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CLERA Hosts Virtual Conference on Argentina's Pulse Crops

The fifth edition of CLERA's annual Argentine pulse conference attracted more than 1,500 attendees from 17 countries.

On Friday, July 31st, CLERA, Argentina's national pulse industry association, hosted its annual pulse conference for the fifth year running. This year's event, like many others of its kind in this time of COVID-19, was held online rather than in person. The half-day conference was emceed by Ricardo Bindi of [Agrositio](#) and attracted more than 1,500 viewers from 17 countries. Video recordings of the entire event are available [here](#). Below, we summarize the major points made by each presenter.

Welcome and Opening Remarks

Following a brief introduction by Bindi, CLERA President Sergio Raffaelli opened the event by touting the finalization of phytosanitary protocols with China, opening the door for the export of Argentine dry peas to the Asian Giant. Work continues to enable bean and chickpea exports, he said. Raffaelli also cited CLERA's efforts to assist the country's vulnerable



(Agroindustrial Council of Argentina), formed by more than 45 national agricultural organizations in representation of the agro-industrial economies of the country. The Council aims to grow annual ag exports from \$65 billion to \$100 billion, creating 700,000 new jobs and establishing Argentina as an international leader in the food trade. As member of the Council, CLERA is working with other ag associations to realize this vision.

Raffaeli's remarks were followed by those of Juan Usandivaras, executive president of the Agencia Argentina de Inversiones y Comercio Internacional (Investment and International Trade Agency of Argentina). Usandivaras began by noting Argentina's importance as an exporter of beans, peas and chickpeas, and the pulse sector's significance to the economies of various regions of the country. The sector, he said, had performed well during the COVID-19 pandemic, with the value of pulse exports in the first semester of the year up 40% compared to the same period last year. Looking ahead, he highlighted opportunities for the pulse trade in India, Pakistan, the United Kingdom, Mexico and China, as well as those created by the innovation taking place in the plant-based ingredients segment. In regard to the latter, he singled out Beyond Meat and Impossible Foods, and encouraged the sector to add value to its pulse production in order to create similar products in Argentina. In the pursuit of these opportunities, the Investment and International Trade Agency of Argentina offers the sector its services and support, he said.

At the conclusion of Usandivaras' remarks, Bindi introduced each of the sessions that followed.

Physiological Fundamentals to Improve Bean Yields

Agustin Calderoni, a crop protection specialist, began his presentation by stating that, on average, the crops of the world realize only 24% of their yield potential. In the case of beans in Argentina, the average yield out in the fields is 1,400 kg/ha. compared to 6,000 kg/ha. in a controlled environment. He then ran through the developmental stages of a bean plant, comparing it to the stages of human development, and identified what the plant needs at each stage and how that need can be met.

Benefits of Pulse Consumption

Dr. Luciano Angles, a specialist in nutrition and obesity disorders, focused his presentation on the importance of eating healthy and nutritious foods to keep one's immune system strong, especially during the current global pandemic. Pulses, he said, are especially important in this regard, as they provide the body with vitamins A, B, C and D, omega 3, zinc,



Propiedades de las legumbres

- Alto contenido en proteínas igual o superior al de las carnes o pescado aunque con una calidad inferior por la falta de metionina (debe complementarse con la proteína de los cereales)
- Contenido glucídico en forma de almidón
- Nulo contenido en colesterol y bajo en grasas y son mayormente insaturadas (ventaja cardiovascular)
- Valores elevados en fibras alimentarias
- Importante contenido vitamínico
- Alto contenido en MAGNESIO, HIERRO y ZINC
- Baja cantidad de Sodio y alta de Potasio

Dr. Angles reviews the health and nutritional properties of pulses.

Argentina's Economic and Financial Outlook

Dr. Claudio Zuchovicki, a renowned financial specialist, shared his perspective on Argentina's economic and financial outlook given the reality of the COVID-19 pandemic.

He began by suggesting that rather than imagining a post-pandemic future, we ought to think about how to co-exist with the coronavirus, as it is sure to have lasting effects into the future. He then highlighted some key financial factors about world economies. In the developed world, he pointed out, nations have responded to the pandemic by issuing currency to aid the affected citizenry and sustain demand. Additionally, throughout the world, interest rates have been and will continue to be low through 2022. This has contributed to a perception that currencies will devalue, and people have reacted by stocking up on tangible goods.

Eventually, the low interest rates will lead to increased investment in production driven not by greater consumption, but mostly by speculative interest. In this regard, he stressed that despite national lockdowns, productive capacity and demand have remained intact, as evidenced by how quickly China's productive sector bounced back in two weeks following the country's reopening, as well as long lines at retail stores in Europe.



those parts of the economy that were trending upward and the fall of those headed in the opposite direction. For proof of this, one need look no further than the big tech sector, where companies like Google and Amazon have thrived during the pandemic. Today, the markets are betting on genetics, health, entertainment, esthetics and training.

In the case of Argentina, the country has a chance to seize the moment. To do so, its productive sectors need to be bold and increase production. Labor costs are low in Argentina and that will attract investment. The government, he advises, should undertake needed structural reforms for this to be more than just a fleeting moment and also incentivize investments in production.

Market Outlooks

The last session of the day consisted of a panel of industry insiders moderated by CLERA president Raffaelli. Each panelist gave a presentation on a specific pulse crop.

Dry peas: Lucas Genero of Agrofin provided the outlook for Argentine dry peas. The planting of the 2020 crop is nearly wrapped up with an estimated 70,000 hectares of peas seeded (65,000 hectares of green peas and 5,000 hectares of yellow peas). That represents a 30% increase over the prior years. Production is estimated at 150,000 MT, but dry conditions cast doubt on yields. The 2020/21 campaign starts with zero carry-in and, given the strong demand both domestically and internationally, no carry-out stocks are expected.

The finalization of phytosanitary protocols with China a few months ago represents a new opportunity for Argentine yellow pea exports. The challenge now is for Argentina to ramp up production in order to generate volume and offer competitive prices.



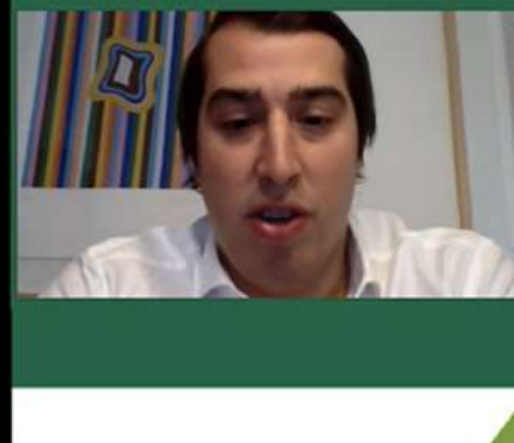
Arveja Campaña 2020	
Producción-cosecha 2020 - 2021 y Stocks Campaña 2019-2020	
	2020
Hectareas Sembradas Verde Estimada con un 90% de avance - 31/07 -	65,000.00
Hectareas Sembradas Amarilla Estimada con un 90% de avance - 31/07 -	5,000.00
Total	70,000.00
Hectareas Cosechadas Verde	61,904.76
Hectareas Cosechadas Amarilla	4,761.90
Total	66,666.67
Rendimiento estimado Tm/HAS Verde	2.20
Rendimiento estimado Tm/HAS Amarilla	2.90
Producción total de Arvejas Verde 2020	136,190.48
Producción total de Arvejas Amarilla 2020	13,809.52
Total	150,000.00
Stocks disponibles cosecha anterior Carry 2019 Verde al 31/07	7,500.00
Stocks disponibles cosecha anterior Carry 2019 Amarilla al 31/07	8,500.00
Total	16,000.00
Disponible para venta en el año 2020 Verde	143,690.48
Disponibles para venta en el año 2020 Amarilla	22,309.52
Total	166,000.00
Semilla uso propio para campaña 2021	15,000.00
Descarte y uso animal estimada campaña 2020	24,900.00
Uso domestico consumo humano y animal	25,000.00
Stock disponible para exportacion Campaña 2021	101,100.00



Mung beans: Martin Lazara of ALISOF reported on the outlook for Argentine mung beans. He projected exports of 38,000 MT this campaign and stated that Argentina has diversified its destinations and is no longer solely dependent on India. Today, he said, India remains the primary buyer, but Argentina also exports to a total of 30 countries, including Vietnam Malaysia and the UAE.

Argentina remains a relatively small player in the mung bean trade. The biggest exporter is Myanmar, which averages exports of 450,000 MT per year. Additionally, Argentina faces competition from regional exporters, namely Brazil and Venezuela.

Poroto Mung. Campaña Corriente	
Producción-cosecha y Stocks Campaña	
	2020
Hectáreas Sembradas	38.000,00
Hectáreas Cosechadas / Estimadas	36.100,00
Rendimiento estimado Mt/has	1,00
Producción total	36.100,00
Stocks disponibles cosecha anterior	1.437,00
Total oferta estimada	37.537,00
Semilla uso propio próxima campaña	1.400,00
Descarte y uso animal estimada	3.724,00
Exportaciones realizadas desde 01-03-20 / 30-06-20	24.000,00
Uso domestico	2.000,00
Saldo estimado al 01/07/20	6.413,00

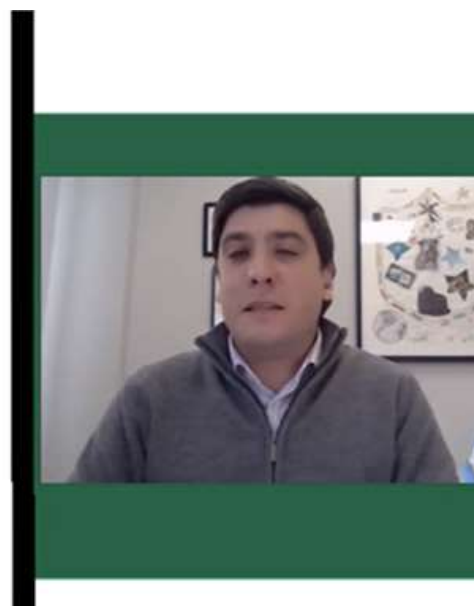




Argentina had a large carry-in. Initially, the big buyers were from the EU. Later, buying shifted to the Middle East. Then new crop became available at other origins and Argentine exports stalled. That is, until COVID-19 ignited a frenzy of buying and Argentine chickpeas began to be highly demanded once more, especially within the South American region. As a result, Argentina enters the 2020/21 campaign with zero carry-in.

Like the dry pea crop, the 2020 chickpea crop was planted in dry conditions. Consequently, seeding fell short of initial intentions, with an estimated 62,500 hectares planted to chickpeas this year. The crop will therefore be smaller, Campo summarized, and export volumes will be down as a result of the limited supplies.

 		
Garbanzo. Campaña Corriente		
Producción-cosecha y Stocks Campaña	2019	2020
Hectáreas Sembradas	90.000,00	62.500,00
Hectáreas Cosechadas / Estimadas	87.000,00	56.250,00
Rendimiento estimado Mt/has	1,50	1,50
Producción total	130.500,00	84.375,00
Stocks disponibles cosecha anterior	23.050,00	2.445,00
Total oferta estimada	153.550,00	86.820,00
Semilla uso propio próxima campaña	7.500,00	11.000,00
Descarte y uso animal estimada	13.050,00	12.656,25
Exportaciones realizadas desde 01-11-19 / 30-06-20	128.555,00	-
Exportaciones estimadas desde 01-11-20 / 30-06-21	-	60.000,00
Uso domestico	2.000,00	2.000,00
Total demanda estimada	151.105,00	85.656,25
Stocks Finales estimados	2.445,00	1.163,75



Black beans: Nicolas Karnoubi of Olega spoke next about the black bean crop. This year, the crop was seeded late because of low soil moisture levels. Frost in late May then caused significant losses. An estimated 120,000 hectares were seeded to black beans this year, but as much as 10% was left unharvested. Yields were below average, at 1,100 kg/ha.

The biggest buyer of Argentine black beans is Brazil, usually taking 80% of the crop. Prices at the border, Karnoubi reported, stood at \$750 MT. Argentina is also seeing greater demand from Chile and Colombia, as well as domestically, which is likely the result of immigration from Venezuela, where black beans are a staple food. European demand is also up and Karnoubi hopes China will become an important importer in the near future as well.



Mexico. He hopes, though, the recent negotiations will change that.

Poroto Negro. Campaña Corriente	
Poroto Negro Campaña 2020	
Produccion - Cosecha y Stocks Campaña 2020	
Hectareas Sembradas	165.000,00
Hectareas Cosechadas	152.000,00
Rendimiento Estimado Tm/Ha	1,10
Produccion Total de Porotos Negros 2020	167.200,00
Stock Disponible Cosecha Anterior Carry 2019 (al 01/01/2020)	63.000,00
Saldo Disponible para Venta en el Año 2020	230.200,00
Semilla uso propio para campaña 2021	19.000,00
Descarte y Uso animal estimado	20.064,00
Exportaciones realizadas desde 01/01/20 hasta el 30/05/20	54.000,00
Uso Domestico	2.000,00
Stock Disponible para Venta Campaña 2020	135.136,00
Ventas Estimadas (embarcadas y a embarcar) al 30/07/20	45.000,00
Saldo Disponible para Venta Campaña 2020	90.136,00



Colored beans: Matias Macera of Desdelsur reported on Argentina's cranberry, dark red kidney and light red kidney bean crops. On average, Argentina exports 60,000 MT of these bean types per year.

Argentina is the top exporter of cranberry beans and therefore the driver of international prices. The top markets for Argentine cranberry beans are Italy, Turkey and Pakistan. Brazil also comes into the market when carioca bean prices are high. Macera noted that cranberry beans are delicate and were the hardest hit by the dry conditions in April and May. Because of the lack of moisture, seeding fell short of intentions and the yields were a paltry 750 kg/ha. on average. Supplies, therefore, are tight for 2020/21.

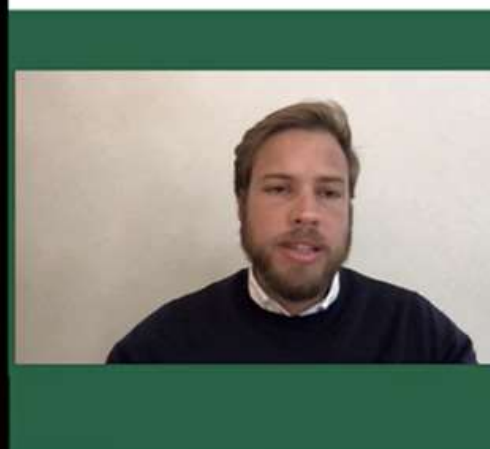
On dark red kidney beans, Argentina's crop is mainly destined for the canning industries of Italy, Spain and Portugal. This year, 28,600 MT of dark red kidney beans were harvested and have already nearly sold out. Argentina's dark red kidney beans generally sell prior to the start of the North American harvest in September.

Lastly, turning to light red kidney beans, Macera said Argentina typically produces a crop of 6-8,000 MT. The top buyers are Colombia, Portugal and the UAE. The 2019/20 campaign also saw good movement into the U.S. because of a poor crop there. This year, Argentina's light red kidney bean crop is marked by smaller than usual caliber sizes. Nonetheless, the beans were well received by buyers and fetched good prices (\$1,400 to \$1,450 C&F), mostly because no other supplies were available.



Poroto Cranberry. Campaña Corriente

<u>Poroto Cranberry Campaña 2020</u>	
Produccion - Cosecha y Stocks Campaña	2020
Hectáreas sembradas	28.000,00
Hectáreas cosechadas	23.000,00
Rendimiento estimado Tn/has	0,75
Producción TOTAL	17.250,00
Stocks disponibles cosecha 2019 (al 1/01/20)	4.462,00
Disponible para venta en el año 2020	21.712,00
Semilla uso propio para campaña 2021	2.800,00
Descarte y uso animal estimado	2.605,44
Exportaciones realizadas desde 01/01/20 hasta el 30/05/20	4.462,00
Uso doméstico	250,00
Stock disponible para exportacion Campaña 2020	11.594,56
Ventas estimadas (embarcadas y a embarcar) al 30/07/20	8.500,00
Saldo disponible para venta Campaña 2020	3.094,56



Poroto Colorado DRK. Campaña Corriente

<u>Poroto Colorado Dark Campaña 2020</u>	
Produccion - Cosecha y Stocks Campaña	2020
Hectáreas sembradas	27.000,00
Hectáreas cosechadas	26.000,00
Rendimiento estimado Tn/has	1,10
Producción TOTAL	28.600,00
Stocks disponibles cosecha 2019 (al 1/01/20)	3.782,00
Disponible para venta en el año 2020	32.382,00
Semilla uso propio para campaña 2021	2.700,00
Descarte y uso animal estimado	3.238,20
Exportaciones realizadas desde 01/01/20 hasta el 30/05/20	3.782,00
Uso doméstico	1.000,00
Stock disponible para exportacion Campaña 2020	21.661,80
Ventas estimadas (embarcadas y a embarcar) al 30/07/20	17.500,00
Saldo disponible para venta Campaña 2020	4.161,80



Poroto Colorado LRK. Campaña Corriente

Poroto Colorado Light Campaña 2020	
Produccion - Cosecha y Stocks Campaña	2020
Hectáreas sembradas	6.000,00
Hectáreas cosechadas	5.500,00
Rendimiento estimado Tn/has	1,10
Producción TOTAL	6.050,00
Stocks disponibles cosecha 2019 (al 1/01/20)	353,00
Disponible para venta en el año 2020	6.403,00
Semilla uso propio para campaña 2021	700,00
Descarte y uso animal estimado	640,30
Exportaciones realizadas desde 01/01/20 hasta el 30/05/20	353,00
Uso doméstico	200,00
Stock disponible para exportacion Campaña 2020	4.509,70
Ventas estimadas (embarcadas y a embarcar) al 30/07/20	4.000,00
Saldo disponible para venta Campaña 2020	509,70

Alubia beans: Horacio Fragola of Alicampo delivered the final presentation on Argentina's alubia bean crop. He started by recapping the 2019 alubia bean harvest, one of the best in history, with yields of 1,600 kg/ha. and production in excess of 200,000 MT, a record volume. Planting dates varied and as a result so did the quality and caliber sizes of the crop. Despite this variation and the large volume, the entire crop sold fast, with 160,000 MT sold in the second semester of 2019 alone; that is the amount typically sold over the course of an entire campaign. Additionally, Argentina has had success diversifying its markets. Over the past 10 years, the number of destinations increased from 50 to 65. This has helped Argentina decrease its dependence on its traditional European markets.

Given the success of the 2019/20, there was strong grower interest this planting season and the area seeded to alubia beans grew by 15-20% to 175,000 ha. The dry conditions, however, adversely impacted yields, which came in at 1,100 kg/ha. on average. The caliber size of the beans was also affected. Normally, Argentina's alubia beans are in the 180-200 caliber range, but this year the average is 220-240, with some product as small as 300. Even so, demand has been strong and Fragola expects stocks to sell out in the next few months. There has



Poroto Alubia. Campaña Corriente

Poroto alubia Campaña 2020

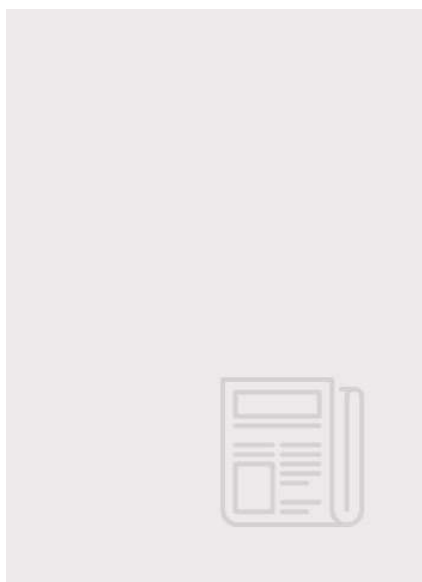
Produccion-cosecha y Stocks Campaña 2020	2020
Hectareas Sembradas	175.000,00
Hectareas Cosechadas	165.000,00
Rendimiento estimado Tm/HAS	1,10
Produccion total de porotos blancos alubia 2020	181.500,00
Sotcks disponibles cosecha anterior Carry 2019	43.156,00
Produccion 2020 + Carry in 2019	224.656,00
Semilla uso propio para campaña 2021	21.000,00
Descarte y uso animal estimada cosecha 2020	18.150,00
Exportaciones realizadas desde 01-01-20 hasta el 30-06-20	47.049,00
Uso domestico	2.500,00
Saldo disponible para venta Campaña 2020	135.957,00



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