



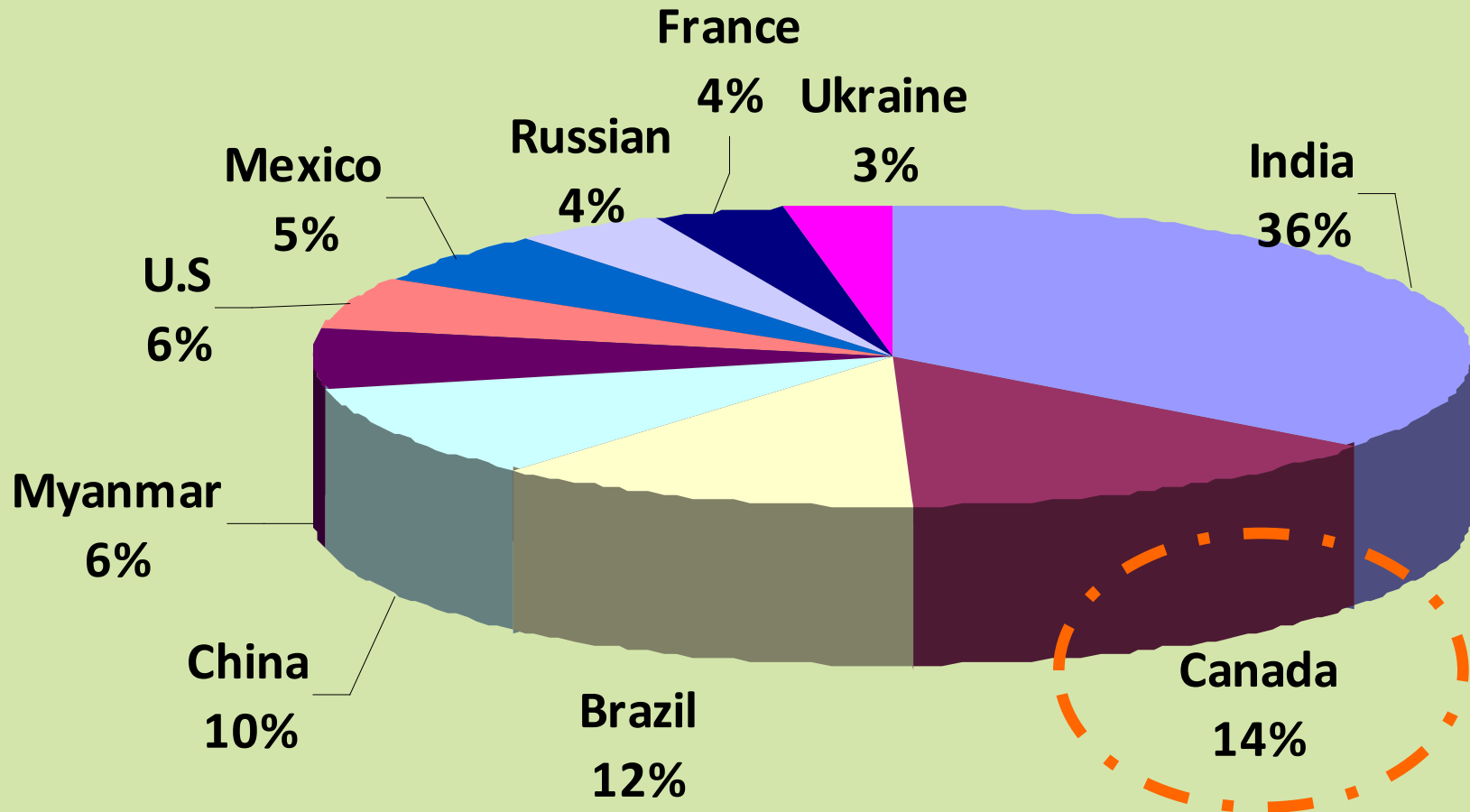
Pulse Brown Bagger
Hosted by: Marketing Council
March 4, 2010

An industry in boom time

Global Pulse Markets

Global Pulse Production
World Trade in Pulses
Canadian Pulse Production and Exports
Distribution of Canadian Pulse Exports
World Pulse Consumption Projections

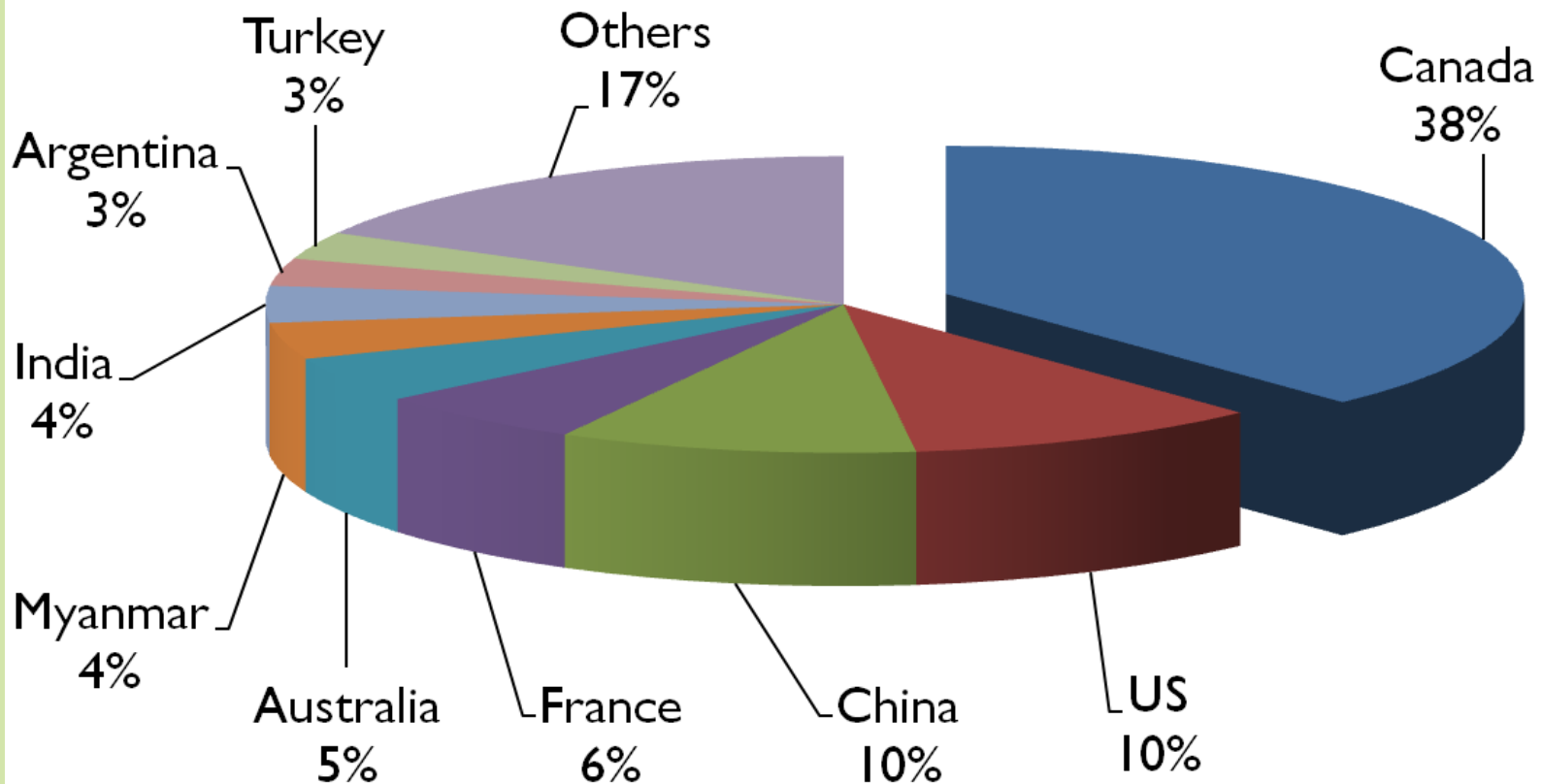
Top Global Pulse Producers* (2008-09)



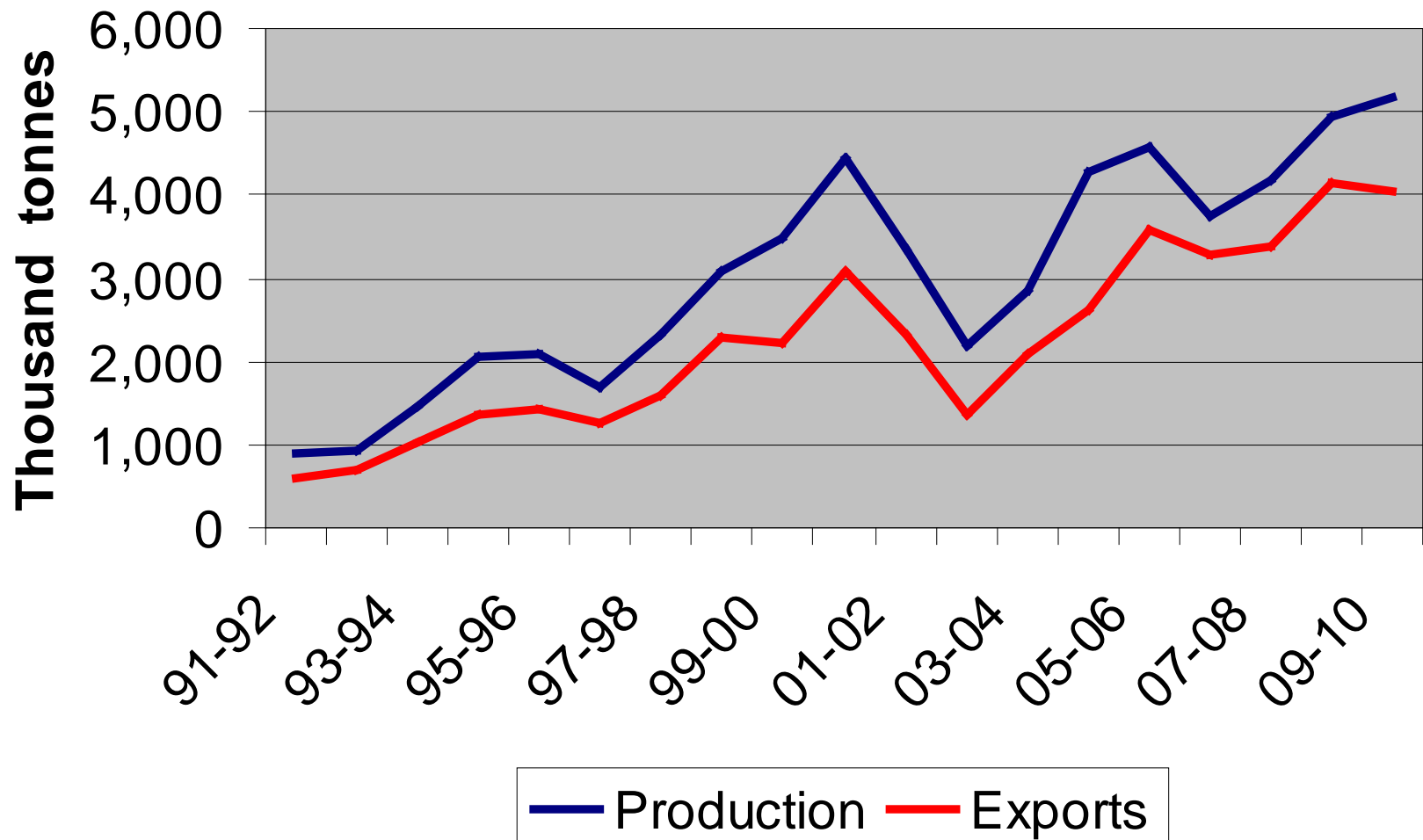
*Pea, bean, lentil, chickpea

World Trade in Pulses

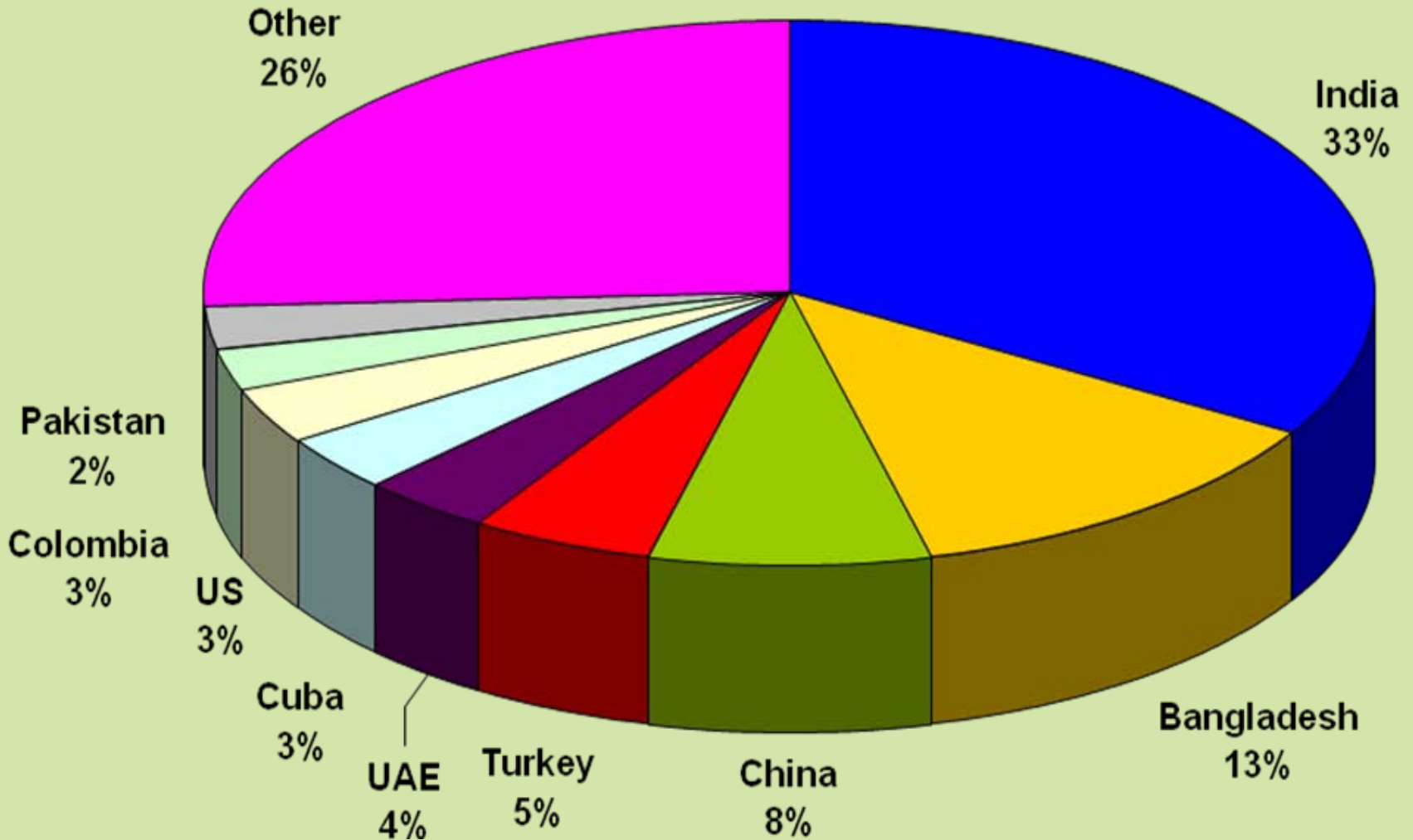
Average 2004-07



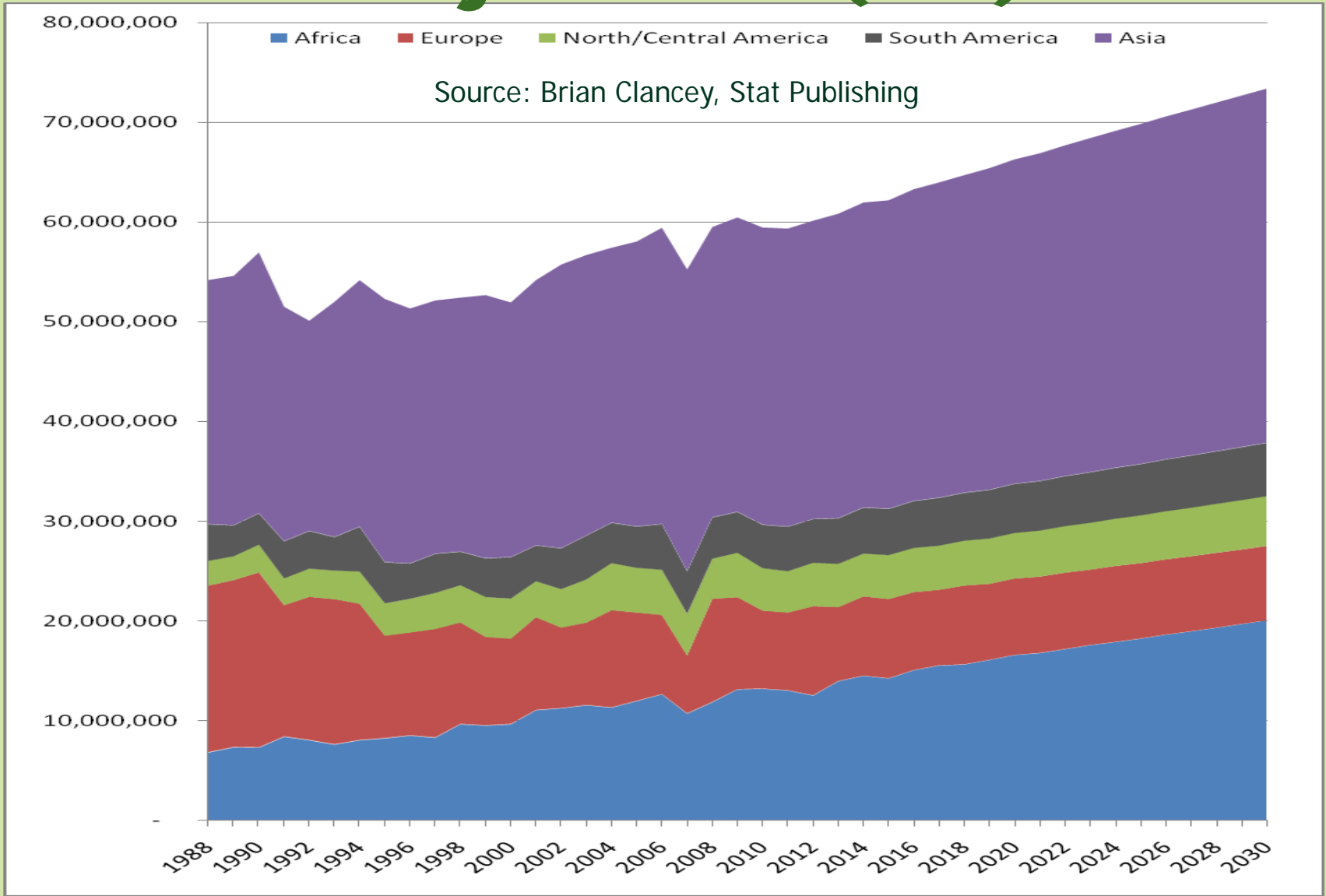
Canada pulse production and exports



Canadian Pulse Exports - 2008/09



World Pulse Consumption Projections (MT)

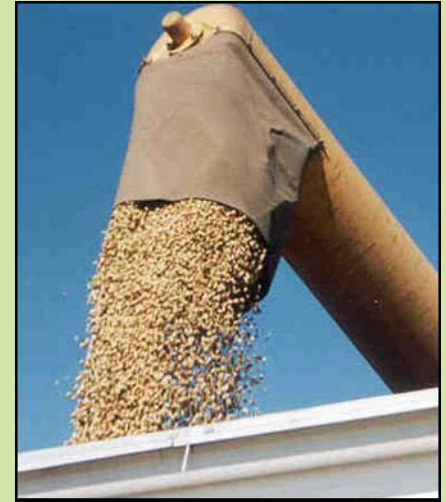


The Alberta Pulse Industry

Who is APG?
Alberta Pulses
Alberta Pulse Production
Value of Alberta Pulse Production
Alberta Pulse Potential
APG's Vision and Mission

Who is APG?

- We represent 4,700 pulse producers
- Non-profit organization, est. 1989
- Run by a producer-elected board of directors comprised of 12 pulse producers.
- Funded by refundable levy, calculated as 1% of the value of the pulses sold by producers.
- Pulse primary production contributed approximately \$186 million to the Alberta economy in 2009
- More than 80% of the Alberta pulse crop is exported to international markets.



Alberta Pulses



Green peas (whole)



Yellow peas (split)



Green lentils



Red lentils (split)



Small Red beans



Chickpeas/
Garbanzo beans



Black beans



Pinto beans

- **Field Pea** – Mostly yellows, some greens, marrowfats and maples. Grown throughout the province
- **Lentil** – Red and green lentils. Grown in south eastern Alberta
- **Chickpea** – Mostly kabuli (7-10 mm), some desi (6-7 mm). Grown in south eastern Alberta
- **Dry beans** - Pintos; Great Northern; Small Red; Black; Pink. Grown under irrigation in southern Alberta
- **Faba beans** – New pulse crop. Small acres throughout the province.

Alberta Pulse Production - 000 tonnes				
Year	Dry Peas	Lentils	Dry Beans	Chickpeas
2004	508	7	60	13
2005	618	14	58	20
2006	614	0	58	22
2007	567	0	53	0
2008	708	4	35	10
2009	667	30	50	18
Average	614	9	52	14

2009 Canadian Pulse Production - 000 tonnes						
Crop	Total	SK	AB	MB	ON	QC
Pea	3379	2613	667	100	0	0
Lentil	1510	1480	30	0	0	0
Dry Bean	216	n/a	50	89	77	4
Chickpea	76	57	18	0	0	0
Total	5181	4093	747	189	77	4
%	100%	79%	14%	4%	1%	0%

Contribution of Pulse Sales to Alberta's Ag Sector

Year	AB Pulse Crop Value	AB Farm Cash Receipts - Crops	Contribution of Pulses
2005-06	\$ 91,474,300	\$ 2,413,000,000	3.8%
2006-07	\$ 122,767,900	\$ 2,617,000,000	4.7%
2007-08	\$ 149,420,600	\$ 3,474,000,000	4.3%
2008-09	\$ 185,542,800	\$ 4,628,000,000	4.0%

Year	Value of AB Pulse Crops	Value of AB Pulse Crop Exports
2005-06	\$ 91,474,300	\$ 71,621,581
2006-07	\$ 122,767,900	\$ 109,611,817
2007-08	\$ 149,420,600	\$ 122,669,551
2008-09	\$ 185,542,800	\$ 141,436,019



Alberta's Pulse Potential

- **Current AB pulse acres:**
 - In 2009, pulse acres were 4.6% of total AB crop area (excluding tame hay).
- **Current SK pulse acres:**
 - In 2009, pulse acres were 14.0% of total SK crop area (excluding tame hay).
- **Optimism...**
 - While the percent of pulse acres in Alberta are relatively low, on a positive note, it should be easy to double pulse acres in the province if we start making some good advances in developing new and less price sensitive markets.
- **Now what will it take to get there and stay profitable as an industry?**



Vision and Mission

- **Vision:** Have Alberta pulses recognized by consumers as environmentally friendly, healthy, nutritional, and recognized by all producers as being an essential element in a sustainable cropping system.
- **Mission:** To provide leadership, increasing the competitiveness, profitability, and sustainability of pulse production as well as promoting the health and environment benefits of pulses.



Achieving the Vision & Mission

Extension
Marketing
Risk Management
Sustainability and Traceability
Production Research

Extension

- **Tammy Jones, Grower Relations and Communications Director**
- **Pulse Agronomy Network**
 - Nearly 550 producers, agronomists and retailers receive bulletins every 2 weeks
- **Pulse Crop News**
 - *"I can't think of the last time that any grower magazine was as filled with interesting articles with stories told from many perspectives. I can't say I read it from cover to cover but almost all of it. Nice job."* Gordon Bacon, CEO Pulse Canada
- **Update the pulse production manual**
- **Education Programs**
 - Classroom Agriculture Program, Aggie Days
- **www.pulse.ab.ca**

Have a more visible presence in agriculture to serve pulse producers more effectively



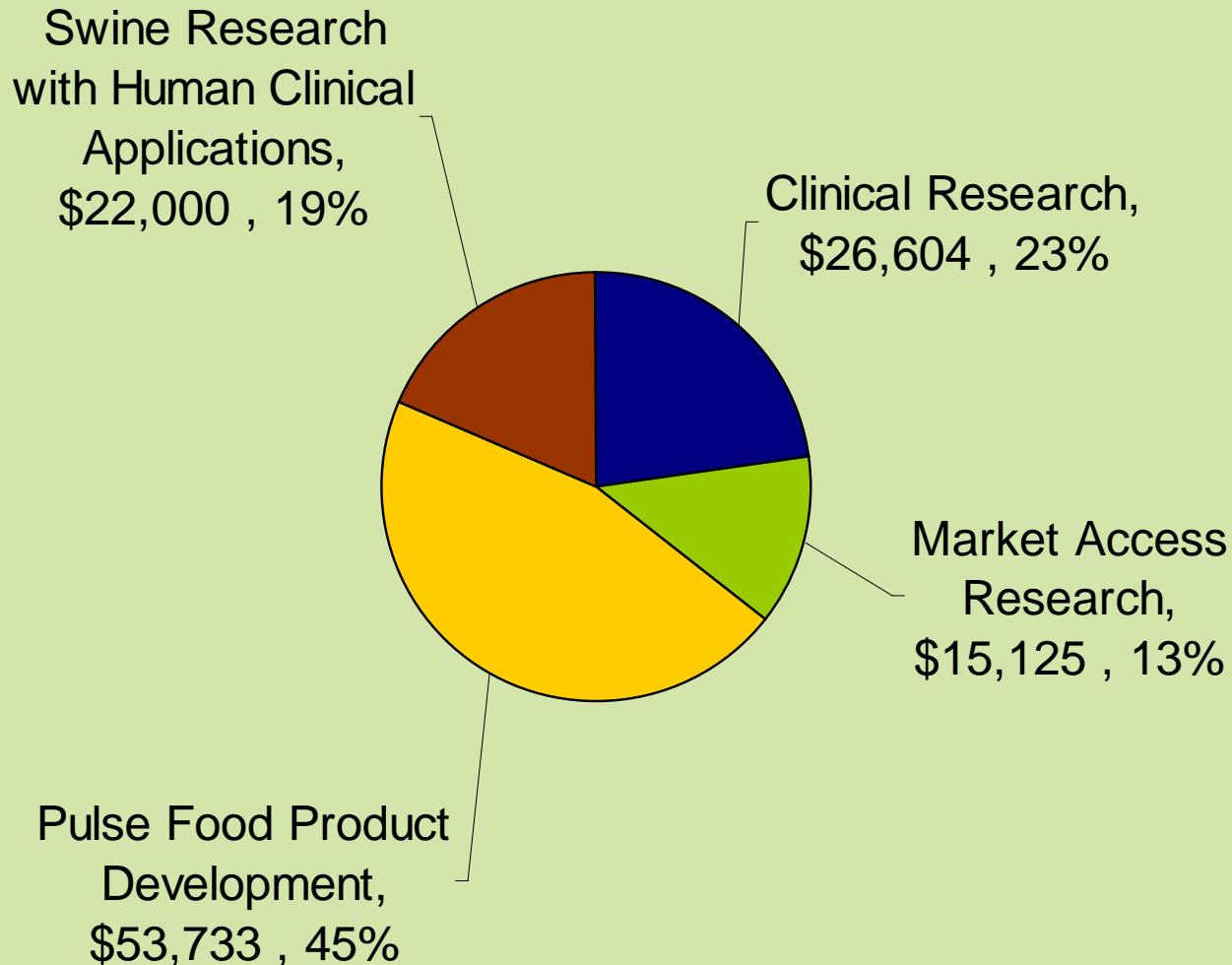
Marketing

- **Development of Pulse Fractionation Use and Production Capacity**
- **Human Nutrition Consultant – Wendy Benson**
 - Health Professionals Education
 - Pulse Week at Madison Grill
 - Press Releases and Radio Features
 - Include pulses in high school curriculum
- **Factors Influencing Canadian Pulse Consumption**
 - Who is eating pulses and why?
 - Do Canadians care that pulses are good for their health, good for the environment and are produced in Canada?
 - What would it take to increase pulse consumption?
- **Transportation****
- **Feed Pea Benchmark****
- **Market development research**

** in cooperation with Pulse Canada



2009 Market Development Research Investments



Risk Management

- **AFSC improvements to crop insurance**
- **Input on Producer Payment Security**
- **CGC - Licensing Review for the Pulse and Special Crops Industry**
- **Grain Growers of Canada**
 - Lobby efforts for more federal government support for agriculture production research – request to double A base research budget at AAFC
 - Lobby efforts to improve the regulatory system to make it more 'friendly' for the private sector to increase their technology investments in the Canadian crop sector



Sustainability & Traceability

- **Crop Sector Working Group's policy program Coordinator – Sharon McKinnon**
 - APG is committed to working with other crop industry groups to come to consensus on issues impacting the crop sector as a whole
- **Agri-Environmental Partnership of Alberta**
- *"Enhancing Farmer Profitability: Developing Canada's environmental brand through collaboration with the food industry on sustainability"**
 - addressing knowledge gaps and running pilot projects using food industry sustainability metrics.
 - taking critical steps to capture value for pulse producers and increase their profitability.

*in cooperation with Pulse Canada

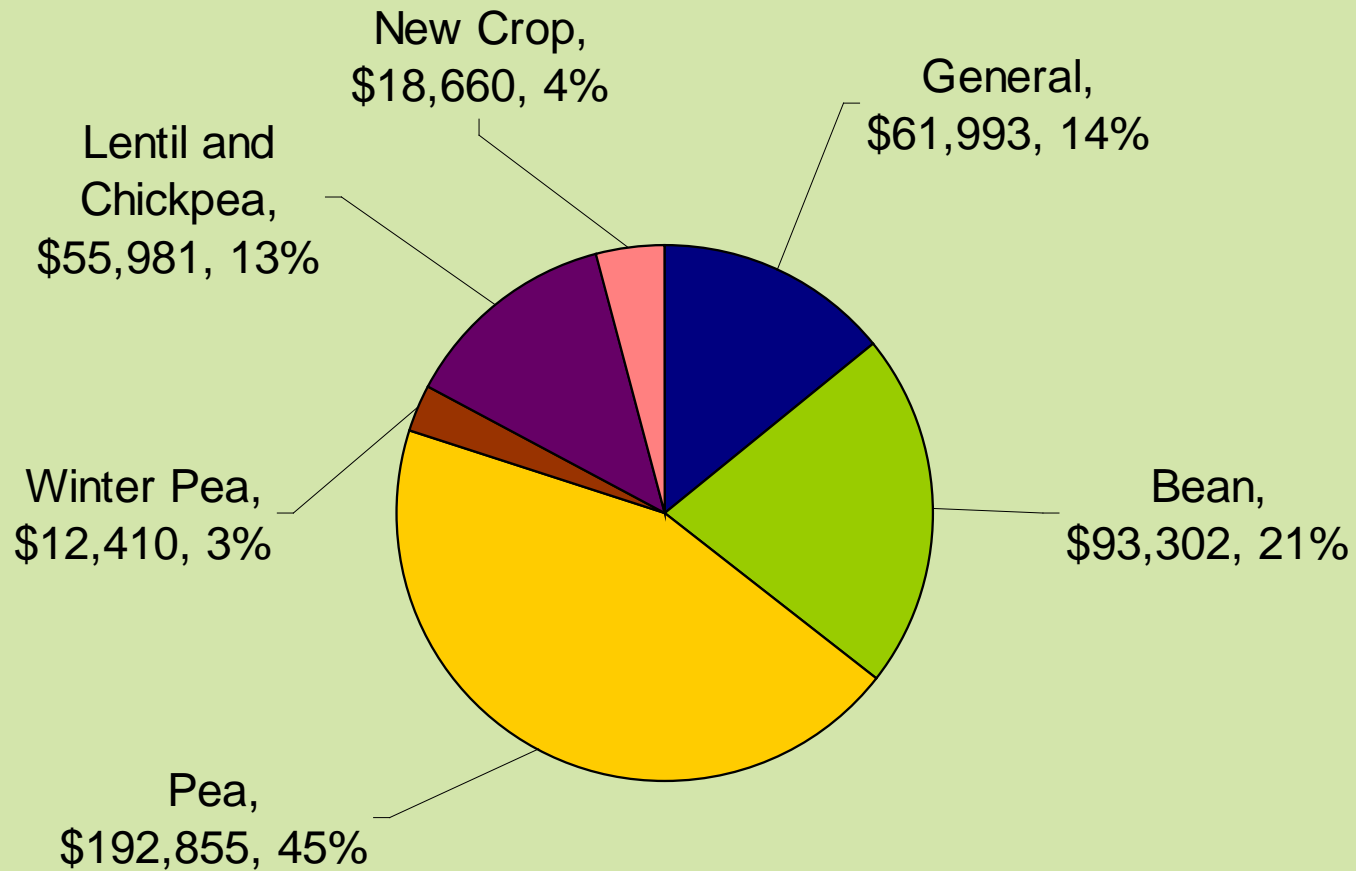


Production Research

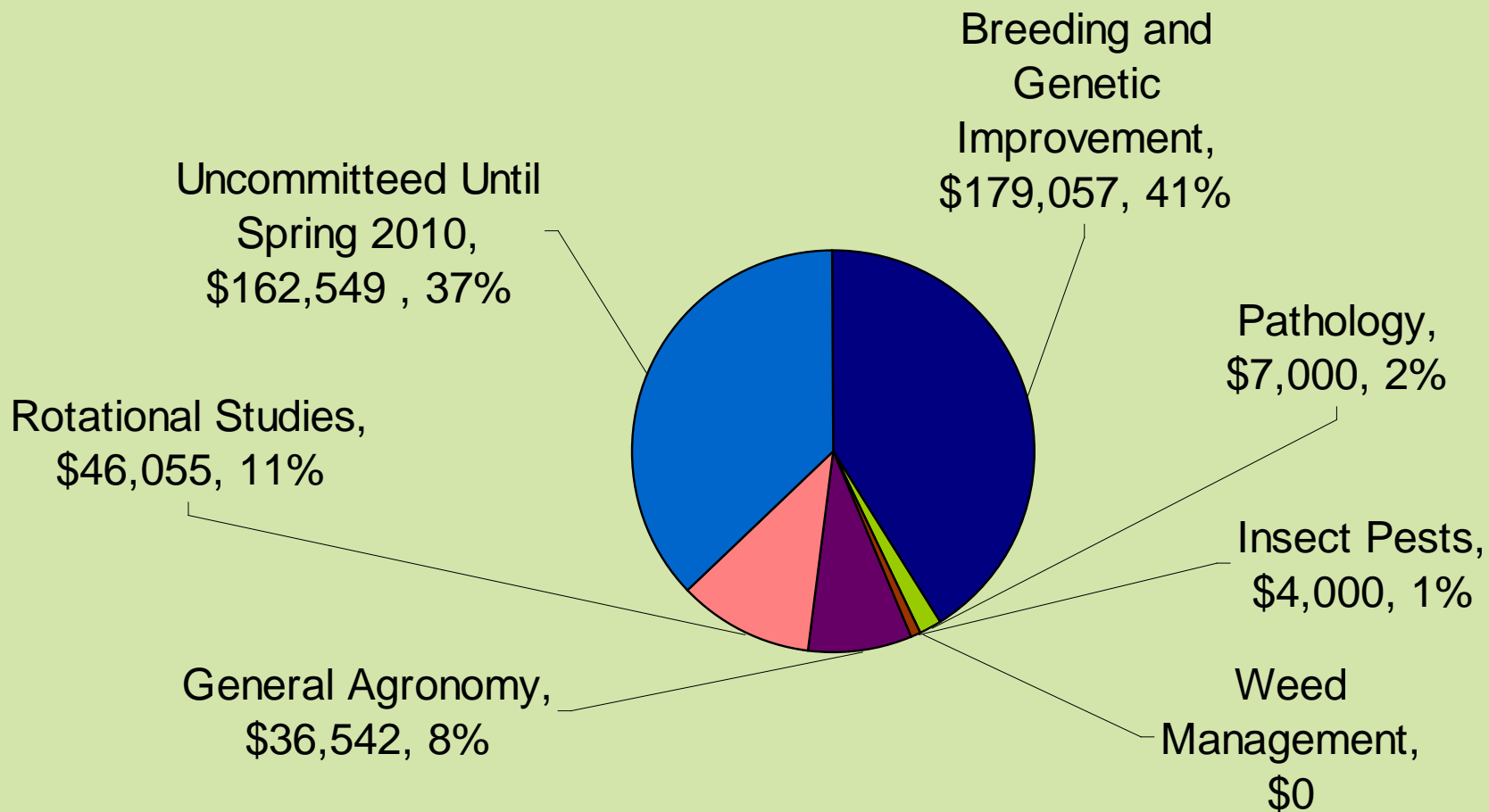
- **Alberta Pulse Research Workshop**
 - Realigning production research priorities to meet producer needs
- **Pulse Science Cluster**
 - Funding for national pulse research priorities
- **Prairie Pesticide Minor Use Consortium**
 - Gold member
- **Wise investments in Production Research Projects to:**
 - Jenn Walker, Pulse Industry Development Officer
 - Solve production constraints
 - Maximize leverage of grower dollars
 - Support quality scientists that deliver results to growers



2009 Production Research



Production Research

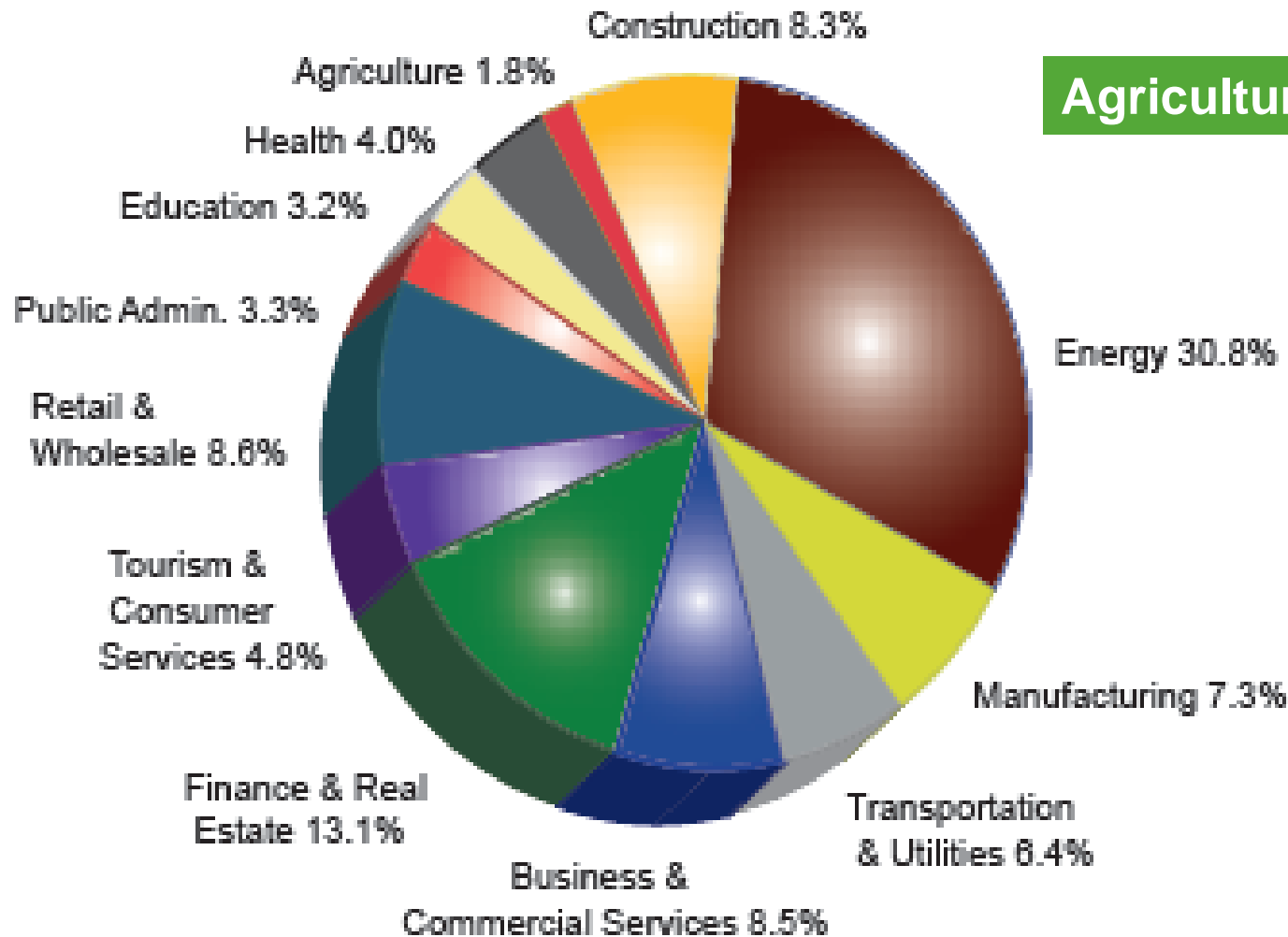


Money, Money, Money, Mon..ey

Alberta GPD by Sector
GoA Spending by Ministry
ARD Budget

Alberta GDP by Industry 2008

Total GDP \$291.7 Billion



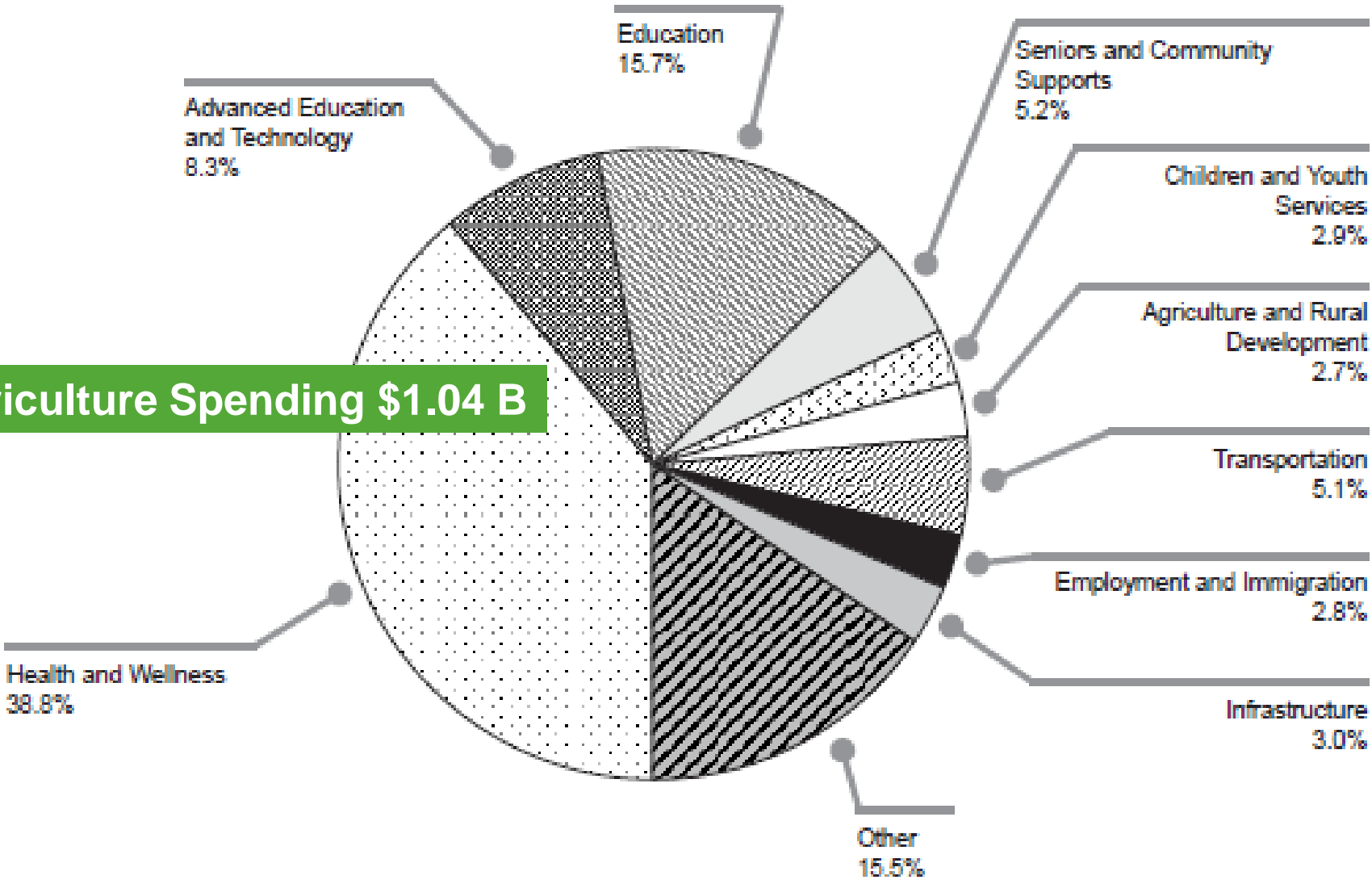
Agriculture GDP \$5.25 B

Source : Alberta Finance and Enterprise

2010-11 Expense by Ministry

\$38.7 billion

Agriculture Spending \$1.04 B



ARD 2010-11 Budget

- Budgeted program expense is nearly \$1.1 B.
- \$86 M or 7.5% reduction from 2009-10 primarily due to reduced ag income support & crop insurance.
- The 2010-11 budget:
 - \$418 million for AFSC insurance programs
 - \$292 million for ag income support. Including \$129 million in provincial contributions to AgriStability.
 - \$116 million for industry development & food safety.
 - \$50 million for ALMA



Working in Tight Budgets

Commitment to the Basics
Commitment to Aligning Priorities
A Promising Future

Commitment to the Basics

Contributions of ARD staff to our industry:

- **Mark Olson, Provincial Pulse Industry Development Specialist** - presented our growers with profitable new pulse crop opportunities and is building markets for these and existing pulse crops
- **Manjula Bandara, Special Crops Research Scientist** - played an essential role in expanding lentil and chickpea acres in the province
- **Kan-Fa Chang and Ron Howard, Plant Pathologists** - developed effective methods to combat pulse crop diseases that, if gone unchecked, would have crippled Alberta pulse production
- **Jay Han, Food Scientist** - developed a cracker made from chickpea flour that is gluten free and contains between 3 to 6 times more iron than existing products

Commitment to the Basics

Contributions of ARD staff to our industry:

- **Sharon Faye and Diane McCann-Hiltz, Market & Consumer Analysis Unit** – coordinated “Factors Influencing Pulse Consumption” study
- **Shirzad Chunara, Functional Foods and Natural Health Products** – Helped Joerg Klemphauer access Growing Forward funding to install retail pulse packing equipment
- **Damian Coneghan, Trade Director International Offices and Trade Division** – assisted with international pulse media tour and Mexico Chef seminar

Commitment to Aligning Priorities

- Growing traditional pulse markets (i.e. China, India,)
- Developing new pulse ingredient (flours and fractions) markets in North America and Europe
- Developing new pulse crop opportunities (i.e. mung bean, faba bean)



A Promising Future if we ...

- Keep experienced, knowledgeable ARD staff and resources in the pulse industry
- Work together on common priorities:
 - Increase Alberta pulse acres to at least 15% of Alberta acres
 - Maintain and grow traditional markets
 - Expand pulses into new markets
 - Make pulse production a profitable and sustainable component of producer rotations
- Keep open lines of communication and a collaborative attitude with the entire agriculture sector

