



CANADA: PULSE AND SPECIAL CROPS OUTLOOK

August 9, 2005

For 2005-06, total area seeded to pulse and special crops in Canada decreased by 2%, from 2004-05, as increases for dry peas, lentils, dry beans, sunflower seed and chickpeas were more than offset by decreases for mustard seed, canary seed and buckwheat. Statistics Canada's (STC) seeded area survey, conducted during May 16 - June 3 and released on June 23, provided seeded area estimates for most pulse and special crops by province, but for some of the smaller producing provinces the area seeded has been estimated by AAFC. In general, crop development is near normal, except for Manitoba where it is mostly behind normal due to stress caused by excessive moisture. Normal crop abandonment is expected except for Manitoba where higher than normal abandonment is expected due to excessive moisture. Yields are expected to be higher than trend for Saskatchewan and Alberta, trend for Ontario and Québec, and below trend for Manitoba. The poor crop in Manitoba mainly affects Canadian dry bean, sunflower seed and buckwheat production because Manitoba is normally the largest producer of these crops. The dry pea and lentil harvest has started and harvesting of chickpeas, mustard seed and canary seed is expected to start in mid to late August. It is assumed that precipitation will be normal for the harvest period and that average quality will be normal.

Total production in Canada is forecast to decrease by 6%, from 2004-05, to 4.9 million tonnes (Mt). Total supply is expected to increase by 5% to 6.1 Mt, as higher carry-in stocks more than offset the decrease in production. Exports are forecast to increase by 9% due to stronger demand. Carry-out stocks are expected to increase marginally. Average prices, over all types, grades and markets, are forecast to increase for chickpeas and mustard seed, decrease for dry peas, lentils, dry beans and sunflower seed, and be the same for canary seed and buckwheat. The main factor to watch are precipitation and temperatures during the late summer and fall in Canada. Other factors to watch are the exchange rates of the Canadian dollar against the US dollar and other currencies, ocean shipping rates and growing and harvest conditions in major producing regions, especially United States, India and Australia.

DRY PEAS

For 2005-06, production is forecast to decrease by 10% as a 2% rise in seeded area is more than offset by lower yields. Production is expected to decrease for yellow, green and other types. Supply is forecast to increase slightly due to higher carry-in stocks. World supply is expected to increase by 2% to 12.6 Mt, but use is also forecast to increase, resulting in stable carry-out stocks. Canadian exports and domestic use are expected to increase due to stronger demand in both food and feed markets. Carry-out stocks are forecast to decrease, with a stocks-to-use (s/u) ratio of 16%. The average price, over all types, grades and markets, is forecast to decrease slightly due to the higher world supply.

LENTILS

For 2005-06, production and supply are forecast to increase, due to a 10% rise in seeded area. Production is forecast to decrease for large, medium and small green types, but increase for the red type. World supply is forecast to increase by 8% to 4.22 Mt due to higher carry-in stocks. Although world use is expected to increase, carry-out stocks are forecast to rise. Canadian exports are expected to increase by 15% due to higher demand. Carry-out stocks are forecast to rise, with a s/u ratio of 36%. The average price, over all types and grades, is forecast to decrease only slightly from 2004-05, as pressure from higher world supply is mostly offset by support from higher average quality.

DRY BEANS

For 2005-06, production and supply are forecast to increase, due to a 20% rise in seeded area and lower abandonment. Production is expected to increase for white pea, pinto, black, dark and light red kidney, cranberry, small red and pink beans, but decrease for Great Northern beans. US

production is forecast to increase by 37% to 1.07 Mt, while supply increases by only 15% to 1.21 Mt due to lower carry-in stocks. Canadian exports are forecast to increase due to higher supply. Carry-out stocks are expected to increase, with a s/u ratio of 6%. The average price, over all classes and grades, is forecast to decrease due to the higher supply.

CHICKPEAS

For 2005-06, production and supply are forecast to increase, as a 65% higher seeded area and lower abandonment more than offset lower yields. Production is expected to increase for large and small kabuli types, but decrease for the desi type. World supply is expected to increase marginally to 8.95 Mt. Canadian exports are forecast to increase due to the higher supply. Carry-out stocks are expected to increase, but remain low. The average price, over all types, grades and sizes, is forecast to increase due to higher average quality and a shift to the production of the higher priced kabuli types.

MUSTARD SEED

For 2005-06, production is forecast to decrease by 39% because of a 31% fall in seeded area and lower yields. Production is expected to decrease for all types, yellow, brown and oriental. Supply is forecast to decrease by only 6% due to higher carry-in stocks. Exports are forecast to rise due to higher demand and carry-out stocks are forecast to decrease, with a s/u ratio of 66%. The average price, over all types and grades, is expected to increase due to the lower supply.

CANARY SEED

For 2005-06, production is forecast to decrease by 32%, as a 43% fall in seeded area is partly offset by higher yields. Supply is expected to decrease by only 2% due to higher carry-in stocks. World supply, 90%

of which is in Canada, is forecast to decrease slightly to 400,000 t. Canadian exports are expected to increase due to higher demand and carry-out stocks are forecast to decrease, with a s/u ratio of 57%. The average price is forecast to be the same as in 2004-05, in line with the relatively stable world supply.

SUNFLOWER SEED

For 2005-06, production and supply are forecast to increase due to a 26% rise in seeded area, lower abandonment and higher yields. Production is expected to increase for both types, confectionery and oilseed. US supply is forecast to increase by 49% to 1.63 Mt. World supply is expected to increase by 5% to 28.6 Mt. Canadian exports and domestic use are forecast to increase because of the higher supply. Carry-out stocks are expected to increase, but remain low. The average price, over both types and all grades, is forecast to decrease because of the higher supply in US and Canada.

BUCKWHEAT

For 2005-06, Canadian production is forecast to increase slightly, as a lower seeded area is more than offset by lower abandonment and higher yields. Supply is expected to decrease due to lower carry-in stocks. Exports are forecast to decrease and carry-out stocks are expected to be negligible. The average price is forecast to be the same as in 2004-05, in line with a relatively stable world supply.

FURTHER INFORMATION:

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CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

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Grain and Crop Year (a)	Area		Yield t/ha	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (d)	Carry-out Stocks	Average Price (e) \$/t
	Seeded 000 ha	Harvested								
Dry Peas										
2001-2002	1,344	1,285	1.57	2,023	27	2,245	1,381	589	275	190
2002-2003	1,297	1,050	1.30	1,365	41	1,681	628	743	310	210
2003-2004	1,303	1,271	1.67	2,124	24	2,458	1,316	937	205	175
2004-2005p	1,388	1,345	2.48	3,338	40	3,583	1,900	1,083	600	135
2005-2006f	1,410	1,365	2.20	3,000	30	3,630	2,000	1,130	500	115-145
Lentils										
2001-2002	708	664	0.85	566	6	828	478	219	131	320
2002-2003	601	387	0.91	354	9	494	320	119	55	390
2003-2004	554	536	0.97	520	5	580	368	174	38	420
2004-2005p	778	750	1.28	962	8	1,008	520	328	160	310
2005-2006f	860	815	1.23	1,000	5	1,165	600	255	310	285-315
Dry Beans										
2001-2002	184	175	1.70	298	42	390	263	97	30	725
2002-2003	230	219	1.89	414	40	484	298	106	80	445
2003-2004	167	167	2.13	356	31	467	344	83	40	495
2004-2005p	163	126	1.75	220	30	290	241	44	5	650
2005-2006f	196	173	1.73	300	40	345	270	55	20	530-560
Chickpeas										
2001-2002	486	467	0.97	455	12	497	146	211	140	380
2002-2003	221	154	1.01	156	9	305	105	140	60	300
2003-2004	63	63	1.08	68	2	130	74	36	20	330
2004-2005p	47	39	1.31	51	5	76	40	31	5	385
2005-2006f	77	72	1.18	85	5	95	50	35	10	415-445
Mustard Seed										
2001-2002	166	158	0.66	105	3	213	171	9	33	685
2002-2003	289	255	0.60	154	9	196	114	22	60	595
2003-2004	340	328	0.69	226	2	288	121	75	92	390
2004-2005p	317	304	1.00	305	2	399	130	79	190	295
2005-2006f	217	208	0.89	185	2	377	150	77	150	300-330
Canary Seed										
2001-2002	170	163	0.70	114	0	184	134	20	30	660
2002-2003	287	227	0.78	176	0	206	164	22	20	575
2003-2004	251	243	0.93	226	0	246	168	11	67	345
2004-2005p	356	318	0.94	300	0	367	175	37	155	230
2005-2006f	204	194	1.06	205	0	360	185	45	130	215-245
Sunflower Seed										
2001-2002	73	67	1.55	104	29	179	92	65	22	355
2002-2003	100	95	1.65	157	21	200	105	60	35	440
2003-2004	119	115	1.30	150	16	201	96	80	25	405
2004-2005p	87	59	0.92	54	30	109	35	69	5	490
2005-2006f	110	95	1.21	115	25	145	60	75	10	375-405
Buckwheat										
2001-2002	16	14	1.14	16	1	17	6	8	3	325
2002-2003	12	12	1.00	12	1	16	6	7	3	340
2003-2004	9	9	1.11	10	1	14	5	7	2	355
2004-2005p	9	7	0.71	5	1	8	4	4	0	355
2005-2006f	7	6	1.00	6	1	7	3	4	0	340-370
Total Pulse And Special Crops (c)										
2001-2002	3,131	2,993	1.23	3,681	120	4,553	2,671	1,218	664	
2002-2003	3,025	2,399	1.16	2,788	130	3,582	1,740	1,219	623	
2003-2004	2,797	2,732	1.35	3,680	81	4,384	2,492	1,403	489	
2004-2005p	3,136	2,948	1.78	5,235	116	5,840	3,045	1,675	1,120	
2005-2006f	3,080	2,928	1.67	4,896	108	6,124	3,318	1,676	1,130	

(a) August-July crop year.

(b) Excludes products.

(c) Includes Pulse Crops (dry peas, lentils, dry beans, chick peas) and Special Crops (mustard seed, canary seed, sunflower seed, buckwheat)

(d) Includes food, feed, seed, waste and dockage. Total domestic use is calculated residually.

(e) Producer price, FOB plant. Average over all types, grades and markets.

p: preliminary

f: forecast, Agriculture and Agri-Food Canada, August 9, 2005

Source: Statistics Canada and industry consultations.