Agriculture and Agri-Food Canada   Agriculture et Agroalimentaire Canada

CANADA: PULSE AND SPECIAL CROPS OUTLOOK 2008-09

August 1, 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) has provided estimates of area seeded for all pulse and special crops for 2008. 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 rise marginally, but remain historically low 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. 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. Production for large green lentils is expected to rise. Medium and small green lentil production is expected to fall while a significant increase in red lentils is expected. Total supply is forecast to fall marginally due to lower carry-in stocks. Canadian exports are expected to fall due to lower exportable supply 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 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 is forecast to fall sharply due to a large decrease in seeded area. However, supply is expected to only fall slightly as lower production will be partly offset by high carry-in stocks. 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 at low levels. 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 due to the lower supply. Carry-out stocks are expected to remain unchanged at low levels. 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 **August 1, 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	40	3,180	2,300	780	100	3	305
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	700	118	5	1	635
2008-2009f	631	610	1.25	765	10	780	665	105	10	1	640-670
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	50	367	295	52	20	6	705
2008-2009f	147	145	1.91	277	45	342	270	52	20	6	845-860
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	80	64	100	69	560
2008-2009f	83	80	1.31	105	5	210	110	60	40	24	570-600
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	2	207	150	52	5	2	695
2008-2009f	198	192	0.83	160	0	165	110	50	5	3	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	190	23	70	33	560
2008-2009f	164	159	0.97	155	0	225	170	25	30	15	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	110	51	5	3	585
2008-2009f	71	68	1.55	105	20	130	75	50	5	4	630-660
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	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	130	5,274	3,829	1,140	305		
2008-2009f***	2,830	2,754	1.72	4,727	130	5,162	3,700	1,152	310		

(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, August 1, 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.