

Subsecretaría de Mercados Agropecuarios
Secretaría de Mercados Agroindustriales



Ministerio de Agroindustria
Presidencia de la Nación

ARGENTINA'S AGRICULTURE:

“SAB KUCH MILEGA”



COUNTRY. MAIN FACTS

- Surface : 2.78 square kilometers. Eighth biggest country in the world.
- Population: 43.8 million (World Bank 2016)
- Diversity of climate, weather and geography.
- Natural Resources: fertile land and water.
- Literacy: 98.09 % (UNESCO)

COUNTRY. MAIN FIGURES


- 31 million seeding hectares (tenth in the world) with capacity to increase the area up to 70 million.
- 137 million tons of grains and oilseeds produced in 2017.
- More than 4.700 kilometres of maritime coast.
- Ports facilities to export.

PULSES. MAIN FACTS

- Argentina is the 5th global exporter of pulses, with over 600,000 Tons yearly exports, which means 4.1% of global market share.
- Argentine domestic consumption is only of 120 grs/capita/year. 50% of that domestic consumption are lentils, 22% beans, 18% peas, and 10% chickpeas. Due to the low level of domestic consumption, Argentina exports most of its pulses production to the global markets.
- Argentina has optimal soil, moisture and climate for pulses production, a condition that determines a leading edge competitive advantage in the world. The main pulses produced in Argentina are: beans – chickpeas – lentils – peas.



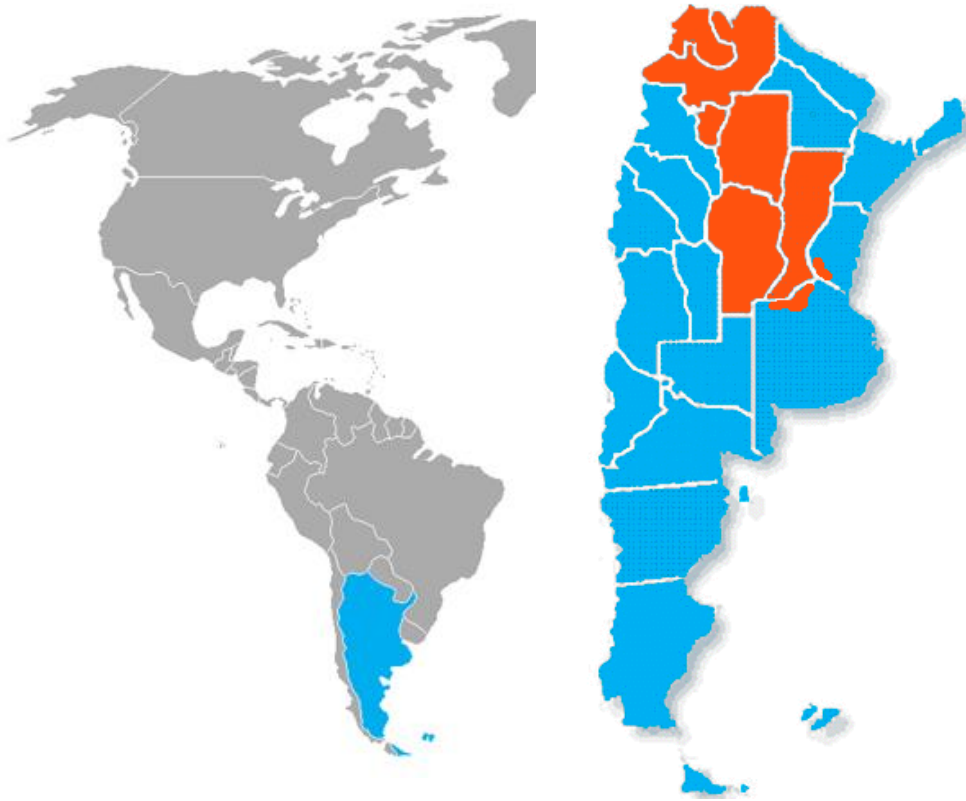
NEW ECONOMICAL RULES **WITH BENEFITS TO THE PRODUCTION AND EXPORT SECTOR**

- Free rate of exchange.
 - Removal of export taxes.
 - Release of export quotas.
 - Cooperation between private and public sector.
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SOME FACTS

- We produce different kind of pulses.
- The local consumption is very small, so we export most of our production.
- We are the second exporter of white beans and within the first ten in chickpeas and green peas.
- We could extend our seeding area.
- The local consumption will not increase in the near future.
- We are a clear supplier for the world.

Pulses Productive Zones in Argentina



Entre Ríos	Peas
Santa Fé	Lentils, Peas
Salta	Beans, Chickpeas, Lentils
Santiago Estero del	Beans
Jujuy	Beans, Lentils
Tucumán	Beans
Catamarca	Beans
Córdoba	Beans, Lentils, Peas,
Buenos Aires	Lentils, Peas

Argentine Pulses Production Global Markets

- ✓ 97% of the Argentine pulses production is exported, which means only 3% is consumed domestically.
- ✓ In 2017 exports grew 0,5%. Jan-Nov exports were 562.000 Tons, with a total FOB value of U\$D 470.000.000
- ✓ Brazil is the main importer of Argentine pulses, with 20% of total exports during 2017, Turkey imports 13.5%, Pakistan takes 7.5%, and Algeria takes 7% of our exports.

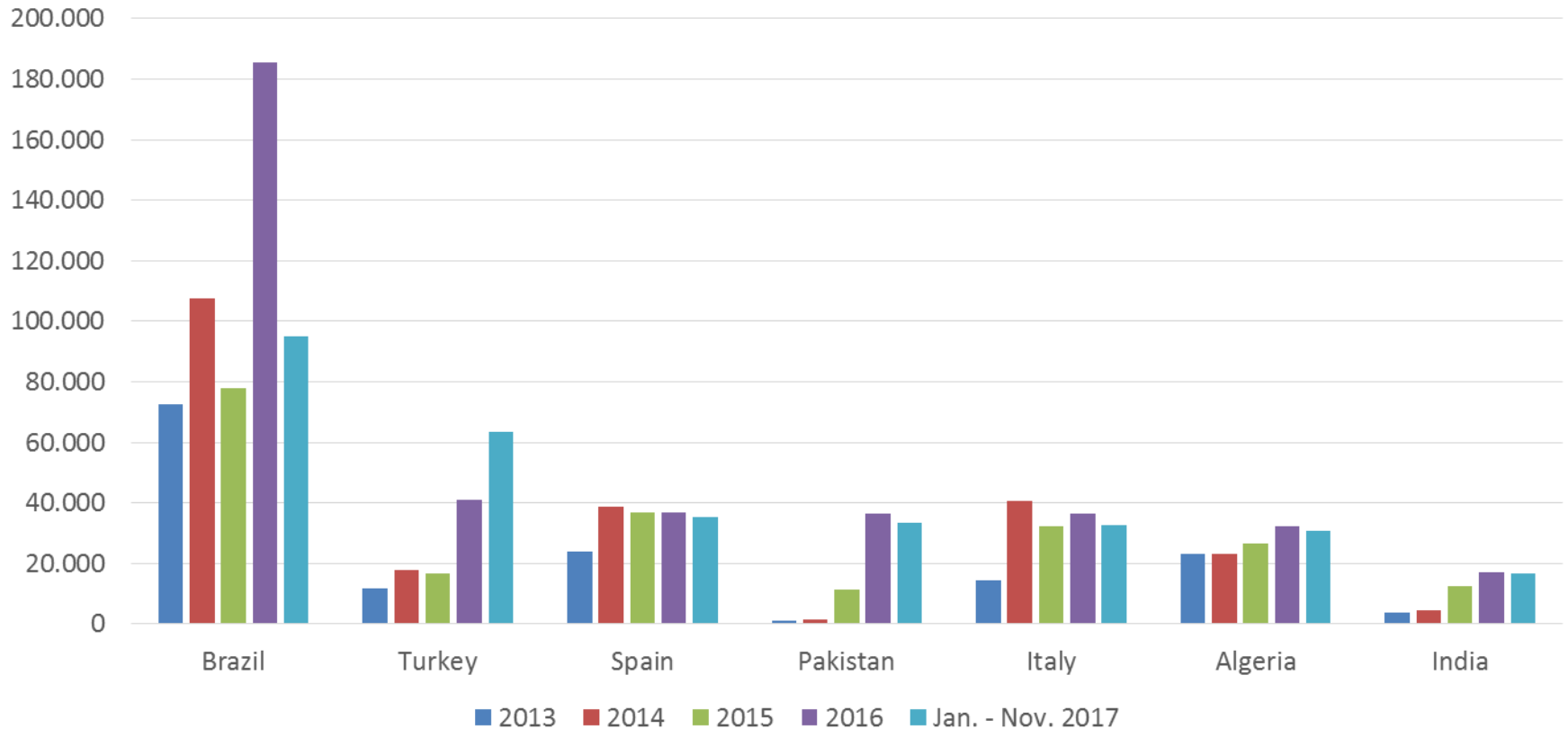
Product wise:

- **Beans** constitute 81% of total pulses exports: 45.2% are Alubia beans variety and 39% Black beans varieties.
- **Chickpeas** follow beans in importance in Argentina. Kabuli variety leads production, with some Desi under development. Kabuli chickpeas are exported mainly to Pakistan.
- **Green Peas** follow chickpeas in importance. Argentina is the main South American green peas producer. There are 76 varieties of green peas being produced in Argentina, exported mainly to Brazil, where only the green variety is sold. Argentine green peas presence in Brazil has been solid and constant over the years. 99% of green peas exports are in the form of shucked dry peas.
- **Lentils** are the 3rd important pulse produced in Argentina for food, after beans and dry peas. In the last few years, main importers from Argentina have been Uruguay, Portugal and Spain.
- **Yellow peas** have the largest volume demanded in the global market, with India as the largest consumer of yellow peas. Argentina has begun producing yellow peas.

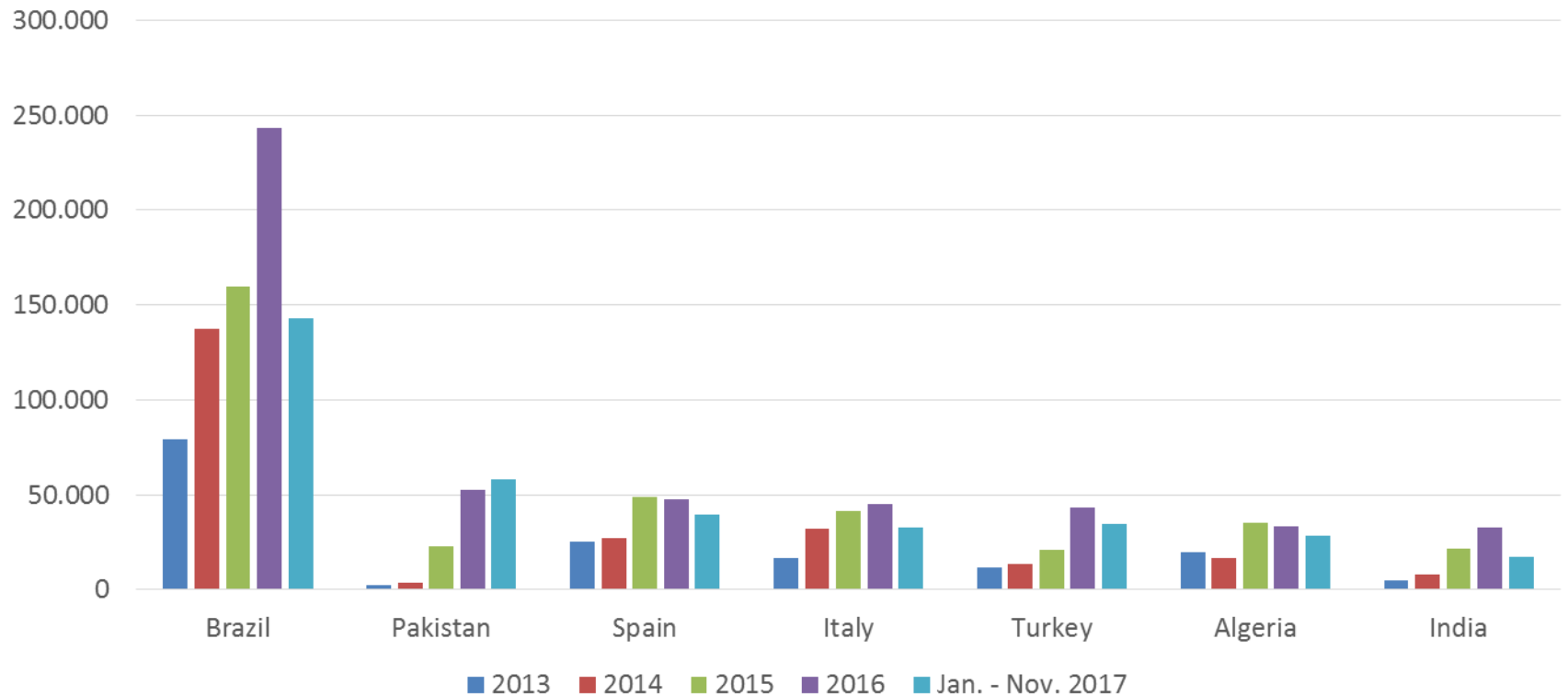
Main Argentine Pulses Exports Destinations.

Jan. – Nov. 2017	USD FOB	Metric Tons	% Market Share
Brazil	94.934.000	143.048	20.2%
Turkey	63.393.000	57.958	13.5%
Pakistan	35.462.000	39.324	7.5%
Algeria	33.261.000	32.991	7.1%
Italy	32.704.000	34.256	7.0%
Spain	30.610.000	28.484	6.5%
Portugal	16.760.000	17.520	3.6%
India	14.470.000	25.750	3.1%
United Arab Emirates	12.260.000	12.285	2.6%
Mexico	9.089.000	12.285	1,9%
Total	470.301.000	562.048	

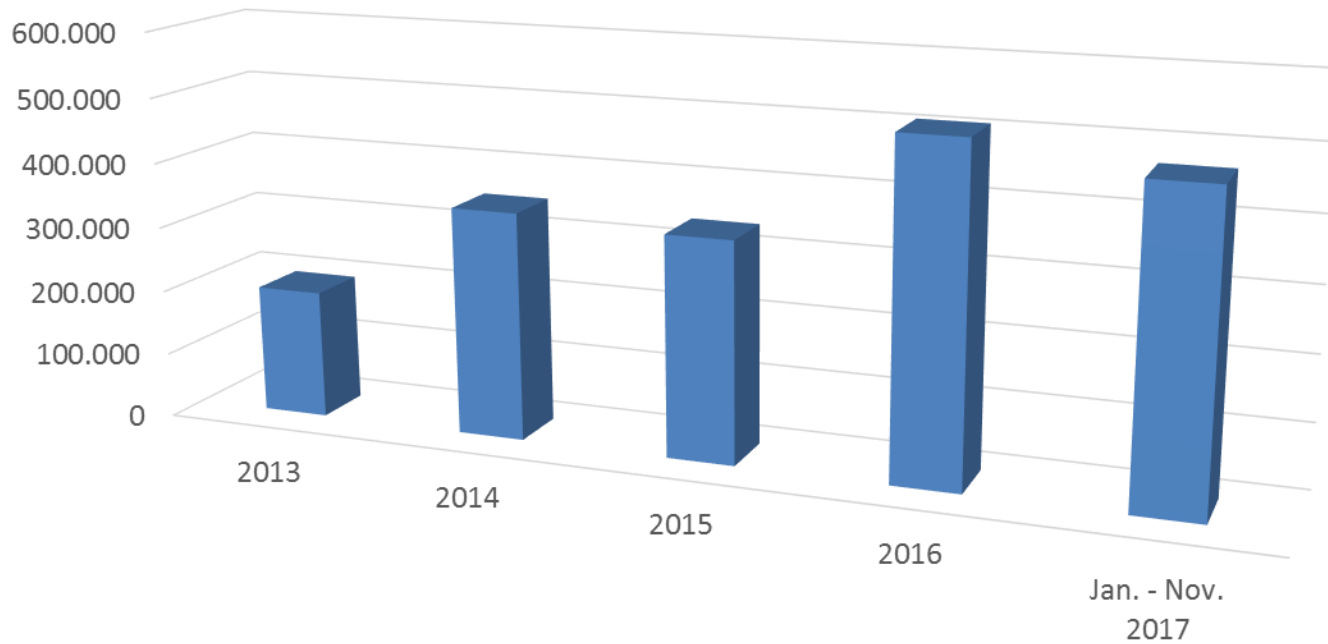
Main Argentine Pulses Export Destinations (FOB in thousand U\$D) 2013-2017



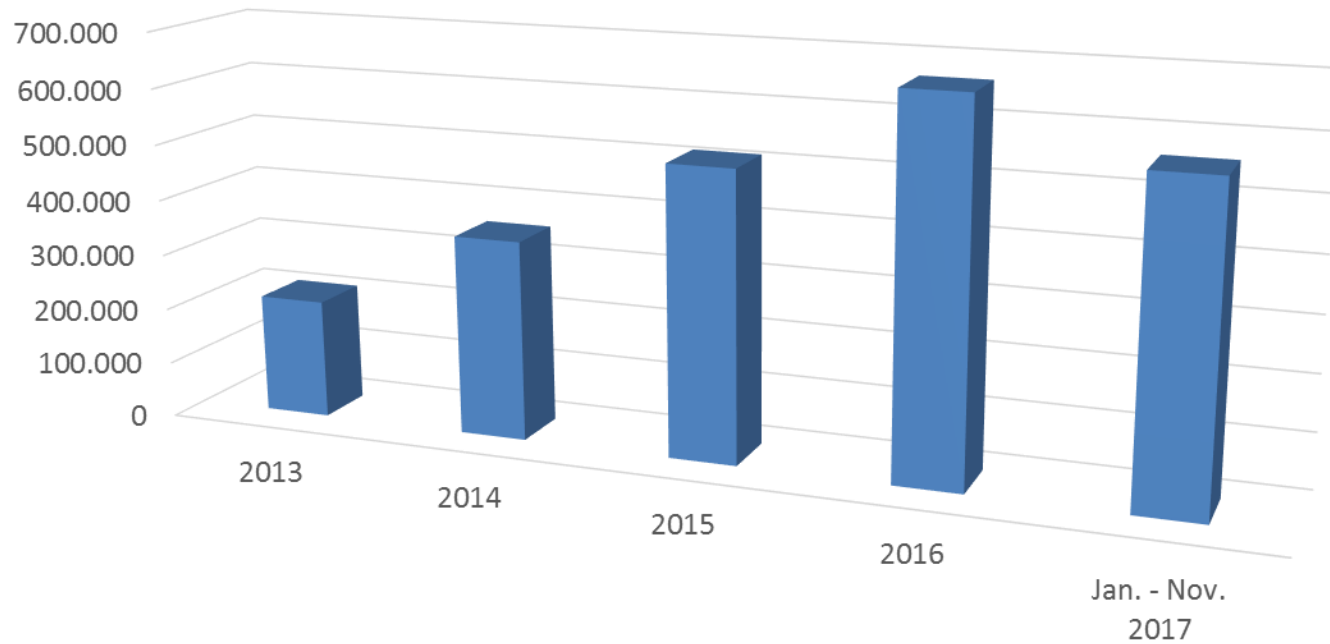
Main Argentine Pulses Export Destinations (Metric Tons) 2013-2017



Argentine Total Pulses Exports (FOB in thousand U\$D)



Argentine Total Pulses Exports (Metric Tons)



Final comments:

- Argentina is a natural leader agricultural producer. We can provide what the world food market needs, as a strategic geopolitical ally for many countries.
- Becoming the world's food supermarket is one of Argentina's goals, and from the Ministry of Agroindustry we are devoted to reach that goal, with the focus on:
 - i. Becoming more competitive
 - ii. Reducing bureaucracy
 - iii. Opening new global markets for Argentine products

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