



A Canadian perspective on the Australian pulse industry.

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While Australia is our most significant competitor in international pulse markets, there are some quite marked differences between the Canadian and Australian pulse production, even if the eventual products are rather similar and compete for the same markets.

In a typical, non-drought, year Australia expects to produce about 2.5M tonnes of pulses, which Pulse Australia values at almost A\$1B - one Australian dollar is worth about Can \$0.94.

Australian pulses are generally grown in what is described as a Mediterranean type of climate, characterized by hot and dry summers and relatively cool and wet winters. The trick for Australian growers is to seed the crop into good winter moisture and have the crop mature before it gets too hot and dry. This, of course, contrasts with continental climate of the Canadian Prairies with relatively hot and wet summers but dry and cold winters, and where generally moist soil conditions and long day lengths allow for crops to mature quickly during the summer.

Table 1: Total Pulse Production in Australia for 2007, tonnes

State	Chickpea	Beans (faba, broad)	Field peas	Lentil	Lupin	Australia
WA	200	3,500	55,000	50	210,100	268,850
SA	9,250	133,000	143,000	69,000	65,000	419,250
VIC	19,000	35,000	60,000	62,000	25,000	201,000
NSW	201,500	8,500	9,500	100	30,500	250,100
QLD	83,000	0	0	0	0	83,000
Total	312,950	180,000	267,500	131,150	330,600	1,222,200
Area(Ha)	306,000	132,500	292,500	129,500	453,700	1,314,200

Source: Pulse Australia

The geographic spread of production is wider than in Canada and the types of pulses grown is more varied; see Table 1 for 2007 production. (Note: Production was down in 2007 due to drought). By way of comparison Canada produced about 4.1M tonnes pulses in 2007, of which 2.3M were peas in Saskatchewan.

A comparison between the climate of Esperance, a major pulse production area in Western Australia, and Lethbridge illustrates the climatic differences, Chart 1. The amount and distribution of precipitation is not too different, but in Australia the wet months are in the winter which is June, July and August. Summer temperatures are not that different, but

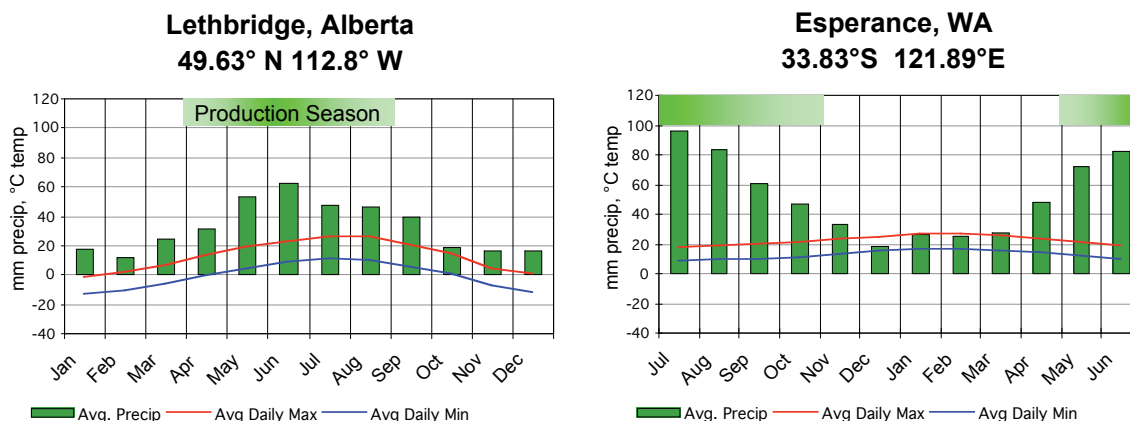
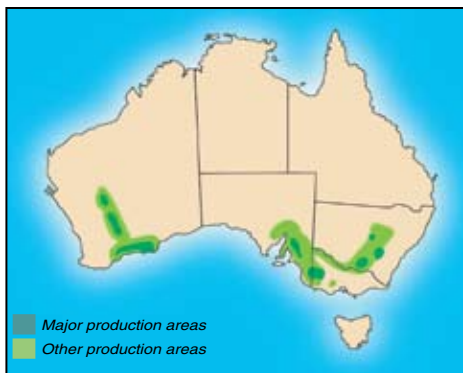
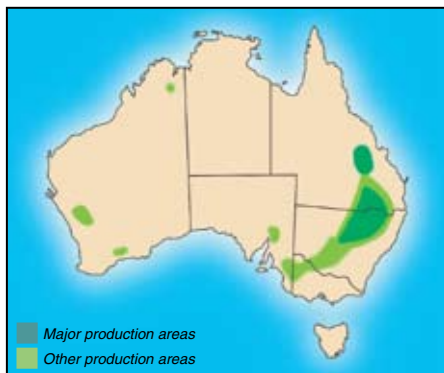


Chart 1. A graphic comparison of climate normals for Lethbridge, AB and Esperance, WA.

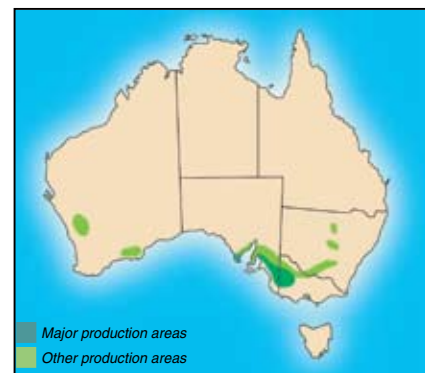




Field pea production areas in Australia



Chickpea production areas in Australia



Lentil production areas in Australia

Australia does not have a winter worth a mention when it comes to temperatures.

To take advantage of winter moisture and avoid summer heat, most pulses in the Esperance area are seeded in mid to late May after other cereals, equivalent to mid to late November in the north hemisphere. They are harvested the first week of November or soon after, equivalent to May in the northern hemisphere.

Strange as it might seem, but always open to debate, Canada probably has a climatic advantage for production of most pulses. While lots of sunshine and not much rain in summer may be good for surfing, wine production and tourists, Australian pulse production has to depend on adequate winter rainfall.

Moisture is almost certainly more critical than temperature. The Australian pulse growing areas are at much lower latitudes, closer to the equator than the Prairies – equivalent to southern California, than the Prairies. But winter rains seem to be less reliable in the pulse growing areas of Australia than summer rains are on the Prairies.

What the Australians refer to as the "Break," the first winter rain, marks, often dramatically, the end of the dry summer and is critical for crop prospects. In fact, it is common practice for Australian farmers to wait for the break before investing in planting a crop and/or deciding on what to grow. This may be similar to the situation sometimes faced by Prairie farmers when there is more rain than "needed" in the spring.

When it comes to harvesting Australians do not face, of course, the challenge of getting the crop off before the snow flies. But cold Prairie winters are not without advantage when it comes to protecting stored pulses from pests.

Droughts, certainly in recent years seem to have created greater problems for Australia than western Canada.

But once it comes to marketing Australia appears to have a locational advantage. It is certainly closer to Asian markets in absolute terms and even to European markets in cost terms. Most major production areas are within trucking distance of, or a short rail haul from, ports, see map. And certainly there are no challenges with mountains or blizzards in Australia.

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