

October 2001 Vol. 1 No. 1

# pulsepoint

saskatchewan pulse growers



## Coming at You

Key Issues for  
Pulse Growers

- Transportation
- U.S. Subsidies
- Market Status

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## CHAIRMAN'S MESSAGE



**Lyle Minogue**

Chairman of the Board



# Changing Times

Hello again,

You will be surprised, pleasantly or otherwise, by the new look of our newsletter. The new format marks a major change in our communications policy. In the past it has always been the policy of Saskatchewan Pulse Growers to keep advertising out of our newsletter to ensure that all news and information was presented from a producer perspective.

Some producers have told us they would welcome information on products that they might want to use. Your Board of Directors has decided to try going with this new format, which includes an advertising insert. Revenue from advertising will enable us to upgrade the quality of our newsletter and free scarce dollars for other needs, such as research and market development. In the new format we will include more input from producers in the articles and will welcome feedback.

This change in policy is consistent with our philosophy that farmers must partner with companies that supply inputs and buy our products. One group alone can't be successful

at maintaining and developing our industry. It requires a co-operative effort.

Recently we have had commitments from the Federal and Provincial Governments to increase support for the pulse industry. It is about time, now that we have over seven million acres of pulses in Western Canada. We will be approaching industry and asking them to join with us in a team effort of producers, industry and government, to make Canada the world's leading pulse producer. We will need the support of everyone.

The bad news is that many producers are having a dismal harvest with poor yields. This has helped to increase prices somewhat, but that is small consolation for those with little or no production. For those fortunate enough to get some crop, remember, the price of pulses to a large extent is determined by what Saskatchewan farmers are willing to sell for.

Wishing you the best,

Lyle Minogue

Chairman, Saskatchewan Pulse Growers

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Over seven million acres of pulses are now being planted and harvested in Western Canada.

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# Delivering During Drought

Drought years probably make it more important than ever for agricultural producers to get market timing right. The reason is low yields reduce the number of times growers can participate in markets by reducing the saleable quantity of grain available after harvest.

The situation is often made more difficult when droughts in one part of the world are offset by improved yields elsewhere. World markets have a hard time keeping up with local markets which may be on the rise.

Unquestionably, there is a strong likelihood season average prices for Canadian-origin pulses will end the 2001-02 marketing campaign above last season's levels. Aiding this is a bullish outlook for dry edible beans, and expectations of generally stronger agricultural commodity prices during the coming months. This lessens the risk consumers will substitute other products for pulses; except insofar as they look at substituting field peas or small calibre chickpeas for dry edible beans, lentils and large calibre kabuli chickpeas.

As runaway markets seem less likely, the timing of sales will become a bigger issue for primary producers. This makes it interesting to look at the performance of grower markets in general, and in specific years when average yields were reduced on account of drought and other problems.

Canadian large green lentil markets are normally strongest in the August through November period, while small green lentils peak between December and February. The only time, on average, where this was not the case was during years with exceptional yields. Looking at the four years since 1985 with low yields, large green lentil prices peaked in the October-November period, while surging again in the February-March and May-June shipping periods.

In years with low yields, small green lentil markets remained strong through the entire October to March period, suggesting this class

of lentil typically enjoys a longer shipping season than large green.

Drought did not seem to have as strong an influence on the performance of field pea markets. Prices have historically trended upward across the growing season, however they tended to peak earlier in the season when there was drought than was generally the case. This could be a result of the tendency for prices to rise to levels which discourage sales later in the marketing year. Decreased demand from processors coupled with anticipation of the pending harvest may limit sales opportunities for growers, forcing prices near or below the season average more quickly than would otherwise be the case.

Chickpeas are too new to Canada to have revealed their true colours in terms of market performance.

However, grower data for the last three marketing years shows desi-type chickpeas closely match the price performance recorded by field peas; while kabuli-type chickpeas follow a similar pattern to lentils. The three-year average price performance of 7mm chickpeas is close to small green lentils, while the 8mm and 9mm categories are reminiscent of large green lentils.✱

## IN BRIEF

**Brian Clancey looks at the consequences of drought on pulse prices.**

### Canadian Grower Price Performance After a Drought (per cent of annual average price)

Month	Laird	Eston	Yellow Pea	Green Pea	Feed Pea
August	88	84	93	94	98
September	104	99	99	97	101
October	105	103	101	96	100
November	106	106	98	96	101
December	99	105	98	96	99
January	98	104	101	98	101
February	102	106	104	100	101
March	100	107	104	103	100
April	98	101	104	105	102
May	100	99	102	108	103
June	103	99	101	105	97
July	98	89	96	100	95

source: STAT Market Research

### Canadian Grower Price Performance 1996-2001 (per cent of annual average price)

Month	Laird	Eston	Yellow Pea	Green Pea	Feed Pea
August	105	101	101	94	100
September	105	96	94	90	98
October	104	97	96	97	99
November	104	101	99	99	100
December	100	102	99	100	102
January	98	103	98	102	102
February	97	107	97	104	102
March	93	101	100	106	103
April	93	96	101	103	103
May	98	97	107	105	100
June	104	102	107	104	96
July	98	97	100	96	93

source: STAT Market Research

## ★ IN BRIEF

**Can Canadian producers survive the distorted market and low prices that may follow if pulses are included in the U.S. Farm Bill?**

# Subsidy Stress

United States policy-makers are currently engaged in re-writing farm legislation which would see support programs to domestic farmers rise significantly over the next decade – likely distorting world trade and seriously hampering the ability of non-U.S. producers to compete in a global marketplace. The prospect is causing stress in Canada.

While potentially devastating for all Canadian producers, the specific effect on Canada's pulse producers is still a little murky. Congress hasn't fully decided whether pulse crops should be included in any of the new subsidy plans. If they are, some trade experts believe that will seriously darken the prospects of what, to now, has been one of the few rays of light in Canadian agricultural production.

"This brings into question the ability of our producers to manage in the long-term. If farmers start diversifying into things like pulses, they're looking at the future and seeing an industry that is profitable and not distorted right now," says James Kettel, Research Economist with Saskatchewan Agriculture and Food. "If (funding to pulses) goes through, then it might lead to big acreages coming on-line in the U.S., and as a result there would be an increase in world supply and probably a decrease in prices."

## All Eyes South

Kettel has been watching the situation south of the border since the beginning of the summer. At the heart of the matter are two bills – the U.S. Emergency Farm Aid Bill, which is reviewed annually, and the next U.S. Farm Bill, which will replace the one set to expire in 2002.

The Emergency Farm Aid Bill, which passed on August 3 of this year, contains

emergency aid payments that are similar to federal bailouts of the last three years and will maintain U.S. farm incomes near the historic high of 1997. This year's bill will result in a total federal payout to farmers of US\$5.5 billion. Pulses were not among the crops eligible for this emergency assistance.

The concern however, says Kettel, is that the original U.S. Senate version of the bill, which was worth US\$7.4 billion, did contain payments specific to pulse crops. Supporters of the Senate's version have vowed to raise the issue of spending this difference of US\$1.9 billion again this fall. Kettel says in the U.S., it is possible that this additional spending could be tacked on as a "rider" to another Senate bill and be passed. "So, there's still a threat that there could be additional spending going to the pulse sector this year," says Kettel.

That leads to the next, and even greater, concern for Canadian producers. What the Senate decides to do with any additional emergency aid could also play a big part in what the next U.S. Farm Bill will look like. The Farm Bill spells out the shape of U.S. farm policy. The U.S. House of Representatives Agricultural Committee has already completed a draft version, with a proposed farm budget that will add US\$74 billion to current farm program spending over the next 10 years. It does not include funding for pulses.

The danger is that the Senate may still include pulses in its version of the Farm Bill, even though the House of Representatives did not. This is due to pressure coming from



**SUBSIDIES**





individual Senators, many of whom are from northern tier, pulse-producing states, like Tom Harkin of Iowa, and Byron Dorgan of North Dakota, as well as from lobby groups like the USA Dry Pea and Lentil Council. The Council's Gerald Barton is quoted in *The Western Producer* as saying his group is pushing for inclusion in the federal loan payment portion of the Farm Bill because "banks are reluctant to lend money to farmers who are seeding crops not eligible for support. The lack of available financing is contributing to a drop in U.S. pulse acreage."

The Senate's Farm Bill is expected to be completed sometime in September. (In general, if both houses draft similar bills, then one house might simply pass the version drafted by the other. Where there are large discrepancies, a bill must then be deliberated on by a joint committee, before being presented to both houses again prior to proceeding to the President.) The reason why there seems to be a push from both houses to get this passed soon – even though the current Farm Bill runs through 2002 – is due to speculation that

*"U.S. farmers today are shielded from adjustment, while our competitors are not. The adjustment burden thus falls especially on grain and oilseed farmers in Latin America, Canada, Australia and Africa who face lower world prices and reduced profitability."*

J.B. Penn, formerly of Sparks Co.

the US\$70 billion surplus that is earmarked for the bill may be allotted to other areas if the agriculture sector doesn't lock it up.

### What are the Ramifications?

If the U.S. begins to subsidize its pulse farmers, there is no doubt about the effect it will have on Canadian producers, says Kettel. He says the best evidence is actually provided by a prominent American authority. In January this year, J.B. Penn, then with the agricultural consulting firm Sparks Co. and now the United States Department of Agriculture's Under-Secretary of Farm and Foreign Agricultural Services, published a policy paper on American emergency aid payments.

"The \$23 billion in ad hoc subsidies to U.S. farmers (from 1999-2001) have held more resources in commodity production than otherwise would have been the case, and the extra output obviously pushes prices lower," wrote Penn. "Moreover, in a reversal from the past 60 years, U.S. farmers today are shielded

from adjustment, while our competitors are not. The adjustment burden thus falls especially on grain and oilseed farmers in Latin America, Canada, Australia and Africa who face lower world prices and reduced profitability, and who receive little additional assistance from their governments."

As well, the reversal that Penn alludes to could have even greater international ramifications than those forced onto the pulse sector. In the last round of World Trade Organization (WTO) negotiations, it was American opposition to the European Union (EU) and Japan that led to the implementation of the WTO Agreement on Agriculture. The agreement was designed to reduce trade distortions. But with U.S. policy apparently shifting towards favouring trade-distorting agricultural subsidies, this



**Canadian pulse producers need to address the threat of U.S. subsidies to avoid the problems that currently dog grain and oilseed producers.**

could dash any hope of the current WTO negotiations achieving any significant reductions in U.S. and EU subsidies. The irony of this flip-flop is outlined by an American source – again. The National Corn Growers Association is on record as saying the proposed U.S. Farm Bill “makes it difficult to advance America’s trade liberalization agenda”.

Regardless, there is a real threat that pulses may soon be included in some sizable U.S. farm subsidy programs. As Kettel sees it, there are only a few options available to Canadian producers. One is to implore the provincial and federal governments to get working on the situation.

This is already happening. Canadian Agriculture Minister Lyle Vanclief brought up the importance of reducing tariffs in a speech he delivered at the CICILS/IPTIC Convention in June. Manitoba Agriculture’s Assistant Deputy Minister Craig Lee has also acknowledged that there will be “more crops with depressed prices” because of U.S. subsidies.

Kettel says Provincial Agriculture and Food Minister Clay Serby raised the issue with U.S. officials directly at a recent Provinces-States Advisory Group meeting. The group convened at the Tri-National Accord meeting in Colima, Mexico in early September. The Mexicans and Canadians agreed to work together on this issue. Finally, there is the possibility the U.S. Farm Bill may be in violation of either WTO or North American Free Trade Agreement regulations.

Time may or may not be on Canada’s side. The US\$5.5 billion Emergency Farm Aid package was pushed through quickly because of a desire to get the money into American farmers’ hands this fall. The Farm Bill, however, might not be completed until next year if the House of Representatives and the Senate aren’t close on their draft versions, and it has to go to a joint committee.

Addressing the situation now, however, is the key on this side of the border – in order to try to prevent Canadian pulse producers from having to face the same global marketplace that currently dogs grain and oilseed producers. “It’s tough, but I think we need to raise our concerns and put them in a way that the U.S. policymakers realize what impact they have on the rest of the world,” says Kettel. “It’s one of the few markets that isn’t distorted by U.S. and EU subsidies. That’s why we’re pushing hard on this one.”★



# Mapping Out Opportunities

North American consumer tastes are definitely changing. Although some of the trend towards seeking out ingredients for exotic foreign dishes can be attributed to the steady influx of different cultural groups into Canada and the United States, a large part can also be credited to the growing desire of North Americans to simply try new things. As a result, interest in pulse-based food products has never been higher.

In order to get a handle on what North Americans are demanding, the Saskatchewan government has completed a study on consumer-ready pulses and pulse products that identifies a wealth of new opportunities for local producers and processors. Renata Bereziuk, Marketing Specialist with the Industry Development Branch of Saskatchewan Agriculture and Food, says the time is right for the flourishing provincial industry to grab a larger piece of the pulse market pie.

"The recent expansion of the pulse industry has made it apparent that pulse production in Saskatchewan is not a passing trend," says Bereziuk. "The Industry Development Branch felt it important to conduct this study to help Saskatchewan pulse and food processors identify potential opportunities to further develop secondary processing in the province."

Among the many causes for optimism is that although the pulse production and processing industry in North America is fairly new, it has a multitude of market segments already demanding its products – those of note include the large Hispanic community in the U.S., as well as growing Middle Eastern and East Indian populations, along with health-conscious and vegetarian consumer groups.

"Opportunities exist for value-added pulse products, particularly in the gluten-free segment because many products are in the introduction stage of the product life cycle," says Bereziuk. "The greatest opportunity exists in freeze-dried and dehydrated products containing pulses, often used in instant meals and side dish options."

One of the products appearing to show great promise is gluten-free pasta. Currently, the bulk of gluten-free pasta is derived from rice, which offers low input and production costs. Gluten-free pasta made from pulse flour could be developed as a viable alternative for the same reasons.

Along with market, consumer and product profiles, and an analysis of the consumer-ready pulse product industry, the study also provides readers with a pulse processor contact list, a list of health and natural foods distributors in the U.S. and Canada, and a market opportunity matrix.

In order to maintain a competitive advantage for its industry, the province is restricting distribution of the study to Saskatchewan producers and processors for the first year.

Canglobal Management Inc. of Saskatoon conducted the study. The data was compiled from a variety of sources, including the Internet, as well as previous reports and analysis of pulse production, processing and consumer product industries. The consultants also conducted a series of telephone and personal interviews with producer associations, processors

## ★ IN BRIEF

**A provincial government report identifies how Saskatchewan pulse processors can capitalize on growing North American demand.**



**Changing demographics and consumer tastes in North America have contributed to an increase in consumption of pulse-based food products.**

and retailers. They also conducted retail store audits and interviews of both mainstream and ethnic specialty stores in the urban markets of Saskatoon, Toronto, Vancouver, Chicago, Los Angeles, Miami, and New York/New Jersey.

"We limited the study to North America because we wanted the study to be as thorough and detailed as possible in the market closest to us. An initial emphasis of this study included assessing the potential for consumer-ready pulse products in the Hispanic market, which is heavily concentrated in the U.S.," says Bereziuk.

Anyone interested in obtaining a copy of the Market Analysis Consumer-Ready Pulse Products report from Saskatchewan Agriculture and Food is encouraged to contact Bereziuk at (306) 787-8541 or rbereziuk@agr.gov.sk.ca.★

## ★ IN BRIEF

This August, several international traders previewed the factors influencing this year's global pulse marketplace.

# Putting Together the Puzzle

## What volume of pulses will

India need to import this year? Will Morocco even import at all? With reduced yields, can Canadian production fulfill the needs of both the Middle East and that growing market in South America? These are just a few of the questions pulse exporters must consider in order to garner the best prices for themselves and their suppliers.

Only by looking at every piece of the global pulse puzzle do these traders get an idea of how the markets are shaping up. Here then is an early market preview from three of Canada's leading exporters. They outline some general trends, observe how Canada's industry is dealing with a dip in production, and provide a theory as to why buyers aren't quite biting yet.

### Four to Watch

Marlene Boersch is Executive Vice-President of Berdex Canada Ltd., a processing company that specializes in exporting edible pulses, primarily lentils and chickpeas. Boersch admits the guessing game involved with international

trading is "the most interesting part of it".

Boersch says there are four market trends to which she's paying close attention this season. The first is the re-emergence of

Turkey, which has not only increased pulse acreage this year, but also has a weak currency working to its advantage. "They've had severe deterioration of the Turkish lira, which makes it more profitable to export. To reduce the price (of their exports) a few U.S. dollars, when converted to their lira, is very easy for them to do. Therefore, they're much more competitive with us," says Boersch.

Of equal importance is how India's second crop of pulses is shaping up. The Indian sub-continent is the world's largest market for pulses, despite also being the biggest single

producer. The region's domestic production always plays a role in how much countries like Canada can expect to export there. So far, production looks to be much improved, as India has received substantially higher monsoon rainfalls this year compared to the last three years.

The third factor is the South American economy, which Boersch foresees as having problems. With North America's economy slowing down, South America will definitely be affected. Whether a financial downturn affects the ability of countries like Brazil, Ecuador, Argentina, and Chile to pay for pulse imports remains to be seen.

The fourth factor is the effect weather has had on Canadian production, and subsequently, pulse prices. "Due to the drought experienced over the summer, we no longer have extremely cheap pulses," says Boersch, referring to the dry spell that ravaged Saskatchewan and Alberta. "Will we export the same tonnage? We'll have to see. It will depend on what the other alternatives (for importing countries) are. It is a little different than last year."

### Reduced Yields

Dave Walker is General Manager of Walker Seeds, an independent pulse crop dealer in Saskatchewan. He says over 70 per cent of the province was affected by the lack of rainfall Boersch alluded to. As a result, he sees pulse yields being severely reduced this year.

Walker says Western Canadian production was projected at 3.3 million tonnes of peas. Now, he estimates total production will likely be closer to 2.2 million tonnes – a decrease of one-third. He also predicts a 20 per cent reduction in lentil yields, and a 30 per cent drop in chickpea yields. The chickpea totals could be further reduced because of disease in the kabuli crop. The net effect might not be so drastic, though, because an overall increase in Canada's pea and chickpea acreage might help to offset the lower yields, says Walker.

*"With the dramatic decrease in pea yields, we'll see that (feed/human consumption) ratio change. Maybe only 40 to 50 per cent will move as feed."*

Dave Walker, Walker Seeds

Examining the markets crop by crop, Walker says Canada's high pea prices have enabled France, its main competitor, to get off to a better start in selling. "With the Canadian price going up because of the drought, there has been a higher percentage of French peas booked into our traditional edible markets, like the Indian subcontinent," says Walker.

"There was a lot of cargo booked out of Canada in peas for September – based on average yields and increased acreage – but as the drought advanced, prices started reacting to that and just shot up," Walker adds. He says shipments out of Vancouver's port were between \$40 to \$45 higher per tonne at one point. He says after the initial rush in September, pea prices should begin to drop and become more competitive.

The ratio of peas that will move as feed this year will also be affected. "About 65 per cent of the peas in Western Canada move into the animal feed markets," says Walker. "With the dramatic decrease in pea yields, we'll see that ratio change. Maybe only 40 to 50 per cent will move as feed."

However, that feed total should continue to grow in the future. "We'll continue to see improvement in animal consumption of peas for feed. This may occur in some South American countries, as well as the Pacific Rim," says Walker. "It won't happen overnight, but there is movement to reduce tariffs on the importation of peas. Peas are more competitive with soybean meal as feed."

In red lentil production, Walker says it is important to keep an eye on Turkish production, as Turkey is Canada's main competitor for the traditional markets of India, Pakistan, and the Middle East in that crop. Turkey's red lentil production is forecast to be higher than last year, due mainly to increased acreages.

In chickpeas, Turkey again is Canada's main competitor in the seven to eight millimetre size, while Mexico and the United States are notable producers in the larger chickpea sizes. "We'll see lower prices on chickpeas compared to last year, as a result of increased Canadian, Turkish and Mexican production," Walker surmises.

### Wait and See?

Another trader, Rob Tisdale, Manager of Special Crops and Trading with XCAN, says trading partners are taking a bit of a wait-and-see approach. This hesitation to commit means a true sense of the global marketplace won't be known for a little while yet.

"The reality is there are very few end buyers participating in inquiries at this time," says Tisdale. "Why? Because they are complacent themselves in their supply. They are also complacent in regards to what the acreage numbers are in Canada, because Canada is the new person on the block."

"If Canada fell off the map 10 years ago in pulse production, nobody would have been too upset," he continues. "Now we're to the point where we've affected the whole world's pulse



**Over 70 per cent of the province was affected by a lack of rainfall this summer, resulting in pulse yields being severely reduced this year.**

supply picture. There are a lot of unhappy campers within the Middle East and elsewhere, you name it, who have been forced to change what they do. And nobody likes change. So we seem to be at a point where the consumers of this world are just sitting back."

Tisdale says it might even be Canadian farmers who determine when the pulse trading season really gets going. "It'll be when the farmers start to react by selling into whatever bids they have out there. My feel of it right now is the farmer is in no hurry. They can get money for wheat, they can get advances on pulses," says Tisdale.

He notes that at the end of August, pea prices had rebounded to the high end of historical price ranges. "If I was a prudent farmer, I would max out my advances and also, sell at least 10 to 20 per cent of my production into this 'made in Canada' price," he says.

When all the pieces are laid out and examined, it seems likely this season will show a decline from 2000 exports. "Since we're producing less tonnage than anticipated, I think we'll have a hard time surpassing last year's exports. We probably won't do as well as last year," Boersch says. ✧



by Robynne M. Anderson

★ IN BRIEF

**Moving 3.5 million tonnes of Canadian pulses to exporters each year is no easy task. No wonder transportation issues dominate the industry.**

# Dodging

**Demurrage.** The word strikes fear into the hearts of shippers. It's the rate or amount payable for failing to deliver on time. Dodging demurrage is just one of many incentives for getting product to the right place at the right time. These also include happier customers, better sales, and improved profitability.

Getting that product to market on time, however, is no easy task. There are multiple parties and thousands of miles involved. So there can be little wonder that transportation issues are one of the most common concerns in the pulse industry. Recently, some high-profile events have brought those concerns into greater focus.

"There have been a lot of lost sales and large penalties because of logistical problems," explains Glenn Annand, Vice-Chair of the Saskatchewan Pulse Growers (SPG). As a result, the SPG created a Transportation Committee last year which Annand chairs. "We don't want the industry to have losses due to handling problems," he explains. Aware that there are some buyers discounting Canadian product because Canadian exporters can't always ensure customers will get it on time, Annand suggests transportation issues are "tarnishing our image".

As a pulse producer and processor himself, Annand has some first-hand experience with these challenges. At his Mossbank facility, rail use isn't even an option. In his plant, the staff stuffs ocean containers, which are first moved to Saskatoon or Regina by truck, before being loaded onto rail cars for shipment to port. Although the majority of production is bagged product, Annand requires flexibility from all carriers to manage for both larger and smaller lots, depending on client needs.

For other pulse shippers the range is even greater. Much of the volume shipped is in bulk, but often, it is also containerized, bagged, and sometimes pre-packaged for human consumption markets. "It's a real mix compared to shipping cereals," explains Annand. That's why the work of the special crops industry to address transportation issues is so critical.

In past years, shippers have been adversely affected by rail car shortages. Rail rationing is a policy the railways have for grain shipments.

# Demurrage

When the system backs up, all shippers share the pain by receiving a proportional reduction in their car allotment. The effect is damaging to small and large shippers alike, and is problematic in competitive environments where there are people in other countries champing at the bit to serve your customer instead. It's particularly disconcerting in this industry, since most pulse shippers depend on rail.

Todd Naber of Naber Seed and Grain Company, a prominent pulse producer, processor and exporter, has become the hero for those fed up with reduced rail service. He actually took CN Rail to task by filing a complaint to the Canadian Transportation Agency (CTA) in 1998, claiming a loss of \$92,500 due to a plant shutdown and potential demurrage charges of US\$10,000 per day. Further delays in service followed, and Naber's team of lawyers continued to cite these problems as a mounting legal battle broke out between the processor and the rail company, including a further complaint in November 2000.

Ultimately, the CTA found in favour of Naber, concluding that CN's service, or lack thereof, constituted substantial commercial harm. In total, during the three weeks in 1998, Naber received only 27 per cent of the cars required and sustained "significant disruption" of his operation. CN was ordered to advise Naber of potential service interruptions in writing, and to negotiate a service arrangement and communication procedure. The CTA also supported Naber's 2000 claim. Despite the CTA rulings, there is still no final legal settlement, as Naber is still in litigation with CN.

Annand describes Naber's move as "groundbreaking for the industry". He believes the decision has forced the railways to respond by creating new programs, despite the fact the legal case is still ongoing. When asked why others haven't pursued the same course as Naber in filing complaints, Annand offers a realistic assessment. He believes many other pulse shippers are frustrated with their rail service but, "It's always difficult to sue someone and then have to work with them." The relationship between shipper and carrier is a difficult one which most shippers try to manage carefully.

However, between Naber's case and the work of the SPG Transportation Committee, Annand feels a lot has been done to raise awareness of the issue. Dick Dawson, a well-known consultant, was hired to do an assessment of key issues. As well, the Canadian Special Crops Association (CSCA) and SPG have met with the railways and the Canadian Wheat Board to discuss the unique needs of special crops shippers. Momentum is building to address the issues head-on.

## New Programs

Last year, CP Rail came out with a program called Max Trax. It allows advance car ordering for 25-car blocks with the goal of increasing the predictability of service for smaller shippers. Ian LaCouvee, Manager of Public Affairs at CP Rail, notes that it is addressing the needs of the special crops industry on an ongoing basis. "We'll continue to adjust to ensure we're meeting the needs of shippers," he says.

CN is also adjusting its approach to pulse crops. Jim Feeny, Director of Public Affairs, CN Rail, notes, "There is definitely an opportunity in the pulse market." To meet the needs of this growing industry, the company is introducing a new service to the West Coast this fall. Though many details were still being established when interviewed, Feeny explains the service will allow customers to book small car lots two to eight weeks in advance. It is a win-win for customers who will get better service, and the railways, who can plan better.

Feeny rejects the notion that the program is a response to the CTA ruling on Naber. The railway works to meet many shippers' needs and often does so with less dramatic conflict. "Overall, the vast, vast majority of cases are settled by negotiations between shippers and carriers," he says. The goal is always to avoid conflicts going to the regulator, he adds.

The new programs are steps in the right direction. However, the railways may be further challenged to serve pulse shippers properly in the years ahead. With the rapid decline in the number of elevators and points to be served, the railways have been finding greater efficiencies in consolidated service. At the

*In a "ground breaking" move Naber Seed & Grain Co. filed a complaint with the Canadian Transportation Agency about poor rail services.*

## Web Info

For the Dawson Report visit:  
[www.saskpulse.com/web/transport.html](http://www.saskpulse.com/web/transport.html)

For the CTA ruling visit:  
[www.cta-otc.gc.ca](http://www.cta-otc.gc.ca)  
Search using the keywords  
Naber Seeds.



*“On the shorter distances, we’re as competitive as rail.”*

Don Paul, Westcan Bulk Transport Ltd.

same time, several of those points are being purchased, often to process and handle special crops. When asked how the railways can cope with the potential rebirth of many of these facilities, LaCouvee answers simply, “We’ll go wherever the traffic is.” Perhaps, but pulse shippers need to be realistic that it takes a lot of volume to constitute “traffic” in a world increasingly dominated by 100-car unit trains.

### Container Options

One potential solution is the increased use of container shipments. LaCouvee notes that there has already been tremendous growth in this business. An advantage is that containers are well-suited to intermodal traffic and multiple handlings by road, rail and ship.

That’s already where the trucking business is getting a substantial piece of pulse movement. Processing operations may not necessarily have rail service and are using roads to get to key rail sidings before loading there. As well, pulse production must reach domestic processing facilities, and many producers are opting to use trucking companies rather than hauling themselves.

Shipping to ports is less of an option. Naber’s research has found that truck rates are, on average, 30 to 40 per cent higher than rail to get bulk product to port. Trucking becomes more competitive if the shipments are direct to buyers in North America – in which case the rate drops to about 20 per cent higher than rail. Trucking becomes even more economical if pulses can be shipped on a back haul arrangement. However, these are hard to orchestrate and are not consistently available.

It’s a tough call, since highways provide an escape from the rail car rationing that causes small shippers so much grief. Plus, service is more immediate. “Super B’s are the quickest way to get product to port, but they’re the most expensive. It’s a saw-off between speed and cost,” sums up Annand.

Don Paul, Assistant General Manager of Westcan Bulk Transport Ltd., agrees that it is a cost/benefit decision. Trucking rates are really a function of distance and volume and it gets harder for trucks to compete on really long hauls. “A rail car holds twice as much as a truck so their price by tonne/mile is pretty good,” Paul acknowledges. “But on the shorter distances, we’re as competitive as rail.”

### Long-Term Effects

Realistically, these are the kinds of compromises needed to make the system work. As frustrating as rail rationing, logistics problems, and trucking costs can be, the transportation issue still appears unlikely to reshape the pulse industry in Saskatchewan. One might conclude that if delivering bulk product is too low-margin to make road movement an economical option, perhaps adapting production to higher value pre-packaged goods would help make it more viable.

However, that’s not likely to be the case. Most pulse buyers are bringing in products from Canada and elsewhere before repackaging for the human consumption market. Canadian shippers cannot necessarily compete cost-effectively to source these various products. As well, the primary target for pre-packaged goods is the United States. With all of their regulations on labelling, etc. it becomes a tough game to play. Naber also noted that even if Canadian processors moved to splitting lentils, as many are considering, it creates only a small increase in margin that cannot sustain the increased costs associated with trucking, for example.

So it seems the transportation problems are not big enough to fundamentally change the pulse business in Canada. Frustrating? Yes. Damaging? Yes. Industry-altering? No. “The problem with transportation is not that we don’t get the product delivered. It’s that we don’t get it delivered on time,” Naber says.

Ironically, the problem may be reduced a little this year by the drought. Lower volumes of all crop kinds may reduce congestion and alleviate some of the problems in the short-term. However, longer-term solutions are what’s needed and that’s why these forward steps, like allowing advance booking, are so important.

Continued pressure should see even further adaptations to the system. “I think a lot of innovation and entrepreneurship has developed an evolving system that has been well-explored,” says SPG Transportation Committee Chair Annand. To spur on the evolution, both the CSCA and SPG will continue to work on transportation issues in an effort to further influence the available options and build a co-operative spirit with the railways. At the same time, the creative people who have built the pulse industry will continue to find new ways to work within the current system, in order to meet the needs of their customers and dodge demurrage. ✱



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General Testing	Sample Type	Germ	Purity	Vigor*	%PS	TZ.*	Sample Size
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	Rye, Triticale	\$18.50	\$21.00	\$26.50	\$12.25	\$38.00	1 Kg for purity, 250g for others
	HRS Wheat	\$18.50	\$21.00	\$26.50	\$12.25	\$38.00	1 Kg for purity, 250g for others
	Buckwheat	\$18.50	\$21.00	\$26.50	\$12.25	\$48.00	1 Kg for purity, 250g for others
	Durum, Prairie Spring Wheat	\$18.50	\$24.00	\$26.50	\$12.25	\$38.00	1 Kg for purity, 250g for others
	Lentils, Sunflowers, Corn	\$18.50	\$21.00	\$27.50	\$12.35	\$48.00	1 Kg for purity, 250g for others
	Peas, Beans, Chickpeas	\$21.00	\$21.00	\$27.50	\$12.25	\$38.00	1 Kg for purity, 250g for others
	Canola, Mustard	\$18.50	\$38.00	\$27.50	\$12.25	\$48.00	250 grams for all tests
	Canarygrass	\$18.50	\$28.50	\$27.50	\$12.25	\$48.00	250 grams
	Alfalfa, Clover, Dill, Caraway	\$18.50	\$28.50	N/A	\$12.25	\$48.00	250 grams
	Coriander, Vetches, Borage	\$21.00	\$21.00	N/A	\$12.25	\$48.00	250 grams
Specialty Testing	Grasses - Large	\$24.00	\$50.00	N/A	\$19.00	\$48.00	250g M&P requires % PS in Germ
	Grasses - Small, Timothy	\$24.00	\$65.00	N/A	\$19.00	\$48.00	250g M&P requires % PS in Germ
	Vegetables	\$19.50	\$28.50	N/A	\$19.00	\$48.00	please call
	Flowers, Herbs	\$19.50	\$28.50	N/A	\$19.00	\$48.00	please call

Specialty Testing	Test	Crop	Fee	Remarks
	1000 Kernel Weight	all Crops	\$10.00	
	APHIS	all Crops	\$19.00	Plus purity (requirement for exporting seed to the United States)
	Canola Preliminary Purity - 100gr	Canola, Mustard	\$85.00	
	Canola Preliminary Purity - 25gr	Canola, Mustard	\$34.00	
	Special Purity	Canola, Uncleaned	\$43.00	Specific check for Cleaver, Mustards & other Brassica's
	Erucic Acid	Canola	\$70.00	
	Glucosinolate	Canola	\$45.00	
	Herbicide Tolerance	Canola	\$56.00	Specify which herbicide to test for
	Barley - Malting Germination	Malting barley	\$23.50	Malt barley germs do not measure the value for seed potential
	Moisture	all Crops	\$18.00	Oven method
	Soil Tests (+ germ)	all Crops	\$10.00	Too nullify the effects of pesticides (such as Glyphosate)
Surcharges	Seed Identification	all seed	\$10.00	
	Green Seed Count	Canola, Mustard	\$12.00	

Surcharges	Service	Fee	Information	NOTES
	Cancellation fee	\$10.00		<b>CFIA Accreditation # 1144</b>
	Extra report	\$5.00		<b>Canadian Seed Institute Accredited</b>
	Faxing	\$1.00		Complimentary sample envelopes available upon request.
	Rush	\$10.00		Germ, Vigor & Disease testing received by noon are guaranteed to be started that day.
	Sample cleaning	\$5.00		Samples may be sent by mail, courier, bus, or dropped off in person.
	Sample treating	\$15.00		All testing is done per CFIA's methods and procedures unless otherwise specified
	Treated sample	\$10.00		All tests are priced individually.
				* Denotes advisory tests

**Terms:** Payment must accompany sample unless prior credit arrangements have been made. A service charge of 2% will be added to all overdue accounts. Visa, Mastercard, Cash or Cheque accepted. Prices subject to change without notice. Fees effective October 1, 2001. (7% GST included)

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Barley, Wheat	Smut	\$48.00	N/A	1000 embryos extracted from the seed	
	Fusarium* - total	\$38.00		Enumerate & identify the species of fusarium	
	Vomitoxin*	\$29.95		Test for DON, expressed as ppm	
Canola	Blackleg Initial*	\$38.00	N/A		
	Blackleg Virulence*	\$38.00			
	Alternaria*	\$38.00	All Three Diseases \$74.75	200 seeds plated	1000 seeds plated for all three diseases
	Blackleg* (Both)	\$60.00		1000 seeds plated	
	Sclerotinia*	\$36.00		200 seeds plated	
Lentil	Ascochyta	\$46.00	All Four Diseases \$65.95	Ascochyta lentis	400 seeds plated
	Anthrachnose*	\$46.00		Colletotrichum truncatum	
	Botrytis*	\$46.00		Botrytis cinerea	
	Sclerotinia*	\$46.00		Sclerotinia sclerotiorum	
Pea	Ascochyta	\$38.00	All Three Diseases \$65.95	Ascochyta pinodes, pisi, and pinodella	
	Botrytis*	\$46.00		Botrytis cinerea	200 seeds plated
	Sclerotinia*	\$46.00		Sclerotinia sclerotiorum	
Chickpea	Ascochyta	\$46.00	All Three Diseases \$65.95	Ascochyta rabiei	400 seeds plated
	Botrytis*	\$46.00		Botrytis cinerea	
	Sclerotinia*	\$46.00		Sclerotinia sclerotiorum	
	Ascochyta	\$105.00	All Three Diseases \$145.00	Ascochyta rabiei	1,000 seeds plated
	Botrytis*	\$105.00		Botrytis cinerea	
	Sclerotinia*	\$105.00		Sclerotinia sclerotiorum	
Lentil, Pea, Chickpea	<b>Pathologist's Report-</b> complete assessment of seed-borne organisms	\$138.00	Report on ascochyta, anthracnose, botrytis and other seed-borne organisms which may cause seed rotting, reduced emergence or seedling blight (such as fusarium, sclerotinia, and pythium).		
Flax	Alternaria*	\$38.00		Alternaria linicola	
Field Bean	Anthrachnose*	\$46.00	Both Diseases	Colletotrichum lindemuthianum	
	Botrytis*	\$46.00	\$65.95	Botrytis cinerea	
	Common Bacterial Blight	Call	N/A	Xanthomonas campestris pv.phaseoli	
Faba Bean	Ascochyta	\$46.00	Both Diseases	Ascochyta fabae	
	Botrytis*	\$46.00	\$65.95	Botrytis cinerea & Botrytis fabae	
Soybean	Bacterial Blight*	Call	N/A	Pseudomonas syringae pv.glycinea	
	Botrytis*	\$46.00		Botrytis cinerea	

Seed Disease Testing

Seed Disease Testing

Sample Type	Disease Tests	Ind. Fee	Combination Fee	Remarks	
Lentil	Ascochyta*	\$13.95	Both Diseases	requires plates from us	
	Anthrachnose*	\$13.95	\$17.95		
Chickpea	Ascochyta*	\$24.00	N/A	requires plates from us	
Canola	Sclerotinia Test Kit	\$46.95	N/A	Home test for the prescence of sclerotinia	

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[www.stpeters.sk.ca/crse/crrf](http://www.stpeters.sk.ca/crse/crrf)

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## October 26

### Call for Nominations Deadline

Nominations for 2002 Board of Directors

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[www.saskpulse.com](http://www.saskpulse.com)

## October 29-30

### Re-inventing Agriculture: Implementing the Vision

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(306) 244-2151

[www.agrivision.sk.ca/conferences.htm](http://www.agrivision.sk.ca/conferences.htm)

Saskatoon, Saskatchewan

## November 19-24

### Canadian Western Agribition

(306) 565-0565

[www.agribition.com](http://www.agribition.com)

Regina, Saskatchewan

## November 29-30

### Excellence 2001: Managing Excellence in Agriculture

Presented by the Canadian Farm Business Management Council

(888) 232-3262

[www.cfbmc.com/registration](http://www.cfbmc.com/registration)

Mont Tremblant, Quebec

## January 2

### Call for Resolutions Deadline

Annual General Meeting

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(306) 668-5556

[www.saskpulse.com](http://www.saskpulse.com)

## January 7-8

### Pulse Days 2002

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## January 7

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Canada is a major player in pulse production, with about 50 per cent of world exports in peas, lentils and chickpeas – and it is turning heads again. Long-time international producers are looking with envy at Canada's infrastructure for pulses. And now, with the Pulse Canada Research initiative spearheading pulse development, our momentum just keeps building.

With an eye to achieving efficiencies in national pulse research, this newest division of Pulse Canada will both co-ordinate pulse research across the country, and ensure research projects and funding address the most important needs of pulse development. The producer-focused approach will ensure Canada's research dollars are well-spent on projects that give Canadian pulse producers an international leg up.

Specifically, Pulse Canada Research is working to increase the Canadian pulse industry's international competitiveness by enhancing national research capabilities and developing strategic research policy. "We are using expertise already located across Canada to get the job done," says Holly Rask, Director of Research with Pulse Canada.

Rask says the need for a national voice in pulse research was identified when industry members expressed their desire to tackle issues of pulse quality research in Canada. They quickly realized there was potential for more than just investigating quality, so they chose to develop a comprehensive national strategy for Canadian pulse research.

Rask works with a strong team, including a committee dedicated to a cohesive strategic approach to using research dollars. The Committee itself is comprised of representatives from the pulse trade, each of the major funding groups, and from producer groups in each province. Lyle Minogue, a long-time pulse grower and advocate for the Canadian pulse industry, chairs the Pulse Canada Research Committee. Gordon Bacon, of Pulse Canada, is working along with Rask to launch the national strategy.

Since the fall of 2000, Rask has been busy compiling the findings from a number of groups to outline the pulse research projects which exist in Canada today. They will serve as the basis for creating an approach to future research projects. "We started by dividing the research into four main areas," Rask recalls,

"Agronomy, Genetic Improvement, Sustainable Environment, and Quality and Utilization."

Rask adds that subcommittees have been established to develop strategies for each specific area by drawing together various experts. Each group includes researchers from the private sector, universities, Agriculture Canada and other government institutions. Findings will be compiled for a workshop this November.

Already, the subcommittees have identified issues that need attention. "One thing we discovered quickly is that there were shortages in infrastructure and people in research," Rask says. However, with that information, Pulse Canada Research can build the foundation needed to expand pulse research in Canada. The Saskatchewan government has already taken one step to increase both personnel and infrastructure dedicated to pulses by creating a full-time Pulse Crop Pathologist position with dedicated lab space for research at the University of Saskatchewan.

By and large, however, these shortages reflect that although the pulse industry in Canada is growing quickly, the scale of research in all areas, including breeding and quality development, is falling behind. This is particularly evident when compared to overseas countries where pulses are a staple food, and the amount of research conducted far outweighs that in Canada.

The Research Division of Pulse Canada is hoping to become more competitive in this area by following a new approach – bringing those with a vested interest in pulse research together to find the answers and streamline costs. It's a producer-focused initiative that is ensuring research dollars are spent in areas that matter most to pulse growers.

Rask expects this initiative will have a positive impact on the Canadian pulse industry, and will attract greater funding as well. In fact, it is even drawing interest from international research collaborators. "We will be quickly linking up with experts around the world," Rask says, "all to improve pulses."

From improved field performance to new markets and uses for pulse crops, the new Research Division of Pulse Canada is making sure research is done where it's needed. By optimizing research funding and efforts across the country, Pulse Canada Research is helping to ensure Canada will continue to produce top-quality pulses for consumers at home and abroad.✧

## IN BRIEF

**Pulse producers have a new research tool in the quest to maintain Canada's position as a major player in the international pulse market, and it is making people around the world take notice.**



# Speaking to the World

## ★ IN BRIEF

**Canada attracted over 500 people from 35 countries to the international pulse convention.**

### The 2001 International Pulse

Trade and Industry Confederation (CICILS/IPTIC) Convention, held in Vancouver, British Columbia this spring, was a great opportunity for Canadians in the industry to meet pulse players from all over the world. With over 500 people from approximately 35 countries attending the conference, it was the biggest CICILS/IPTIC event ever. Conference hosts showcased the strength of the Canadian industry to all participants. Plus, the Saskatchewan government took the opportunity to promote our province's capabilities.

Drawing rave reviews from attendees, the Convention was deemed a tremendous success. The backdrop of beautiful British Columbia provided the ideal setting, which, combined

everybody will be reading off the same page in the future.

As always, one of the greatest strengths of the CICILS/IPTIC Convention is simply the chance to visit with people involved in the pulse trade globally. "The fact that a venue was provided where people could rub shoulders to talk about trade opportunities should probably be considered one of the highlights of the overall CICILS conference, and likely always will be," says Twynstra.

To provide a special forum for its pulse industry, Saskatchewan Agriculture and Food (SAF), in conjunction with the Saskatchewan Trade and Export Partnership, organized a cocktail reception for international pulse buyers. About 120 people attended the event. The more intimate setting provided opportunities for everyone. "Because it was a smaller group, discussions that were much more focused and meaningful could take place," says Saskatchewan Pulse Growers (SPG) Acting Communications Manager Jackie Blondeau, who organized the reception while still with SAF.

The goal of bringing together international buyers and Saskatchewan suppliers was accomplished, in part, through the participation of Saskatchewan Agriculture Minister Clay Serby. The Minister gave a short address, and lingered to talk to some of the international groups in an effort to heighten the profile of Saskatchewan suppliers.

Garth Patterson, SPG's Executive Director, participated in the reception. "The room was packed full of both buyers and exporters with a fairly high level of energy. The discussions went right on until the CICILS/IPTIC banquet that evening," he says.

At the banquet, some changes to the executive of CICILS/IPTIC were announced, which according to Sabourin will give the organization new momentum. Paul Lambert, of PL International Inc. in California, was elected President at the meeting, while Canada's own Gordon Bacon was elected Vice-President.

According to Twynstra, who has been to half a dozen conventions in the past 15 years, this was the best one ever. "We're just delighted with the turnout, the countries represented, the momentum that is there. It was a fantastic conference, and I think Canada and its organizers should be complimented for putting together a program that encouraged that type of participation."✱



Saskatchewan pulse growers were well-represented at the international convention.

with a stellar program, resulted in a coup for Co-Chairs Peter Twynstra and Richard Sabourin, members of the Canadian Special Crops Association.

Many issues vital to those in the international pulse industry were addressed at the Convention, including establishing alternate uses of pulses and increasing pulse consumption. The development of internationally recognized nomenclature and grading standards was also on the agenda. Twynstra says CICILS/IPTIC is working on a reference book containing pictures, sizing, and common trade terms, so that

# Pulses on Parade

## Saskatchewan Pulse Growers'

(SPG) mission is to maximize the profitability and sustainability of pulse growers in the province, and every summer growers have the chance to see first-hand the research that is making that statement a reality.

Since the 1980s, SPG has conducted field tours that showcase the latest developments in pulse crops. They are not only a chance for pulse growers to see how pulse research is working to their benefit, but also a heads-up to technology coming down the pipe. With tours of new seed treatments, new herbicide options, new varieties, and better choices for crop rotation, these crop tours are a great tool for pulse growers to keep on top of pulse production innovations.

This year, three major tours sponsored by SPG gave more than 600 participants across Saskatchewan the chance to get informed about what's up with pulses.

### Pulse Tour North

This year's Pulse Tour North offered a little something for every producer. The day-long slate of activities was held at the Agriculture and Agri-Food Canada Research Farm in Melfort, and attracted more than 130 people.

Randy Kutcher, a scientist at the Melfort Farm, co-organized this tour along with Saskatchewan Pulse Growers. Kutcher says that considering the drought conditions in Saskatchewan, there was relatively good attendance at the event. Some of the most impressive information presented was the work being done on new varieties – especially for specialty markets and disease resistance. One particular study on adapting red lentils to the northern growing areas of Saskatchewan was well-received, according to Kutcher. Rotation studies on the effect of including pulses at various intervals piqued participant interest as well.

The tour also included a large sclerotinia study on lentils. Ironically, though, Kutcher noted the disease wasn't as prevalent this year with the dry weather keeping levels low. An optional tour of the Prairie Agricultural Machinery Institute (PAMI) swine manure test drew 10 to 20 curious attendees at the end of the day.

### Pulse Tour South

The largest of the three tours that Saskatchewan Pulse Growers sponsored this year took place at the Semiarid Prairie

Agriculture Research Centre (SPARC), where nearly 400 people turned out for the Dryland Cropping Systems Field Day 2001. Attendees to the Swift Current site were treated to a wealth of information, including highlights from various research projects of both SPARC and Wheatland Conservation Area.

These projects included pulse variety tests, inoculant placement and use options, various disease and weed control options, and new crop rotation suggestions. There were also some non-pulse projects, such as a study on optimal fertilizer application for yield and protein of different wheat and durum varieties, and the yield potential of thin canola stands.

### Select Seed Grower Field Day

The annual Select seed grower summer tour was held at the Kernen Research Farm in Saskatoon, where approximately 70 participants attended. Select seed growers, pulse breeders and staff from the Crop Development Centre, and members of the Saskatchewan Pulse Growers staff and Board, enjoyed the day viewing breeder and pre-breeder plots at the Kernen, Goodale, and SPG research farms.

The annual summer tour provides Select seed growers with the opportunity to view breeder seed production of pulse varieties released in recent years, as well as plots of upcoming pulse breeding lines with the best potential for release in the future.

### Pencil Them In

Field tours are a great opportunity to learn about the innovative research, and the people conducting it, that help

Saskatchewan pulse growers succeed. Plan to tour with SPG next year and see what is in store for your industry. Check out future issues of *Pulse Point* for 2002 summer field tour dates, so you can plan to be there. There is already one location confirmed: the Scott Research Farm in Scott, Saskatchewan.✧

## ★ IN BRIEF

**This year, more than 600 people participated in SPG sponsored field tours, taking advantage of the opportunity to receive first-hand information on the latest in pulse innovations.**

### Pulse Tour North Sponsors

#### Platinum Sponsors

BASF  
Dow AgroSciences

#### Gold Sponsors

Bayer  
Philom Bios  
Copeland Seeds  
Gustafson  
Liphatech  
Saskatchewan Wheat Pool  
Syngenta

#### Associate Sponsors

Agricore  
Can-Seed Equipment  
MicroBio RhizoGen (MBR)  
Naber Seed & Grain  
Simpson Seeds  
Walker Seeds



Melfort Pulse Tour

### Pulse Tour South Organizers

Saskatchewan Agriculture and Food  
Semiarid Prairie Agriculture Research Centre  
Wheatland Conservation Area

# It's a Conference that's *Pulse*-ating

## ★ IN BRIEF

### **Pulse Days highlights include:**

- ✧ **Market Information**
- ✧ **Production Updates**
- ✧ **International Perspective**
- ✧ **Interaction**

### **Can't attend Pulse Days 2002?**

View it live on the web at [www.saskpulse.com](http://www.saskpulse.com)

## **It's time to take your pulse again.**

Pulse Days 2002, "The World's Premiere Producer Conference on Peas, Lentils, Chickpeas and Beans", is being held in Saskatoon, Saskatchewan January 7-8, 2002.

Ray McVicar, Provincial Specialist – Special Crops with Saskatchewan Agriculture and Food, knows the value growers find in the conference. As a regular attendee and frequent guest speaker, he believes Pulse Days has a reputation as a positive, optimistic event – a nice break from the current agricultural climate of low commodity prices and other challenges. "I think farmers enjoy the opportunity to come to a meeting where it is mostly positive information that is provided, and people do come here for that feeling."

Organized and presented by the Saskatchewan Pulse Growers (SPG), the annual conference boasted 1,700 participants last year, making it the largest meeting of its kind worldwide. The upbeat mood to which McVicar refers reflects strong growth in the sector. The conference offers a great opportunity to keep that growth going, by featuring a wide variety of speakers who provide not only the big picture of a vibrant industry, but also a realistic view. Attendees also benefit by being able to keep up-to-date on the latest developments in pulse research and planting intentions. Some of the topics to be addressed at Pulse Days 2002 include:

- ✧ Production Trends in Canada and Around the World
- ✧ Competitive Forces in the Global Pulse Industry
- ✧ Market Outlook
- ✧ Profiting Through Meeting Consumer Demands.

"Pulse Days 2002 will see several enhancements over last year's event," says Jackie Blondeau, Acting Communications Manager with Saskatchewan Pulse Growers. "Our agenda will be the best yet, featuring an impressive lineup of international speakers. For the first time ever, Pulse Days will be broadcast live on the SPG web site."

Along with the valuable seminars, the conference's Wine and Cheese Reception at Prairieland Exhibition is also a highlight, as it provides perhaps the best occasion to meet others in the industry. "If you want to organize a meeting, or just visit with people, or have a one-on-one meeting, it's an excellent place to get that done because so many people in

the pulse industry are there – not only from Saskatchewan, but a lot from across Canada, and a few international visitors as well," says McVicar. "So if you want to get together with someone in the pulse industry, it's the place to go." A new addition to this year's reception is a pulse research poster session, which will provide an opportunity for growers to interact with Pulse Days speakers, pulse crop researchers and other industry resource people.

Scheduling Pulse Days during the province's Crop Production Week is also a benefit. Farmers can meet a range of crop buyers at one time. "I think farmers really appreciate that opportunity," says McVicar, "because they don't have to drive around, or spend all that time on the phone." And this year, crop production show passes can be used any day during Crop Production Week.

As well, being a part of Crop Production Week enables pulse farmers to keep in contact with other producer groups, such as grower associations for canola, flaxseed, mustard, wheat, herb and spice. "Farmers don't just grow pulses, they also grow cereals, oilseeds and others," says John Serhienko, a past Director of the Saskatchewan Pulse Growers. "At Crop Production Week they can gather information from all the different organizations." ✧

## **Get on the Bus!**

The ever-popular free bus service will again be offered this year. Getting from the hotel to the conference couldn't be easier – no worries about parking or plugging in that car.

## **No need to hail a cab at Pulse Days 2002.**



## **Hotels on the bus route:**

**Best Western** – 1715 Idylwyld Dr. N., (888) 244-5552  
**Country Inn & Suites** – 617 Cynthia St., (800) 456-4000  
**Delta Bessborough Hotel** – 601 Spadina Cr. E., (800) 268-1133  
**Heritage Inn** – 102 Cardinal Cr., (888) 888-4374  
**Holiday Inn Express** – 315 Idylwyld Dr. N., (800) 465-4329  
**Park Town Hotel** – 942 Spadina Cr. E., (306) 244-5564  
**Quality Inn** – 90-22nd St. E., (800) 228-5151  
**Radisson Hotel** – 405-20th St. E., (800) 333-3333  
**Ramada Hotel** – 806 Idylwyld Dr. N., (800) 667-6500  
**Sandman Hotel** – 310 Circle Dr. W., (800) 726-3626  
**Saskatoon Inn** – 2002 Airport Dr., (800) 667-8789  
**Saskatoon Travelodge** – 106 Circle Dr. W., (800) 578-7878  
**Sheraton Cavalier** – 612 Spadina Cr. E., (306) 652-6770  
**Super 8 Motel** – 706 Circle Dr. E., (800) 800-8000  
**Thriflodge** – 1825 Idylwyld Dr. N., (877) 847-4388



# 2002 Board of Directors Nominations

If you are a registered pulse producer, and would like to be instrumental in building Saskatchewan's pulse industry, fill in the nomination form below. It must be signed by three other registered growers.

Two positions are open for Directors on the Board of the Saskatchewan Pulse Growers. Nominations are being accepted until noon on FRIDAY, OCTOBER 26, 2001.

## Responsibilities:

- 10 Board meetings per year (one per month except during harvest and seeding); committee meetings as required
- Average time commitment of board members is 45 days per year
- Terms are for three years, with a maximum of two consecutive full terms

## Nomination Form

*In accordance with the Saskatchewan Pulse Growers Regulations, I, the undersigned, hereby submit my name as a candidate for election to a seat on the Board of Directors of the Saskatchewan Pulse Growers.*

First Name

Last Name

Address/Town

Postal Code

E-Mail

Telephone

Fax

Signature

*I have grown the following  
pulse crops:*

2000

2001

*I nominate the above pulse producer as a candidate for election as a director of the Saskatchewan Pulse Growers.*

Name of Registered Producer (signature)

Name of Registered Producer (signature)

Name of Registered Producer (signature)

Name (please print)

Name (please print)

Name (please print)

Telephone

Telephone

Telephone

Fax

Fax

Fax

**Please return this form to:**

**Saskatchewan Pulse Growers, #310-111 Research Drive, Saskatoon, Saskatchewan, S7N 3R2**

**Telephone: 306-668-5556 Fax: 306-668-5557**

**Note:** Only registered producers can hold office, vote, or nominate others. If your dealings with the Saskatchewan Pulse Growers (e.g. levy submission) have been through your company name, rather than your own name, you should contact the Saskatchewan Pulse Growers Office. You may have to sign the "Designated Representative Form" which designates you as a representative of the company for election and nomination purposes. Please contact the Saskatchewan Pulse Growers Office at (306) 668-5556 if you think this might apply to you.

## ON POINT

For more information about SPG activities please call: (306) 668-5556,  
e-mail: [pulse@saskpulse.com](mailto:pulse@saskpulse.com), or visit our web site: [www.saskpulse.com](http://www.saskpulse.com).

### IN BRIEF

#### News from and about Saskatchewan Pulse Growers (SPG).

The popularity of the Saskatchewan Pulse Growers web site continues to grow, with nearly 80,000 hits between April 1 and June 30 of this year – almost four times as many as the second quarter last year. Saskatchewan is the source of 25 per cent of the traffic, with total Canadian visits about double that. Pulse News is the most popular page (after the home page) and Thursdays are the busiest day. SPG is planning some improvements to the site, including changes that will make navigation easier.

Saskatchewan Pulse Growers is once again partnering with BASF Canada to recognize an individual who has made a significant contribution to the development of the Saskatchewan pulse industry. The BASF Pulse Promoter Award is presented annually at Pulse Days and nominations are now being sought for the 2002 Award. Nomination forms are available at the SPG Office. The 2001 recipient was Professor Emeritus Robin Morrall, who is retired from the Biology Department at the University of Saskatchewan.



**Professor Emeritus Robin Morrall receives the BASF Pulse Promoter Award.**

A 2001 update to the SPG Select Seed Grower database includes information on Select Growers who were allocated breeder seed developed at the Crop Development Centre since 1997. Found at [www.saskpulse.com/seed](http://www.saskpulse.com/seed), the database is an easily accessible tool for farmers seeking a specific variety. It includes names, addresses and phone numbers of Select growers who have been allocated seed and who may be able to supply seed to commercial growers. The information is organized so that users can search by crop, town, keywords such as variety name or number, or grower name. The site also provides variety description tables and a seed exchange forum.

Jackie Blondeau has joined Saskatchewan Pulse Growers as Acting Communications Manager. Blondeau has been seconded from her position as International Business Development Specialist with Saskatchewan Agriculture and Food in Regina. As Communications Manager for SPG, Blondeau will take over the management of several large projects, including the Annual Pulse Days conference, *Pulse Point*, and the SPG web site. Blondeau will serve SPG for a one-year term.



**Jackie Blondeau has joined Saskatchewan Pulse Growers as Acting Communications Manager.**

"Saskatchewan Pulse Growers is excited about the experience and enthusiasm Jackie Blondeau will bring to our communications program," says Garth Patterson, SPG Executive Director. "We're also pleased with the co-operation shown by Saskatchewan Agriculture and Food in supporting this secondment position."

Alberta Pulse Growers and Saskatchewan Pulse Growers, together with corporate partners Syngenta, BASF, Gustafson and Monsanto, are jointly funding the development of a chickpea video. The focus of the video will be production and marketing, and it is expected to be useful to both new growers and international customers. The video project is being co-ordinated by Janette McDonald, General Manager, Alberta Pulse Growers. It is expected to be completed in time for viewing and distribution at Pulse Days.

The Canadian Special Crops Association (CSCA) has a new Board of Directors. Kevin Dick, who brings a wealth of experience and expertise to his role at CSCA, has accepted a second year as President of

the Board. Earlier this year, Dick joined Commodity Marketing Company as Vice-President of Canadian Operations, working from a satellite office just outside of Winnipeg. Prior to his current position, Dick was in the marketing department of United Grain Growers. He will be joined on the Executive by two new Board members: Scott Cunningham (CrownAg International), who will serve as Vice-President, and Martin Chidwick (XCAN Grain Pool), who takes on the role of Secretary-Treasurer. Blair Stewart (Fill-More Seeds Inc.) and Steve Foster (Saskatchewan Wheat Pool) are ex officio members.

Dick will also serve as Program Area Director for Market Development. The Transportation and Ongoing Issues Program Director will be Dave Macfarlane; Chidwick assumes responsibility for Trade and Arbitration Rules and Finance; and John Thompson becomes Director for Pulse Canada and the National Edible Beans Committee.

Pulse Canada has added some new faces to its Board in 2001. Joining Board Chair Germain Dauk of Naicam, Saskatchewan, Vice-Chair John Thompson of Blenheim, Ontario, and Secretary-Treasurer Jack Froese of Winkler, Manitoba, at the Board table are:

- ✧ Dennis Dalton of Wainwright, Alberta;
- ✧ Larry Anderson of Kent Bridge, Ontario;
- ✧ Larry Knibbs of Delisle, Saskatchewan;
- ✧ Don Meier of Star City, Saskatchewan;
- ✧ Marlene Boersch of Winnipeg, Manitoba, who is now Past Chair.



The North Dakota Dry Pea and Lentil Council (NDDPLC) has a checkoff system which funds its activities. Canadian processors who are purchasing seed from North Dakota growers are reminded of this system and the importance of it to the Council. Remittance of the checkoff dollars to NDDPLC by Canadian buyers is encouraged. Please contact Eric Bartsch at (701) 222-0128 for more information.

The University of Saskatchewan has a new pulse pathology laboratory. The College of Agriculture invested \$250,000 in the facility, which is located on the 6<sup>th</sup> floor of the College. Equipment was provided through donations and loans from other Department of Plant Science labs, with SPG contributing to the infrastructure as well. Drs. Sabine Banniza and Godfrey Chongo are directing the work of the lab.

Saskatchewan Pulse Growers has issued a Call for Pulse Research Posters, for a Poster Session at Pulse Days 2002. The session will take place during the Wine and Cheese Reception on Monday, January 7. This is a new feature at Pulse Days and will provide an opportunity for growers to interact directly with Pulse Days speakers and researchers. Those interested in presenting should call Jackie Blondeau at (306) 668-5556 or e-mail [jblondeau@saskpulse.sask.ca](mailto:jblondeau@saskpulse.sask.ca) for more information.

## Pulse Canada

Pulse Canada has implemented a structural change to reflect the higher priority the organization is putting on research and policy. Gordon Bacon has been named CEO, effective October 1.



**Gordon Bacon has been named the CEO of Pulse Canada.**

"Gordon is very well-suited to this position," says Germain Dauk, Chair of the Pulse Canada Board. "He has an outstanding grasp of our industry, and he knows the implications of the many forces affecting it, such as food safety." Bacon will be coordinating activities in market development, research, and policy. He will also continue to farm and will remain Vice-President of the International Pulse Trade and Industry Confederation (CICILS/IPTIC) as well. The position of President at Pulse Canada has been eliminated.



## ★ BUSINESS

### CFIP Cheques Being Issued

Officials at the Canadian Farm Income Program (CFIP) are urging producers who may have experienced income shortfalls in 2000 to apply now for the 2000 CFIP program. Ellen Funk, CFIP spokesperson, says producers must obtain and complete an application form from their offices before they will receive a CFIP payment. According to Funk, cheques are now being issued under the CFIP 2000 program to eligible producers. The federal/provincial disaster program issues payments to producers who have experienced a sudden or severe drop in farming income from their previous years' averages. Call 1-888-343-1064 or visit [www.agr.ca/cfip](http://www.agr.ca/cfip) for more information.

### MBR Acquires RhizUp

MicroBio RhizoGen (MBR), manufacturer and marketer of Rhizobium inoculants, seed coatings, specialty colourants and other bio-agronomic products, has acquired the RhizUp line of inoculants from Eco Soil Systems Inc. The acquisition includes the RhizUp brand, licences, labels, and all production and marketing rights.



### Walker Seeds Ships Food-Aid

Walker Seeds Ltd. of Tisdale, Saskatchewan has been awarded a contract by Canadian Foodgrains Bank to supply 10,000 tonnes of yellow peas for a food-aid shipment to North Korea this fall. Dave Walker, co-owner of Walker Seeds, says, "Our processing and shipping expertise, combined with overseas experience, allowed us to be competitive in bidding on this contract." The majority of peas will be coming from Saskatchewan farmers. The food will be used in nurseries and kindergartens, and to ensure pregnant and nursing mothers have enough protein. There has been a chronic food shortage in North Korea ever since its major trading partner, the Soviet Union, collapsed.

## ★ PRODUCTS

### Cell-Tech C Approved

Liphatech's Nitragin brand Cell-Tech C has received Canadian approval as an in-furrow, liquid inoculant. Pea and lentil growers can now inoculate their crops using standard liquid fertilizer equipment, eliminating extra steps. Cell-Tech C should be mixed with water in the spray tank. Containing a minimum of 720 million Rhizobium bacteria per gram, it is compatible with biological phosphate enhancers and may be used with Crown or Thiram fungicide.

## ★ WEB

### Liphatech Revamps Web Site

Liphatech has revamped its web site with interactive features to help farmers choose inoculants to suit individual needs. The site, at [www.liphatech.com](http://www.liphatech.com), offers information on products, recent field trials and compatibility studies. It's designed as a learning resource for those who want to find out more about inoculants. Retailers will also find important educational and regulatory information.

### Pulse-Canola Feed Database Reaching Thousands

A Pulse-Canola Feed Literature Database, launched by pulse and canola grower groups in Western Canada in 1998, is having a substantial impact on the demand for pulse rations in Canada and around the world. In recent months the web site has had more than 5,000 hits per month, with at least half of the users searching the database for information. Peas have achieved about 85 per cent inclusion in hog rations in Alberta and Saskatchewan as a result of this database and other educational programs. The database is available on the Saskatchewan Pulse Growers web site at [www.saskpulse.com](http://www.saskpulse.com).

## ★ FINDINGS

### Extension Works

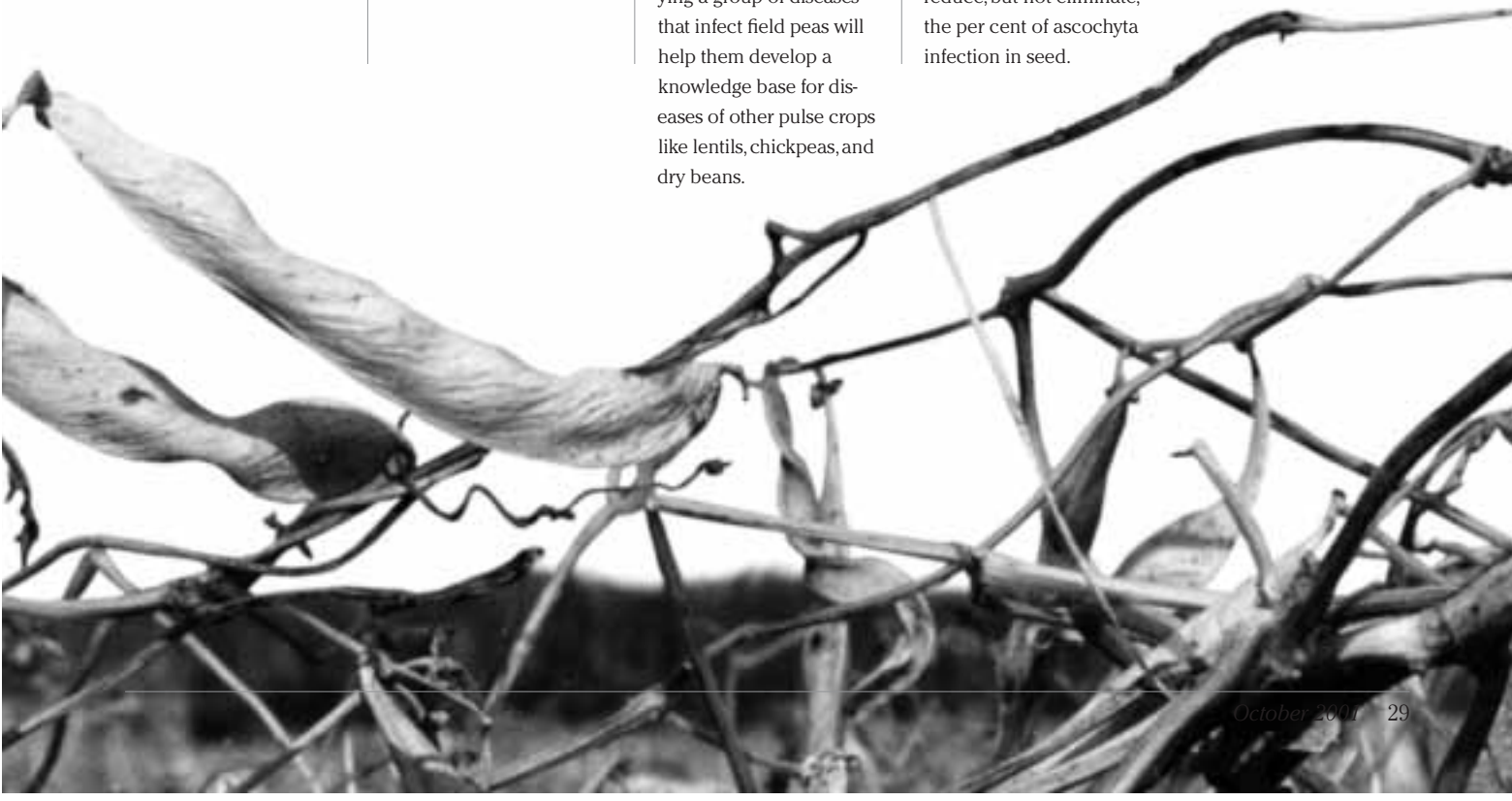
An independent research report released this spring confirms the value of research and extension in disease management of field peas. For every dollar spent on research and extension by the Alberta Research Council (ARC), the report states, over \$5 of benefits are accrued back to the field pea grower through reduced average costs of production, increased returns from higher yields, and reduced damages due to better control of insects and diseases. The report, released by Kurt Klein, an Economics professor with the University of Lethbridge, and Alvin Ulrich, an agricultural economics consultant with Ulrich and Associates of Saskatoon, also states that ARC's experience in studying a group of diseases that infect field peas will help them develop a knowledge base for diseases of other pulse crops like lentils, chickpeas, and dry beans.

### Ascochyta Study

New research is giving chickpea growers another tool to reduce their risk of crop damage from ascochyta. The study was funded by Saskatchewan Pulse Growers because of the serious risk of ascochyta to the Saskatchewan chickpea industry. The project looked at whether disease risk can be reduced by selecting and planting only certain sizes of kabuli chickpeas. Discovery Seed Labs in Saskatoon carried out the research on large-seeded kabuli chickpea varieties only. Their results showed that screening to separate large seeds can reduce, but not eliminate, the per cent of ascochyta infection in seed.



**Ascochyta in chickpeas.**



## PEAs, Qs AND As



Do you have any ideas for this section? E-mail them to *Pulse Point*, c/o issues@issuesink.com, or fax them to (204) 475-5247. Let's get producers talking!

### ★ THE ISSUE

**The possible inclusion of pulses as a crop that may be subsidized by the U.S. government (see *Subsidy Stress*, page 4) is weighing heavily on the minds of Saskatchewan producers.**

"Yes, I've heard that (U.S. subsidies) may be coming. It won't help us at all. It'll end up the same as wheat – people in the States will grow more, not necessarily because there's a demand, but because they'll be paid for it. In theory, the U.S. government is all for free trade, but as soon as there's some pressure from the farm lobby, they go ahead and do whatever they want."

Don Tait  
Elrose, SK

"Subsidies have hurt us in every other crop, so why would it be any different for pulses? I would think there would be a change from what's happening now... and not for the better."

Thomas Mann  
Drinkwater, SK

"If it does encourage production of peas to the point of displacing soybean meal as feed, that might be positive. It might open opportunities for Canadian feed pea producers. That's one optimistic way to look at it."

Vince Walker  
Star City, SK

"It will add more difficulty to the prices Prairie farmers are already contending with. It will add some more supply to the marketplace, and reduce the prices farmers receive, which are somewhat depressed right now. It's another issue the federal government needs to take to Washington. I'm not terribly optimistic we'll have success, but we need to raise it."

Chris Hale  
Rouleau, SK

### ★ QUOTABLES ★

*"I always go to Pulse Days, and the other meetings held during Crop Production Week. I find them informative, I get the chance to meet a lot of my friends, and there's always the exchanging of good ideas. I also try to get to Agribition in Regina, and the Farm Progress Show in the summer, if I can get away."*

**Don Tait**, Elrose, SK, outlining some events he would recommend to other producers, as well as providing us with a shameless plug for Pulse Days 2002. (Confirm your attendance now!)



**Pulse Days 2001.**

*"I would want to keep focusing on yield and some disease resistance. Increasing protein content in dry peas would also be a worthwhile project."*

**Pat Beaujot**, Langbank, SK, on what he would concentrate on if he were a pulse breeder.



**Desert-like conditions prevailed this summer.**

*"What I remember this year was non-stop wind and blowing dust from May to June, and a non-stop hot, dry day that ran from July to August. I'm surprised we grew the grain we did given the adverse conditions this year. The number one reason was the use of direct seeding and soil management techniques to preserve the moisture we had in the soil bed from the winter. The other two reasons were chemical controls and new varieties."*

**Todd Naber**, Melfort, SK, on his most vivid image of the 2001 drought, and his theories on how he was able to "weather" it.



# Fall Cash Advance Program for Pulses

The request is in to continue the federal government's cash advance program for pulses, and this fall Saskatchewan Pulse Growers (SPG) expects the program will again be approved. The program, administered by the Manitoba Corn Growers Association (MCGA) for all the Prairie pulse grower organizations, is a tool that helps growers manage their cash flow. With commodity prices hitting record lows in the past few years, this tool becomes even more valuable.

Theresa Bergsma with MCGA expects that the 2001 fall cash advance program will be the same as last year. Interest-free loans up to \$50,000 will be available at a cost of \$150 for administration, plus a 2 per cent deposit. This \$50,000 is a cumulative maximum for all crops, under all programs. This includes not only the pulse program, but also those for cereals, canola, and others.



The Saskatchewan Pulse Growers expects the federal government's cash advance program for pulses will be approved again this year.

Interest-bearing loans (prime minus  $\frac{1}{4}$  per cent) will be available on loans over \$50,000, to a maximum of \$250,000, at a cost of \$200 for administration plus a 2 per cent deposit. Credit and inventory checks will be performed based on federal government guidelines.

Farmers who applied for the spring advance must roll it into their fall advance, if they are applying for one. Otherwise, advances from the spring of 2001 must be paid by December 10, 2001.

Bergsma hopes that cash advance prices will be slightly higher than last year. She anticipates that the program and prices will be finalized, and application forms made available, by October 1, 2001.

For your application or more information, call the MCGA toll-free on the Prairies at **877-598-5685**. The forms will also be available on the SPG web site ([www.saskpulse.com](http://www.saskpulse.com)).✱

## RESOLUTIONS



Saskatchewan Pulse Growers  
has issued a Call for  
Resolutions for its Annual  
General Meeting (AGM).

The meeting is slated for  
Monday, January 7, at the  
Saskatoon Inn, during  
Pulse Days 2002.

Resolutions must clearly note the  
person who is proposing them.

A seconder will be called for at the  
Annual Meeting.

Robert's Rules of Order will apply.



Resolutions should be mailed to:  
**Saskatchewan Pulse Growers**  
310-111 Research Drive  
Saskatoon, Saskatchewan, S7N 3R2  
or faxed to: (306) 668-5557  
or e-mailed to: [pulse@saskpulse.com](mailto:pulse@saskpulse.com)  
by Wednesday, January 2, 2002.



## CLOSING THOUGHTS



**Garth Patterson**  
Executive Director

# The Maturing of an Industry

### ★ THE TEAM

EXECUTIVE DIRECTOR  
Garth Patterson

VARIETY RELEASE MANAGER  
Joelle Paradis

ACTING COMMUNICATIONS  
MANAGER  
Jackie Blondeau

ADMINISTRATIVE ASSISTANT  
Cathy Northey

ADMINISTRATIVE ASSISTANT  
Tammy Oviatt

CONTROLLER  
Helen Baumgartner

ANIMAL NUTRITION  
CONSULTANT  
Barb Stefanyshyn-Coté

CONTACT US  
310-111 Research Dr.  
Saskatoon, SK S7N 3R2  
tel. (306) 668-5556  
fax (306) 668-5557  
pulse@saskpulse.com

Our industry has grown by about 1,000 per cent in the past 10 years! What a success story! The drought has hit many pulse growers hard this year, but I have no doubts that our industry will recover and continue to prosper. Pulse growers have shown over the years that they are willing to change, adapt, and take reasonable risks in order to succeed.

To continue to build value in our industry, it is useful to identify critical success factors. RESEARCH & DEVELOPMENT has been a cornerstone to our success. Consider our successes (and failures) to date in peas, lentils and chickpeas; most are related to the adaptability of varieties to our growing conditions. Why haven't dry beans taken off in Saskatchewan? The number one reason is the lack of suitable varieties. Our continued success and growth in the pulse industry will only occur if we either develop better varieties or access varieties that are adapted to our conditions and meet the quality requirements of the market. This not only means investing millions of dollars more (of public and grower funding), but also creating the conditions for increased private investment.

Secondly, we must place more emphasis on INCREASING THE DEMAND for our products. Our industry has proven that it can supply good quality product at reasonable prices. If we continue to increase production without a corresponding decrease in supply from other regions, or increase in demand, it can only mean one thing – lower prices! The best example of the benefit of market development is in feed peas for hog rations. Through

industry and grower efforts we now supply about \$40 million per year of feed peas into Western Canadian hog rations and expect this to increase to \$80 million in the next five years. Not a bad return on investment when you consider that the pulse industry spent less than \$500,000 to develop this market!

Thirdly, we must INFLUENCE GOVERNMENT AND CORPORATE POLICY to ensure that it is either neutral or positive to our industry. These include such issues

as rail transportation, pesticide harmonization, GMOs, foreign production subsidies and Canadian Grain Commission's grades and regulations affecting pulses. The Board's strategic plan and budget emphasize these critical success factors. You will hear more about this at our upcoming annual meeting.

Like the growers we represent, this organization has also been willing to change, adapt, and take reasonable risks in order to succeed. Consider the area

of Extension and Communications: Pulse Days has grown to become the largest and best farm meeting of its type anywhere in the world! The late Don Jaques (our past Administrator) initiated a low-cost, no frills newsletter to growers that was often fondly referred to as the "green rag!" Four years ago, Penny Eaton, our Communications Manager, upgraded the newsletter to a two-colour, easy-to-read format with no advertising.

*Pulse Point* signifies the maturing of our industry. Advertising is now being accepted in order to meet the needs of both growers and industry. The full-colour magazine format exemplifies the quality and professionalism in our industry. I hope you like it. ★



**Saskatchewan Pulse Growers supply about \$40 million per year of feed peas into Western Canadian hog rations.**



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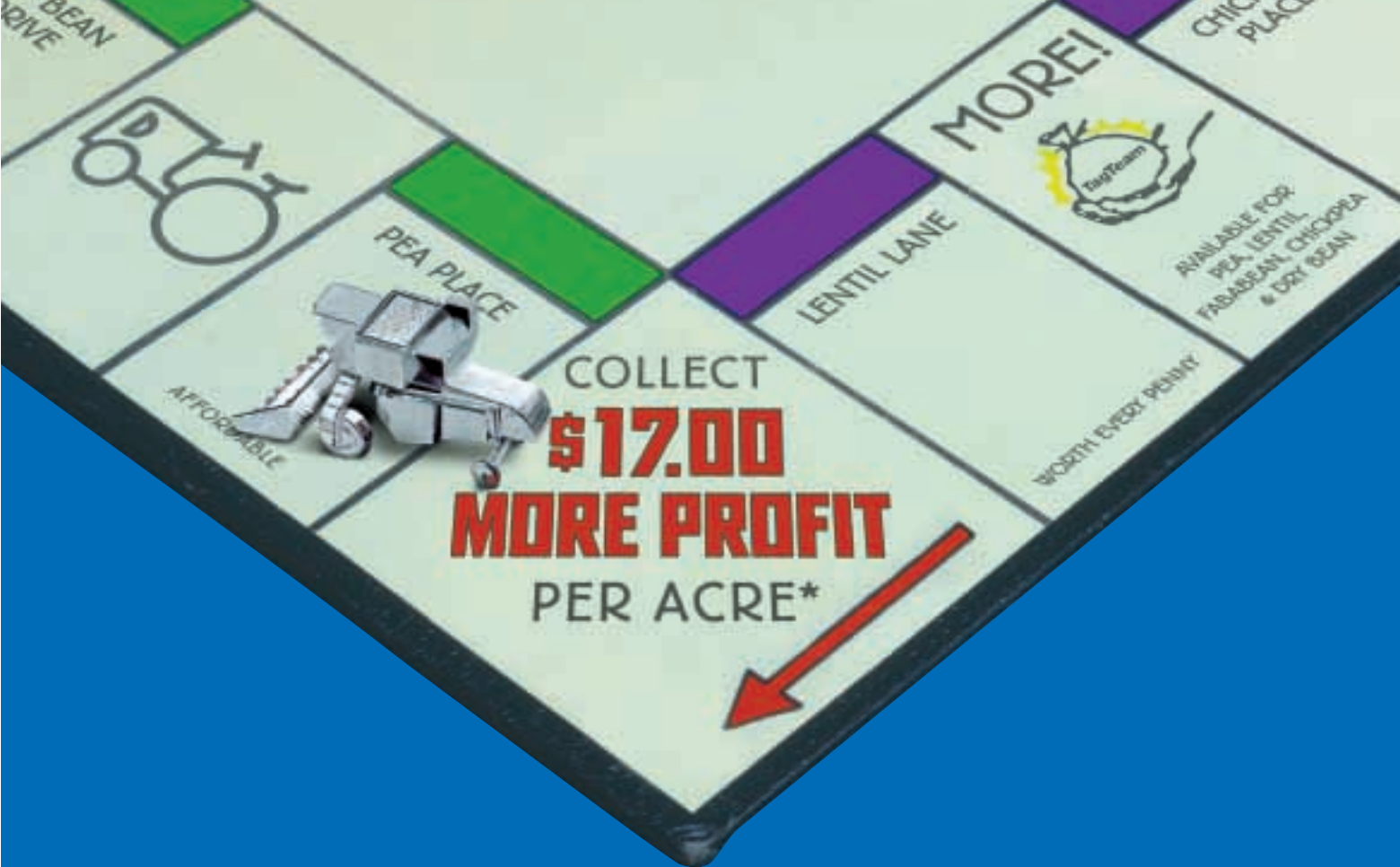


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