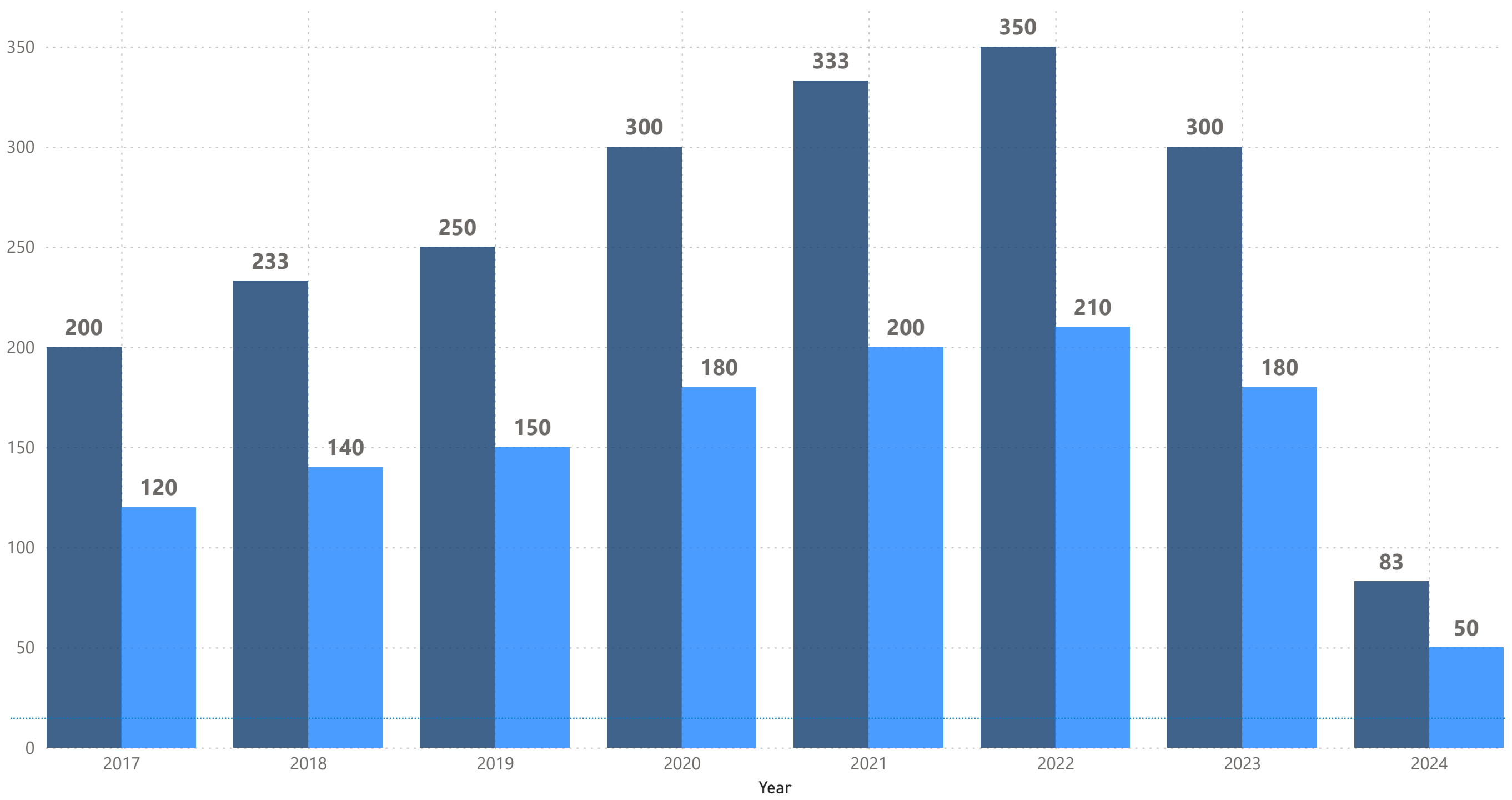
The 2024 Tanzanian chickpea crop is set to drop dramatically YoY with acreage falling from 300,000 ha to just 83,000 ha. Total production is predicted at around 50,000 MT, down from 300,000 MT last year and 73% lower than the previous five year average of 184,000 MT.

Pigeon peas have proved a more attractive prospect to farmers this year as they continued to grow in price due to strong demand from India. Speaking to the GPC in March, Zirack Andrew of the Tanzanian Pulses Network predicted that pigeon pea production would rise by 100,000 MT in 2024.



4> Tanzanian production

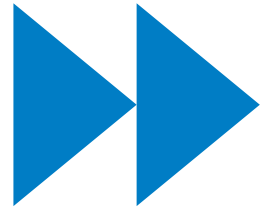
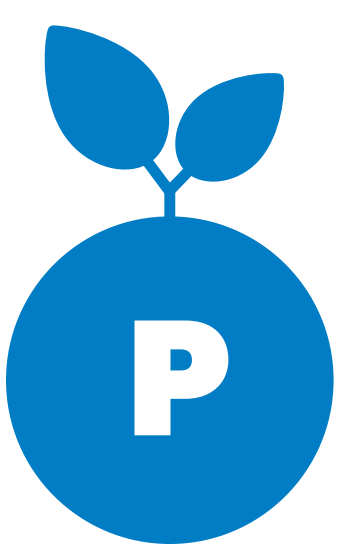
AREA HARVESTED AND PRODUCTION BY YEAR – TANZANIA



AREA HARVESTED (1,000 HA)



PRODUCTION (1,000 MT)



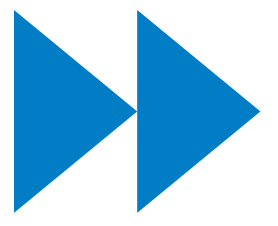
PARADIGM SHIFTER

From bean to bioplastic: the new faba breakthrough

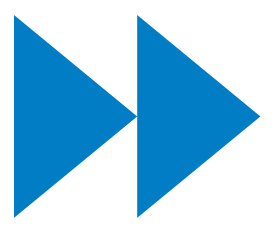
Can pulses help end fossil fuel pollution? A recent discovery seems to hold the promise of mitigating the environmental toll of petroleum-based plastics, with faba beans front and center.

BY MARIANA FUSARO

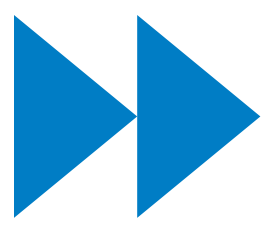
2 MINUTE READ



It looks like synthetic packaging film, but it is mostly made from faba bean protein. In a groundbreaking move in the field of sustainable innovation, researchers at the University of Saskatchewan have unveiled a pioneering new bioplastic, designed to be a biodegradable wrap for the food sector. “You can take it off the food product, put it in the green bin or your garden, and it is going to degrade and add nutrients to the soil, since it is all made of proteins. So, it is a win-win for the environment,” explained Dr. Michael Nickerson, Saskatchewan Agriculture and Food Research Chair in Protein Quality and Utilization and head of the R&D team. The new plant-based film not only has the potential to replace traditional plastic wrap, it is also

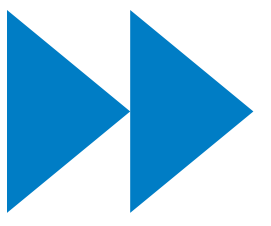


intended to keep food fresh for longer. To produce it, scientists formulate the ingredients into a film-forming solution, which they cast in special molds to create the required thickness. Afterwards, they condition the film in humidity control chambers until it has achieved the desired levels of strength and flexibility before it goes into the packaging area. Since one of the prototypes they are working on is intended to enhance the shelf life of fresh products, the team is doing a shelf study on fresh meat. “We have active ingredients that are really working to inhibit the growth of spoil bacteria and we’re increasing the shelf life quite a bit in this fresh meat, so we are really excited to move on to phase two and proof a concept of this



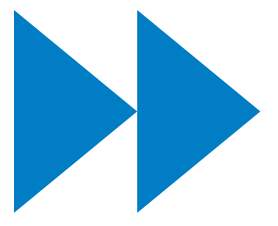
type of packaging,” said Nickerson. The bioplastic derived from faba bean protein exhibits significant strength, flexibility, and thermal stability, making it suitable for a myriad of applications ranging from packaging materials to biomedical devices. Moreover, its biodegradability ensures minimal environmental impact, offering a sustainable solution to the planetary emergency caused by plastic pollution.

At last year’s COP 28 summit in Dubai, after three decades of climate talks, leaders agreed that the world needs to transition away from fossil fuels to achieve net zero by 2050. This will have considerable implications for the plastics industry, given that 99 percent of plastics, including

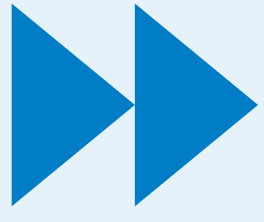


The University of Saskatchewan, founded in 1907, sustains a strong scientific tradition as a public research organism (Shutterstock).

the waste that pollutes oceans and landfills, is petroleum-based. The climate crisis and synthetic plastics go hand in hand.



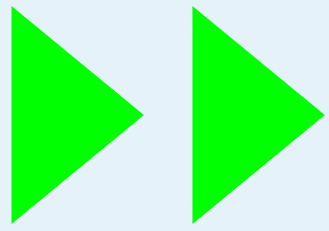
Industry experts have hailed the discovery of the University of Saskatchewan as a game-changer in the quest for environmental preservation, one that not only mitigates the dependency on fossil resources but also addresses the pressing need for plastic waste reduction. As the world struggles with the urgent imperative of fighting climate change and safeguarding the planet for the next generations, innovations like this faba bean bioplastic seem to hold the promise that we can, indeed, be forging a path towards a greener, cleaner, and more resilient future. ◀▶



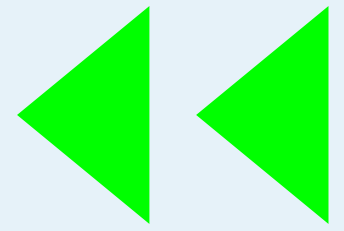
MEET OUR MEMBERS

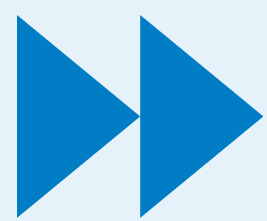
This is us

The GPC community is always growing - we highlight new members from countries across the globe.



FOCUS ON NEW MEMBERS!





MEET OUR MEMBERS

PRESIDENT'S CLUB PLATINUM PARTNERS

AUSTRALIA

Arya Pulses Australia

BRAZIL

Arbaza

Coperaguas

Cooperativa

Agroindustrial

CANADA

AGT Foods – Arbel

ETG Commodities

INDIA

Sharp Agricom

Star Agriwarehousing
& Collateral

Management

NETHERLANDS

Skane Group

Viterra

RUSSIAN FEDERATION

Top Grain

SINGAPORE

Agrocorp International

TURKEY

Armada Foods

Bashan Agro

Dicle Group

UNITED ARAB EMIRATES

Arab and India Spices

Emco International

Mellow Trading

UNITED STATES OF AMERICA

ADM Edible Bean

Specialties

Columbia Grain

International

GOLD PARTNERS

ARGENTINA

Cono Trading

International

Desdelsur

AUSTRALIA

Mandala Trading

Parsram Exporters

BULGARIA

EU-Nomia

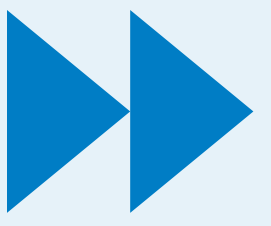
CHINA

Nanjing Bonagro

GERMANY

Asigest Deutschland

Versicherungsmakler



MEET OUR MEMBERS

GmbH

KAZAKHSTAN

JSC Atameken-Agro

RUSSIAN FEDERATION

FruitImpex

SINGAPORE

Aditya Birla Global
Trading (Singapore)

SPAIN

Legumbres Luengo

UKRAINE

Sintez Group & Co

UZBEKISTAN

Global Export

R S Triveni Foods

SILVER PARTNERS

ARGENTINA

Andes Harvest

Argencrops

AUSTRALIA

AUS Grain Exports

Centre State Exports

DDT Holdings

Kellyson Group

Peters Commodities

BANGLADESH

City Commodity

BELGIUM

Alimex Europe

Braet-De Vos

Casibeans

CANADA

ARG Foods

CFT Corporation

Marina Commodities

Ray-Mont Logistics

Canada

EGYPT

Teekay & Danny

International

GERMANY

PETKUS Technologie

GmbH

INDIA

AGS Foods India

AK Agri

Chokadi Brokers

ESAF Multistate Agro

Cooperative

Faqir Chand Vinod

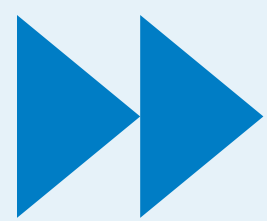
Kumar and Co.

Liladhar Pasoo

Forwarders

Shivam Shipping India

Shree Sheela



MEET OUR MEMBERS

International (Global Garbanzo)

Sri Bhagyalakshmi

Enterprises

Vibgyor Agro

Commodities

ITALY

Caxa

Pedon Group

MADAGASCAR

Malde Kara

NEPAL

Mahabir Overseas

OMAN

Shahi Foods and

Spices

PAKISTAN

Bombi's Group

Kanwal Trading Co.

Saad Agro

Commodities

SINGAPORE

Adroit Overseas

Arvee International

Seasons Overseas

SPAIN

Mediterranean Foods

Garrido

SWITZERLAND

Bühler

TURKEY

Ande Logistics Services

UNITED ARAB

EMIRATES

Agrisea Foodstuff

Trading

DOA Trading DMCC

Golden Rise Trading

Hakan Foods DMCC

Sajjan Foods DMCC

SSI Agroworlds General

Trading

Sun Impex

International Foods

UNITED STATES OF

AMERICA

Ardent Mills

Kelley Bean

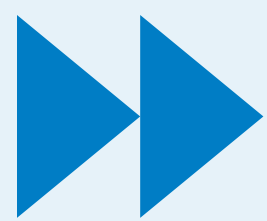
URUGUAY

Cralpey Trading

UZBEKISTAN

Sofia Agro / "Sofia

Ticaret"



MEET OUR MEMBERS

NATIONAL ASSOCIATIONS

AUSTRALIA

Grains Australia

BRAZIL

IBRAFE Brazilian Dry Beans Institute

CANADA

Pulse Canada

CHINA

China Chamber of Commerce of Import and Export of Foodstuffs, Native Produce and Animal By-Products (CFNA)

ETHIOPIA

EPOSPEA

INDIA

India Pulses and Grains Association

JAPAN

Japan Pea and Bean Importers Association

MYANMAR

OATA Myanmar

SINGAPORE

Singapore Pulses

Federation

SOUTH AFRICA

Dry Bean Producers Organisation

SPAIN

Asociacion de Legumbristas de España

UKRAINE

Community Of Pulse Producers and Customers Of Ukraine

UNITED KINGDOM

Pulses UK

UNITED STATES OF AMERICA

American Pulse Association

US Dry Bean Council

USA Dry Pea and Lentil Council

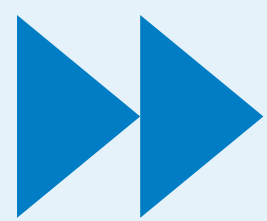
COMPANY MEMBERSHIPS

ARGENTINA

Agrosud

AgroTrend

Alea y Cía.



MEET OUR MEMBERS

Bal Foods

Batrade Food Products

Belgrains

CAS Exportaciones

Conexa Foods

Agribusiness

Cremer y Asociados

Elementa Foods

Argentina Fyofoods

Going Natural

Jewell Especialidades

Jose Maria Lazara

JR Commodities

KC Agribusiness (prev
KC World Trade)

Liag Argentina

Murray Food Products

Olega

Orange Field Trading &
Brokerage

Oscar Pemán y
Asociados

Paramerica

Primore

Pulses and Grains

Ronalb Argentina

Samal Agro

Tecnocampo

Tierra Lejana

Uranga Trading

AUSTRALIA

Agri Direct Australia

Agri Om Australia

Agri-Oz Commodities

Agrisemm Global

Brokerage

AgVantage

Commodities

AmSpec Australia

Ausons Corporation

Austalian Choice

Exports

Australian Grain Export

AWA Foods

Chester Commodities

CL Commodities

Commex International

Cropify

Esperance Quality

Grains

Export Import Australia

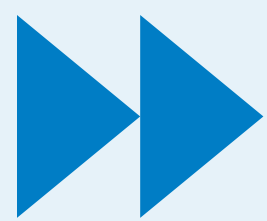
Fletcher International

Exports

Gold Star International

Graintrend

Green Agro



MEET OUR MEMBERS

GTE Technology
previously Graintech
Engineering

Inari Australia

Independent

Commodity

Management

Itochu Australia

JK International

Karim Takieddine -

ABC Exports

Lotema Brokerage

Market Check

Pacific Global Sprouts

Robinson Grain

Trading

RSD Weavers (AJI
Packaging)

Simplot Australia

SJ TRADE (AUS)

Societa Cofica

Spagricon Australia

StoneX Financial

Teague Australia

TFB Trading Australia

TR Harbour

Venedor International

Wilson International

Trade

BELIZE

Bel-Car Export and
Import

BRAZIL

Akila Group

Gadkin Alimentos

HR Representacoes

Comerciais

Iberica Corretora

Kfourri Trading

(previously Allbeans

Brazil Pulses and

Grains)

Malthus DMCC

MT Pulses

RS Trade Comercial

Exportadora Agricola

Samba International

BULGARIA

RBL Food Bulgaria

Union 09

CANADA

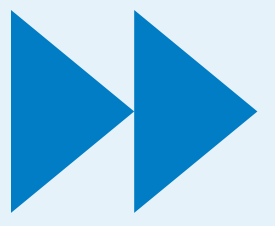
Agro-Haribec

Agrohall

Alberta Pulse Growers

Commission

All Commodities



MEET OUR MEMBERS

Trading
Avianje
B. Terfloth Canada
Bassano Grain
Brar Natural Flour
Milling
DG Global
Ever-Grain
Fazco General Trading
FCC
Global Commodities
Traders
Global Food and
Ingredients
Granum Worldwide
Trading and
Consulting
Grasslands Group of
Companies
Hensall District Co-
operative
JGL Commodities
Mercantile Consulting
Venture
Natural Specialty
Crops
Parrish & Heimbecker
Paterson Global Foods

Purely Canada Foods
Corp

Red River Agro

Richardson
International
Saskatchewan Pulse
Growers
SGS Canada
Shah Trading
Sinamco Trading
Trillium Commodities
Victoria Pulse Trading
Corporation
WTC Group

CHILE

Nama International

CHINA

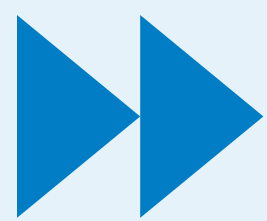
Eco Specialty Crops

**Gansu Jun Hao Shun
Trading**

Hebei Julite Sorting
Technology
Linyi Tintin Imp. & Exp.
Shijiazhuang Xinhe
Trading
United Brokers

COSTA RICA

Walmart Costa Rica



MEET OUR MEMBERS

DENMARK

Frey Commodities

EGYPT

Alamir for

Manufacturing and

Preparing Agro

Products

Fresh From Farm

Mediterraneo

Naggari Co. For

International Trade

Roots Commodities

ETHIOPIA

Africa Ventures

Trading (AVP)

Edao International

Trading

Ghion Gas

Qine Trading

Rixos Trading

Soreti International

Trading

Tewomed Trading

Tropical Pharma

Trading

Yanet Industrial

Yediabi Import Export

FRANCE

Ciacam Samson

Cherqui

Cogeser

Eureden Group

GC Trade

Inter-Courtage

Bayonne

JL Lamau

RAGT Semences

Sabarot Wassner

Semences de

Provence

Soufflet Negoce

GERMANY

German Grain TAB

Mueller's Muehle

Schlüter & Maack

Transimpex

GREECE

Elamer

INDIA

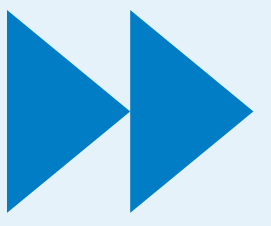
Abha Agro Exports

Adani Wilmar

Agri Business

Corporation

Agrimpex India



MEET OUR MEMBERS

AKMK Agro Industries

Amar International

Anil Industries Katni

Ask Agro Commodities

Atulkumar Mulji

Balaji Exim Enterprises

Bharat Agencies

Bherulal Radheshyam

Bhandari

BJSN Agro Impex

C R Pime Foods

Dhiren Enterprises

Erth Commodities

Esarco Exim

Farm India Impex

GrainCorp India

Greenleaf

Corporations

Himatlal Hirji & Co

HM Agro Ventura

Hosokawa Micron

India

Integrated Service

Point

Jindal Overseas

Corporation

Kishor Kalyanji Corp

Krishna Canvassers

Krishya Logistics

Lakhanlal Kantilal

Louis Dreyfus

Company India

M V Agrotech

M/S Kamal Dall Mill

Madhurima

International

Mayur Global

Corporation

Mega Grain Trading

Monarda

Mulakh Raj and Sons

Narendra Forwarders

Nawarat Investments

New Tea Impex

Nokha Agrotech

P.A. Enterprises

Pagariya Exports

Parakh Foods and Oils

Prafulchandra Vasanji

Premier Pulses

Pushpam Traders

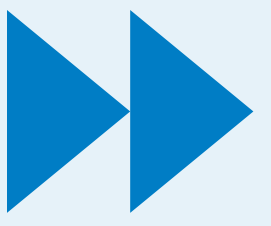
R R Agro

Rajat Agro

Rajat And Company

Commodities

Rasiklal Liladhar



MEET OUR MEMBERS

Thakkar

Rathnam Brothers
RDC Agro Ventures
Rite Food Products
RR Agro
Sai Baba Agrilink
Sanghar Exports
Satyendra Packaging
Seeds & Grains India
Shah Nanji Nagsi
Exports

Shakambri Khadya

Bhandar

Sharad Enterprises

SHIV Agro Food

Shivam Shipping
Agency
Shree Laxmi Trading
Corporation

Shree Mahasagar

Impex

Shri Commodities
Shri Niwas Dall & Besan
Mill

Sierentz Global

Merchants

Simosis International

SP Meditor

Sree Impex

SRV Enterprises

Sumit Enterprise

Superior Agro Crops

Tinna Trade

Tri-Une Impex

Consultant

Uma Exports

V Ganesh Foods

V.N.M.A.D Firm

Victoria Foods

Wonder Investment

Managemet

INDONESIA

Pt. Sinar Indo Agro

Pulses

ISRAEL

Glazman International
Trade

Plantae BioScience

ITALY

Agras Pulses

Fabris & Co

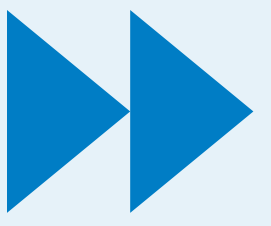
(International Brokers)

JAPAN

Amakasu Trading

Mitsui & Co.

Sugihara Industrial



MEET OUR MEMBERS

JORDAN

Abu Odeh Bros.

KAZAKHSTAN

Eurasia Grain Trade

KENYA

Capital Reef

Spice World

LITHUANIA

UAB Vigori

MALAYSIA

Just Imex

MMK Spices

TRC Global

MEXICO

Agricola Ersama

Agro Servicios A

Productores Del Valle
(Terminel)

Alimentos Agricolas y
Naturales

Bodega De Granos El
Alazan y El Rocio

DIGRAVA

La Macarena

Nochistongo

Pro Granos

MYANMAR

Evertop Commodities

NEPAL

Namaste Agro

Industries

Narayani Modern

Pulses Industries

NETHERLANDS

AgriFood Trade

Ebro Ingredients

LenersanPoortman,
a division of Holland

Diervoeders

Rabobank

NEW ZEALAND

(AOTEAROA)

Davis Food Ingredients

PAKISTAN

AWAM Group of
Companies

Balaji Commodities

Bawany Enterprises

Bhakhрани

International

Doni and Company

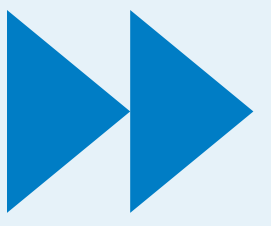
Fine Crop International

Horizons Trading

Corporation

Inam Trading

Khaliq Traders



MEET OUR MEMBERS

Khuzaima International
M Suleman Enterprises
M.K Grain

Commodities
M/S New Data Dall &
Flour Mills

Marvel Agro
Commodities
Mast Qalander Group-
Pakistan

Midtrans Foods
Midtrans International

Nayab Trading

Promising Pulses
International
Sakhi International
SS Indenters

PERU

AFI
Agro Fergi
Andes Alimentos y
Bebidas

POLAND

HARS Lucjan Hojda

PORTUGAL

Arbus Comercio
Internacional
MEPS

RUSSIAN FEDERATION

Agromer

SINGAPORE

Arcenciel Impex
BLPL Singapore
Fortune Natural
Resources
ICICI Bank, Singapore
Branch

Kwee Gee

PL Global Impex
Sudima International
Tata International
Singapore
Valency International

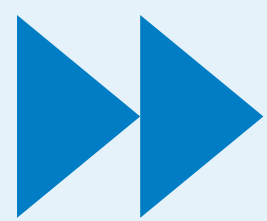
Vetcom Industries

SOUTH AFRICA

AQ Holdings
Mallies Spice Works
Pride Milling

SPAIN

Arizon Abogados
Carratala Import
Export
Cereales y Servicios
Agrícolas de Burgos
Industrias Racionero
José Abril



MEET OUR MEMBERS

Legumbres La
Cochura
Legumbres Penelas
Santiago Blazquez
Seprolesa

SRI LANKA

Amro Sugars
City Mines Lanka
Company
Globalax
Gnanam Imports
Omega Traders
Pulses Splitting &
Processing Industry
RG Brothers

SWITZERLAND

Granosa
HB Agrotrade
MK Merchants
Sunstone Brokers

TANZANIA

Mahashree Agro
Processing
SM Holdings

TURKEY

Akmemis Gida
Aky Technology

Akyem

Aprin

Duru Bulgur
Ekrem Agro

Esse Foods

Goze Tarim
Indika Turkey
Meduya
Memisoglu Tarim
Orhan Sirt Tarim
Otat Tarim
Ozalp Toros Gida
Ramos Agro
Saysan
Tiryaki Agro
Yayla Agro
Yazgan Tarim

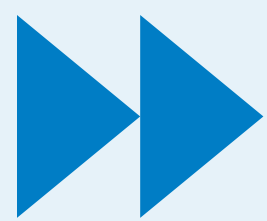
UKRAINE

VEA Brokers (prev.
Veles Agro Broker)

UNITED ARAB

EMIRATES

Afcom Trading DMCC
AGS Foods DMCC
Al Amir Food Industries
Alfagroup-Agrox Gulf
Holding



MEET OUR MEMBERS

Algebra Commodities
DMCC

Conexus Agri

HS Global DMCC

India Middle East Agri
Alliance

Ivory Trading FZE

Jatlee Commodities
DMCC

JKT Foods Europe
DMCC

Maercom DMCC

Meke Commodity

Trade House DMCC

Mercancia Continental
DMCC

Natcore Resources
DMCC

SHE Agro DMCC

SSA Agri DMCC

SSB FZE

Waterloo

Commodities DMCC

UNITED KINGDOM

Chelmer Foods

Legumology

Wherry and Sons

UNITED STATES OF AMERICA

Ackerman Marketing

Alvarado Commodities

Anderson Northwest

Baba Grains

Chippewa Valley Bean

Commercial Lynks

DACK Trading

George F. Brocke &
Sons

GOLDEN GRAINS

Inland Empire Milling

Jack's Bean

International

Maviga NA

McDonald Pelz Global
Commodities Asia

North Central

Commodities

North Star Food

Trading

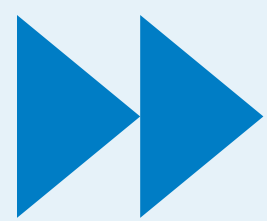
PKT Associates

The Andersons

The Redwood Group

TRC Trading

Corporation



MEET OUR MEMBERS

WASEDA Commodities
Yanez International
Sales Agents

VENEZUELA

Agricola Latina

Exportadora Agrícola

EXASA

Trustex Trading

OTHER: RESEARCH, MEDIA OR NONPROFIT

ARGENTINA

Agtrace Food
Consultoría y
Comunicación
Agropecuaria

New World Trading

AUSTRALIA

Agriculture Victoria
Australian Export
Grains Innovation
Centre
NSW Department of
Primary Industries

**The University of
Adelaide**

BULGARIA

Hristo Popov

CANADA

Glacier Farmmedia

Government of Alberta

Saskatchewan Trade
and Export Partnership
(STEP)

ETHIOPIA

Ethiopia Ministry of
Foreign Affairs

FRANCE

Terres Univia

INDIA

AgriFi.AI

AgPulse Analytica
IGrain India
National Agricultural
Cooperative Marketing
Federation Of India Ltd.
(NAFED)

NETHERLANDS

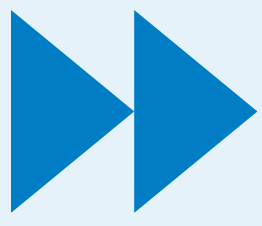
FMO, the Dutch
Development Bank

SINGAPORE

Enterprises Singapore

TAIWAN

SUNCUE



MEET OUR MEMBERS

TURKEY

Eastern Mediterranean
Agricultural Research
Institute

Ministry of Forestry and
Agriculture

UKRAINE

Agro Service Trade

Bulgaria

UNITED ARAB

EMIRATES

DMCC

UNITED KINGDOM

Foreign,

Commonwealth &

Development Office

UNITED STATES OF AMERICA

Fairman International
North Dakota State
University



PULSE FORWARD

DRIVING THE FUTURE OF FOOD SYSTEMS