



UK pulses - fostering innovation to unlock sustainability, healthy eating and climate change benefits

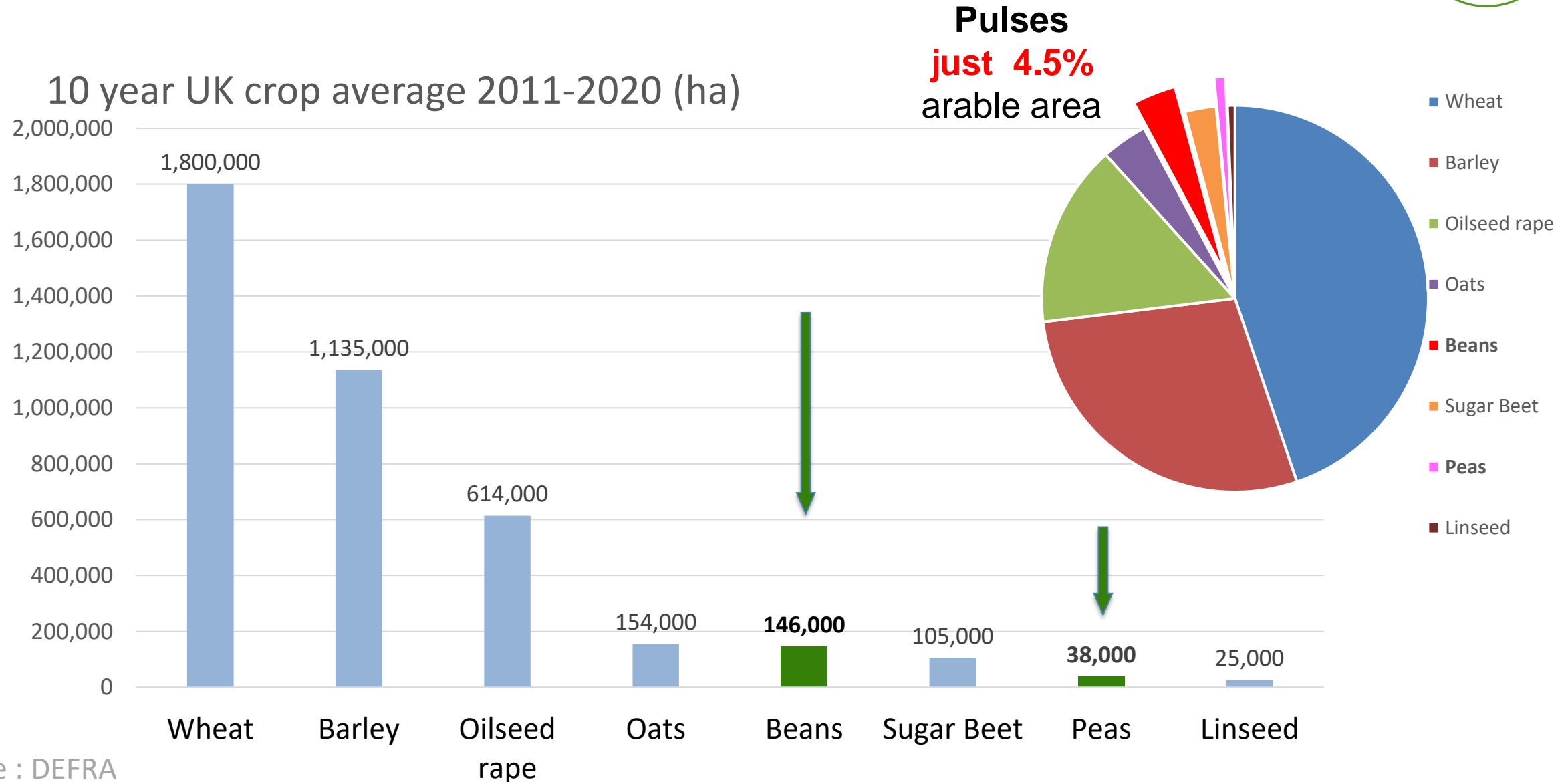


All-Party Parliamentary Group on  
Science and Technology in Agriculture

# UK market and crop, opportunities and barriers

Roger Vickers 16<sup>th</sup> March 2022

# The UK Market – crop area context



# The UK Market - conundrum



## UK Pulses & veg legumes - niche crops <250,000ha

### – Under invested in research nationally

- WW Estimated \$175million annually v \$Billions in other crops

<https://www.icrisat.org/global-survey-shows-shortfall-in-research-investment-in-pulses/>  
<https://iyp2016.org/resources/technical-reports/124-pulses-global-research-and-funding-survey>

### – Commercial interest limited

### – Grower funding restricted

## AND YET

### - future national & International importance huge



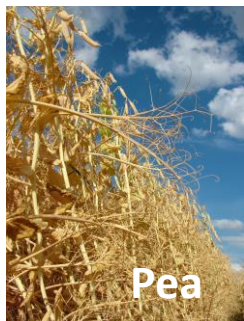
Pea



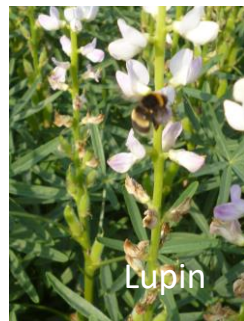
Faba bean



Pea



Pea



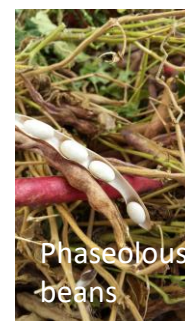
Lupin



Lupin



Phaseolous  
beans



Phaseolous  
beans



Chick pea



Lentil



Faba bean

# The UK Market – dry peas & beans



*Pulses UK crop area forecast 2022*



**Green peas**      **30, 000 ha**

Canning, processing, micronizing  
splits, snacks, export, feed



**Yellow peas**      **6,000 ha**

Splits, fractionation, flour, feed



**Marrowfat peas**      **5,000 ha**

Mushy, canning, snacks, export, feed



**Maple peas**      **3,000 ha**

Specialist export & pigeon feed

perhaps **170,000 tonnes** **peas.**



**Faba beans**      **200,000 ha**

Winter and Spring sown  
40% : 60% ?

Domestic consumption

Animal feed

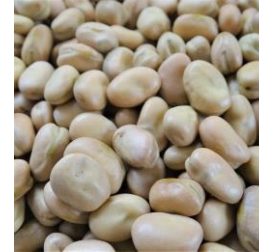
Aquaculture

Export

Human consumption

Animal feed

- Pigs, poultry and cattle



perhaps **800,000 tonnes** **beans.**

**Other uses for peas and bean crops include:**

Seed production, Farm saved seed, Grown and fed on farm

For context Canada produced over 4.5 million tonnes of peas in 2021

# UK Market – why niche crops?

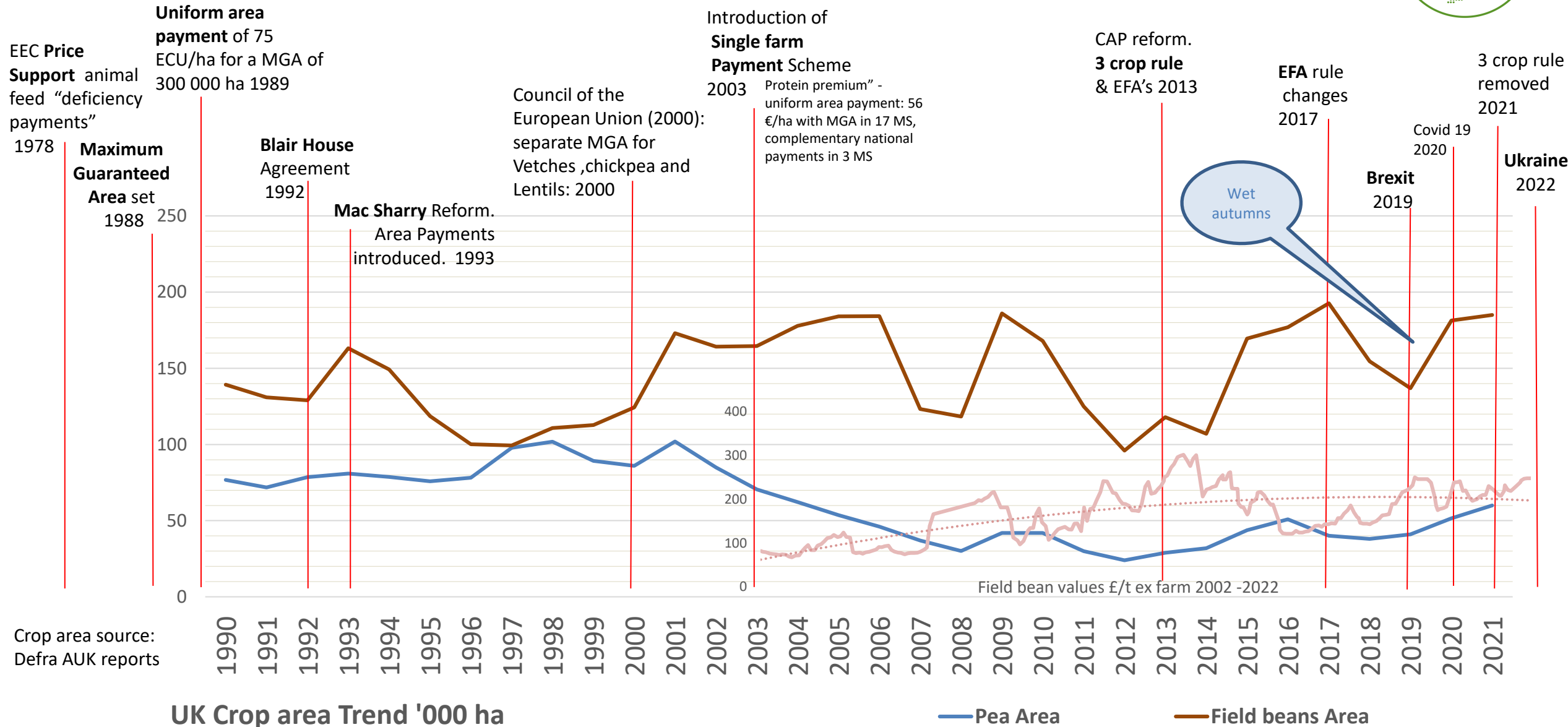


- Broad brush farmers and industry do
  - what makes them money in the market
    - regulations guide permissible activities and give freedom to operate.
- Policy guides action and entrenches behaviour within the market
  - Interpretation is individuality in business
  - ..and of course businesses will ride schemes for advantage.

“Blueprint for UK pulses in Post-Brexit world” : released in 2018 – nothing much has changed <https://www.pgro.org/blueprint-for-uk-pulses/>



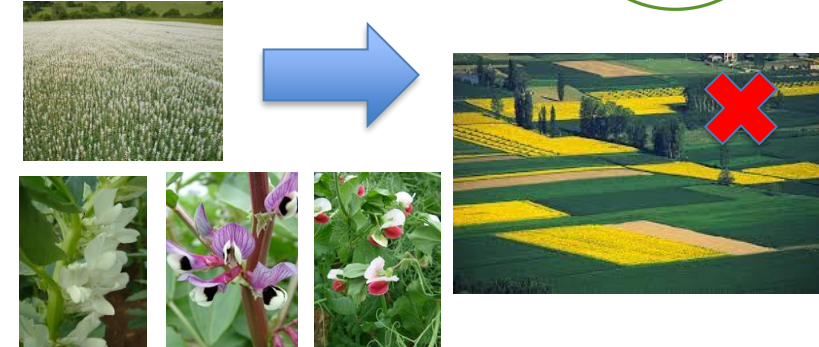
# Crop areas, politics & events



# UK Pulses – Opportunities / Benefits



- Environment and sustainable production
  - **crop productivity & diversification**
    - Encourages biodiversity
  - **Zero nitrogen fertiliser requirement**
    - reduces emissions, pollution and cost
  - **Enhanced soil fertility and resilience**
- Off set trading imbalances
  - protein deficit
- Via education and dietary lead
  - societal & economic benefits
  - reduced health care costs.



UK imports ~2.5mt /yr soya meal equivalents for animal feed.

Efeca: Round table on sustainable soya report 2021

**NHS**

# New market optimism



- **Pulse flour millers**
  - UK start ups
- **Pulse protein demand** is increasing
  - Especially in the USA and trending to Europe
  - Large French and Canadian investments in extraction
- **Pulse snack and ‘freedom food’** markets evolving
  - Pulse imports increasing
- **Plastic alternatives**
  - are being developed from pulses



Field peas



# Barriers to realisation



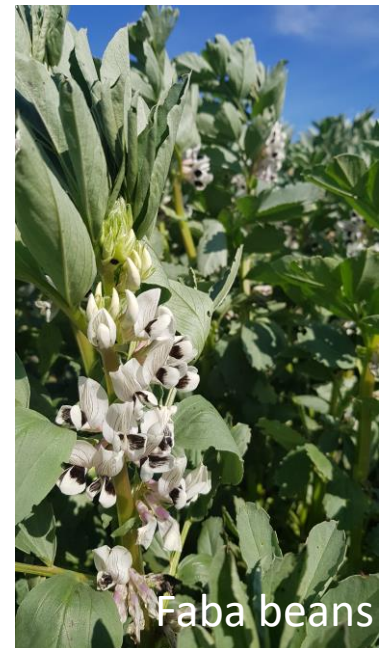
- **Supply and demand**
  - Poor data hampers market development
- **Niche crop status**
  - Minimises commercial investment interest
  - Limits crop improvements
- **Policy focus on major crops**
  - Limited genetic and applied research, crop diversification and supply chain value development
- **Environmental focus without considering food production.**
  - Crop production reliability
  - Failure to promote how food production can contribute positively



# Barriers to realisation



- **Trade barriers** – will this affect demand for worldwide use?
- **Exchange Rates** – influence export potential
- **Competition** – Baltic and central EU areas ?
- **Reduced ag chem availability**
- **Variable quality**
- **Slow development** of new markets





# Pulses



## Pulses deliver public good from agriculture

Sustainable in themselves

Improve long term sustainability of arable cropping

Environmentally sound and nutritious crop

Improve the profitability of the whole rotation.

**Ticking all the boxes of the political moment**

