

FOCUS PULSES

Trusted.
Independent.
Committed.

2024 Edition

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SGS

Exploring Pulses

An Introduction

For millennia, humans have been cultivating and consuming pulses. These dried legume seeds, including varieties such as beans, chickpeas, lentils, and peas, have played a significant role in many cultures and have continued to nourish societies globally.

Pulses are a staple in many global diets, offering a low-fat protein source packed with vital nutrients like iron, potassium, and folate^[1]. The various health advantages of consuming pulses have led to the sale of plant-based foods outpace non-plant-based food sales by threefold in 2021 alone, spurred by consumers' growing preference for plant-based diets and use as a meat alternative. This growth is poised to continue, with projections estimating a market size of 118.96 MMT by 2032, growing at a CAGR of 1.7% between 2024 and 2032^[2].

Culinary applications of pulses are diverse, with traditional dishes across Asia, Africa, and America featuring their nutritious seeds. From soups and spreads to main courses and snacks, they are key ingredients in iconic dishes such as Mediterranean hummus and Indian dal and traditional English breakfasts.

In this Focus on Pulses newsletter, we examine key trends in the global market, and various challenges that exporting countries face, highlighting how our trusted experts support the industry – whether on the ground or in the laboratory. Gain valuable insights from the leading player in the global pulses market.

Read on to learn more.

"My experience with SGS has been nothing short of exceptional. They have set the benchmark for excellence in pulse inspection services, and I have no hesitation in recommending them to anyone seeking reliable and efficient solutions. Thank you, SGS, for your unwavering commitment to excellence."

Kartik Avlani

Founder and Business Head, Grains and Spices.

[1] Delicious and Nutritious - Pulse recipes, facts and videos. (n.d.). <https://pulses.org/future-of-food/pulses-nutrition>

[2] Global Pulses Market Report and Forecast 2024-2032. (n.d.). Expert Market Research. <https://www.expertmarketresearch.com/reports/pulses-market>



Our Commitment to Excellence

Did you know that in recognition of their importance, in 2019, the United Nations General Assembly formally declared February 10th as World Pulses Day?^[3]

The global agricultural commodities supply chain presents opportunities and challenges. While you can easily access a huge range of markets and commodities, you must ensure that your goods meet the necessary quality and quantity parameters, fulfill contractual obligations, and meet local and international standards and regulations.

For over 145+ years, we have been renowned for our independence, accuracy, and technical excellence, offering a unique, industry-leading depth and breadth of solutions. As global leaders in grains and oilseeds testing, we provide unmatched agricultural expertise and innovative solutions tailored to cover the entire supply chain. With our vast network of offices and state-of-the-art laboratories by your side, we can ensure that your testing, inspection, risk management, and fumigation needs are met.

Start your journey to excellence today. Contact us and take the first step towards creating an easier, more effective approach to agricultural trading.



Testing



Inspection



Risk Management



Fumigation & Pest Management

[3] United Nations. (n.d.). World Pulses Day | United Nations. <https://www.un.org/en/observances/world-pulses-day>





Focus on: Australia

Wide-spread agri-capabilities

Since being founded in 1950, our agricultural services in Australia have seen consistent growth and expansion, solidifying our position as a key contributor to the nation's agriculture industry.

Our operations include two key laboratories specializing in agricultural commodity testing, and three offices that oversee our trade and inspection services for our agri-business. These are located across Perth, Western Australia; Adelaide, South Australia; and Melbourne, Victoria. Our vast network of dedicated professionals is also located at various packing locations throughout the country and port terminals.

Spearheaded by our status as Grains and Feed Trade Association (Gafta) and Federation of Oils, Seeds, and Fats Associations (FOSFA) approved Superintendents and accredited for ISO 17020, we provide a comprehensive and seamless range of solutions for pulses. These solutions include sampling, testing, and on-site inspection at inland packing facilities, and bulk export terminals for pulse commodities. Furthermore, on behalf of the Australian Government, our team is authorized to inspect vessels and cargo at port to ensure they meet phytosanitary requirements for the destination country.

In the past year, our laboratory in Perth has expanded its scope of services to include certification from the Grain Trade Australia, authorizing us to test pulses exported from Western Australia.

At our facilities, we analyze over 500 pulse trade samples annually. This includes lentils, lupins, chickpeas, beans, peas, and vetch.

Simultaneously, we certified 22 million metric tonnes (MMT) of wheat, barley, canola, sorghum, and pulses.

Market challenges

In the global pulse export market, Australia is a prominent player as the largest exporter of chickpeas and broad beans. They are also the second-largest exporter of lentils after Canada; and the fourth and fifth-largest exporter of mung beans and peas, respectively.

Despite weather-related challenges affecting crop production, the quality of lentils and desi chickpeas improved during the 2023/24 season, compared to the drop in crop production of 2022/23.

"Working with SGS has been a game-changer for our business. Their commitment to maintaining the highest standards ensures that our products consistently meet the expectations of global buyers. Their team's professionalism and efficiency have been remarkable, providing quick turnarounds and cost-effective solutions. SGS has undoubtedly earned our trust and admiration, and we look forward to continuing our successful partnership with them."

Jay Saraff

Director, Mandala Trading Pty Ltd



Focus on: The Baltics

Multi-country Operations

Our agricultural operations in the Baltics began in 1992. In the 30+ years since; our footprint has expanded to include a network of 13 laboratories across the region.

Stretching across multiple countries, our reach includes six laboratories in Latvia's cities of Riga, Ventspils, and Liepāja; and two each in Lithuania's Klaipėda, Estonia's Muuga and Sillamäe. The most recent addition is an express laboratory in Sillamäe, inaugurated within the last year.

Supporting these laboratories, we have five Agri-trade offices located in Riga, Ventspils, Liepāja, Klaipėda, and Tallinn. Across the Baltics, our team comprises 117 full-time professionals, all dedicated to serving the agricultural industry.

Accredited for Excellence

Ensuring the best in services, our laboratories boast multiple accreditations and certifications. For example, our laboratory in Klaipėda, Lithuania is a FOSFA-certified Approved Analyst for oilseed testing. Furthermore, our operations in Latvia and Lithuania have achieved Gafta-approved Superintendents, Analysts, and Fumigators status.

We offer a wide range of services across the Baltics, including intake control, loading inspection for containers or shipments, laboratory services in line with ISO 605 standards for testing pulses for human or animal consumption, and proficiency testing in cereals and agri-food certified by BIPEA.

Furthermore, we provide fumigation services. Each year, our team inspects over 350 kilo metric tonnes (KMT) of pulses, providing more than 150 different analytical services, demonstrating our extensive capabilities and commitment to the agricultural sector.





Focus on: Canada

Operational Offerings

Across Canada, our operations are spread across six states with eight offices and three laboratories in Prince Rupert, Vancouver, Calgary, Saskatoon, Winnipeg, Hamilton, Thunder Bay, Burnaby, and Montreal. Initially founded in 2000, our agricultural team comprises over 250 full-time employees who support these various facilities.

In Burnaby and Vancouver, both in British Columbia, our laboratories are FOSFA-certified and specialize in analyzing oils, fats, and oilseeds. We are also Gafta-approved Fumigators, Analysts, and Superintendents which verifies us for excellence in our testing and inspection solutions, including supervision of loading and discharge operations.

We are also accredited with ISO 17025 and ISO 17020, which reflects our competence, impartiality, and consistency in operations. Additionally, we are verified by the Non-GMO Project to conduct GMO testing on agri-commodities.

We are also authorized by the Canada Food Inspection Agency (CFIA) to provide grain testing services as part of the REGAL program, which includes testing for live insects.

Wide-range of solutions

With our various accreditations and certifications, we offer remote inspections of containers/railcars during a comprehensive range of solutions for the agriculture industry. This includes on-site and loading, quality analysis to Canadian, U.S., or ISO standards, Glyphosate testing, and GMO testing.

In the future, we intend to broaden our analytical services to encompass testing for fats, fibers, starch, ash, and proteins in pulses.

As part of our commitment to sustainable practices, we expanded our capabilities in January 2023 to include Sustainable Carbon Tracing. This allows us to include total carbon footprint reduction on certificates for each client using our remote inspection services.

Market Overview

In the last five years, North America has seen a surge in the need for pulse protein for pet food and household consumption. Canada is renowned for its high-quality lentil and pea pulse crops, which are exported globally. However, the market has limited supplies of yellow peas and green lentils until the 2024 harvest and can struggle with frequent price changes. As such, this may lead to potential grievances from buyers.

Despite this, SGS is strategically positioned worldwide to help address such issues. In fact, during the 2022/2023 fiscal year, we inspected over 4 MMT of pulses and provided over 550,000 analytical reports to our clientele.



Focus on: India

Strategically located operations

Our agricultural operations in India began over 70 years ago. In the years since we have expanded our footprint greatly, and the country now houses five specialized agriculture laboratories. Strategically located in Chennai, Manesar, Kolkata, Indore, and Ahmedabad, these hubs of research and innovation are supported by an additional eight trade offices and 15 operational bases scattered across the country in cities like Mumbai, Gurgaon, Hyderabad, Krishnapatnam, Tuticorin, Cochin, and Guwahati.

A dynamic team of 250+ full-time analysts, inspectors, and commercial team members who work diligently across these facilities to ensure seamless operations. The laboratories hold prestigious certifications including ISO 17025 accreditation, Export Inspection Agency (EIA), and Food Safety and Standards Authority of India (FSSAI) recognitions, among others. Four of our labs are Gafta-approved and well equipped to analyze all type of pulses.

Continued development

As part of our future goals, we aim to expand our services into the domestic trade market, focusing on inspection and spot testing during the procurement of pulses.

Currently, our comprehensive solutions for pulses commodities range from quality and quantity verification to analytical and guarantee services. These solutions include visual inspections, sampling and testing, packaging and label verification, and real-time reporting, among others. Our commitment to continuous improvement has also led us to recently broaden our agrochemical residue testing in pulses, covering MRLs for the EU, FSSAI, and other country-specific requirements.

Overcoming challenges

Despite the challenges faced by the industry, such as price fluctuations, pest and disease infestations, climate change, and limited access to quality seeds, India's agricultural sector continues to thrive.

At SGS, our independent and committed testing and inspection solutions will continue to play a crucial role in ensuring the right quality and correct quantity are traded at every point of transaction.



Focus on: Pakistan

Comprising of two laboratories and seven trade offices, our operations in Pakistan have greatly expanded since we first launched in the country in 1952.

Centered around pulse-related services, we operate from the vibrant cities of Karachi, Lahore, Islamabad, and Multan. To ensure excellence throughout, a dedicated team of over 315 inspectors, analysts, technicians, and commercial team members oversees our proceedings.

Certified Capabilities

Our comprehensive suite of solutions is tailored to cater to every requirement across the pulses supply chain. We provide a plethora of services, including sampling, chemical and microbiological testing, supervision of loading and discharge, draught survey, warehouse inspections, verification of packaging and bag marking, as well as dispatch supervision from the port to the end buyer.

In addition, our disinfection and fumigation services include pre-shipment treatment of wooden packaging materials, non-toxic pest management, and Integrated Pest Management (IPM) for grain warehouses. All these services are designed to ensure the highest quality and safety standards.

We are also authorized to conduct joint surveys and consultancy services for Pakistan's Government Department of Plant Protection.

As of 2022, SGS Pakistan stands as the only Gafta-approved fumigator in the country. In the past year alone, we have completed over 550 types of analyses and conducted inspections on more than 130,000 MT of pulses commodities, including beans, chickpeas, lentils, and matpe.

Supported by several accreditations and membership with qualifying bodies, including ISO 17025, ISO 9001, ISO 17020, and a certified status as Gafta-approved Superintendents, Analysts, and Fumigators. These certifications vouch for our commitment to quality management, consistent inspection activities, and our ability to produce valid laboratory results.

Market Challenges

Despite facing a historic surge in pulse imports in 2023 and massive price fluctuations, we have been able to adapt and continue our operations. The pulses market in Pakistan differs significantly from other major agri-commodities like rice and corn, with the majority of pulse traders actively importing due to the country's production deficit.

We understand the challenges importers face, such as receiving damaged and infested cargo within containers and weight shortages. To assist them, we have reduced our initial reporting time to two working days after job execution.

Despite these challenges, we remain committed to delivering top-quality services to our clients.



Focus on: Singapore

Since establishing our presence in Singapore in 1971, we have been eager to assist with your business operations.

Our Singapore team serves as a vital link between clients and our wealth of local and international experts, catering specifically to customers engaged in the South East Asia Pacific (SEAP) pulses markets.

Operating from Singapore, our team ensures smooth and uninterrupted delivery of services across the region.

Value-add support services

You can rely on our expertise to coordinate all activities, including:

- Operations
- Sales
- Customer care

We work for you to protect your interests and reduce your risk, ensuring your commodities meet global standards for quality and excellence.



Meet the team

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Our unrivaled regional team

Our agriculture commodities expertise stretches globally. Combining local in-depth knowledge and the latest worldwide industry best practices, we work for you to protect your interests and reduce your risk, ensuring your commodities meet global standards for quality and excellence.

We are SGS – the world's leading testing, inspection, and certification company. With 25 testing laboratories and 30+ trade offices, all specializing in solutions for pulses, you can be assured that we can safeguard and strengthen your pulses trading operations.



325+

Years of combined
experience

25

Specialized
laboratories

32

Trade offices

Gafta
FOSFA

Members

Trusted. Independent. Committed.



Contact us

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When you need to be sure