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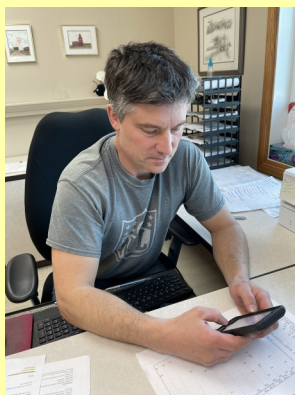
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Pask Farms Ltd.

Fall Newsletter 2023

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THE GAME CHANGERS

Things We Didn't See Coming

ALFOREX

This company was doing about 30% of North America's alfalfa seed production. Owned by Corteva, it was suddenly closed down in late 2022. Most of the staff was terminated, with 100% of staff gone by June 30, 2023. It's varieties, genetics, research operations and seed production came to an end.



In September 2023, DLF USA purchased the varieties and the research facilities. They DID NOT BUY the seed plants and DID NOT BUY the 10,000,000+ pounds of high cost inventory. The real concern is Corteva could "dump" that seed into the world alfalfa seed market. Alfalfa seed will be purchased hand to mouth until this inventory disappears.

USA JET FUEL & LEAFCUTTER BEES

Canola oil, when refined to jet fuel specifications, reduces Green House Gas emissions by about 40%. Wow! Save the World! That sounds great for Canada's canola crop prices. But canola oil jet fuel needs a heavy government subsidy to make it economically feasible.

The USA government will pay the



Leafcutters pollinating hybrid canola seed production in the USA

subsidy, but only on USA PRODUCED CANOLA. So the plan is to produce canola in the Southern US states to get this subsidy. Growing canola requires hybrid canola seed, which requires pollination. The short flight range of leafcutter bees makes them an ideal pollinator. Guess what - production of the hybrid seed for USA farmers to plant will be done in the USA. This means: **USA pollinators of hybrid canola seed will need leafcutter bees.**

PARASITES

We have lost Vapona (dichlorvoX). Period. Forever. It was another casualty in our federal government's need to keep us healthy. In this case bees don't count. All attempts by our leafcutter bee associations fell on deaf ears. Vapona has been a major tool in controlling parasites during incubation and during fall storage. We can't legally use the Vapona we scooped up before the shutdown. It is still available to USA bee producers, but it is against the law to import it into Canada.



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ALFALFA SEED PRODUCTION, MARKETS, AND PRICES

WHICH WAY WILL IT MOVE FROM \$1.50?

2023 ALFALFA SEED CROPS:

USA & ALBERTA:

Most of the USA crop and 50% of the Alberta alfalfa seed crop is in the bin. Grower and Seed Company reports are an average crop on reduced acres.

SASKATCHEWAN AND MANITOBA:

It did look pretty good, but August rains, pesticide resistant bugs and hoppers have taken a pretty good bite. Likely an average crop on reduced acres

EUROPE & ELSEWHERE:

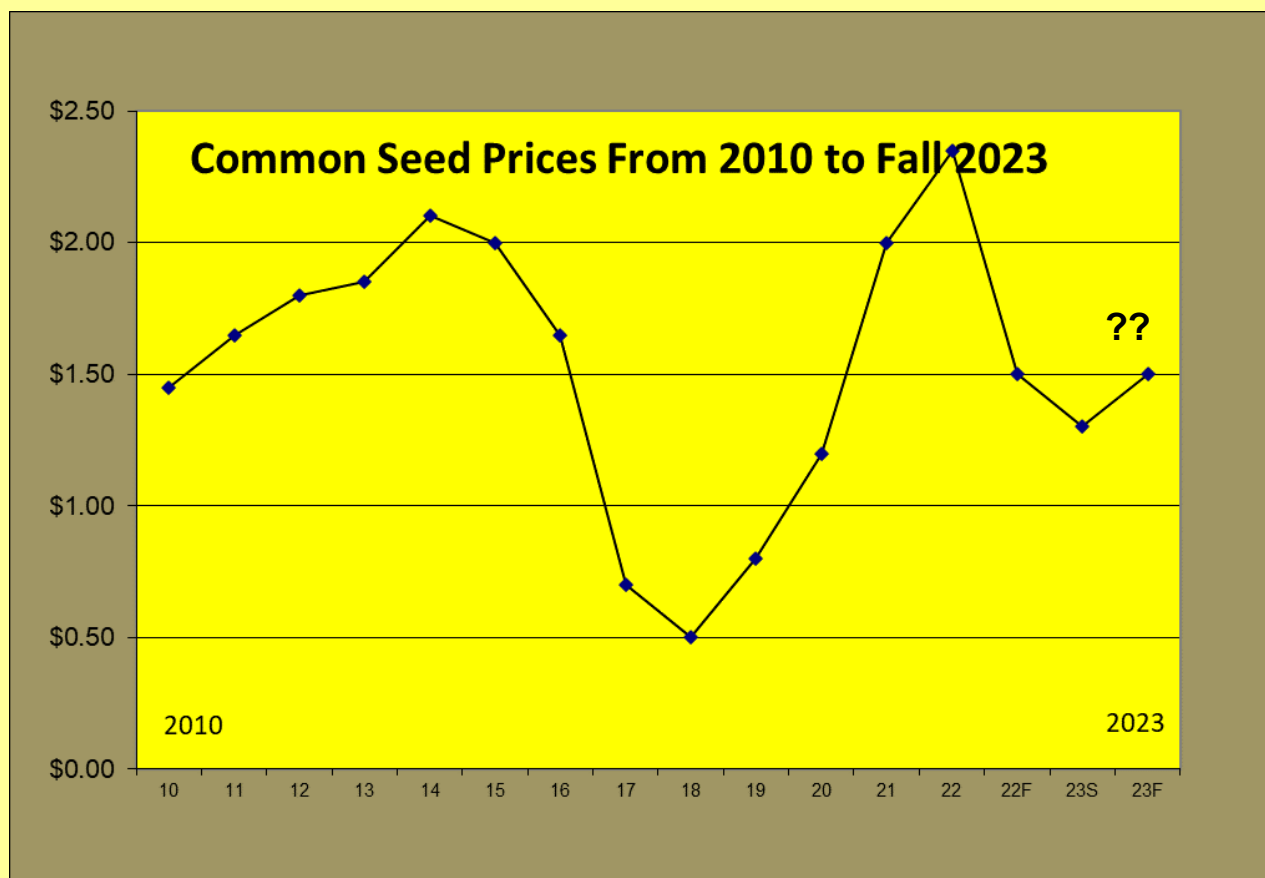
The rumour is that Europe's crop is relatively poor. Everyone is calling to buy Certified Algonquin destined for Europe which would indicate a poor crop.

THE ALFALFA SEED MARKET LOOKS SMALLER

2023- 2024 MARKETS:

THE USA:

- Dairy prices are much lower.
- Hay prices have dropped significantly.
- Much of this market buys Certified USA seed.
- Producing multi-cuts of alfalfa hay means large expenses on machinery, fuel, and irrigation water. The corn-soybean thing is pretty attractive.
- Reducing the portion of alfalfa in the beef and dairy rations is continuing.
- Other crops such as winter triticale, sorghum, bermuda grass, and corn silage continue to eat into alfalfa's market.



ALFALFA SEED CARRYOVER:

- The USA seed companies all have carryover.
- The Alforex inventory is about 1/3 of USA seed needs.
- Some Saskatchewan growers have last year's crop.

CHINA: Traditionally a Buyer when prices are poor. They may continue to buy seed at these prices, but are very price sensitive. Politics can impact this too.

EUROPE: The EU market tends to be about only Certified seed on the EU Variety list. Algonquin is on that list, but common seed is usually not a good item in Europe.

CONCLUSION - STILL TOO MUCH SEED WE NEED AN ALFALFA SEED MARKET

LEAFCUTTER BEE PRODUCTION, MARKETS, AND PRICES

LAST YEAR THE MARKET CRASHED WHEN ALFOREX QUIT

BEE RETURN:

The thing about leafcutter bees is they are a perishable commodity. You sell them or fly them, but you can't carry them over to next year. Trying to figure this out is simply about matching this year's crop to next year's potential market.

The Manitoba and Saskatchewan Bee Crop looks smaller than last year. Everyone else has marginal bee increases or loses bees.

BEE MARKETS:

USA Dormant Alfalfa Seed Growers: This looks steady to larger as DLF look to start production of their Alforex varieties.

USA Non-Dormant Alfalfa Seed Growers: This is a hot seed market right now, typically California.

Eastern Wild Blueberry Growers: This market continues to be steady.

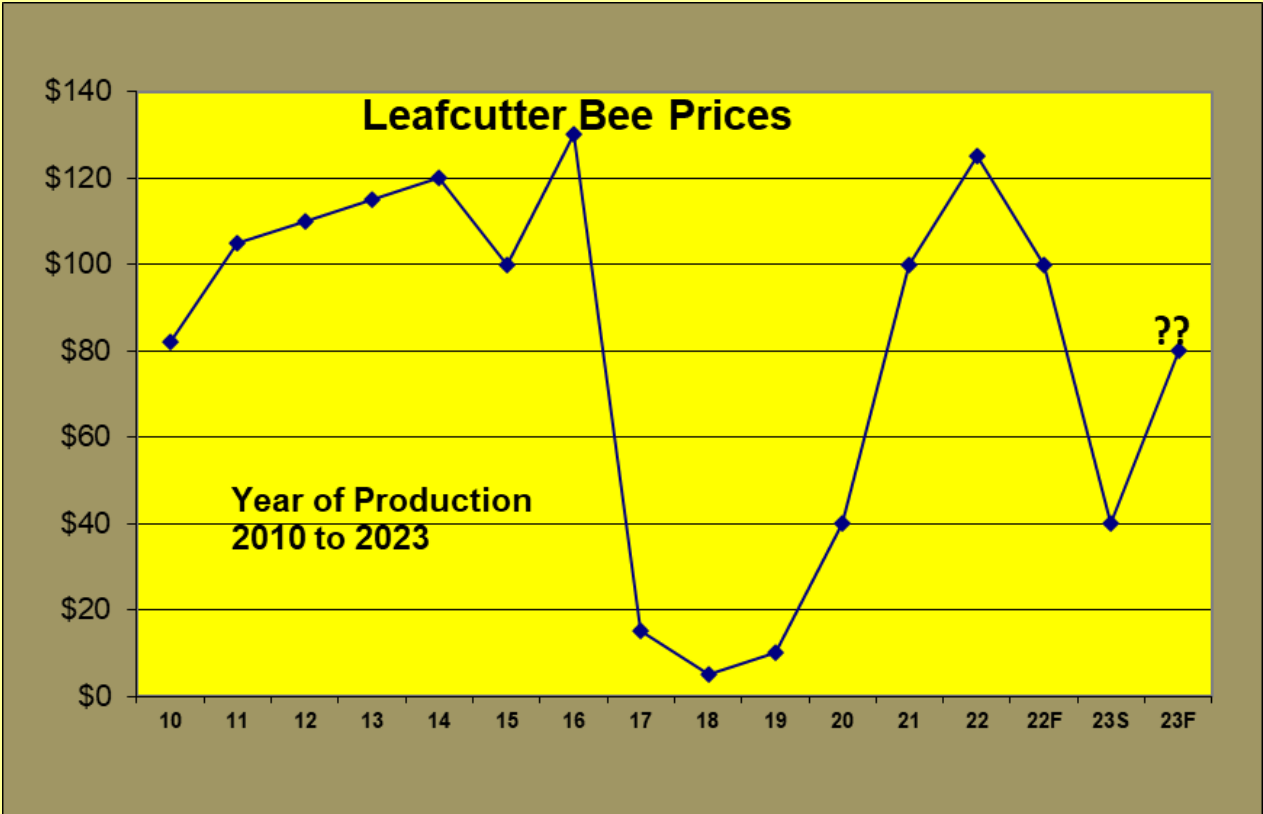
Hybrid Canola Pollinators in Canada & the USA:

There is real potential here for this to be a market mover. The production of hybrid canola seed MUST happen, and leafcutter plays a big role here. The real buyers are the seed companies who cash flow the pollinators.



BEE MARKET OUTLOOK

THINK HIGHER



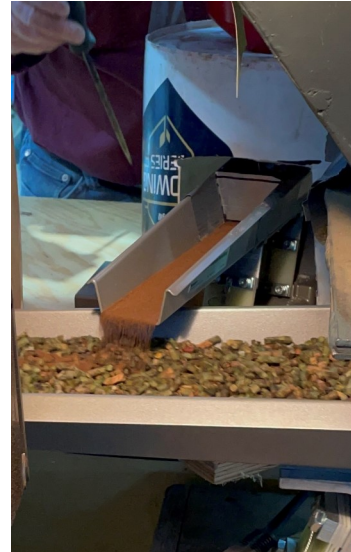
PARASITE CONTROL - VAPONA VS PLANT POWDERS

Current parasite control research is focused on the use of plant powders to control parasites during incubation. Plant Powders are known to repel insects. Maybe they will repel parasites from bee trays. Danica Baines worked with a few producers mixing plant powders into cocoons prior to incubation. The hope was the parasites would either die in the trays or be repelled out of the tray before re-parasitizing other developing bee larva. Gail MacInnis continues this work, but with a different strategy. We decided to get our feet wet, knowing this is bleeding edge, it may not work, and we could lose bees. Our objective was to measure this treatment against Vapona by:

- Doing both laboratory & field scale treatments
- The "check" treatment would be Vapona
- Assess two different powders
- Assess two different application methods
- Measure re-parasitism on Day 13
- Measure final effect on bees on Day 30
- Assess field bee return and final parasitism

The initial parasitism was 1%, the treatments and incubation done by two beekeepers in different incubators with different trays, sampling, assessment by cutting of cocoons at different stages, was all done here by Tracy, Natalie and Adele.

This was a huge amount of work, with hundreds of gallons of bees treated different ways. That photo shows cloves sprinkled into a stream of leafcutter cocoons. The analysis was extensive with over 5,000 cocoons examined.



ALL WE LEARNED WAS "THERE IS A LONG WAY TO GO YET"

Seed Prices: It looks like another slow year. Last year the price dropped from \$2.00 to \$1.60 to \$1.30. This year we expect another year of everyone buying seed as they need it. This market uncertainty, high interest rates, and limited storage space, means that no one is stocking up.

At the moment, **we are paying \$1.50/lb picked up in your yard.** That price may move depending on what market develops (Or Doesn't). We need to see a sample to give you our dockage estimate and firm up any deal.

We Are Buying Alfalfa Seed - Send Us Your Samples

Please send us a 1 kg sample of any alfalfa seed you have for sale

We will do a detailed dockage test and give you a quote for dockage and price

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