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- NO PULSE MARKET NEWS THIS WEEK



USA Pulses China marketing representative Irene Zhou led the U.S. pulse industry delegation at the GPC Qingdao conference in August, where the team met with Chinese buyers and discussed U.S. supply, quality, pricing and market access. From left are Zhou; Moiz Akhtar, Sinamco Trading; Jay Gnanasekaran, Commercial Lynks; Alex Petersen, Sinamco Trading; Justin Flaten, Trutana Foods; and Jason Yep.



NAVIGATING CHANGE IN EVOLVING GLOBAL MARKETS

SHIFTING TARIFFS, TRADE BARRIERS AND COMPETITIVE PRESSURES ARE CHANGING WHERE U.S. PULSES CAN COMPETE AROUND THE WORLD.

By Drex Rhoades, Dir. of Communications

I had someone ask me recently how the trade situation is affecting the U.S. pulse industry. The easy answer is it really isn't helping. A rapidly changing trade landscape is reshaping competition for U.S. peas, lentils, chickpeas and dry beans around the world. In the coming weeks, this newsletter will publish a stocks-on-hand analysis that is being reviewed as I write this. The USA Pulses Stocks report uses USDA figures and industry survey information to evaluate total production and compare it with domestic and international use of U.S. pulses. Ultimately, we'll know what inventory is available for future sales, and that will give us a clue as to how the current turbulent trade environment is affecting our industry. As we anticipate this report, however, we should take a look at the tariff situation in the U.S. and how it affects pulse exports.

For U.S. pulse producers, a tariff imposed thousands of miles away can ultimately affect something much closer to home: who buys the crop, what buyers can offer and where the next export opportunity emerges.

USA Pulses' latest review of tariffs and trade barriers, updated Aug. 6, paints a picture of an industry

challenged by limited access to key global markets. Depending on the crop, a substantial share of U.S. pulse production is sold into export markets each year. Current projections reflect last year's export levels and may change as the marketing year progresses. For reference, U.S. pulse exports totaled \$1.2 billion in 2024-25.

Developments since the Aug. 6 tariff report was completed demonstrate just how quickly the landscape can change.

CANADA: PULSES STAY OUT OF THE LINE OF FIRE

When USA Pulses completed its tariff review in early August, trade tensions between the United States and Canada were already a concern. One of the industry's priorities was straightforward: keep pulses excluded from any Canadian retaliation against new U.S. tariffs. That concern became considerably more immediate just weeks later.

Canada announced counter-tariffs on \$27.6 billion in U.S. imports, effective Sept. 8, following the imposition of additional U.S. tariffs on Canadian products. According to the Department of Finance Canada, the new tariffs range from 15% to 50% and



from the creative mind of
Jacob Slabaugh
Chef and Project Manager
for USA Pulses

LEMON-HERB LENTIL & WHITE BEAN SALAD

YIELD: 2-4 SERVINGS

INGREDIENTS

Salad

1 cup	dry Pardina lentils
1	bay leaf
1 clove	garlic, smashed
1 (15 oz.)	can navy beans, drained and rinsed
1	English cucumber, diced
1 cup	cherry tomatoes, halved
¼	medium red onion, finely diced
½ cup	Kalamata olives, chopped
¼ cup + 1 Tbsp	fresh dill (¼ cup chopped, plus 1 tablespoon whole fronds for garnish)
2 Tbsp	fresh mint, chopped
to taste	salt
½ cup	crumbled feta cheese, for garnish
as desired	extra virgin olive oil, for garnish

This vinaigrette contains raw egg yolk. Consuming raw or undercooked eggs may increase your risk of foodborne illness, especially if you have certain medical conditions.

DIRECTIONS

1. Rinse the Pardina lentils and cook them in plenty of lightly salted water with the bay leaf and smashed garlic clove for 20-25 minutes, or until tender but still holding their shape. Drain and cool under cold running water. This speeds the cooling process and prevents overcooking.
2. In a large bowl, combine the cooled lentils, navy beans, cucumber, cherry tomatoes, red onion, Kalamata olives, chopped dill and mint.
3. Whisk together the egg yolk, lemon juice, red wine vinegar, Dijon mustard, garlic, oregano, honey, salt and pepper. Slowly drizzle in the olive oil while whisking until emulsified.
4. Pour the vinaigrette over the salad and gently toss until evenly coated.
5. Refrigerate for 20-30 minutes before serving to allow the flavors to meld. The salad is even better after a few hours in the refrigerator.
6. Taste before serving and brighten with an extra squeeze of lemon or a pinch of salt, if needed.
7. Garnish with crumbled feta, dill fronds and a drizzle of extra virgin olive oil.
8. Serve.

YOU WILL NEED: cutting board, knife, saucepan, colander, large mixing bowl, small mixing bowl, whisk, measuring cups and spoons.



Lemon-Herb Vinaigrette

¼ cup	extra virgin olive oil
2 Tbsp	fresh lemon juice
1 Tbsp	red wine vinegar
1	egg yolk
1 tsp	Dijon mustard
1 small clove	garlic, minced
1 tsp	dried oregano
1 Tbsp	honey, plus more to taste
1 tsp	kosher salt
½ tsp	black pepper

CHEF'S TIP:

This salad gets even better with time. Make it a few hours ahead and let the flavors meld in the refrigerator.

For extra freshness, finish with a little more lemon juice, a pinch of salt and a drizzle of good quality extra virgin olive oil just before serving.

*Simple ingredients.
Big flavor!*



GLOBAL MARKET CHANGE CONT.

This robot wasn't there demonstrating agricultural technology or trying to buy pulse crops from Justin, as far as we know. The robot was actually among the entertainment at the conference's gala festivities and apparently remained noncommittal on price and volume. For a free workshop on robots that actually work in agriculture, turn the page.

target products including steel, dairy, agricultural equipment, appliances, pulp and paper, plastics and electronics.

Notably for U.S. pulse growers and exporters, whole dried pulses are not included on Canada's published list of products subject to the new counter-tariffs.

That doesn't mean pulse growers are escaping the effects of the broader trade fight with our northern neighbors. The United States imposed a 50% tariff on \$27.6 billion of Canadian goods in August, prompting Canada to retaliate with tariffs of its own.

According to recent reporting by NPR, Northern Plains producers accustomed to an agricultural economy that crosses the border for equipment, parts and other inputs are facing another layer of uncertainty in an already expensive growing season.

That matters because Canada is an important and growing market for U.S. pulses, especially for pulse-growing states along the Canadian border. The USA Pulses analysis projects the market could grow to \$210 million in 2025-26. Preserving tariff-free access while a much broader trade dispute unfolds around the industry is pretty darn important. Canada represents another side of the global trade equation as well: it is also one of the U.S.'s principal competitors in pulse exports.

CHINA SHOWS HOW FAST THE COMPETITIVE LANDSCAPE CAN CHANGE

China may be the clearest example of how quickly tariffs can change the competitive picture.

Canadian dry peas previously faced an additional 100% Chinese tariff, creating an opening for U.S. suppliers. That changed March 1, when China suspended the additional tariff on Canadian peas through the end of 2026, substantially improving access for one of the U.S.'s largest competitors in the Chinese market.

Recent trade data show just how formidable that competition has become. According to the August 2026 market report from USA Pulses' China representatives, Canada supplied nearly 667,000 metric tons of dry peas to China from January through July, accounting for 41.2% of Chinese imports. U.S. dry pea exports to China totaled just 21,248 metric tons, or 1.3% of the market.



INDIA: HUGE MARKET, HIGH WALLS

Nowhere are both the opportunity and the barriers more obvious than India.

India is the world's largest importer of yellow peas and an enormous consumer of pulses. Yet U.S. products face tariffs and restrictions that can make competing there difficult.

According to the USA Pulses tariff review, U.S. green lentils face an 11% tariff, Kabuli chickpeas 44% and yellow peas 30%, while dried green peas face import restrictions. Pulse-based ingredients can encounter tariffs reaching as high as 104%.

Recent market intelligence shows what could be possible if some of those barriers come down. At an August roundtable organized by the USA Pulses India Office in southeastern India, a major pulse-processing region, more than 35 pulse millers and industry representatives discussed U.S. green lentils as a potential diversification opportunity. Processors indicated a willingness to evaluate alternative pulses that can provide reliable availability, consistent quality, competitive pricing and attractive processing returns.

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GLOBAL MARKET CHANGE CONT.

The trade barrier itself was also part of that discussion. Participants were briefed on efforts to establish separate tariff classification for green lentils, which are currently classified with red lentils, and to seek more favorable duty treatment. The report concluded that greater clarity in classification and tariffs could improve commercial confidence among processors and importers.

USA Pulses is advocating for reduced or eliminated tariffs in India, more predictable import policies and an annual pulse purchasing agreement between India and the United States.

The goal isn't just to sell more pulses today. It's about giving U.S. growers a fair opportunity to compete and building a market for U.S. pulses with Indian consumers for years to come.

BEYOND TARIFFS

Tariffs aren't the only barriers to U.S. pulse exports.

In Mexico, U.S. pulse exports have grown substantially over the past decade, but exporters continue to contend with non-tariff issues including zero-tolerance requirements for soil contamination that can delay shipments and increase costs.

In Algeria, the challenge isn't primarily a tariff at all, but a state import monopoly that controls pulse purchases.

In Southeast Asia, tariffs remain substantial on both whole pulses and pulse ingredients. Vietnam applies duties ranging from 15% on several whole pulses to as much as 30% on ingredients, while Thailand maintains a 30% tariff on pulse flour.

Other markets demonstrate what favorable access can look like.

U.S. whole pulses receive duty-free treatment through free trade agreements in countries including Peru, Chile and, for many products, Colombia. Morocco also provides duty-free access under its U.S. free trade agreement.

Every market presents a different set of opportunities and barriers. Navigating those differences is increasingly important to maintaining and growing demand for U.S. pulses.

MARKET ACCESS IS NEVER FINISHED

Perhaps the biggest takeaway from the current tariff environment is that there is no permanent, or definable, finish line. This makes diversification of global markets an important part of the U.S. pulse industry's global marketing approach.

A market that is attractive today can become difficult tomorrow.

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2026 FIRA USA

Agricultural Robotics and AgTech

Bringing together agricultural robotics and AgTech with growers' real-world needs.



October 20–22, 2026

9:00 am – 4:00 pm



State Fair Park

1301 S Fair Ave, Yakima, WA 98901



Event website

<https://fira-usa.com/>



Registration (mandatory)

<https://app.imagina.com/fira-usa-2026/>



Contact

contact@world-fira.com



Free for Growers, journalists, and students.

Registration is mandatory, including for free-access audiences.



Co-organized by:
GOFAR, Yakima County Development Association,
and Yakima County

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USA Pulses Summit 2027

June 21-25, 2027, Minneapolis MN



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Forge new partnerships, spark new ideas,
and help us build a future
where pulses are the center
of every plate — a healthy policy

USA Pulses Summit 2027

June 21-25, 2027, Minneapolis MN

Join **USA Pulses** in Minneapolis, June 21-25, 2027, for a landmark week dedicated to the U.S. pulse industry! **Connect with the people shaping the future of the pulse industry.** Explore business and networking opportunities across the entire U.S. pulse value chain, including:

- U.S. pulse growers, processors, and exporters
- CPG, ingredient, and food manufacturing companies
- More than 100 international buyers from around the world

EXPERIENCE THE SUMMIT

Event highlights include keynote speakers, expert panels, innovation sessions, industry tours, and valuable networking opportunities designed to build connections and grow markets for U.S. pulses.

Registration Opens November 1, 2026



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GLOBAL MARKET CHANGE CONT.

A competitor facing a prohibitive tariff can suddenly regain access. A trade dispute involving automobiles, dairy or steel can spill into agriculture.

That is why USA Pulses and the USA Pulses Trade Association continue working with U.S. trade officials and international partners to protect existing markets while pursuing new opportunities for U.S. peas, lentils, chickpeas, dry beans and pulse ingredients.

The objective is simple even when international trade policy isn't. The U.S. needs to keep markets open, reduce barriers and make sure U.S. pulse growers have the opportunity to compete in today's global pulse market.



Hosted by the
MONTANA
PULSE CROP COMMITTEE

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Uniting Montana and U.S. Pulse Researchers
to Foster Opportunities in Research

PRODUCERS,
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AND RESEARCHERS
ALL WELCOME!

For a
Stronger
Pulse Future

Monday,
November 30, 2026
1:00 – 5:00 p.m.

Hilton Garden Inn
Great Falls, Montana

Meet-and-greet
to follow
with drinks and appetizers.

RESEARCH | COLLABORATION | IDEAS | OPPORTUNITIES | A STRONGER PULSE FUTURE

25 YEARS LATER

— WE REMEMBER —

*In memory of those we lost.
In honor of the first responders
who answered the call.*

★ ★ ★

SEPTEMBER 11, 2001

WE WILL NEVER FORGET.

UPCOMING EVENTS

- Sept. 14–18 America's Food & Beverage Show, Miami
- Sept. 16–18 Food Ingredients Asia, Indonesia
- Sept. 22–24 Climate Week NYC
- Sept. 25 Pulse Foundation Board Mtg.
- Sept. 29–Oct. 1 Food Tech Summit 2026, Mexico City
- Oct. 12 Columbus Day, Office Closed
- Oct. 14 Pulse Foundation Board Mtg.
- Oct. 17–20 SIAL Paris
- Oct. 20–23 FIGAP 2026, Guadalajara, Mexico

PulsePipeline

Your Pulse Connection
USA Pulses

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