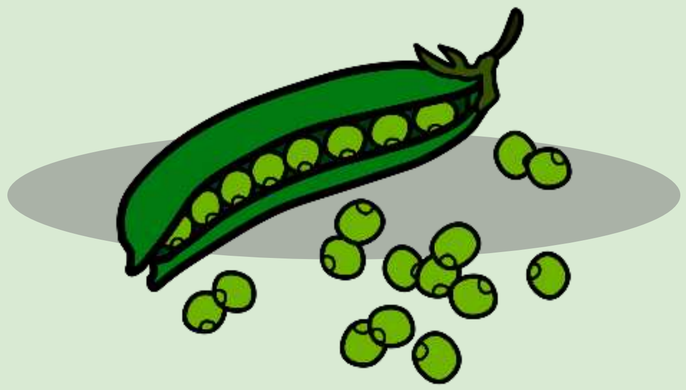
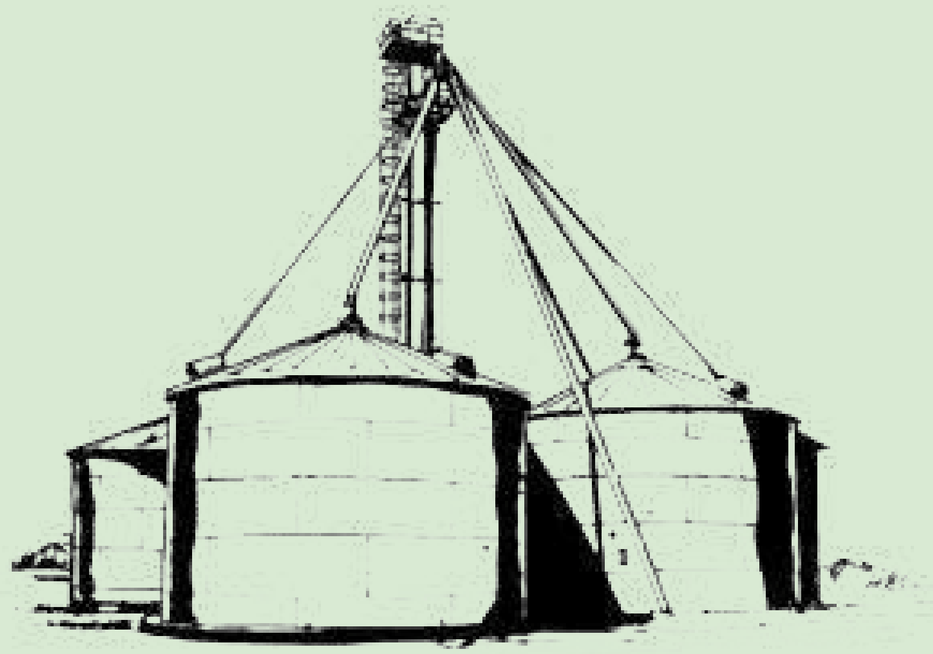
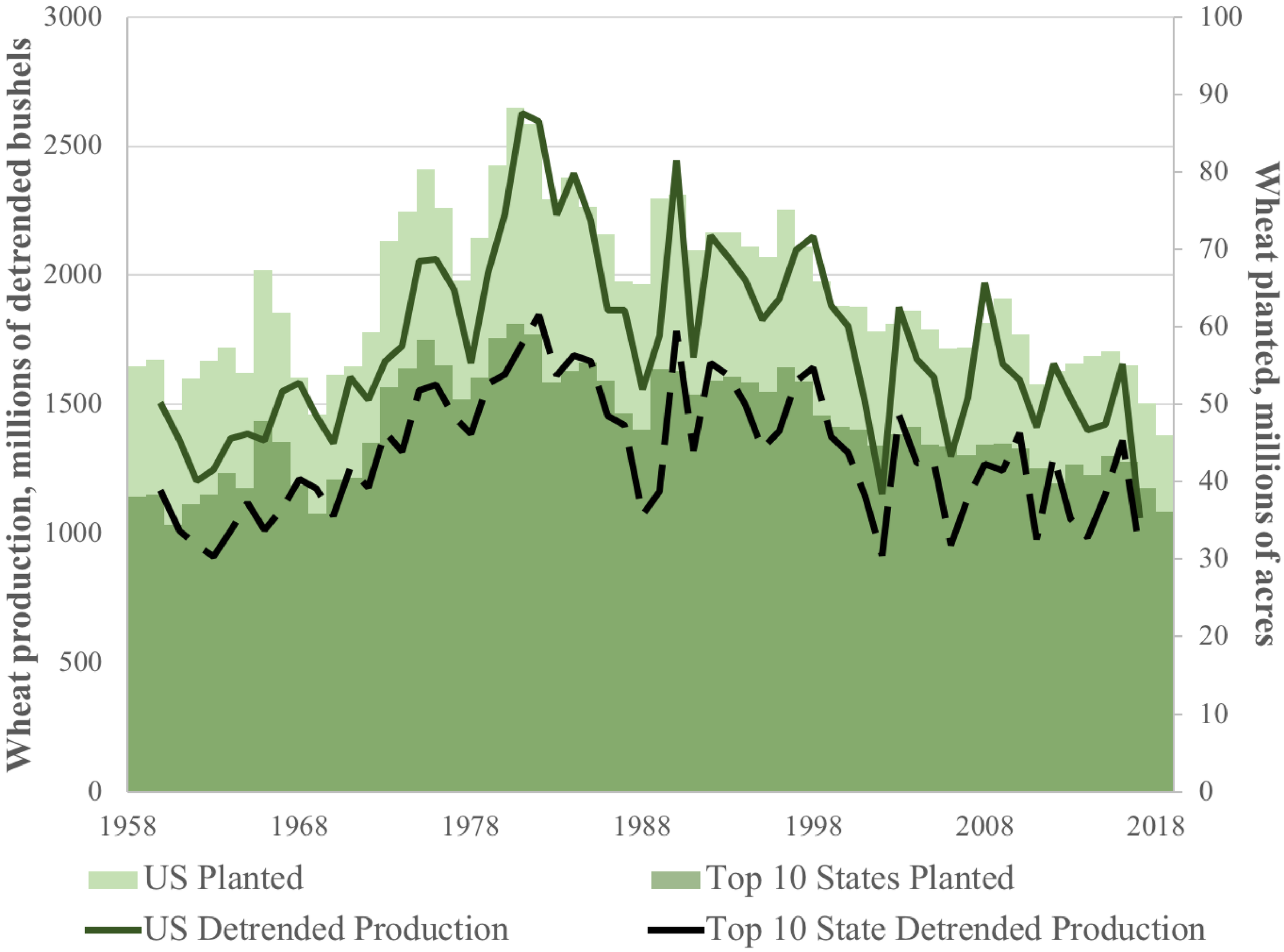


SHIFTING CONSUMER PREFERENCES:

Impacts on Wheat and Dry Pulse Acreage



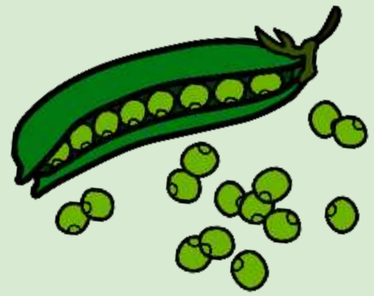
Wheat Planting and Production, 1960–2017



WHAT'S THE STORY?

The Usual Suspects

The Less Publicized Factor

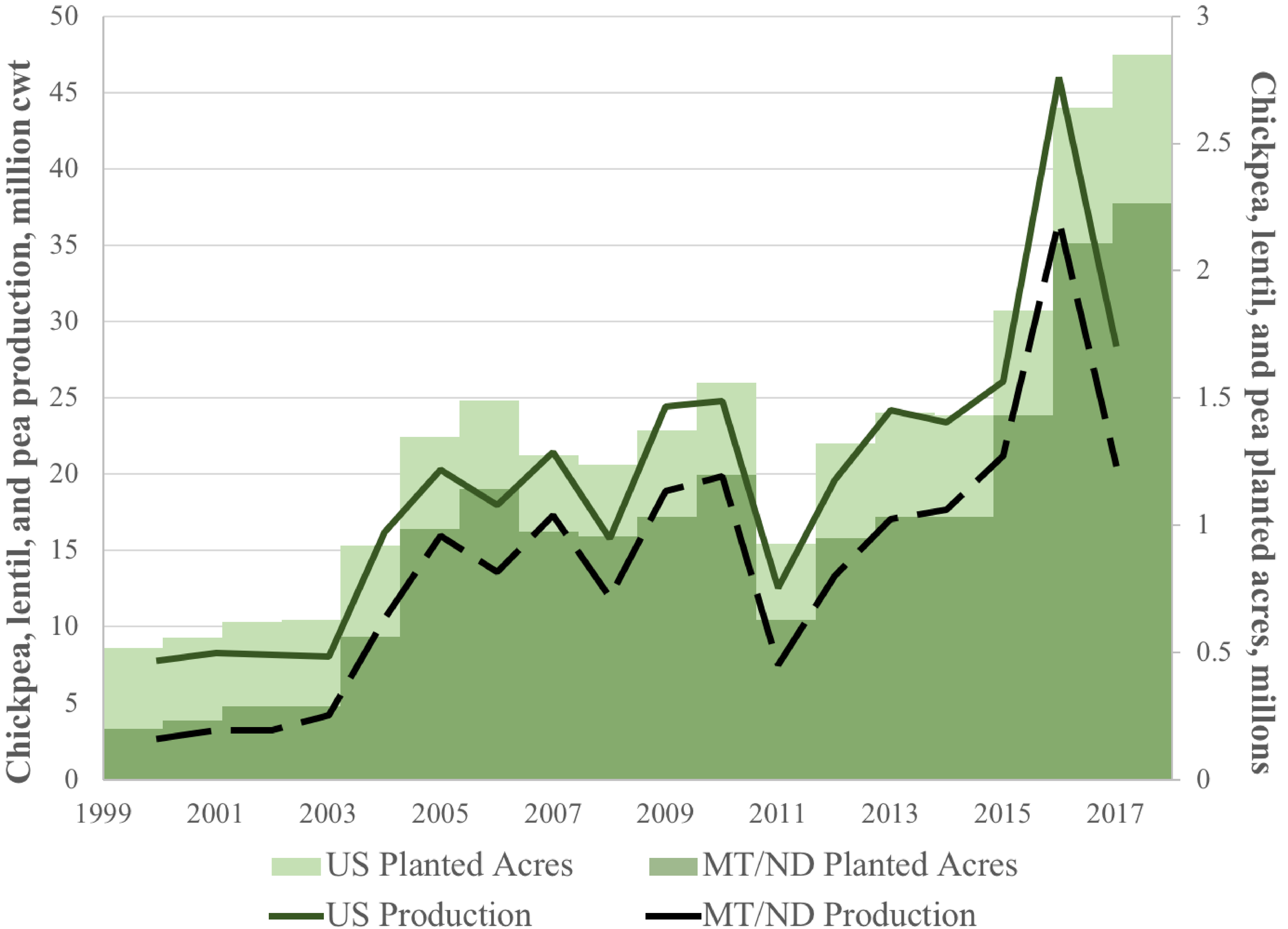


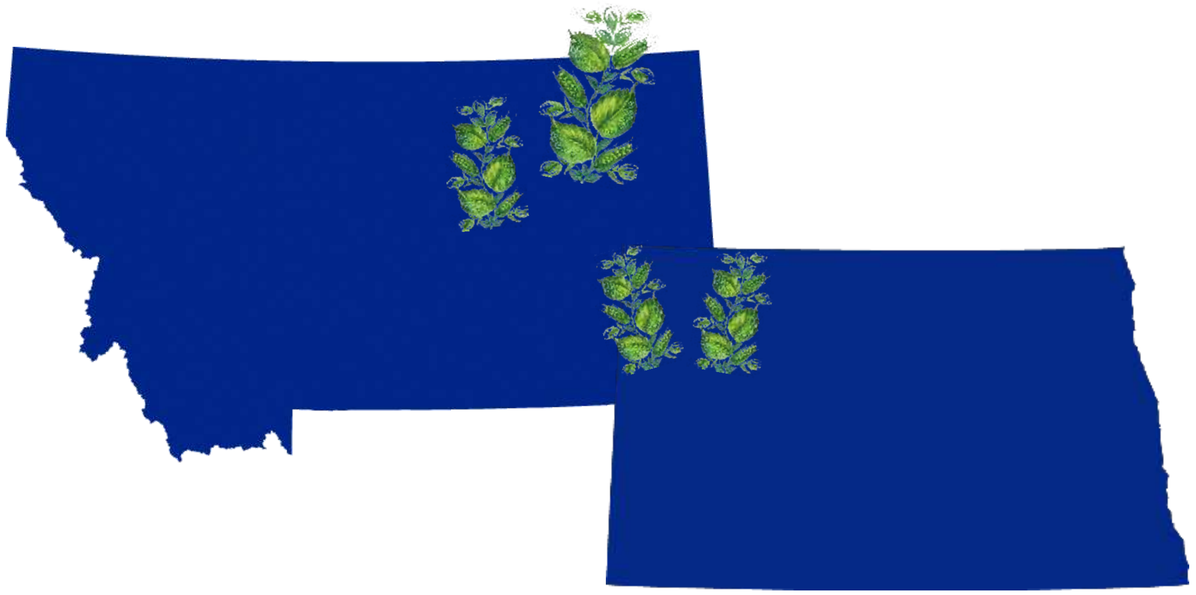
Hello! I'm a...

Millenial

WHAT IN THE WORLD ARE PULSE CROPS?

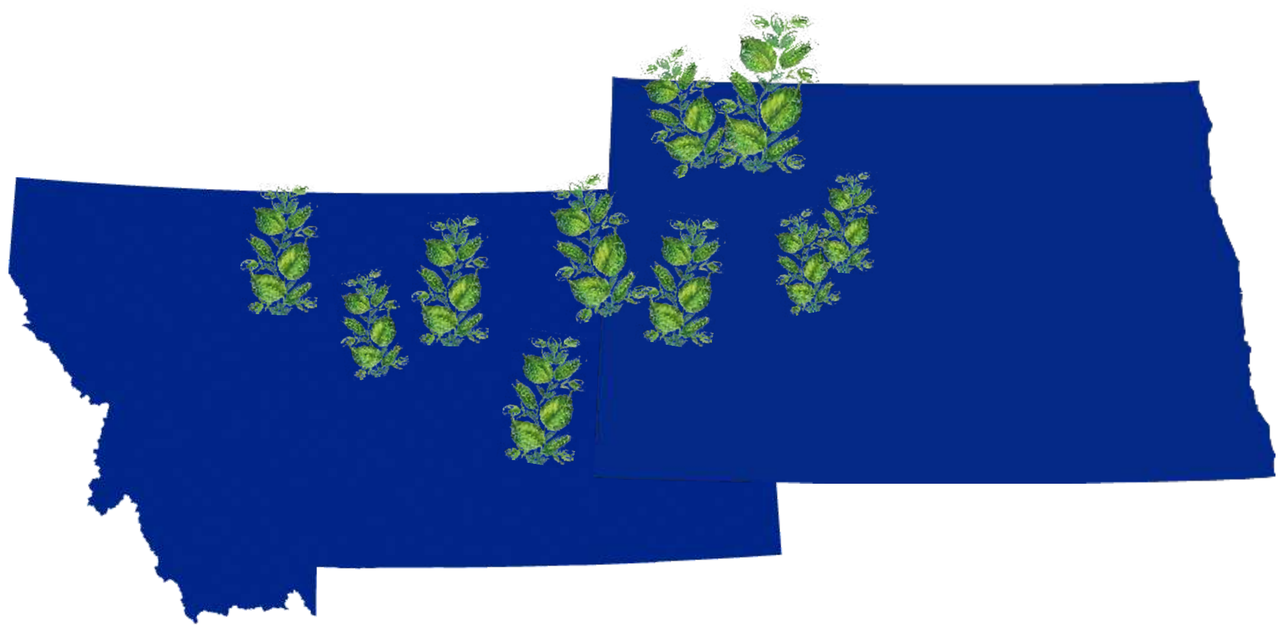
Major Pulse Crops Planting and Production, 2000–2017





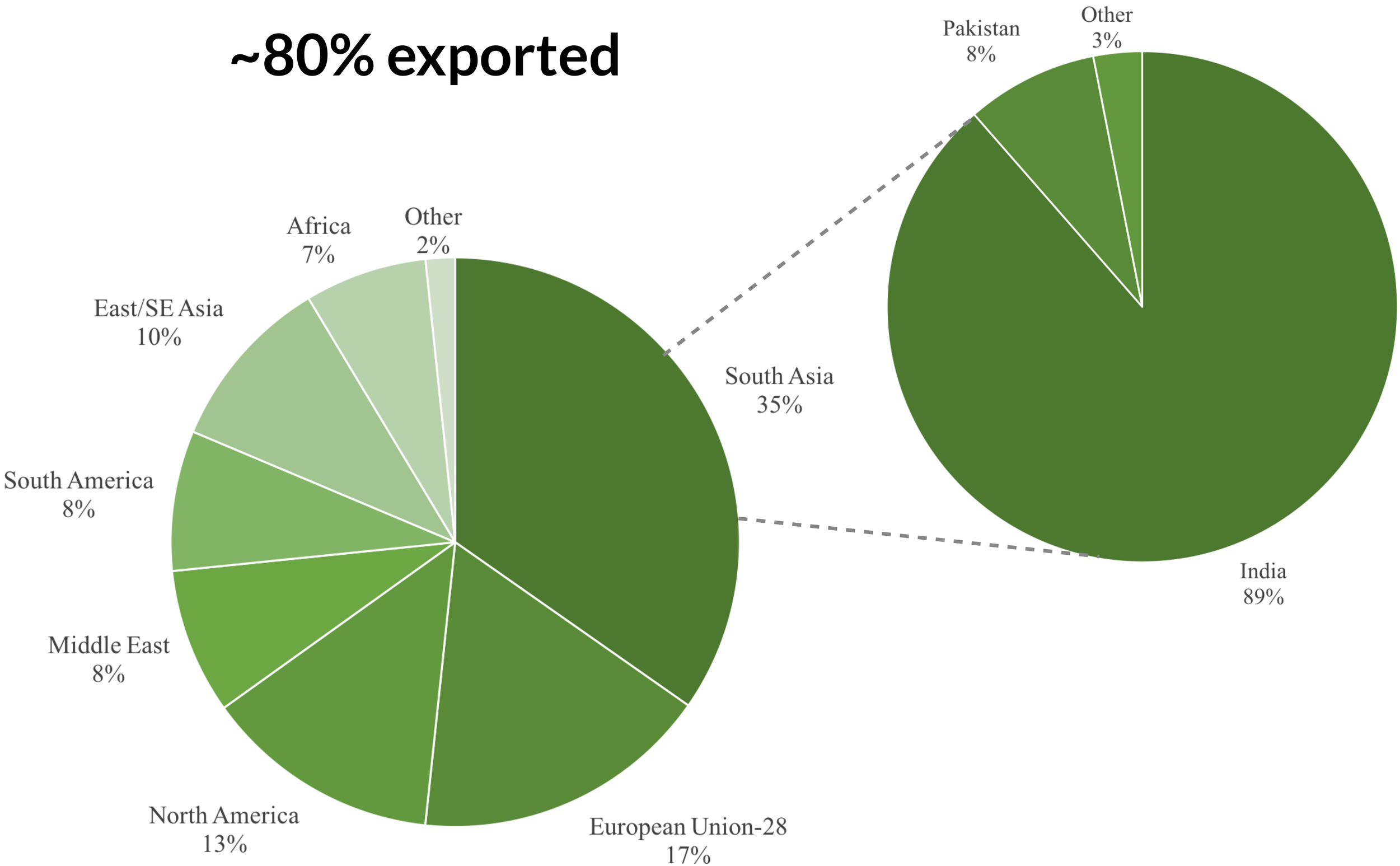
BETWEEN 2000–2017, A 1,024% INCREASE IN MT/ND ACREAGE

0.20 Mil ⟶ 2.26 Mil



THE PULSE MARKETING LANDSCAPE

~80% exported



LENTIL

Cream Ale

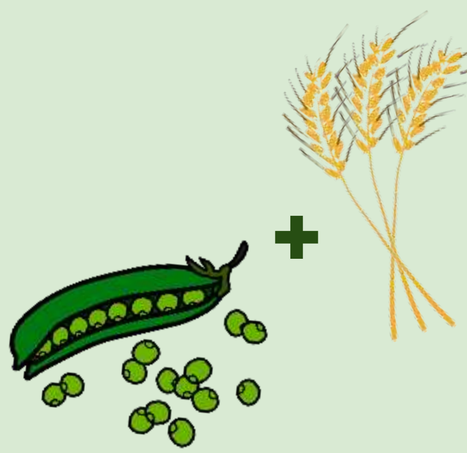
From Pulse to Pint

IMPACTS ON LAND USE AND CROP OUTLOOK

PAST 70 YEARS

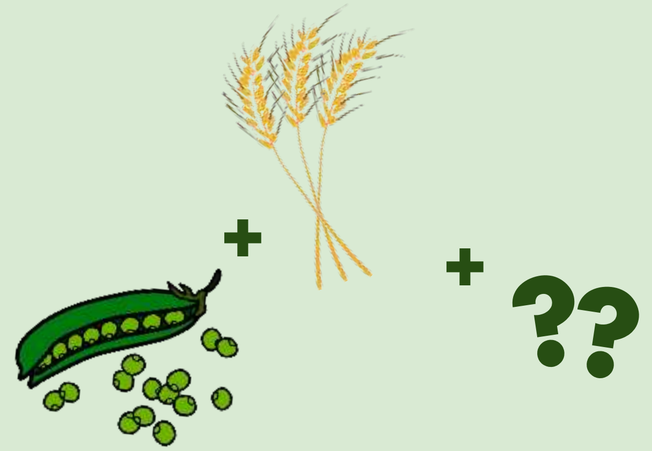
Mostly wheat–fallow

RECENTLY



Wheat–pulse

GOING FORWARD



Wheat–pulse–??

Policy

Agronomy

Wheat-to-pulse price ratios matter

Canada's stocks and production a big factor

80% is exported = changes in trade barriers are critical

November/December Indian tariffs

Future Chinese retaliatory tariffs / non-tariff barriers

Future EU retaliatory tariffs?

NAFTA?

Chinese substitution of peas for soybeans

How quickly does domestic industry develop?

FINAL THOUGHTS

My big question:
How much can pulse production grow?

1. How disruptive will trade conflicts be?

2. Are changes in domestic demand permanent and how quickly can pulse processing infrastructure adjust?

3. To what extent will other dryland wheat states—Kansas, Oklahoma, Nebraska—adopt pulse crops?

Anton Bekkerman

Just Google me