



Canada Pulses Market Outlook



February 12-14, 2020

Rav Kapoor



Agenda

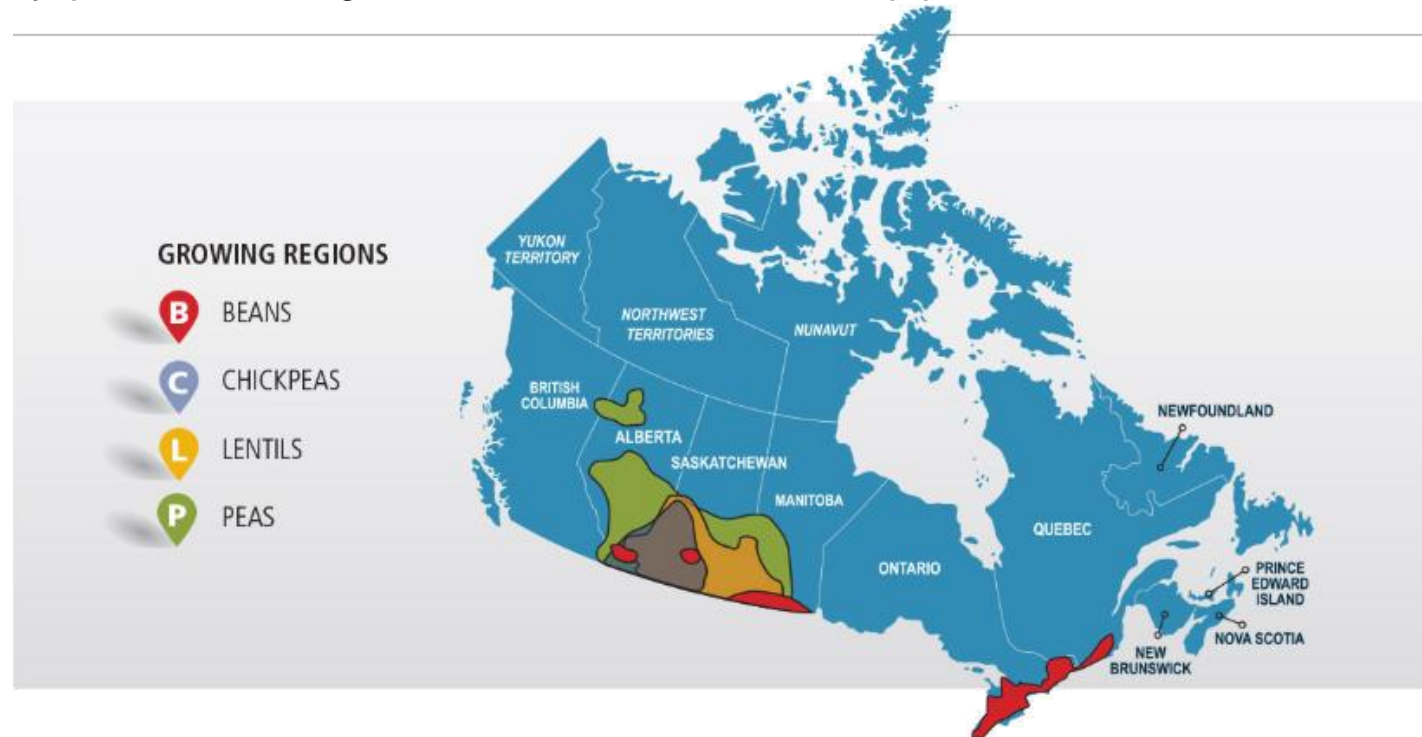
- Canadian **PulseFACTS**
- Production
 - **Green lentils**
 - **Red lentils**
 - **Yellow peas**
 - **Green peas**
 - **Chickpeas**
- Market Summary
- Q&A






PulseFACTS

- Canada is a world leader in production and exports of pulse crops
- Canada is the largest exporter of lentils and dried peas, and a significant producer of chickpeas. Pulses were exported to over 120 countries in 2018
- Canadian pulse farmers seed an average of 9.5 million acres of pulses per year. In 2018 the Canadian pulse industry had an export value of \$2.7 billion
- A key competitive advantage for Canada is the strong partnerships between researchers, industry, producers and government to add value to crop production





Lentils Production

 Canada's lentil growing region



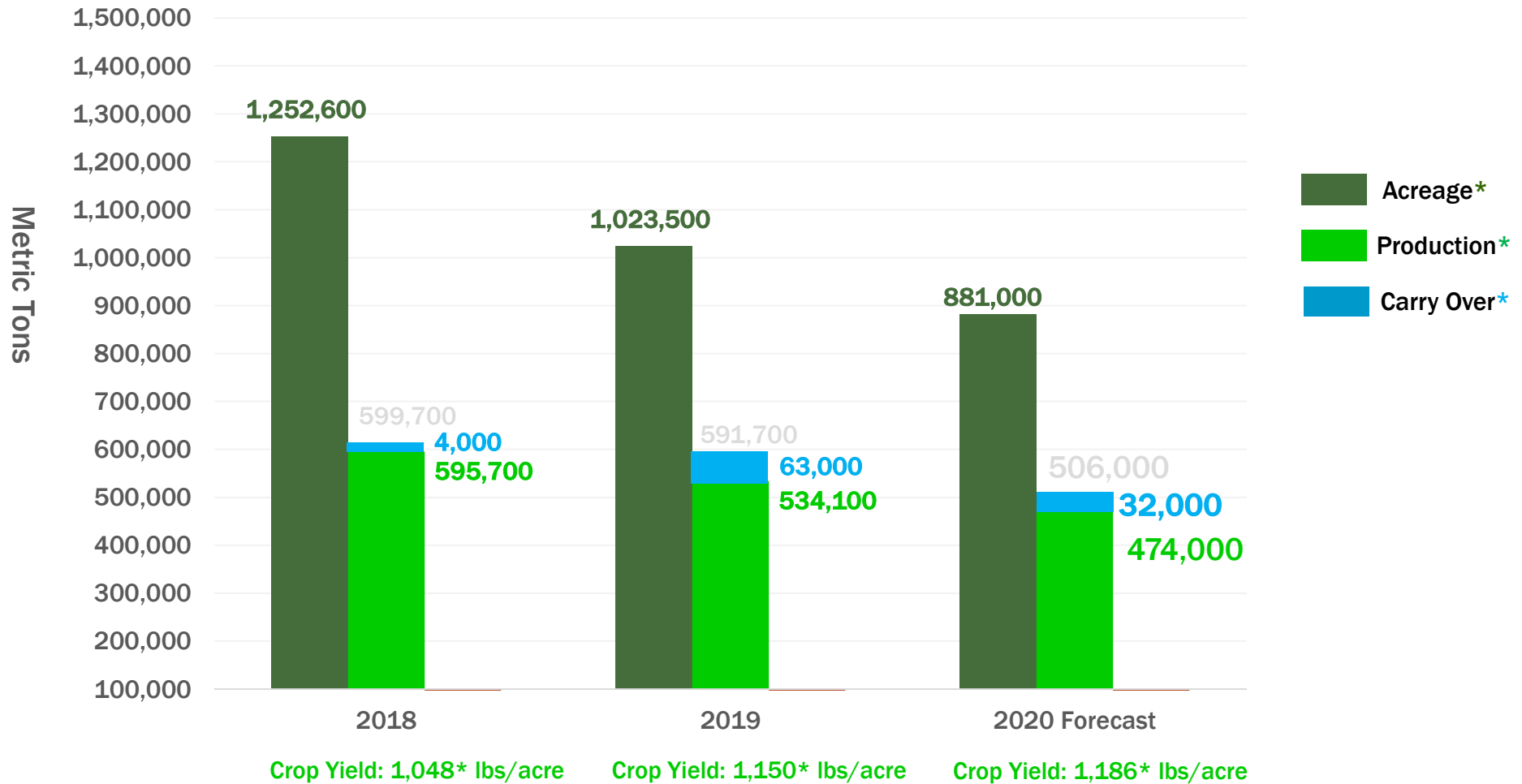
Seeded Acreage: **387,800*** acres
Production: **162,600*** MT

Seeded Acreage: **3,387,700*** acres
Production: **1,997,700*** MT

Source: Statistics Canada, Saskatchewan Agriculture
* 2019 Actuals



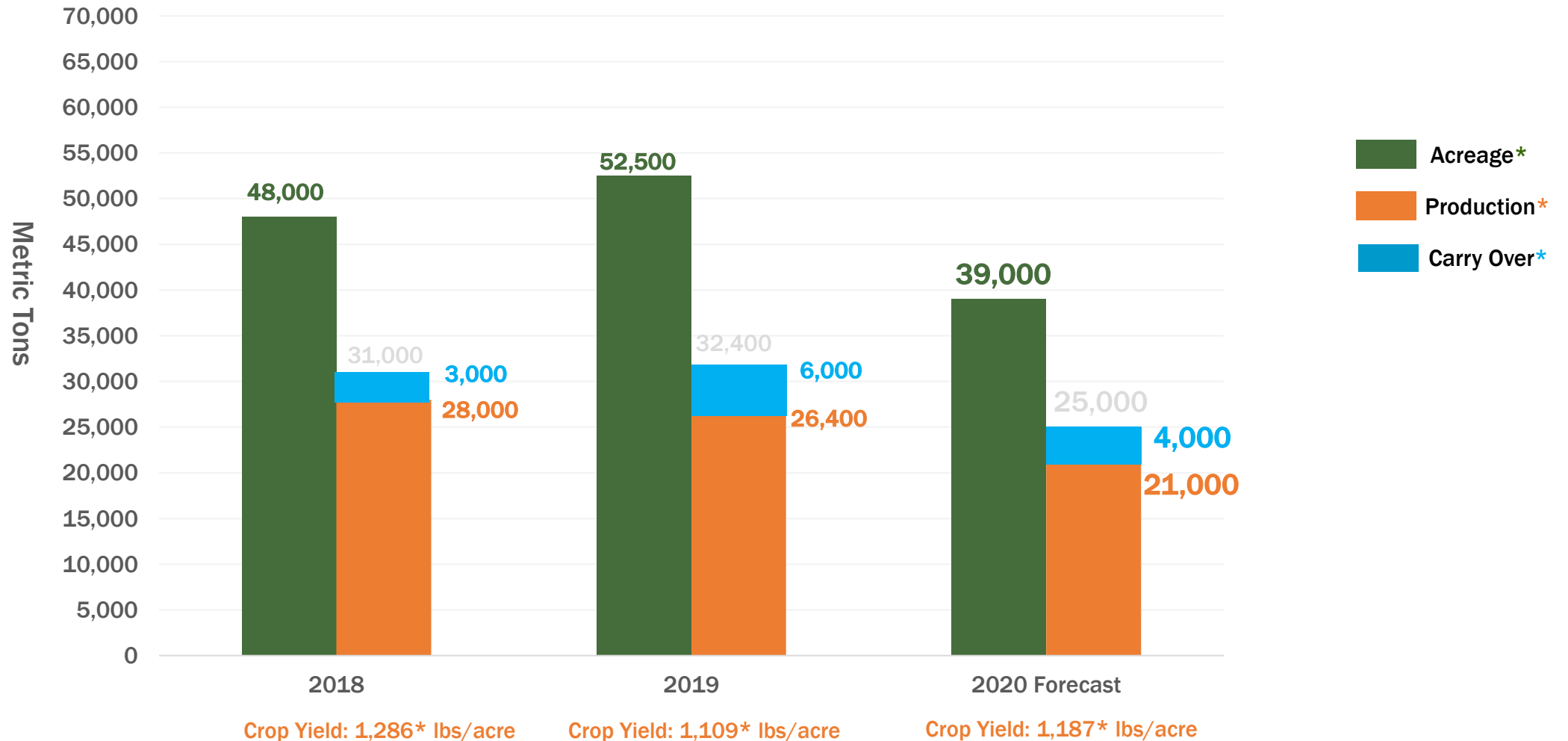
Lairds Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



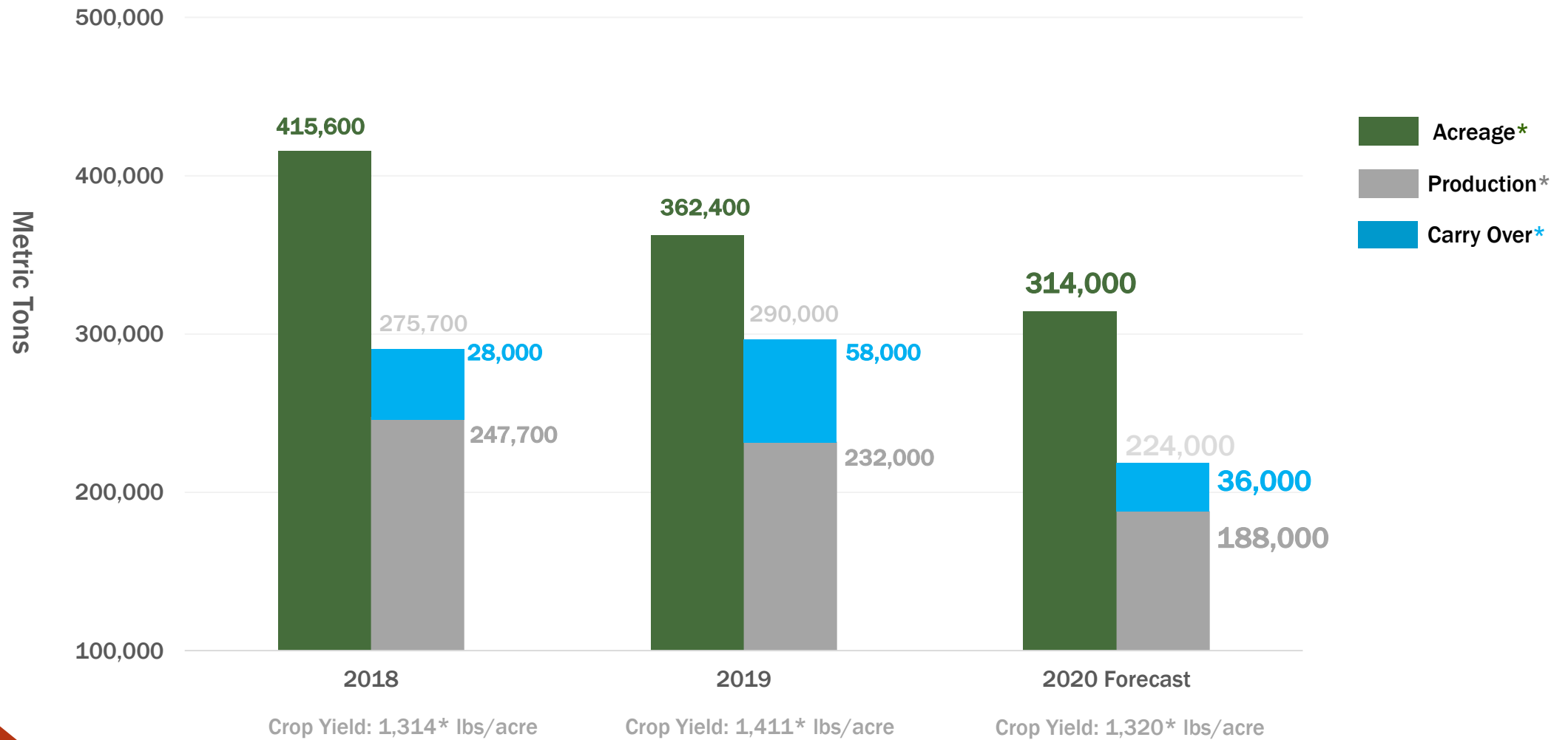
Richleas Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



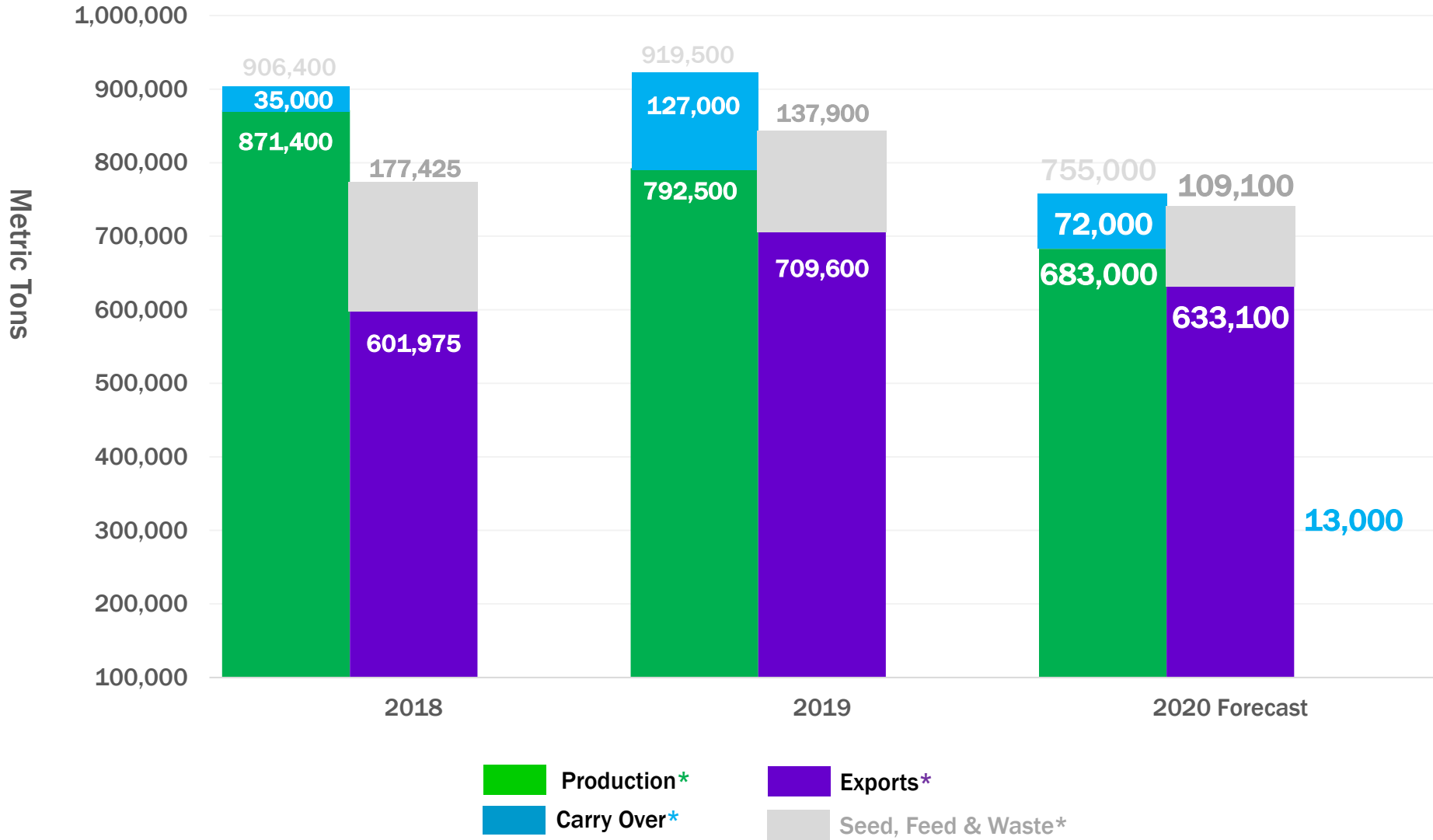
Estons Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Green Lentils Summary



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Green Lentils

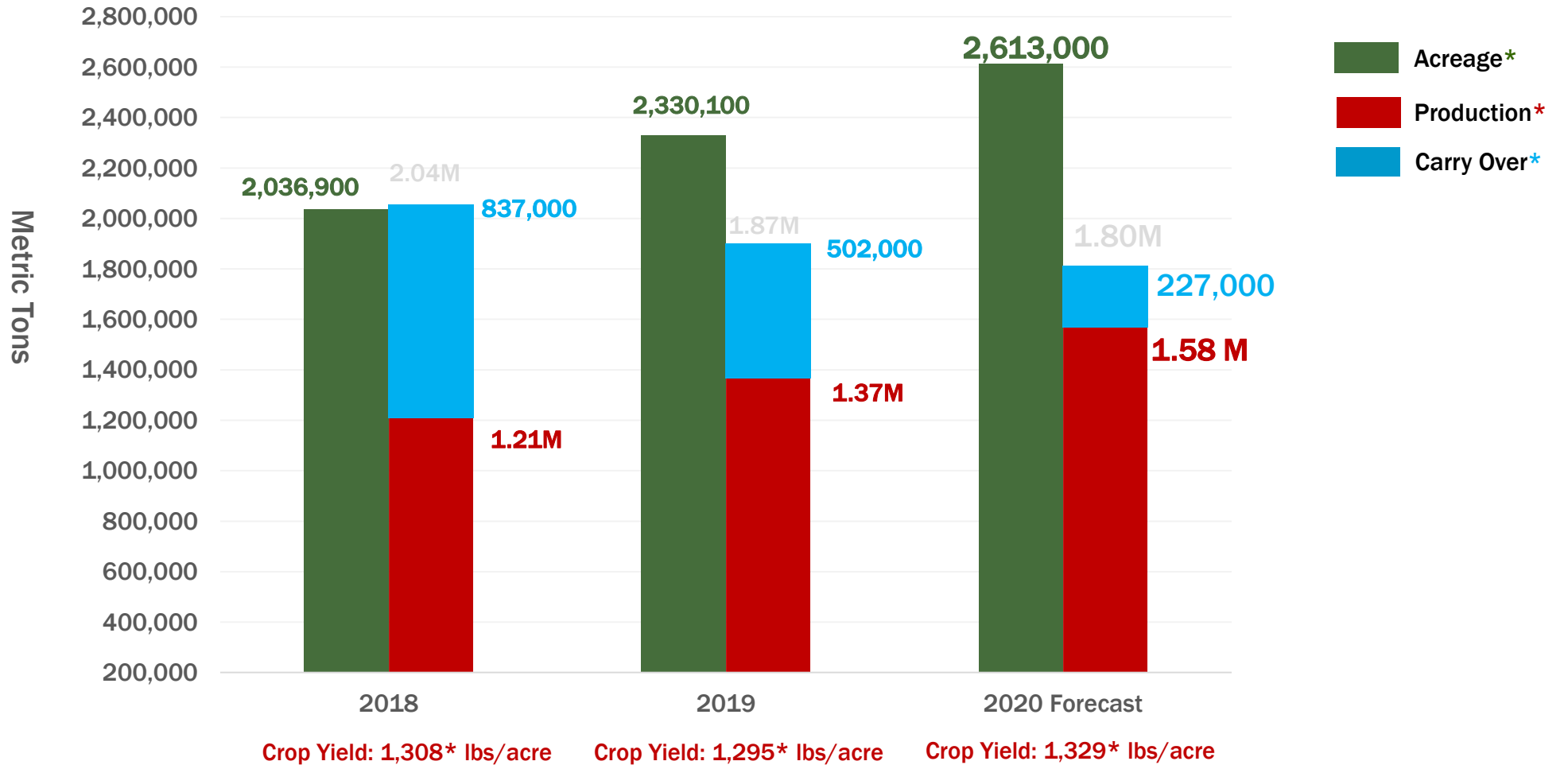
Top 5 Countries Canada Exports to

COUNTRY	Crop Year Period			
	2016-2017	2017-2018	2018-2019	Aug 2019 - Dec 2019
India	60,545	5,582	52,023	39,943
Algeria	48,819	56,678	55,288	27,727
Colombia	33,620	27,986	57,155	14,103
Morocco	21,368	24,539	23,639	11,639
Peru	21,123	24,656	29,152	10,477
Subtotal	185,475	139,441	217,257	103,889
Exports (Other Countries)	322,744	291,380	384,718	54,592
Total Exports	508,219	430,821	601,975	158,481

Source: Statistics Canada as at Feb 5, 2020
* Actuals



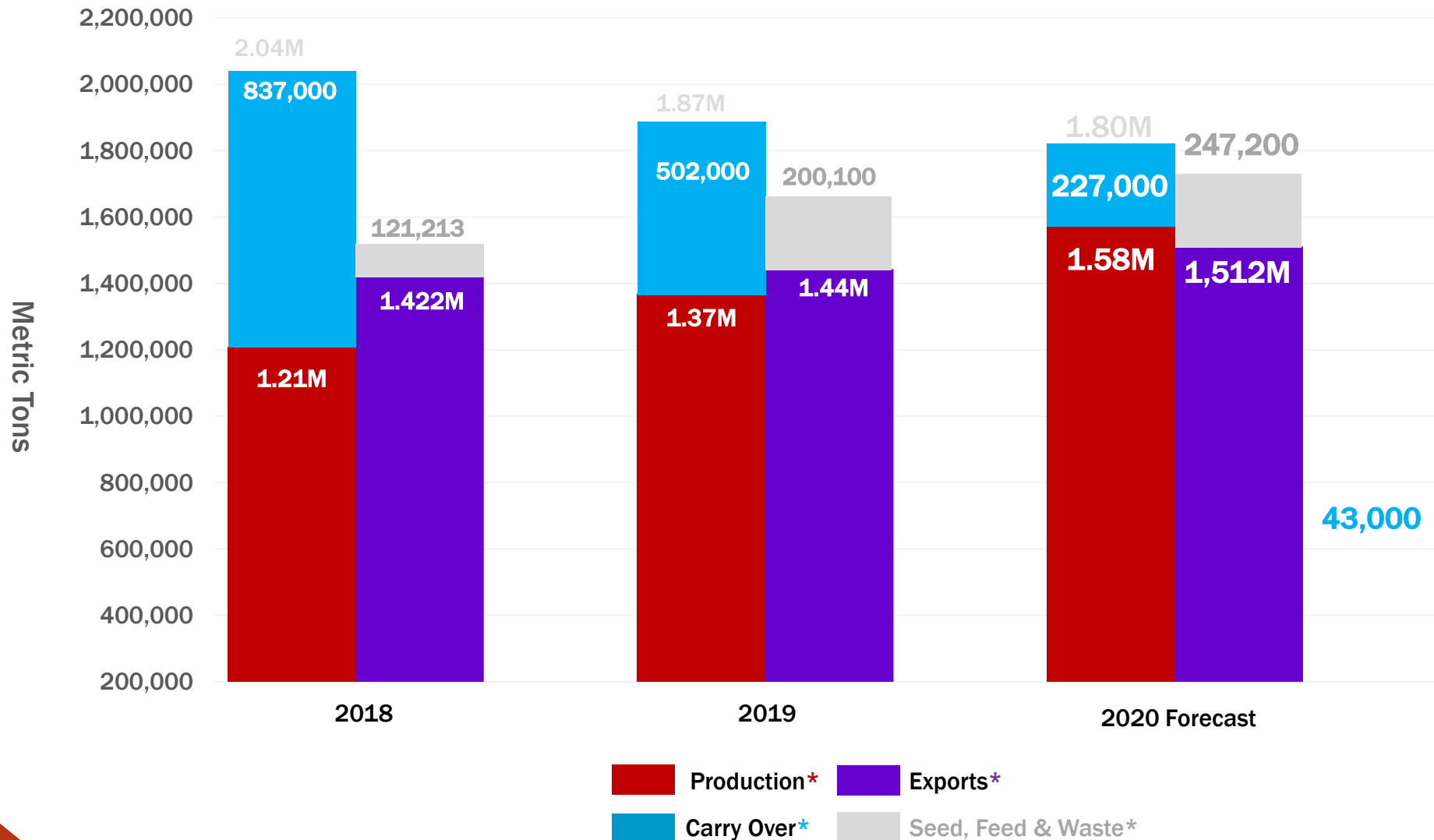
Red Lentils Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Red Lentils Summary



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Red Lentils

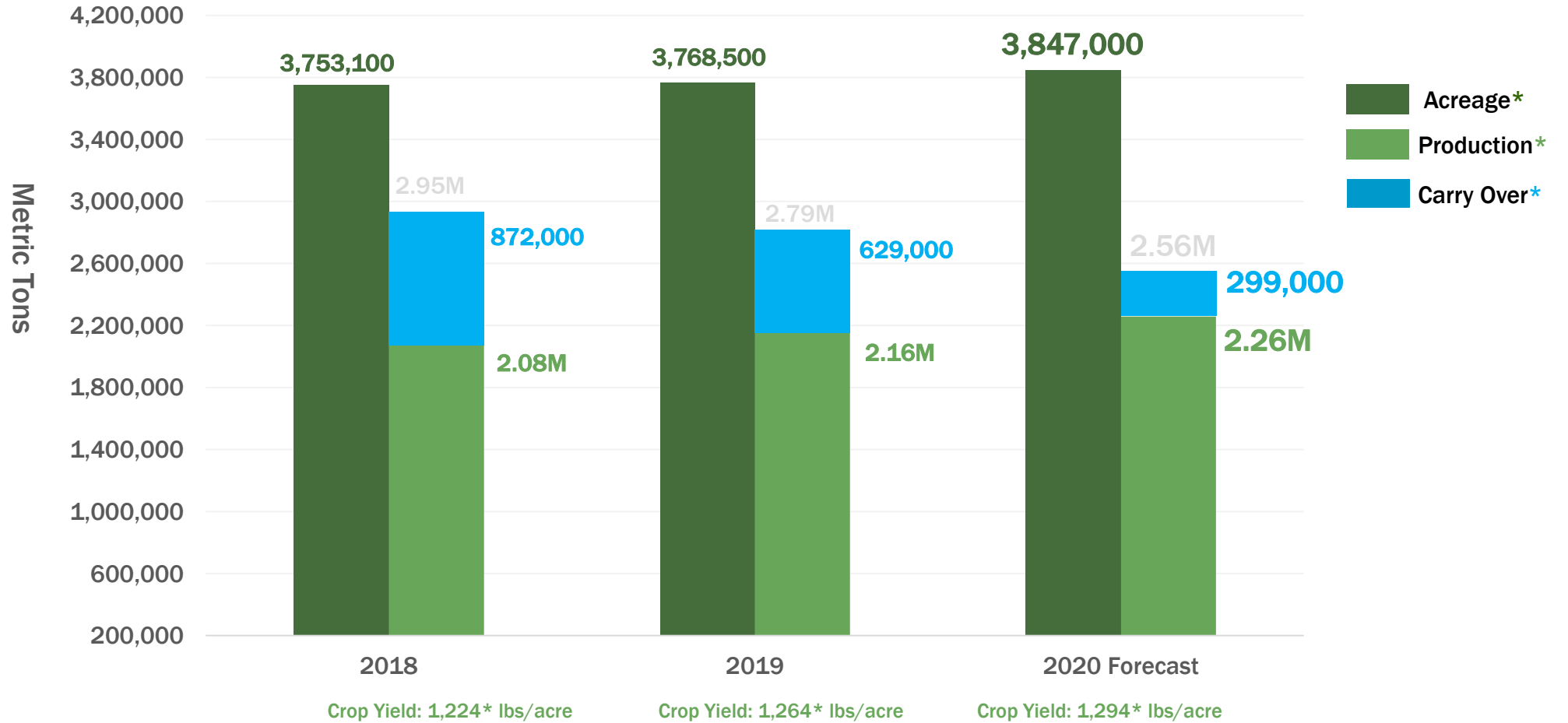
Top 5 Countries Canada Exports to

COUNTRY	Crop Year Period			
	2016-2017	2017-2018	2018-2019	Aug 2019 - Dec 2019
Bangladesh	146,270	28,607	153,494	97,256
India	778,134	120,741	429,082	88,947
Turkey	300,350	192,842	94,371	86,885
United Arab Emirates	118,875	70,099	144,681	66,390
Sri Lanka	80,638	68,178	74,342	22,086
Subtotal	1,424,267	480,467	895,970	361,564
Exports (Other Countries)	285,618	260,471	526,317	97,097
Total Exports	1,709,885	740,938	1,422,287	458,661

Source: Statistics Canada as at Feb 5, 2020
* Actuals



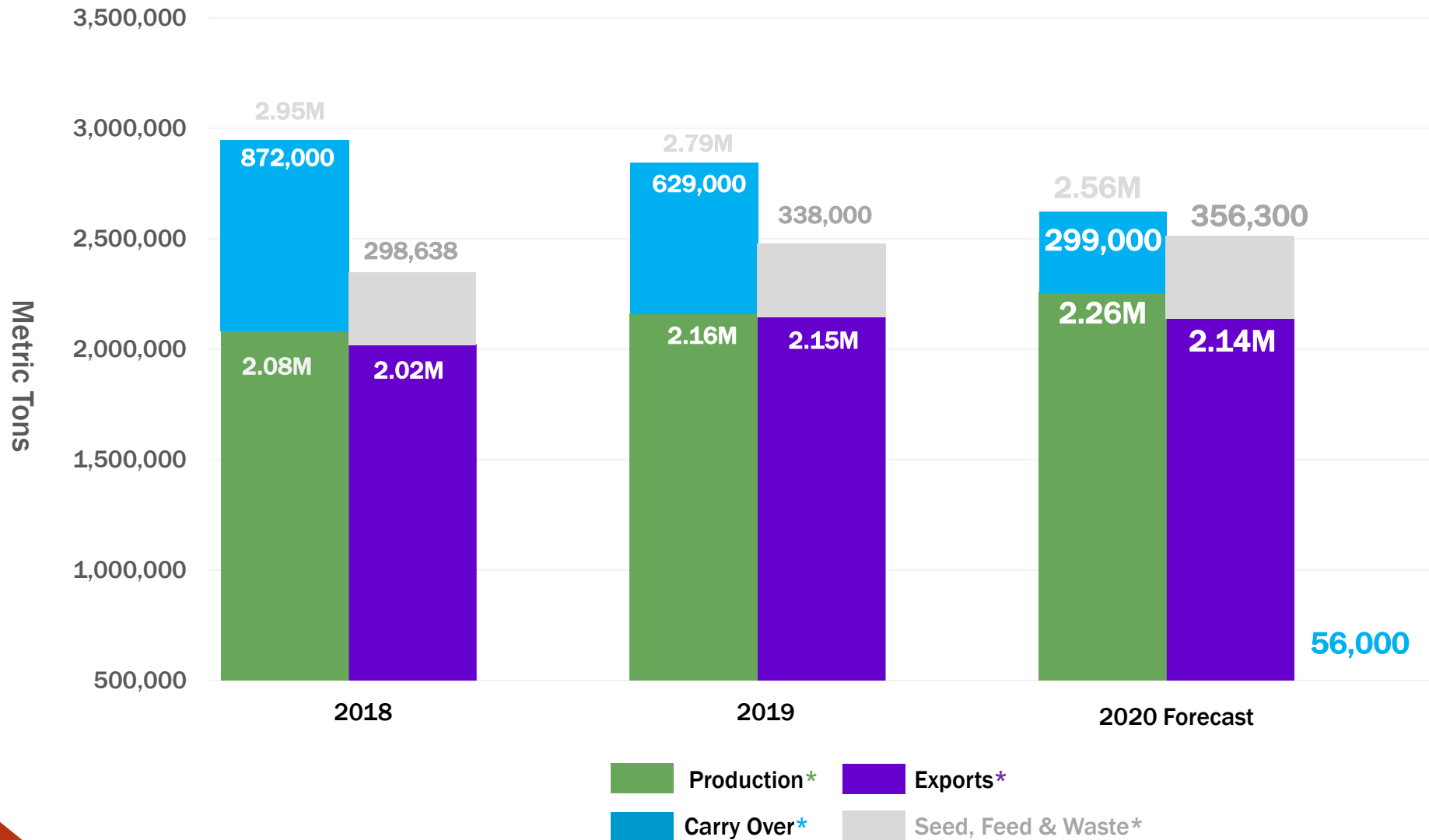
Total Lentils Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Total Lentils Summary



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Total Lentils

Top 5 Countries Canada Exports to

COUNTRY	Crop Year Period			
	2016-2017	2017-2018	2018-2019	Aug 2019 - Dec 2019
India	909,211	164,130	551,663	186,346
Turkey	363,361	256,270	126,858	105,958
Bangladesh	154,661	46,828	169,170	98,175
United Arab Emirates	195,733	166,349	206,156	77,359
Colombia	44,998	50,033	1,731	41,293
Subtotal	1,667,964	683,610	1,145,578	509,131
Exports (Other Countries)	789,799	858,337	878,684	301,307
Total Exports	2,457,763	1,541,947	2,024,262	810,438

Source: Statistics Canada as at Feb 5, 2020
* Actuals



Field Peas Production

Canada's pea growing region



Seeded Acreage: 1,800,200* acres
Production: 1,685,900* MT

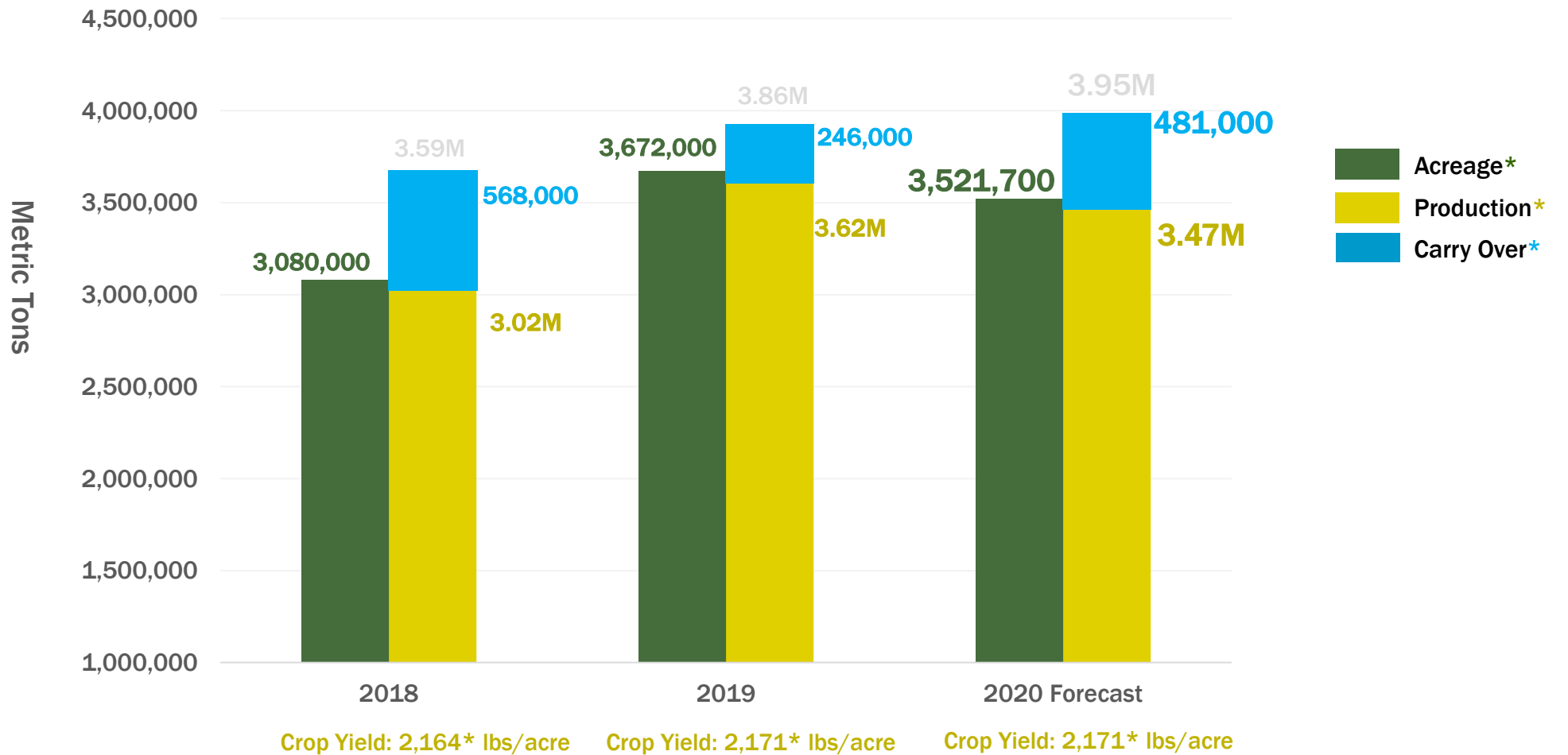
Seeded Acreage: 2,334,900* acres
Production: 2,313,100* MT

Seeded Acreage: 125,600* acres
Production: 163,900* MT

Source: Statistics Canada, Saskatchewan Agriculture
* 2019 Actuals



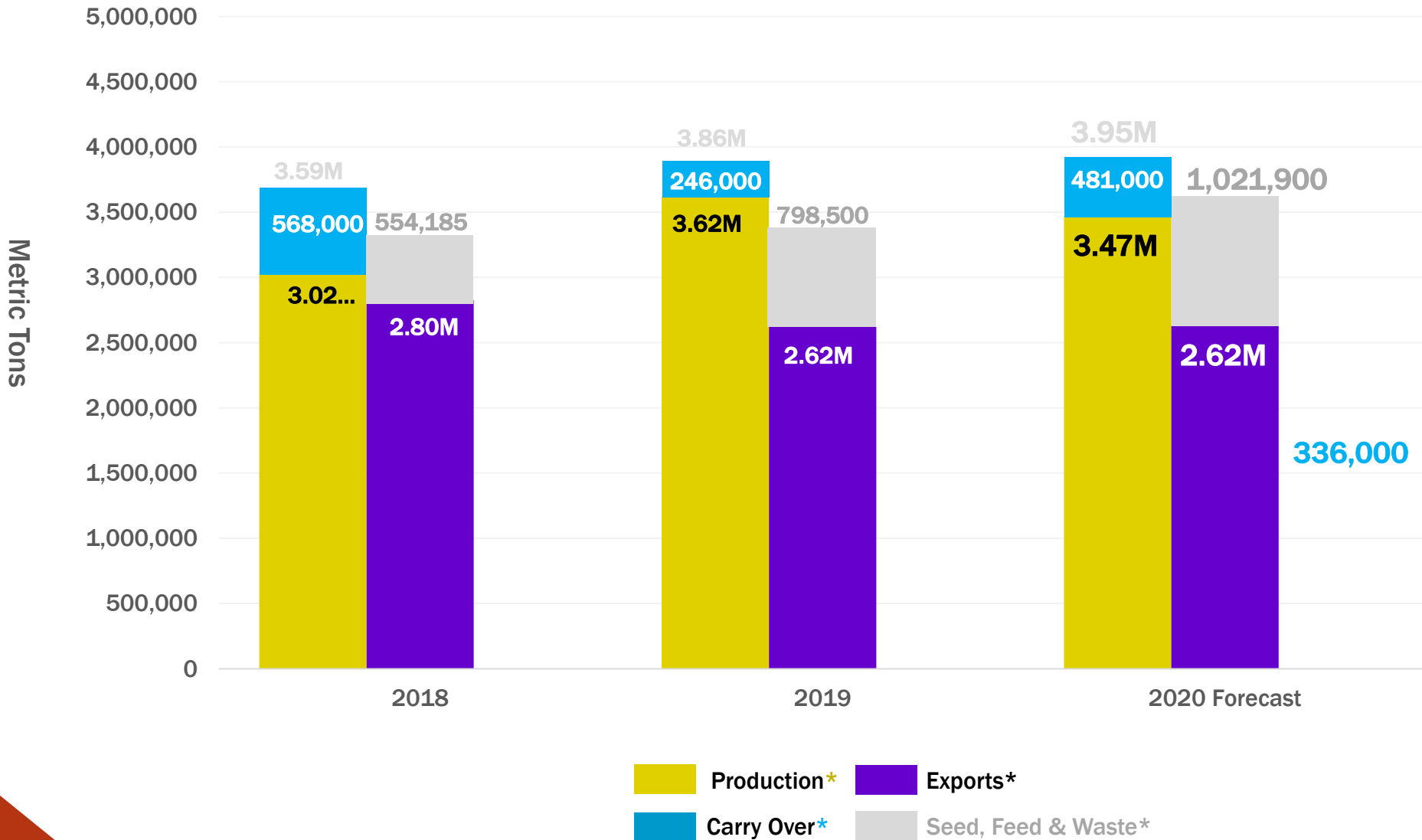
Yellow Peas Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Yellow Peas Summary



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Yellow Peas

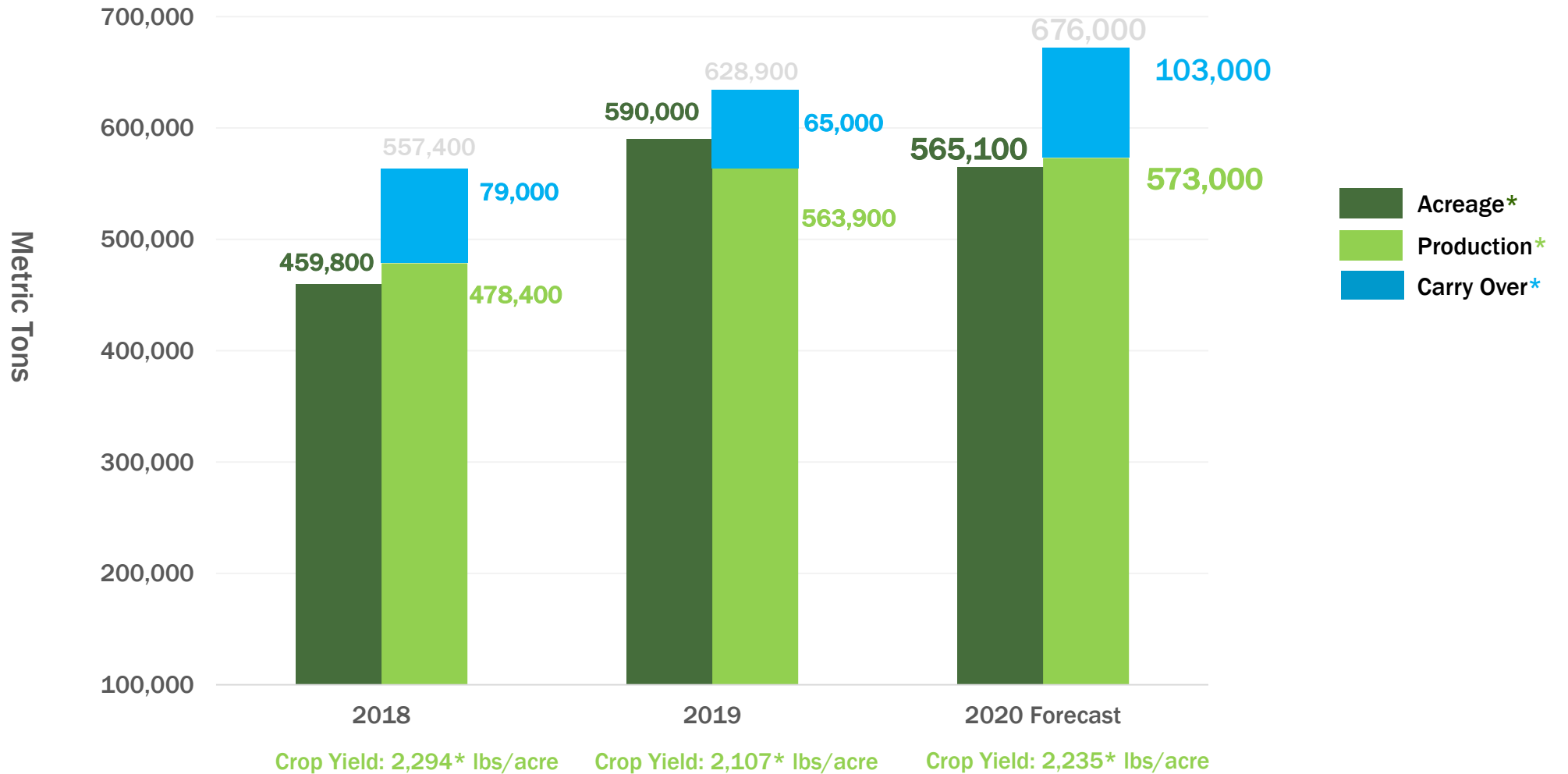
Top 5 Countries Canada Exports to

COUNTRY	Crop Year Period			
	2016-2017	2017-2018	2018-2019	Aug 2019 - Dec 2019
China	926,352	1,777,026	1,658,492	1,020,208
Bangladesh	416,345	101,852	605,665	196,441
Cuba	101,000	79,000	55,000	57,000
India	1,801,529	258,556	137,956	56,233
Nepal	991	2,302	46,508	56,216
Subtotal	3,246,217	2,218,736	2,503,621	1,386,098
Exports (Other Countries)	229,451	143,395	320,294	99,991
Total Exports	3,475,668	2,362,131	2,823,915	1,486,089
% of Total Exports	93.40%	93.93%	88.66%	93.27%

Source: Statistics Canada as at Feb 5, 2020
* Actuals



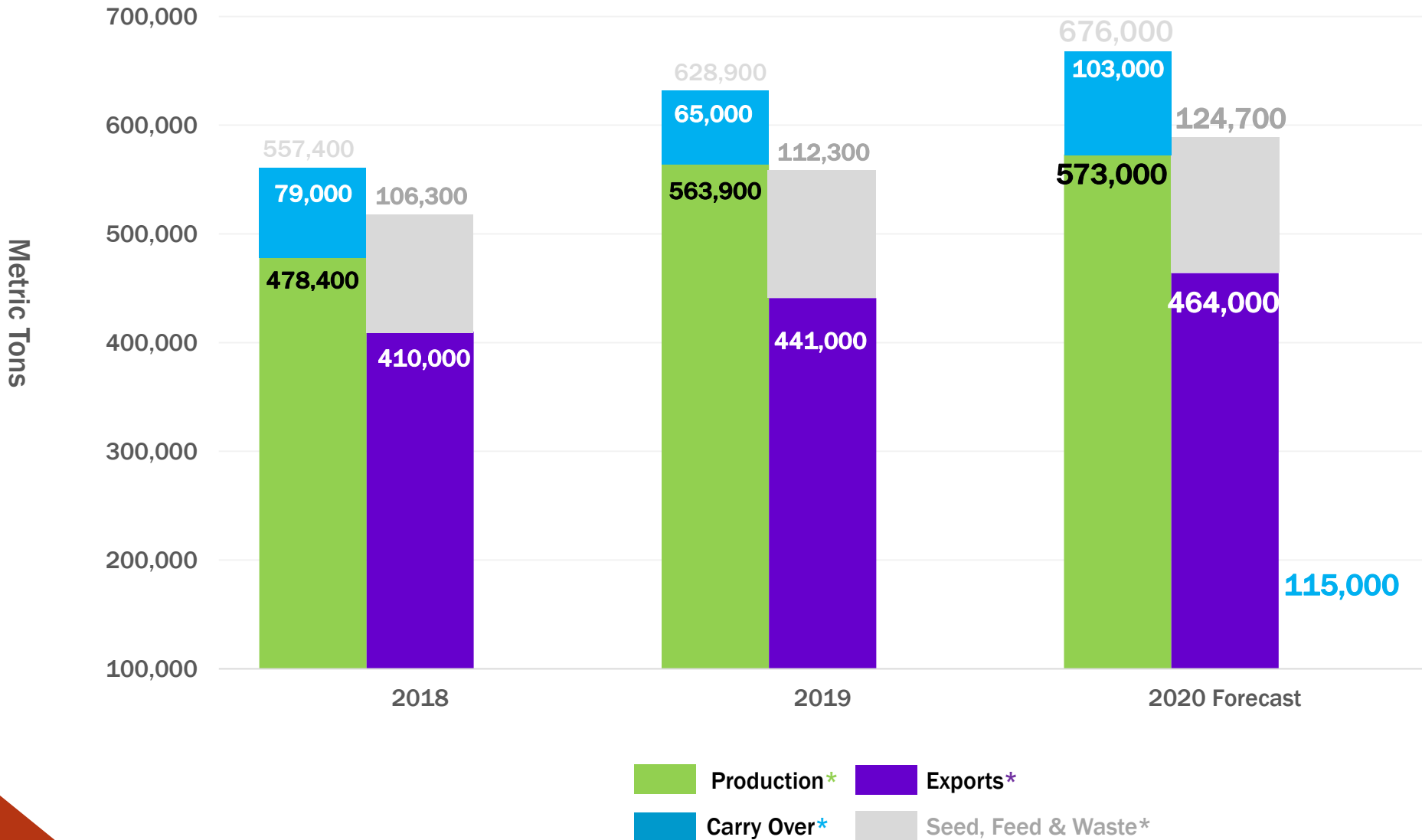
Green Peas Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Green Peas Summary



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Green Peas

Top 5 Countries Canada Exports to

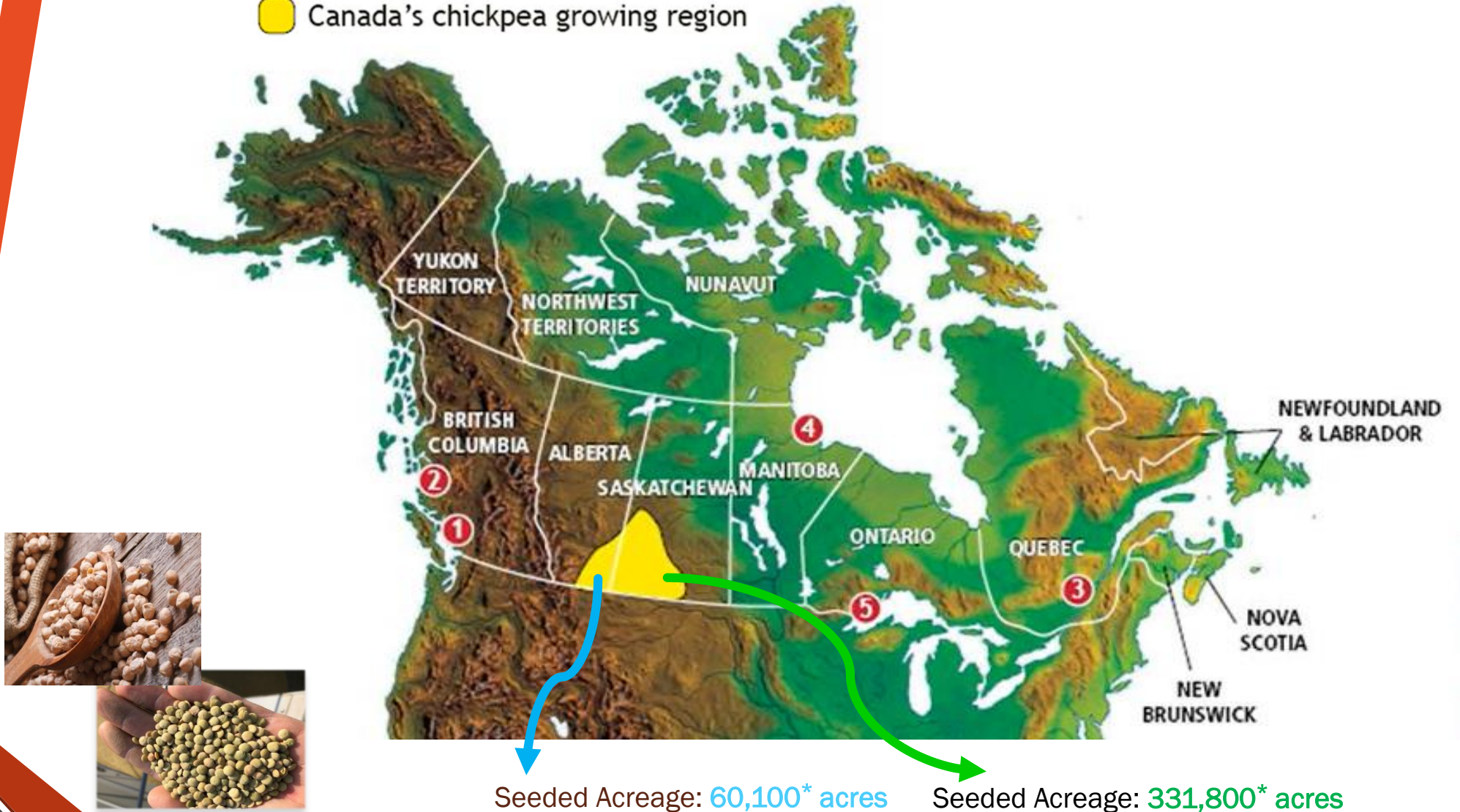
COUNTRY	Crop Year Period			
	2016-2017	2017-2018	2018-2019	Aug 2019 - Dec 2019
China	68,583	74,285	78,946	40,473
India	118,469	76,874	75,805	22,446
Nepal	3,421	8,851	24,548	18,340
Colombia	18,781	24,560	20,729	6,851
Philippines	23,332	24,148	19,860	6,675
Subtotal	232,586	208,718	219,888	94,785
Exports (Other Countries)	60,530	88,734	190,112	30,233
Total Exports	293,116	297,452	410,000	125,018
% of Total Exports	79.35%	70.17%	53.63%	75.82%

Source: Statistics Canada as at Feb 5, 2020
* Actuals



Chickpeas Production

 Canada's chickpea growing region



Seeded Acreage: **60,100*** acres
Production: **27,000*** MT

Seeded Acreage: **331,800*** acres
Production: **224,700*** MT

Source: Statistics Canada, Saskatchewan Agriculture
* 2019 Actuals



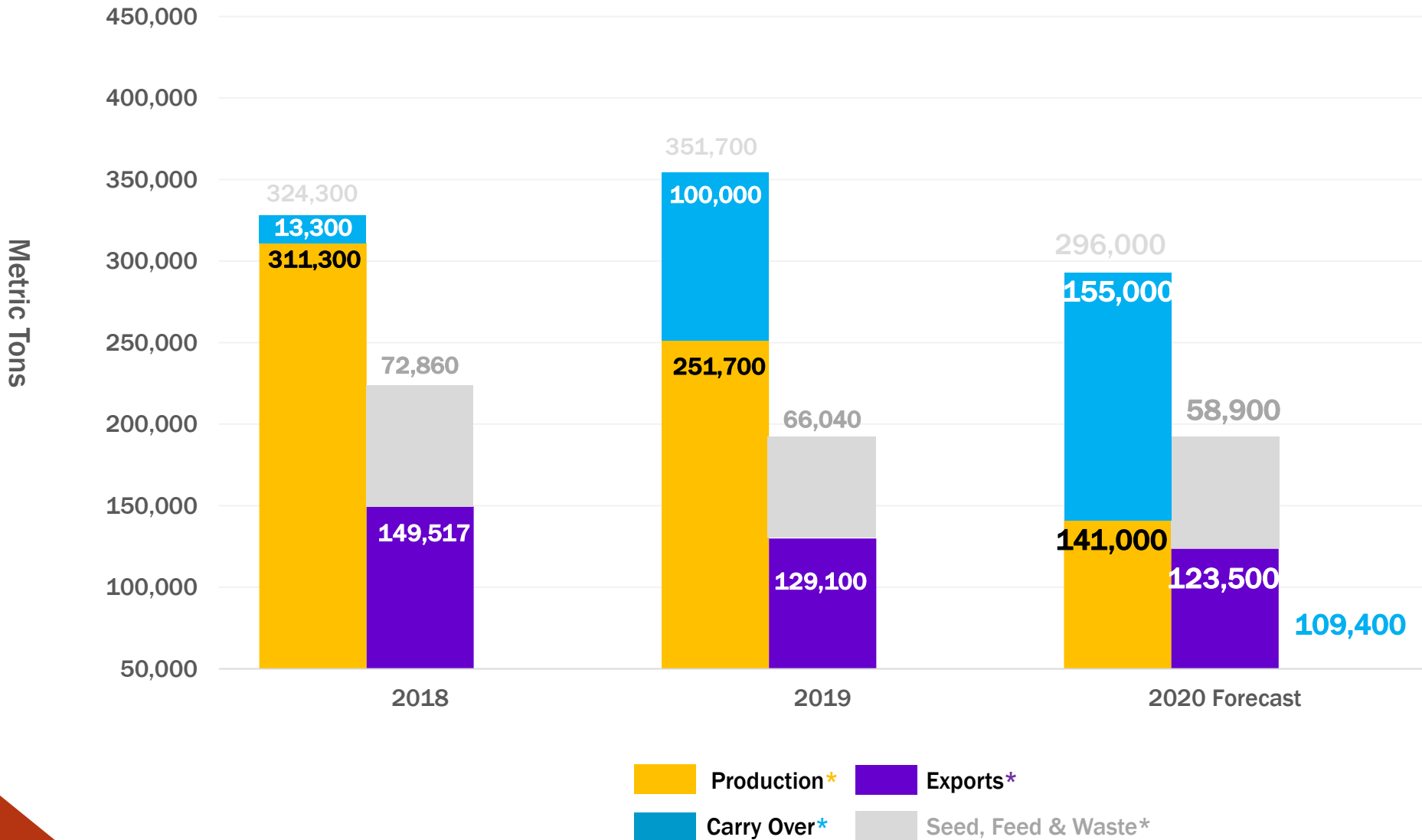
Chickpeas Production



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Chickpeas Summary



Source: Statistics Canada as at Feb 5, 2020
* Estimated Projections



Chickpeas

Top 5 Countries Canada Exports to

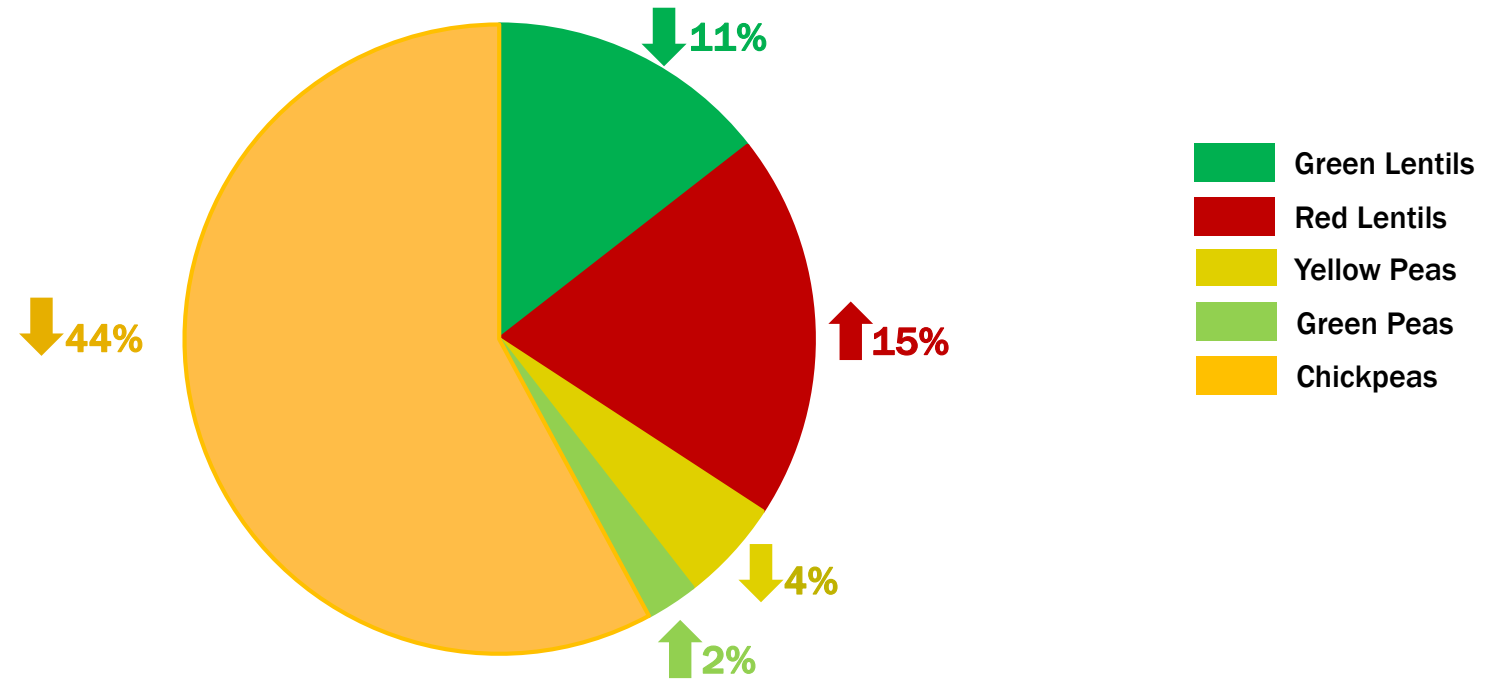
COUNTRY	Crop Year Period			
	2016-2017	2017-2018	2018-2019	Aug 2019 - Dec 2019
Pakistan	17,981	19,759	50,460	12,309
United States	41,303	27,807	23,751	8,521
Syria	499	1,000	3,496	6,032
United Kingdom	3,103	2,688	3,866	2,834
Portugal	2,062	3,167	7,531	1,583
Subtotal	64,948	54,421	89,104	31,279
Exports (Other Countries)	42,675	61,719	60,413	28,152
Total Exports	107,623	116,140	149,517	59,431
% of Total Exports	60.35%	46.86%	59.59%	52.63%

Source: Statistics Canada as at Feb 5, 2020
* Actuals



Market Summary

2020 Production



Updates

Corona Virus

All ocean carriers are announcing additional blank sailings (26) due to concerns

CN Rail Blockade

- Tyendinaga, ON (*Tyendinaga Mohawk Community*)
- New Hazelton, BC (*Wet'suwet'en territory*)



Q&A



THANK YOU

For more information, please visit
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