

IPGA: The Pulses Conclave 2023

Lentil Discussion

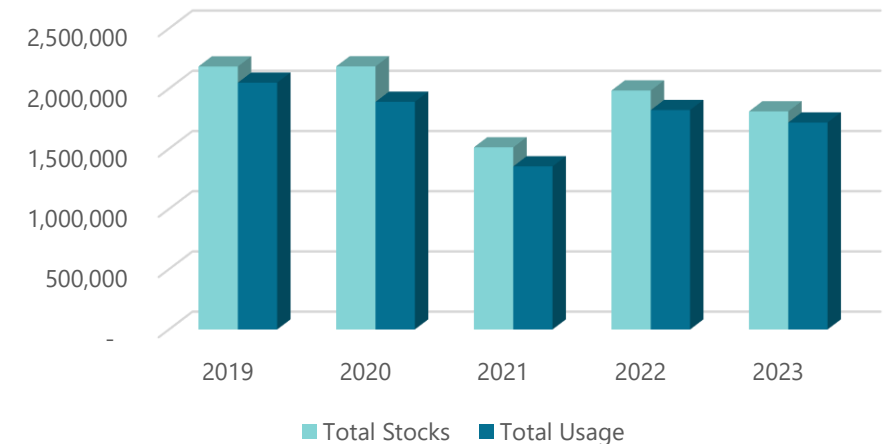
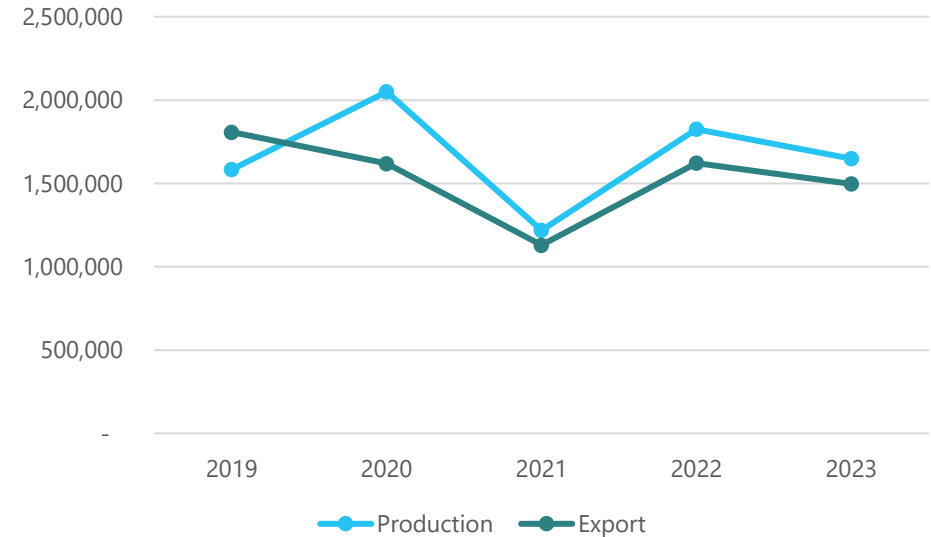
Moderator: Rav Kapoor

Agenda

- 1 Canadian Red Lentil Production
- 2 Canadian Green Lentil Production
- 3 Global Lentil Production
- 4 Canada & Australia Lentil Export
- 5 Questions and Discussion

Canada Production: Red Lentil

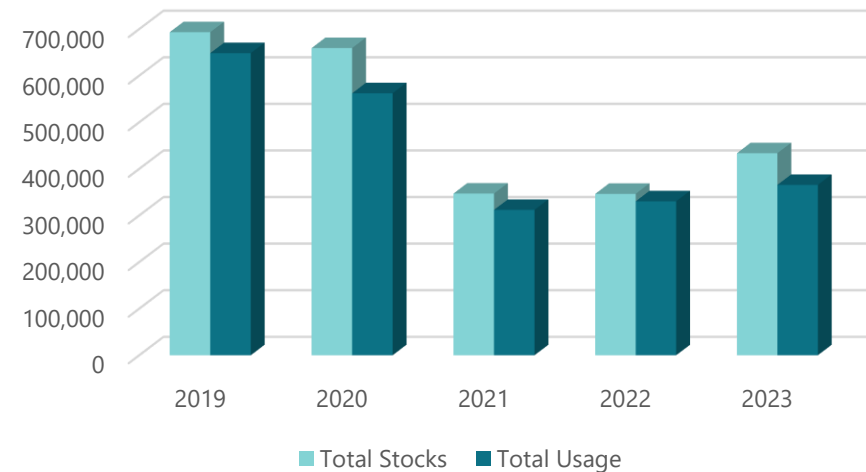
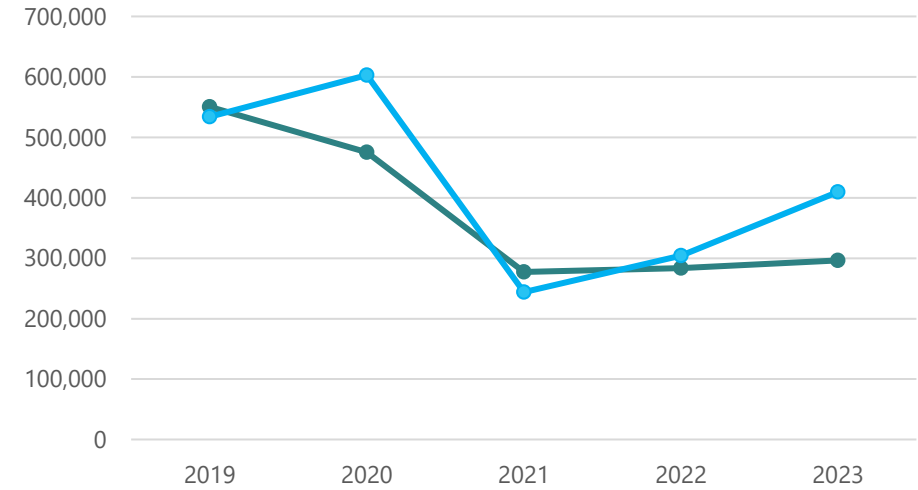
	Canadian Red Lentil Supply-Demand Estimates				
	2019	2020	2021	2022	2023
Acres (acres)	2,330,100	2,931,700	3,167,600	3,179,400	2,770,000
Yield (lbs)	1,498	1,542	848	1,266	1,312
Production	1,583,500	2,050,500	1,218,541	1,826,100	1,649,000
Carry In	600,000	134,000	294,000	158,000	162,000
Export	1,807,032	1,619,200	1,129,700	1,621,900	1,497,500
Seed, Feed & Waste	242,468	271,300	224,841	200,200	220,500
Ending Stock	134,000	294,000	158,000	162,000	93,000
Stocks/Use	6.54%	15.55%	11.66%	8.89%	5.41%



Canada Production: Large Green Lentil

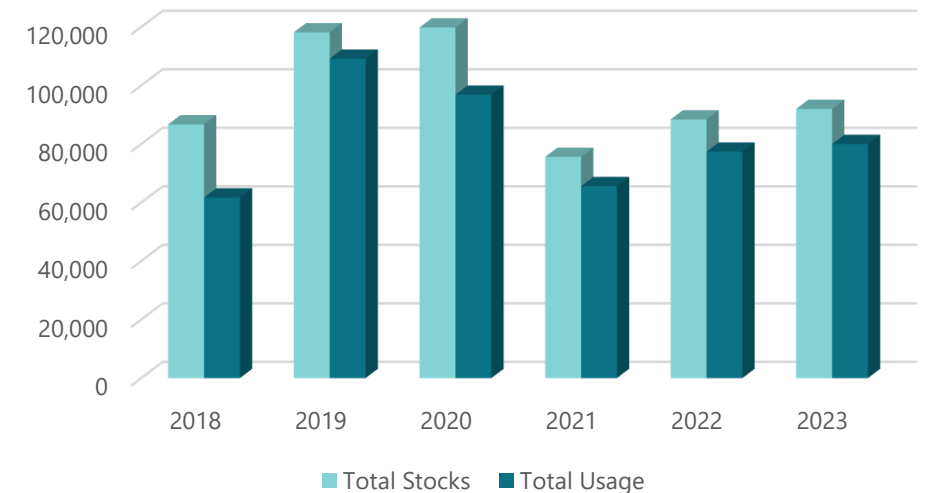
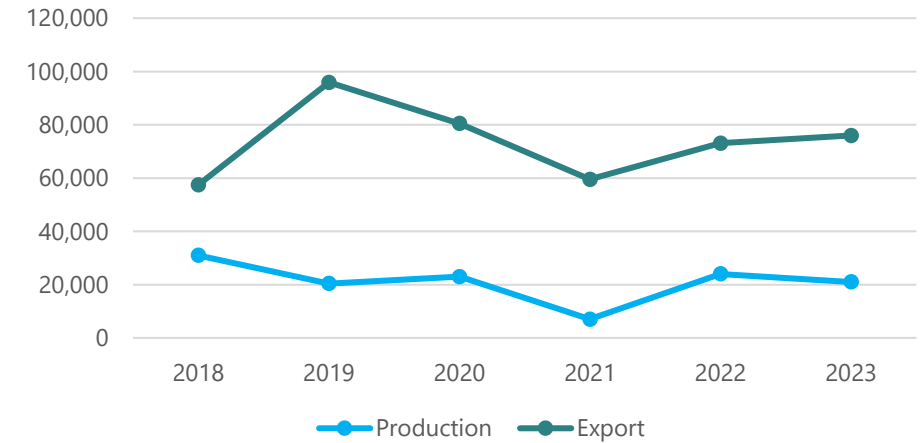
Canadian Large Green Lentil Supply-Demand Estimates

	2019	2020	2021	2022	2023
Acres (acres)	1,023,500	973,300	796,100	770,700	850,000
Yield (lbs)	1,150	1,366	676	871	1,063
Production	534,100	603,200	244,200	304,498	410,000
Carry In	150,000	45,000	97,000	35,000	16,000
Imports	9,096	10,980	5,700	6,800	7,500
Export	550,765	475,190	277,400	283,600	296,200
Seed, Feed & Waste	97,432	86,989	34,500	46,698	69,300
Ending Stock	45,000	97,000	35,000	16,000	68,000
Stocks/Use	6.94%	17.25%	11.22%	4.84%	18.60%



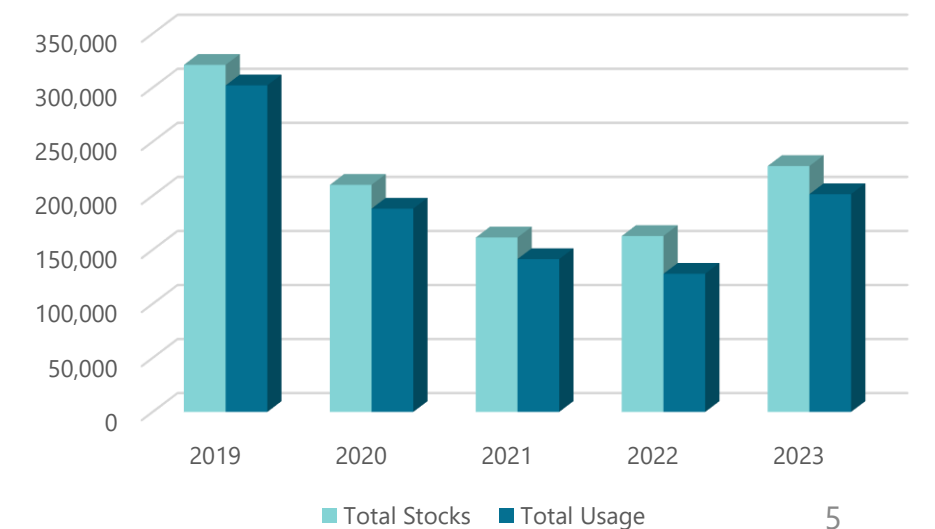
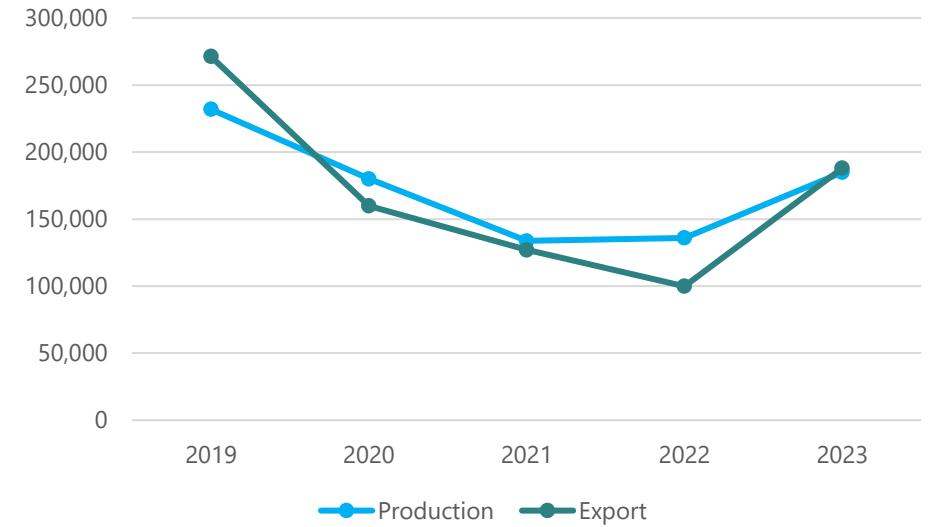
Canada Production: Medium Green Lentil

	Canadian Medium Green Lentil Supply-Demand Estimates				
	2019	2020	2021	2022	2023
Acres (acres)	40,500	40,000	28,000	39,000	38,000
Yield (lbs)	1,110	1,268	551	1,357	1,218
Production	20,400	23,000	7,000	24,000	21,000
Carry In	25,000	9,000	23,000	10,000	11,000
Imports	72,771	87,836	45,600	54,400	60,000
Export	95,900	80,500	59,500	73,100	76,000
Seed, Feed & Waste	13,271	16,337	6,100	4,300	4,000
Ending Stock	9,000	23,000	10,000	11,000	12,000
Stocks/Use	8.24%	23.75%	15.24%	14.21%	15.00%



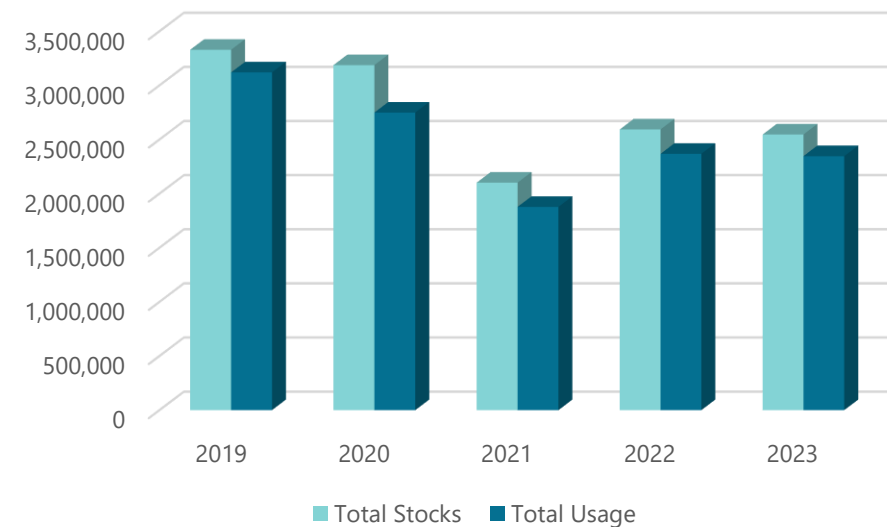
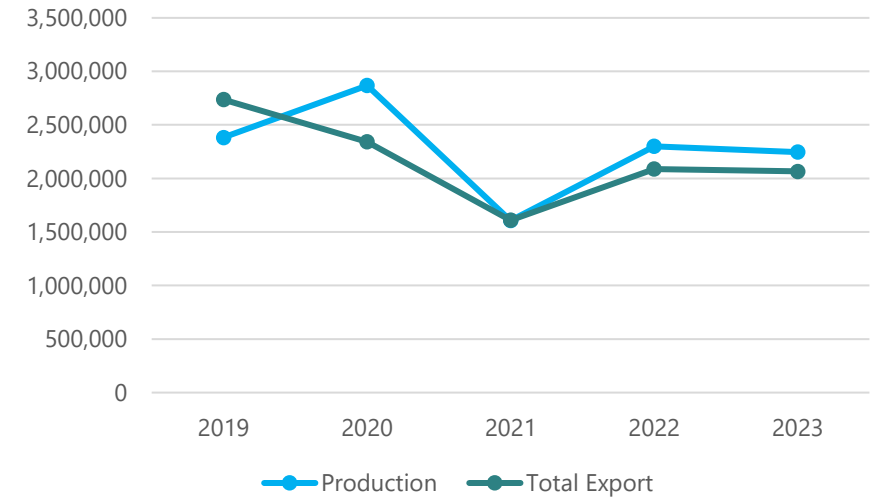
Canada Production: Small Green Lentil

	Canadian Small Green Lentil Supply-Demand Estimates				
	2019	2020	2021	2022	2023
Acres (acres)	362,400	265,800	294,600	314,200	324,000
Yield (lbs)	1,411	1,494	1,001	954	1,259
Production	232,000	180,100	133,700	136,000	185,000
Carry In	80,000	19,000	22,000	20,000	35,000
Imports	9,096	10,980	5,700	6,800	7,500
Export	271,400	159,900	127,100	99,900	188,000
Seed, Feed & Waste	30,697	28,179	14,300	27,900	13,500
Ending Stock	19,000	22,000	20,000	35,000	26,000
Stocks/Use	6.29%	11.70%	14.14%	27.39%	12.90%



Canada Lentil Production

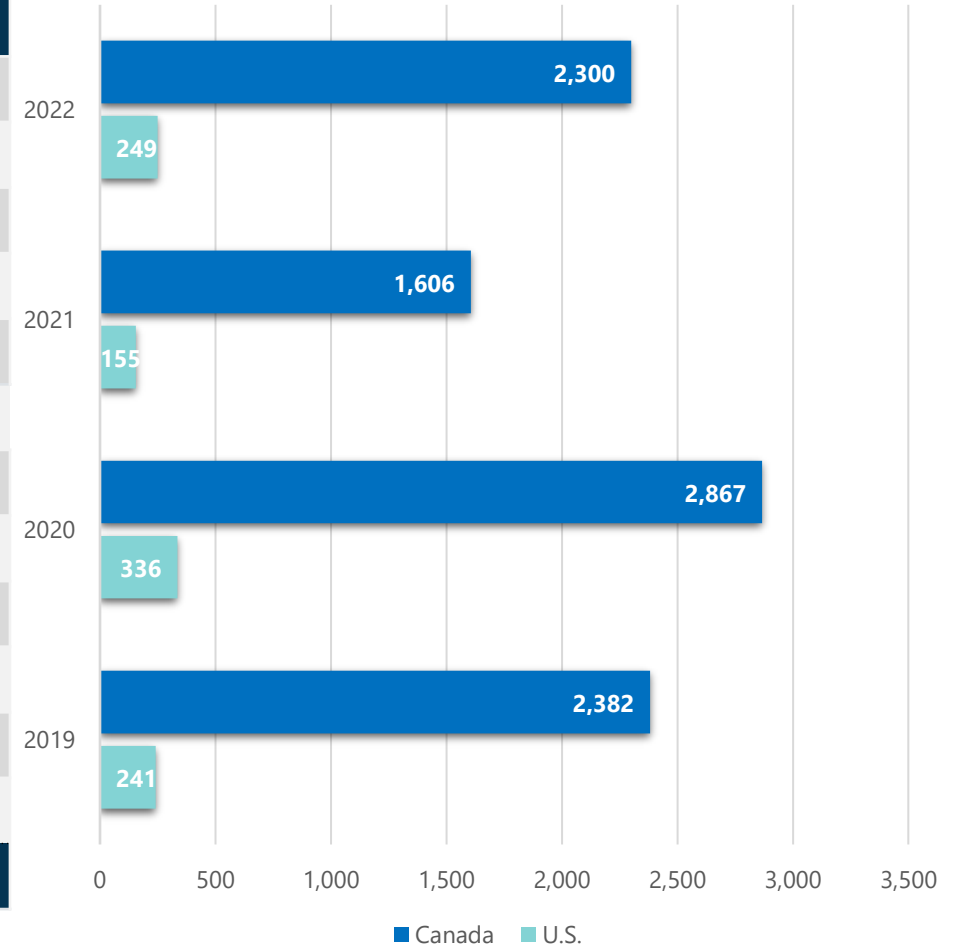
	Canadian All Lentil Supply-Demand Estimates				
	2019	2020	2021	2022	2023
Acres (acres)	3,780,500	4,232,800	4,303,300	4,321,300	4,000,000
Yield (lbs)	1,389	1,494	823	1,174	1,254
Production	2,382,000	2,867,700	1,606,441	2,300,598	2,246,000
Carry In	856,000	209,000	438,000	224,000	225,000
Imports	90,964	109,796	57,000	68,000	75,000
Aug-Nov Exports	675,032	1,034,902	653,266	838,906	N/A
Percent of Forecast	24.66%	44.19%	40.58%	40.16%	N/A
Total Export	2,737,297	2,341,746	1,609,730	2,089,000	2,066,000
Seed & Other Domestic	382,667	406,750	267,711	278,598	280,000
Ending Stock	209,000	438,000	224,000	225,000	200,000
Stock/Use	6.70%	15.94%	11.93%	9.50%	8.53%



U.S. Lentil Production

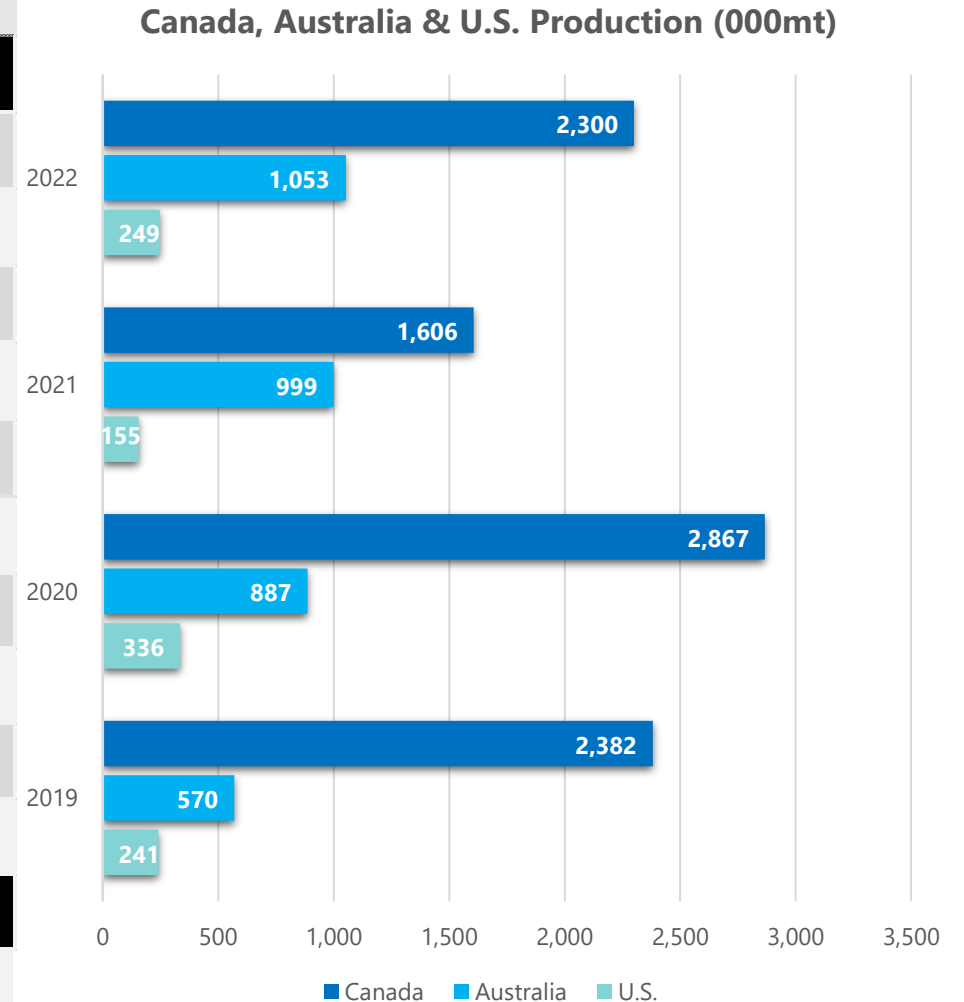
	U.S. Lentil Supply-Demand Estimates			
	2019	2020	2021	2022
Acreage	486,000	523,000	708,000	660,000
Yield (lbs)	1,093	1,416	483	832
Production	241,000	336,000	155,000	249,000
Imports	88,353	93,278	112,994	96,000
Carry In	201,000	58,000	1,000	5,000
Stocks	530,353	487,278	268,993	350,000
Aug-Nov Exports	114,421	147,852	51,101	70,364
% of Forecast	41.23%	48.07%	32.12%	39.53%
Total Export	277,535	307,567	159,106	178,000
Seed	16,968	22,967	12,588	21,235
Domestic	177,851	155,744	92,300	123,764
Total Usage	472,353	486,278	263,993	322,999
Ending Stock	58,000	1,000	5,000	27,000
Stocks/Use	12.30%	0.20%	1.90%	8.40%

Canada & U.S. Production (000mt)



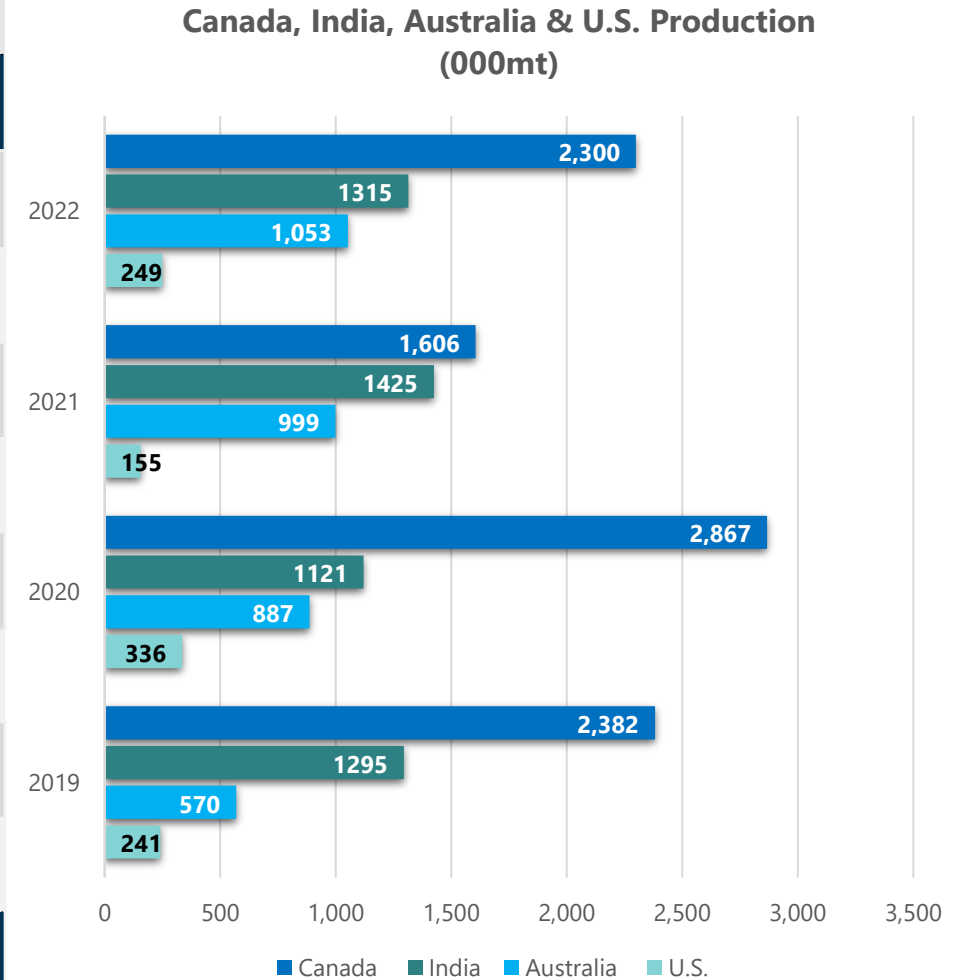
Australia Lentil Production

	Australia Lentil Supply-Demand Estimates				
	2019	2020	2021	2022	2023
Acres (hectares)	446,000	520,000	575,000	646,000	647,000
Yield (kg)	1,278	1,706	1737	1630	1,405
Production	570,000	887,000	999,000	1,053,000	909,000
Carry In	138,000	11,000	1,000	21,000	8,000
Imports	2,800	3,700	3,600	4,100	3,600
Nov-Oct Exports	666,477	873,151	950,306	N/A	N/A
% of Annual	100.00%	100.00%	100.00%	N/A	N/A
Export	666,477	873,151	950,306	1,037,881	872,290
Seed, Feed, Waste	33,323	27,548	32,295	32,219	31,310
Total Usage	699,800	900,699	982,601	1,070,100	903,600
Ending Stock	11,000	1,000	21,000	8,000	17,000
Stocks/Use	1.57%	0.11%	2.14%	0.75%	1.88%



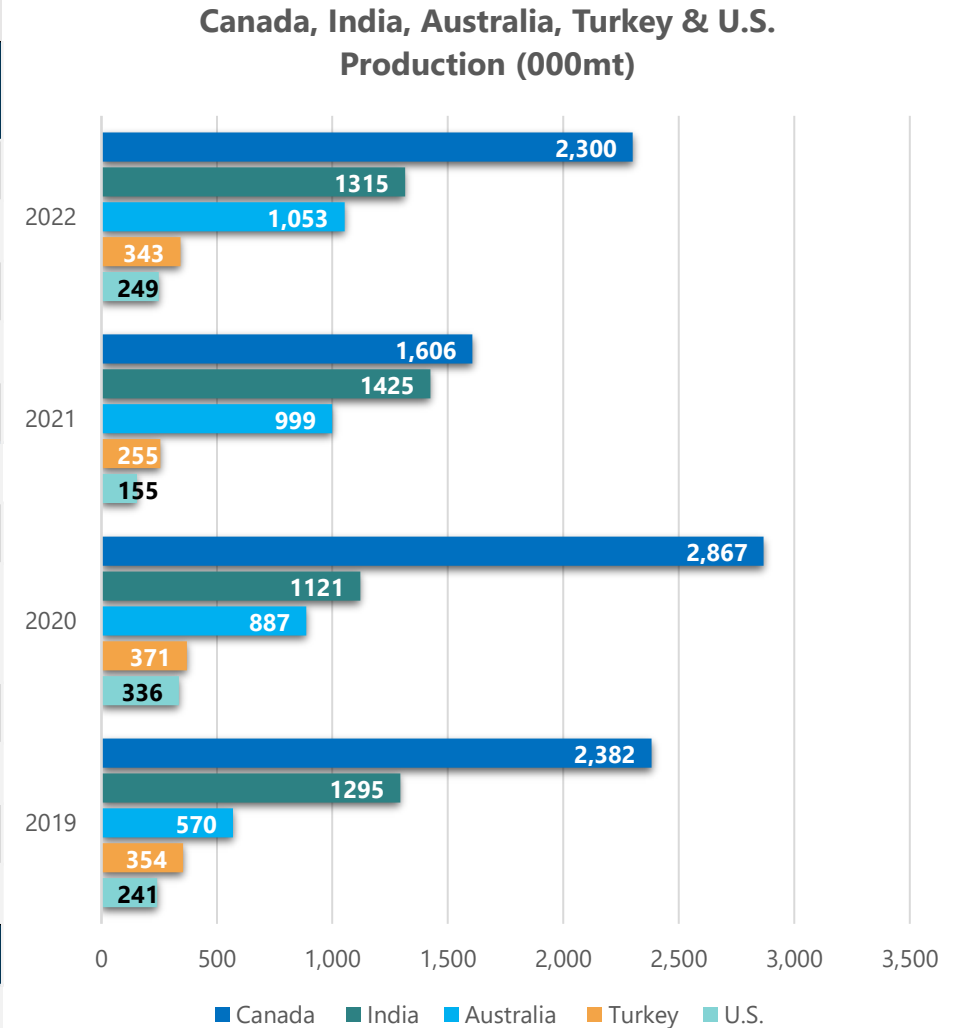
India Lentil Production

	India -Pulses Supply And Usage Balance Sheet			
	2019	2020	2021	2022
Domestic	1,295,000	1,121,667	1,425,000	1,315,000
Imports	822,397	1,061,305	724,537	604,000
Gross Supply	2,117,397	2,182,972	2,149,537	1,919,000
Lost in Milling	301,729	311,074	306,309	273,458
Seed, Feed, Waste	185,000	218,000	205,000	223,000
Net Supply	1,774,000	1,699,000	1,695,000	1,529,000
Per Capita Supply	1.35	1.28	1.26	1.14
Inferred Use	1,729,000	1,642,000	1,589,000	1,492,000
Residual	45,000	57,000	106,000	37,000



Turkey Lentil Production

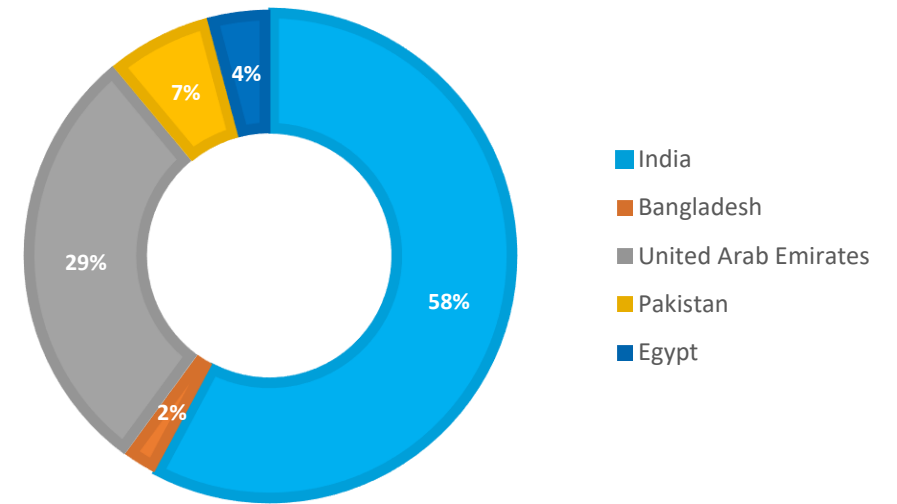
	Turkey Lentil Supply-Demand Estimates			
	2019-20	2020-21	2021-22	2022-23
Area	282,000	248,000	265,000	269,000
Yield (kg/ha)	1,255	1,311	964	1273
Production	354,000	371,000	255,000	343,000
Carryin	8,000	9,000	93,000	14,000
Imports	485,232	531,763	458,000	442,000
Stocks	847,232	911,763	806,000	799,000
Exports	347,034	330,763	326,000	297,000
Seed, Feed, Waste & Other	42,000	44,600	37,900	42,900
Split Losses	93,700	89,300	88,000	80,200
Domestic	355,498	354,100	340,100	354,900
Total Domestic	491,198	488,000	466,000	478,000
Total Usage	838,232	818,763	792,000	775,000
Carryover	9,000	93,000	14,000	24,000
Stocks/Usage	1.10%	11.40%	1.80%	3.10%



Canadian Red Lentil Exports

Canadian Red Lentil Exports (metric tons)					
Crop Year	2019-20	2020-21	2021-22	2021-22	2022
Period	Aug-Jul	Aug-Jul	Aug-Jul	Aug-Dec	Aug-Dec
Top Five Buyers					
India	566,556	507,207	281,904	175,176	275,569
Bangladesh	244,160	192,210	11,000	11,000	94,868
United Arab Emirates	193,627	230,324	141,039	77,410	92,022
Pakistan	45,778	59,887	33,614	6,698	36,357
Egypt	43,559	55,165	20,096	17,120	3,619
Subtotal	1,093,680	1,044,793	487,653	287,404	502,435
Other Countries	539,792	445,815	508,118	215,094	227,286
Total World	1,633,472	1,490,608	995,771	502,498	729,721

2021-22 GL EXPORT BREAKDOWN



Canadian Green Lentil Exports

Canadian Green Lentil Exports (metric tons)

Crop Year	2019-20	2020-21	2021-22	2021-22	2022
Period	Aug-Jul	Aug-Jul	Aug-Jul	Aug-Dec	Aug-Dec

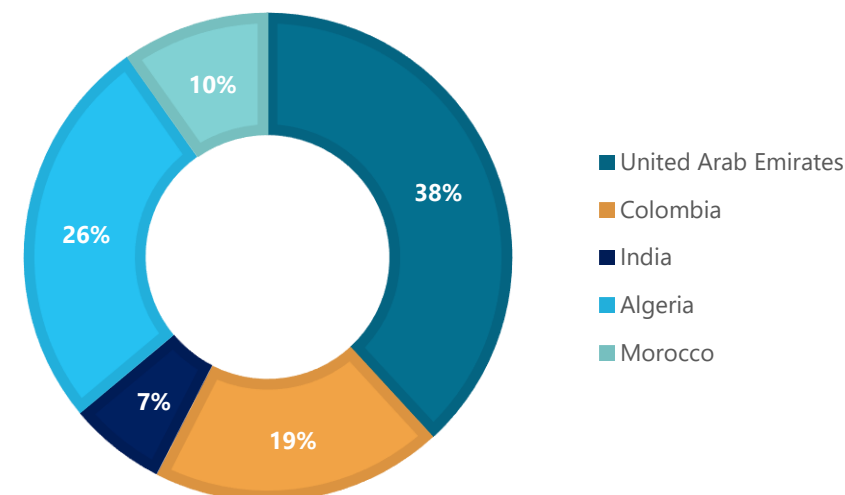
Top Five Buyers

United Arab Emirates	41,694	33,495	60,913	12,018	22,374
Colombia	46,171	26,592	30,884	16,690	21,065
India	90,468	89,630	10,270	8,087	14,633
Algeria	44,386	44,821	41,974	19,669	13,103
Morocco	43,437	27,648	15,571	4,758	11,870
Subtotal	266,156	222,186	159,612	61,223	83,044

Other Countries	214,568	191,640	147,180	79,829	83,073
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Total World	480,724	413,826	306,792	141,052	166,117
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2021-22 GL EXPORT BREAKDOWN

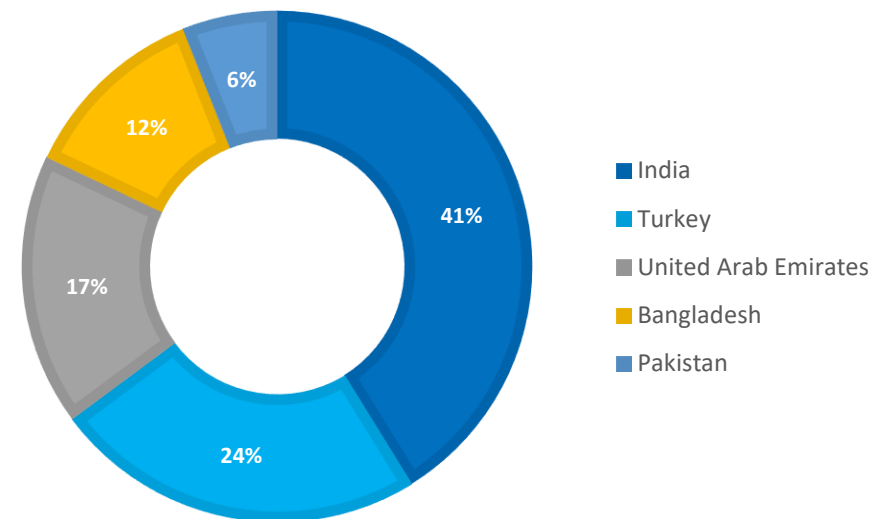


Canadian Lentil Exports

Canadian All Lentil Exports (metric tons)

Crop Year	2019-20	2020-21	2021-22	2021-22	2022
Period	Aug-Jul	Aug-Jul	Aug-Jul	Aug-Dec	Aug-Dec
Top Five Buyers					
India	787,182	666,036	306,834	194,916	301,973
Turkey	418,674	381,939	484,599	214,833	207,615
United Arab Emirates	266,755	278,411	220,960	97,120	126,797
Bangladesh	250,254	193,311	11,208	11,000	94,868
Pakistan	84,217	96,821	52,333	7,466	45,038
Subtotal	1,807,081	1,616,517	1,075,934	525,336	776,291
Other countries	930,216	725,230	534,198	265,477	296,025
Total World	2,737,297	2,341,747	1,610,132	790,813	1,072,316

2020-21 ALL LENTILS EXPORT BREAKDOWN

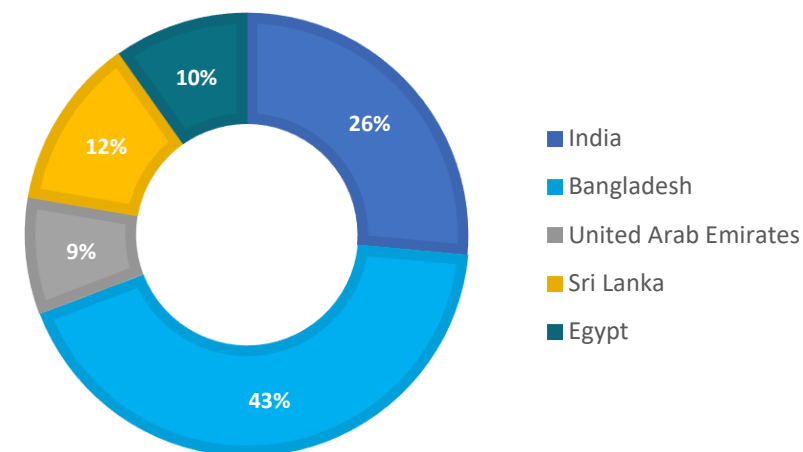


Australian Lentil Exports

Australian Lentil Exports (metric tons)

	2019-20	2020-21	2021-22	2021-22	2022
(metric tons)	Nov-Oct	Nov-Oct	Nov-Oct	Nov-Dec	Nov-Dec
Top Five Buyers					
India	137,660	117,820	229,426	45,322	91,633
Bangladesh	282,488	324,970	370,691	16,733	37,284
United Arab Emirates	7,877	58,449	73,872	553	23,590
Sri Lanka	109,590	144,464	108,450	17,389	14,329
Egypt	30,396	95,633	84,961	7,628	9,483
Subtotal	568,011	741,336	867,399	87,626	176,320
Other countries	98,465	131,816	83,322	9,136	15,078
Total World	666,476	873,152	950,721	96,762	191,398

2021-22 AUSTRALIAN LENTIL EXPORTS



Questions?

THANK YOU