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Report Name: 2025 Pulses Report

Country: China - People's Republic of

Post: Beijing

Report Category: MISC-Commodity

Prepared By: FAS China Staff

Approved By: Adam Branson

Report Highlights:

Pulse production has continued to decline over the last few years while the country remains a top importer of dry peas and mung beans. The main pulses produced and consumed are mung beans, dry peas, fava beans, kidney beans, adzuki beans, chickpeas, and lentils.

OVERVIEW

The forecasts and revised estimates provided in this report are issued by FAS China and are not official USDA data. FAS China provides this analysis as part of its required reporting to maintain a worldwide agricultural information system and support a level playing field for U.S. agriculture.

Pulse[1] production has been declining for several years as government policies encourage farmers to produce higher value feed grain crops, such as corn and soybeans, that align with the Chinese Communist Party's (CCP) food security goals. Please refer to FAS GAIN Report CH2024-0031 for more information on China's food security strategies and policies. In addition, farmers are also switching to vegetables and fruits that have higher potential profits.

The main pulses produced in China include mung beans, dry peas, fava beans, kidney beans, adzuki beans, chickpeas, and lentils (See Table 1). Pulses are grown mostly in mountainous areas with unfavorable weather conditions in the northeast, northwest, and southwest regions of China. Historically, China was a major producer and exporter of these commodities but is now a net importer. China was the second largest importer for total pulses, the top importer of dry peas, and the second largest importer of mung beans globally in MY 2023/24 (October to September). China continues to export a limited amount of dried mung beans, kidney beans, and adzuki beans to Asian countries. In MY 2023/24, China exported 100,552 MT of canned beans (shelled or not shelled) with the primary destinations being Japan, South Korea, and Yemen, accounting for 76 percent of total volumes, and exported 18,739 MT of canned peas.

Table 1. China: Production Areas of Major Pulses in China

Pulses names	Province/Area
Dry peas	Gansu, Heilongjiang, Liaoning, Yunnan,
Lentils	Gansu, Shaanxi, Xinjiang
Chickpeas	Xinjiang
Kidney beans	Heilongjiang, Inner Mongolia, Yunnan
Mung beans	Inner Mongolia, Jilin
Fava beans (dried)	Qinghai, Inner Mongolia, Jiangsu, Yunnan,
Azuki beans	Inner Mongolia, Yunnan, Heilongjiang

Source: Industry Sources

The planting and harvesting time vary depending on the planting regions. In Northern China, pulses often grow during spring (March to May), then farmers harvest from summer to autumn (July to September), while in Southern China, where the weather is warmer and more humid, pulses are planted between September and October, with farmers harvesting during spring.

[1] The term "Pulses" refers to the Food and Agricultural Organization (FAO) definition: Legumes dried for food and not devoted for oil purposes or harvested green (fresh). Examples include dried beans, peas, lentils, and other dried leguminous crops. Major pulses produced and traded in China include dry peas, lentils, chickpeas, mung beans, dried fava beans, kidney beans, azuki beans, and others.

Table 2. China: Production, Supply, and Distribution of Pulses

Country	China, People's Republic of							
Commodity (1,000 tons)	Dry Pea		Kidney Bean		Lentil		Chickpea	
	2023/24	2024/25	2023/24	2024/25	2023/24	2024/25	2023/24	2024/25
Market Year Begin	10/2023	10/2024	10/2023	10/2024	10/2023	10/2024	10/2023	10/2024
Beginning Stocks	34	434	1	0	0	0	0	0
Production	55	50	112	151	15	20	10	12
MY Imports	2,219	1,500	37	32	10	13.2	25.6	30
Total Supply	2,308	1,984	150	183	25	33.2	35.6	42
MY Exports	4	4	77	83	1.5	5.6	0.1	0.1
Total Dom. Cons.	1,870	1,680	73	98	23.5	27.6	35.5	41.9
Ending Stocks	434	300	0	2	0	0	0	0
Total Distribution	1,874	1,684	150	181	25	33.2	35.6	42

Note: Post Estimates; Not Official USDA Data.

Table 3. China: Production, Supply, and Distribution of Pulses, Continued

Country	China, People's Republic of					
Commodity (1,000 tons)	Mung Beans		Fava Beans (dried)		Adzuki Beans	
	2023/24	2024/25	2023/24	2024/25	2023/24	2024/25
Market Year Begin	10/2023	10/2024	10/2023	10/2024	10/2023	10/2024
Beginning Stocks	1	10	2	3	2	5
Production	160	150	255	250	352	350
MY Imports	572	590	4	5	24	26
Total Supply	733	750	261	258	378	381
MY Exports	56	60	9	8	38	40
Total Dom. Cons.	667	690	249	250	335	341
Ending Stocks	10	0	3	0	5	0
Total Distribution	723	750	258	258	373	381

Note: Post Estimates; Not Official USDA Data.

PRODUCTION

Pulse production reached its peak between 2002 to 2005. Pulse production, however, has declined with government programs incentivizing the production of higher value feed grain crops (e.g., corn and soybeans) and changing eating habits of Chinese consumers from staple foods to a more diverse diet. The changing eating habits have encouraged growers to grow higher value vegetables and fruits in places that traditionally grew pulses, reducing the potential production area for pulses.

Dry Peas

Dry pea production is forecast at 50,000 MT in MY 2024/25. Production of dry peas continues to decline from fierce competition from imports that have lower prices and higher quality compared

to domestic dry peas. Domestically produced dry peas are often consumed locally, and, in some areas, dry peas are grown just for family or neighborhood consumption, making the supply of domestically produced dry peas uncertain for processing facilities. In addition, fresh peas are seasonal vegetables for cooking in China, with a production of about 10 MMT per year. Farmers sometimes dry fresh peas for storage purposes, changing the end use based on market conditions.

Lentils and Chickpeas

Post forecasts lentil production at 20,000 MT and chickpeas production at 12,000 MT in MY 2024/25. Favorable weather conditions and expanded demand for lentils and chickpeas nation-wide have contributed to a rebound in lentil and chickpea production in MY 2024/25. Drought over the last few years affected yields and production in the northwest region, but favorable weather helped yield and production rebound this year. Lentils and chickpeas were traditionally grown and consumed in the northwest region and, historically, were not very popular in other areas of China. However, both are now more widely consumed throughout China. Mulei County in Xinjiang Province is famous for its chickpeas and now has a geographic indication recognition for chickpeas grown there.

Kidney Beans

Kidney bean production is expected to increase in MY 2024/25 to 151,000 MT from 112,000 MT in MY 2023/24. Higher prices in MY 2023/24 encouraged a larger planting than the previous year, with the planting area expected to continue to increase in MY 2024/25. China has historically been a major producer of kidney beans, especially in northern China. CCP incentives and programs to encourage farmers to grow high value feed crops, such as soybean and corn, have discouraged farmers from planting kidney beans. The planting area fluctuates year to year, influenced by competitive market prices, demand, and both central and local government policies. The most planted kidney bean varieties in China include dark red, purple/red kidney beans, and light speckled kidney beans.

Mung Beans, Fava Beans, and Adzuki Beans

Production of mung beans continues to decline with an estimated production of 150,000 MT in MY 2024/25. Domestic production of mung beans has dropped since the record production of 1 MMT in MY 2002/03 and MY 2003/04. Farmers who planted mung beans in the past have switched to planting sorghum and corn, or other higher profit crops, such as fruits and vegetables.

Production of fava beans (dried) and adzuki beans are forecast to remain stable in MY 2024/25 at 250,000 MT and 350,000 MT, respectively. China is the top fava bean producer in the world, with fresh fava beans accounting for about 80 percent of total production. Adzuki bean is a traditional crop in China. Adzuki bean production has remained relatively stable over the past ten years.

CONSUMPTION

Consumption of pulses in China are either through direct consumer consumption, such Chinese congees or homemade sprouts for cooking, or through industrial processed food, such as canned food, snacks, and animal feed products. Chinese people traditionally add dried beans to cook mixed staple foods, such as rice with mixed grains and beans, beans congee/porridge, and soup. In some regions, people also have a tradition of eating sprouts of dried peas and beans. China published its Dietary Guidelines 2022 edition (link in Chinese), recommending daily consumption of coarse cereals and a variety of pulses to enhance nutrition.

Health conscience consumers in China are eating more pulses for their low fat and higher protein content. Consumers in China prefer pulses with a bigger size, thinner skin, and a silky and buttery texture. Consumers look for "organic" and "one crop life per year[2]" as these slogans convey a higher quality and better nutrition from rich soil.

The proteins and fibers extracted from pulses can be used in food processing to produce health foods, supplements for infants and children, plant-based foods, snack foods, bakery, and sports drinks. The starch can be used in noodles and sausages. Some fast-food producers offer fast cooking rice with dried beans and peas, powdered soybean milk drink with dried beans, or pre-made food (e.g., rice or noodles with vegetables and beans that have been cooked and are ready to eat after heating for a few minutes), demand for which is increasing among the younger generation in China as they do not often cook at home.

Dry Peas

Post forecast consumption of yellow dry peas to decrease and consumption of green dry peas to increase in MY 2024/25. China remained the largest consumer of dry peas in the world in MY 2023/24, as the feed industry and deep processing (e.g., pea protein, starch, and fiber) are the largest consumers of yellow peas.

Yellow peas are used for feed and industrial deep processing (e.g., producing protein, starch, and fiber). They are also used as ingredients of traditional foods such as stuffings, side dishes with noodles, and pastries. Pea protein is an ingredient in meat alternatives or substitutes, yogurt, sport drinks, and health food products. Pea starch is used to make a special vermicelli noodle called "*Fen Si*." Vermicelli (*Fen Si*) is a very popular Chinese food that can be cooked in hotpots, as a fried dish, or with steamed seafood. Pea fibers are used for bakery, meat products including sausages and dried meat floss, health foods, pet food, and in industrial pet products such as cat litter. Food processors use green peas to produce snacks, bakery goods, canned foods, pre-made dishes, and vegetarian cuisines. With consumers becoming more concerned with purchasing healthier foods and with the impact their food choices have on the environment, food processors anticipate more dry peas usage in food production in the coming years. Food processors in China regard U.S. green peas as high-quality and use U.S. green peas for food production (e.g., bakery, snacks, and healthy dietary foods).

[2] Growers use this slogan to distinguish pulses that are harvested from land used to produce one crop instead of multiple to signify a higher quality and better nutrition.

The usage in feed production increased dramatically over the past four years as COVID impacted prices of feed ingredients and supply chains, such as soybeans and corn. Industry sources reported that in previous years, roughly 60 percent of dry peas were processed for feed production, including pigeon feed, and another 30 percent were ingredients for deep processing, while the remaining 10 percent were for snack and other food production. As the supply of traditional feed ingredients improved, demand for dry peas in feed production will drop. The Chinese pea protein industry is facing antidumping duties and countervailing duties that could impact certain pea protein exports to North America (see Trade Section) and will likely lower demand for yellow peas in the deep processing industry.

Lentils and Chickpeas

Lentils are popular in the northwest for producing sprouts and "Liang Fen" (a type of bean jelly). Lentils and chickpeas are gaining popularity with their inclusion in innovative recipes with both appearing more frequently in restaurants and home cooking. In northwest China, green lentils are grown to produce sprouts and noodles, while green and red lentils are both used for cooking congee/porridge and soup. Chickpeas are often used in snacks, salad, canned food, sauces, bakery goods, and ready-to-eat drink powder. Industry contacts reported that domestic chickpeas are used mostly for snacks as they tend to be smaller and have uneven sizes.

Kidney Beans, Fava Beans, Mung Beans, and Adzuki Beans

Industry reports China's annual consumption of mung beans is around 700,000 MT in recent years. Kidney beans, mung beans, and fava beans have a long history throughout China. Mung bean sprouts are popular ingredients in spring rolls, especially during the Chinese Festival at the start of spring (*Li Chun* 立春). Mung beans are often used in soup, mung bean paste cake, congee/porridge, even popsicle during the summer - Chinese people believe bean popsicles will help with summer heat. Some regions use mung beans to produce vermicelli noodles in a more traditional way. Its protein can be used for plant meat, solid drink, and energy bars. Adzuki, mung beans, and other beans sometimes will be used as feeds for small pets or birds.

Fava beans are mainly used for cooking, snacks, and in canned foods. The fried fava beans are a popular snack and side dish in Sichuan Province as a special flavored food. Dried fava beans are also used to produce plant-based milk beverages, drink powders, bakery items, food coatings, and health products.

TRADE

Imports

China is a net importer of pulses, importing 3 MMT in MY 2023/24. China is the second largest importer for total pulses, the top importer of dry peas, and the second largest importer of mung beans globally in MY2023/24.

China's imports of dry peas in MY 2024/25 is expected to drop by 32 percent as trade sources anticipate global dry pea exporters will shift some of their exports to India. Between 2021 to

2023, India lifted tariffs and trade quotas that it had imposed since 2017 to protect its domestic sector (please refer to FAS GAIN Report IN2024-0037 for more information). With the removal of the trade restrictions, pulse exports to India increased dramatically. During the first ten months of 2024, India's imports of pulses almost doubled from the same period in 2023 (increased from 2.8 MMT to 5.5 MMT), with dry peas[3] increasing the most from 0 MT to 2.5 MMT. The current extension of duty-free imports of yellow peas is set to expire at the end of February 2025. If India does not extend the duty-free imports, exports to India may drop, which could shift some of the exports back to China as the second importer of pulses in the world.

Major dry pea suppliers to China include Russia, Canada, the United States, Australia, and France. Russia gained market access for dry peas to China in late 2022 and, in MY 2023/24, quickly surpassed Canada as the top dry pea supplier. Industry sources indicate that Russia will continue to be the top supplier as it benefits from lower prices, shorter shipment times, and can settle payments in *Renminbi*. Russia and Canada accounted for over 92 percent of China's total dry pea imports in MY 2023/24. The United States was a distant third supplier of dry peas to China.

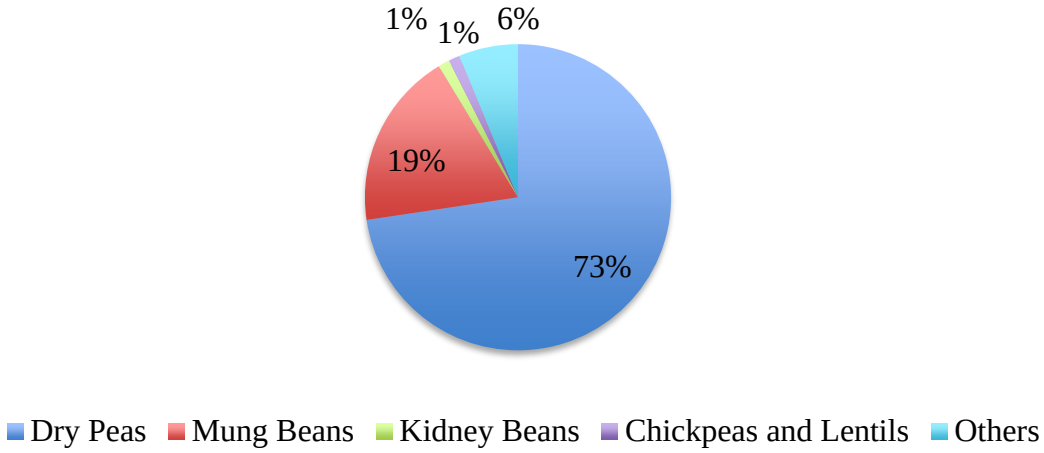
In 2024, the U.S. Department of Commerce and the Canadian International Trade Tribunal announced affirmative determinations in the antidumping (AD) and countervailing (CVD) investigations of certain pea protein from China, resulting in additional duties on certain Chinese facilities exporting pea protein to the United States and Canada. Please refer to the U.S. Department of Commerce's website and Canadian Tribunal's website for detailed information. These AD/CVD actions will impact the amount of yellow pea exported to China; however, U.S. green peas will not be impacted as much since U.S. green peas are mostly used for human foods consumption in China.

The importation of kidney beans and adzuki beans is expected to remain relatively stable, with a slight decrease of kidney bean imports. As kidney and adzuki beans are traditionally consumed varieties and consumption is stable, import volumes will depend on prices and domestic supplies.

The demand for mung beans, chickpeas, and lentils is expected to increase due to higher domestic consumption. Increased demand from India, however, could increase global prices and limit imports.

[3] HS Code: 071310.

Chart 1. China: Percentage of Imported Pulses



Source: Trade Data Monitor, LCC

Table 3. China: Dry Peas Imports (H.S. Code: 071310)

Country (Unit: MT)	MY 2021/22	MY 2022/23	MY 2023/24
Russia	0	276,517	1,087,826
Canada	1,329,075	1,511,108	955,663
United States	8,786	31,145	78,794
Australia	165,103	75,467	50,149
France	62,398	0	35,565
Others	28,650	7,480	11,472
Total	1,594,012	1,901,717	2,219,469

Source: Trade Data Monitor, LCC

China's imports of mung beans increased substantially from 113,368 MT in MY 2018/19 to 572,385 MT in MY2023/24. The major suppliers include Burma and Uzbekistan, accounting for 76 percent of total imports of mung beans.

Table 4. China: Mung Beans Imports (H.S. Code: 071331)

Country (Unit: MT)	MY 2021/22	MY 2022/23	MY 2023/24
Burma	381,944	285,136	311,810
Uzbekistan	130,849	128,244	121,408
Australia	87,664	47,173	61,727
Others	68,731	79,427	77,440
Total	669,187	539,980	572,385

Source: Trade Data Monitor, LLC

The United States, Turkey, and Burma are the major suppliers of lentils to China, exporting a total of 10,140 MT of lentils in MY 2023/24, accounting for 99.9 percent of total lentils imports. Turkey and India are the top suppliers of chickpeas to China, exporting 25,439 MT of chickpeas in MY 2023/24.

Table 5. China: Lentils Imports (H.S. Code: 071340)

Country (Unit: MT)	MY 2021/22	MY 2022/23	MY 2023/24
United States	4,257	19,888	3,601
Turkey	3,735	5,127	3,278
Burma	13,039	687	3,261
France	1	1	3
Total	21,032	25,703	10,143

Source: Trade Data Monitor, LLC

Kidney bean exports to China remain steady, with the import in MY 2024/25 forecast slightly lower at 32,000 MT. Burma, India, and the United States are the top suppliers of kidney beans to China.

Table 6. China: Kidney Bean Imports (H.S. Code: 071333)

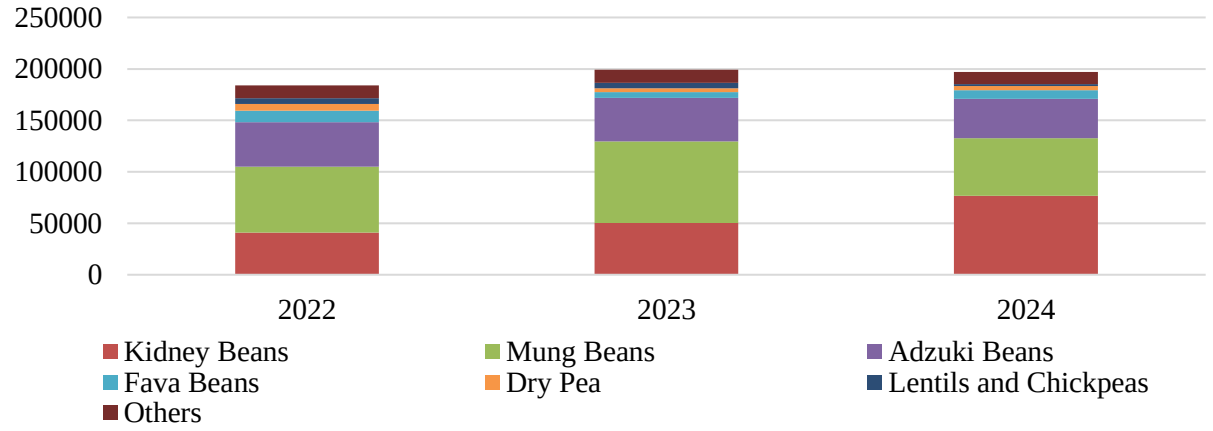
Country (Unit: MT)	**MY 2021/22**	**MY 2022/23**	**MY 2023/24**
Burma	36,490	13,144	14,636
India	0	10,951	9,540
United States	2,888	5,069	8,742
Others	3,906	7,739	3,772
Total	43,284	36,903	36,690

Source: Trade Data Monitor, LLC

Exports

The China's export of pulses is forecast to increase to 300,000 MT in MY 2024/25. China exported a total of 196,907 MT pulses to the world in MY 2023/24, top destinations include Japan, South Korea, and India. China primarily exports kidney beans, mung beans, and adzuki beans. Exports are expected to increase in MY 2024/25 due to reduced domestic industrial and feed consumption.

Chart 2. China: Pulses Exports (MT in MY)



Source: Trade Data Monitor, LLC

China was a major exporter of kidney beans before MY 2013/14, exporting over 700,000 MT of kidney beans annually. Due to a dramatic reduction in planting area, China's kidney bean exports dropped to 76,735 MT in MY 2023/24. The top destination for Chinese kidney beans is India, accounting for 32 percent of export volumes.

China was also a top exporter of mung beans but has since declined due to a lack of supply. In MY 2023/24, China exported 55,881 MT of mung beans, mostly to Japan (30,966 MT), and exported 38,227 MT of adzuki beans mostly to Asian countries, such as South Korea and Japan. China also exported 8,627 MT of fava beans in MY 2023/24, with about 92 percent going to Mexico, Thailand, and Japan.

POLICY

Tariffs

Pulses are subject to retaliatory tariffs as outlined in Table 3. Importers can apply for exemptions of specific products under retaliatory Section 301 tariffs. Please refer to FAS GAIN report CH2020-0106 for more information on China's current retaliatory tariffs and the exclusion processes.

Table 7: Chinese Import Tariff Rates on U.S. Pulses

HS Code (8-digit)	Description	MFN* Rate	Section 232 Tariffs	Section 301 Tariffs	Total Applied Tariff without an Exclusion
07131090	Dry Peas, Shelled	5.0%	N/A	27.5%	32.5%
07133390	Dry Kidney Beans	7.5%	N/A	30.0%	37.5%
07134010	Dry Lentils, Shelled	0%	N/A	25.0%	25.0%

Source: China Customs Import and Export Tarriff

Subsidy

No local or central government provide subsidies to grow pulses in China. On the contrary, incentives are provided to encourage growers to produce major grain crops, further discouraging growers from planting pulses.

Registration

U.S. pulses companies need to register with the General Administration of Customs of the People's Republic of China (GACC) before sending product to China. GACC maintains an official website where facilities may confirm their registrations status: list of approved U.S. pulse facilities (please note that GACC incudes pulses in the grains list). U.S. companies and exporters whose establishments/facilities are not currently on the registered list or that would like to update facility information should reach out to:

USA Dry Pea and Lentil Council
American Pulse Association
Attn: Jeff Rumney, PhD, Vice President of Marketing
jrumney@usapulse.org

After a review, the registration information and email correspondence will be sent to FAS China for further processing with DAPQ. Questions can be sent to FAS China Office at FASChinaDAPQRegistrations@usda.gov.

Additional Resources

Please refer to FAS GAIN Report CH2021-0114 for the previous pulses report and FAS GAIN Report CH2024-0120 for China's peas and plant-based conference held in 2024.

Attachments:

No Attachments.