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CANADA: PULSE AND SPECIAL CROPS OUTLOOK 2008-09

July 2, 2008

For 2008-09, total area seeded to pulse and special crops in Canada is expected to rise marginally from 2007-08, as higher areas for dry peas, lentils, and mustard seed are partly offset by lower areas for dry beans, chickpeas, canary and sunflower seed. Statistics Canada (STC) recently released its preliminary estimates of principal field crop areas for 2008, which provided estimates for all pulse and special crops. It is assumed that precipitation will be normal for the growing and harvest periods, and that the abandonment rate and quality will be normal. Trend yields are assumed for both western and eastern Canada.

Total production in Canada is forecast to increase marginally to 4.7 million tonnes (Mt). Total supply is expected to fall marginally as lower carry-in stocks are partially offset by the increase in production. Exports are forecast to decrease marginally due to the lower supply, while domestic use is expected to remain relatively unchanged. Carry-out stocks are expected to fall to historically low levels for most crops. Average prices, over all types, grades and markets, are forecast to increase for 2008-09 for all pulse and special crops, with the exception of dry peas. The main factors to watch are growing conditions in Canada, the US, the EU, Australia, the Middle East and the Indian subcontinent.

DRY PEAS

For **2008-09**, production is forecast to rise to a record 3.2 Mt, due to record seeded area and higher yields. Supply is expected to increase marginally, as lower carry-in stocks partly offset the increase in production. Yellow pea production is expected to increase, while production of green pea and other types remain unchanged. Exports are forecast to remain unchanged at 2.3 Mt, however, carry-out stocks are expected to rise marginally. World supply is forecast to rise marginally, to over 10 Mt, due to higher production, mainly in Canada, the EU and Ukraine. The average price, over all types, grades, and food and feed markets, is forecast to fall slightly from 2007-08, as a result of the expected increase in world and Canadian supply.

LENTILS

For **2008-09**, total production is forecast to rise due to an increase in seeded area. However, the production for large and medium green lentils is expected to remain unchanged. A small decrease in production of small green lentils and an increase in red lentils is expected. Total supply is forecast to fall marginally due to lower carry-in stocks. Canadian exports are expected to remain unchanged and carry-out stocks are forecast to remain low. World supply is forecast to fall marginally to 3.7 Mt, as lower production, mainly in Turkey and India, combines with lower carry-in stocks. The average price, over all types and grades, is forecast to rise from 2007-08 because of the lower world and Canadian supply.

DRY BEANS

For **2008-09**, production is unchanged but supply is forecast to fall due to lower carry-in stocks. Production is expected to be relatively unchanged for all the major classes of dry beans - white pea, pinto, black, dark and light red kidney, cranberry, Great Northern, pink and small red. Canadian exports are forecast to decrease due to the lower supply. Carry-out stocks are also expected to remain unchanged. US production is forecast to fall to below 1.0 Mt, largely due to lower seeded area in North Dakota. The average price, over all types and grades, is forecast to increase because of the lower North American supply.

CHICKPEAS

For **2008-09,** production and supply are forecast to fall sharply due to a 50% decrease in seeded area. Production is expected to fall for all types - desi, large kabuli and small kabuli. Canadian exports are forecast to increase despite the lower supply. Carry-out stocks are also expected to fall sharply. The average price, over all types and grades, is forecast to increase due to the lower world and Canadian supply.

MUSTARD SEED

For **2008-09**, production is forecast to rise because of the higher seeded area and yields. Production is expected to increase for all types, yellow, brown and oriental. Exports are expected to fall because of the limited supply. Carry-out stocks are forecast to remain unchanged. The average price, over all types and grades, is expected to increase due to the lower Canadian supply and higher contract prices.

CANARY SEED

For **2008-09**, production is forecast to fall marginally because of the lower seeded area. Supply is expected to decrease due to lower carry-in stocks and production. Canadian exports are expected to fall marginally but carry-out stocks are forecast to fall sharply. The average price is forecast to increase because of the lower Canadian supply.

SUNFLOWER SEED

For **2008-09**, production and supply are forecast to fall, as a result of lower seeded area, yields and carry-in stocks. Production is forecast to decrease for both the confectionery and oilseed types. Canadian exports are forecast to decrease because of the lower supply. Carry-out stocks are expected to decrease for the fourth consecutive year. The average price, over both types and all grades, is forecast to increase because of the lower North American supply.

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CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

July 2, 2008

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (d)	Carry-out Stocks	Stocks-to-Use Ratio	Average Price (e)
	thousand ha		t/ha	thousand metric tonnes						%	$/t
Dry Peas											
2004-2005	1,283	1,244	2.49	3,098	57	3,360	1,853	912	595	22	135
2005-2006	1,303	1,267	2.36	2,994	76	3,665	2,567	658	440	14	120
2006-2007	1,261	1,231	2.05	2,520	60	3,020	1,969	846	205	7	180
2007-2008f	1,469	1,443	2.03	2,935	45	3,185	2,300	785	100	3	285-315
2008-2009f	1,536	1,500	2.11	3,160	50	3,310	2,300	810	200	6	270-300
Lentils											
2004-2005	738	714	1.28	916	10	964	451	268	245	34	310
2005-2006	803	785	1.48	1,164	8	1,417	671	271	475	50	230
2006-2007	516	504	1.25	630	13	1,118	852	127	139	14	310
2007-2008f	540	534	1.26	674	10	823	665	118	40	5	600-630
2008-2009f	631	610	1.25	765	10	815	665	105	45	6	605-635
Dry Beans											
2004-2005	160	123	1.77	218	28	311	278	28	5	2	650
2005-2006	192	172	1.85	318	39	362	284	48	30	9	495
2006-2007	178	176	2.12	373	41	444	349	55	40	10	520
2007-2008f	153	153	1.82	277	45	362	290	52	20	6	685-715
2008-2009f	147	145	1.91	277	45	342	270	52	20	6	815-845
Chickpeas											
2004-2005	47	39	1.31	51	4	133	47	39	47	55	385
2005-2006	79	73	1.42	104	7	158	64	81	13	9	490
2006-2007	129	128	1.27	163	5	181	115	56	10	6	550
2007-2008f	174	174	1.29	225	9	244	90	59	95	64	535-565
2008-2009f	83	80	1.31	105	5	205	105	60	40	24	550-580
Mustard Seed											
2004-2005	299	285	1.01	287	1	380	119	67	194	104	295
2005-2006	194	188	0.98	184	0	378	133	55	190	101	265
2006-2007	134	130	0.83	108	1	299	153	55	91	44	380
2007-2008f	176	176	0.65	114	1	206	140	51	15	8	680-710
2008-2009f	198	192	0.83	160	0	175	115	50	10	6	825-855
Canary Seed											
2004-2005	348	318	0.95	301	0	368	163	37	168	84	230
2005-2006	184	182	1.25	227	0	395	185	20	190	93	195
2006-2007	136	131	1.02	133	0	323	178	24	121	60	335
2007-2008f	178	174	0.93	162	0	283	180	23	80	39	535-565
2008-2009f	164	159	0.97	155	0	235	175	25	35	18	560-590
Sunflower Seed											
2004-2005	81	55	0.95	52	35	112	32	65	15	15	490
2005-2006	87	71	1.18	84	26	125	46	52	27	28	345
2006-2007	77	77	2.04	157	12	196	121	52	23	13	395
2007-2008f	81	79	1.58	125	18	166	100	51	15	10	550-580
2008-2009f	71	68	1.55	105	20	140	80	50	10	8	610-640
Buckwheat*											
2004-2005	6	4	0.50	2	1	5	4	1	0	0	355
2005-2006	4	4	1.25	5	1	6	4	2	0	0	355
2006-2007	7	7	1.00	7	1	8	4	3	1	14	355
2007-2008f	3	2	1.15	2	1	4	4	0	0	0	385-415
2008-2009**											
Total Pulses and Special Crops (c)											
2004-2005	2,962	2,782	1.77	4,925	136	5,633	2,947	1,417	1,269		
2005-2006	2,846	2,742	1.85	5,080	157	6,506	3,954	1,187	1,365		
2006-2007	2,438	2,384	1.72	4,091	133	5,589	3,741	1,218	630		
2007-2008f	2,774	2,734	1.65	4,514	129	5,273	3,769	1,139	365		
2008-2009f***	2,830	2,754	1.72	4,727	130	5,222	3,710	1,152	360		

(a) August-July crop year.
(b) Excludes products.
(c) Includes Pulses (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.
f: forecast, Agriculture and Agri-Food Canada, July 2, 2008
* For 2004-2005 to 2007-2008, area and production estimates are only for Manitoba, the main producing province.
** For 2008-2009, it is not possible to do a forecast for buckwheat because the area has decreased to a very low level.
*** Excludes buckwheat.
Source: Statistics Canada and industry consultations.