



## **CANADA: PULSE AND SPECIAL CROPS (P&SC) OUTLOOK**

April 30, 2009

For 2009-10, total area seeded to P&SC in Canada is expected to rise marginally from 2008-09. The areas seeded to dry peas, lentils and mustard seed are expected to increase while areas seeded to dry beans, chickpeas, canary seed and sunflower seed are expected to decrease. Statistics Canada's (STC) seeding intentions survey, conducted during March and released on April 24, provided estimates for most pulse and special crops by province, but in some cases the area seeded has been forecast by AAFC. The actual seeded areas may differ from the intentions due to changes in the market outlook, expected prices, producer reaction to the STC seeding intentions report and soil moisture conditions at the time of seeding. 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 be largely unchanged at 5.3 million tonnes (Mt). However, total supply is expected to rise by 8% to 6.4 Mt, due to large carry-in stocks. Exports and domestic use are forecast to rise due to the higher supply. Carry-out stocks are expected to rise from 2008-09 for most crops. Average prices are generally forecast to fall except for chickpeas and canary seed which are forecast to average the same as 2008-09.

### **DRY PEAS**

For 2009-10, producers intend to increase seeded area to a record 1.7 Mha despite burdensome carry-in stocks. Production is expected to increase to a record 3.6 Mt. Supply is forecast to rise to a record 4.4 Mt, due to large carry-in stocks and higher production. Canadian exports are forecast to increase because of the higher supply. Carry-out stocks are forecast to rise to a record 0.9 Mt and remain burdensome. The average price is expected to decrease from 2008-09 due to the large Canadian supply.

### **LENTILS**

For 2009-10, producers intend to increase seeded area from 2008-09 due to strong export demand and high prices. Production is forecast to increase for the fourth consecutive year. Supply is expected to increase slightly, due to the higher carry-in stocks and higher production. World supply is forecast to rise slightly to 3.9 Mt. Canadian exports are expected to fall despite the increased supply and carry-out stocks are also forecast to rise sharply. The average price is forecast to fall sharply from 2008-09 because of the higher world and Canadian supply.

### **DRY BEANS**

For 2009-10, producers intend to decrease seeded area sharply from 2008-09 because of good prices for alternative crops which are easier to produce. Production and supply are also expected to fall as a result. Canadian exports are forecast to decrease due to the lower supply and carry-out stocks are expected to fall marginally. The average price is forecast to decrease marginally, but remain historically high, due to the lower US and Canadian supply.

### **CHICKPEAS**

For 2009-10, producers intend to decrease seeded area from 2008-09. Production and supply are expected to fall sharply for the second consecutive year. Canadian exports are forecast to rise and carry-out stocks are expected to fall to a low level. The average price is forecast to remain unchanged as lower Canadian supply is offset by higher world supply.

### **MUSTARD SEED**

For 2009-10, producers intend to increase seeded area due to high prices and low carry-in stocks. Production and supply are forecast to increase. Exports are expected to rise because of the larger supply, however carry-out stocks are also forecast to rise. The average price is

expected to fall sharply compared to 2008-09, but remain high by historical standards.

### **CANARY SEED**

For 2009-10, producers intend to decrease seeded area sharply from 2008-09. Production is expected to fall significantly as a return to trend yields combines with the lower area. Supply is forecast to fall despite large carry-in stocks. Canadian exports and carry-out stocks are expected to decrease. The average price is forecast to remain unchanged from 2008-09.

### **SUNFLOWER SEED**

For 2009-10, producers intend to decrease seeded area from 2008-09. Production and supply are also forecast to decrease. As a result, Canadian exports are forecast to fall slightly. Carry-out stocks are expected to remain unchanged. The average price is forecast to decrease marginally from 2008-09, but remain historically high, due to lower US and Canadian supply.

### **FURTHER INFORMATION:**

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**CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION**
**April 30, 2009**

Grain and Crop Year (a)	Area Seeded thousand ha	Area Harvested thousand ha	Yield t/ha	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (d)	Carry-out Stocks	Stocks-to- Use Ratio	Average Price (e) \$/t
				-----		thousand metric tonnes-----				%	
<b>Dry Peas</b>											
2006-2007	1,261	1,231	2.05	2,520	60	2,943	1,969	807	167	6	180
2007-2008	1,469	1,443	2.03	2,935	38	3,140	2,201	684	255	9	305
2008-2009f	1,617	1,582	2.26	3,571	15	3,841	2,150	941	750	24	205-235
2009-2010f	1,702	1,668	2.17	3,625	15	4,390	2,500	990	900	26	185-215
<b>Lentils</b>											
2006-2007	516	504	1.38	693	13	1,191	852	140	199	20	310
2007-2008	540	534	1.37	734	9	942	810	86	46	5	635
2008-2009f	652	631	1.46	920	9	974	850	114	10	1	700-730
2009-2010f	797	786	1.31	1,030	7	1,047	810	122	115	12	515-545
<b>Dry Beans</b>											
2006-2007	178	176	2.12	373	41	444	349	55	40	10	520
2007-2008	153	153	1.82	277	50	367	295	52	20	6	725
2008-2009f	147	145	1.84	266	54	340	255	55	30	10	780-810
2009-2010f	110	108	2.04	220	50	300	230	50	20	7	760-790
<b>Chickpeas</b>											
2006-2007	129	128	1.27	163	5	185	115	60	10	6	550
2007-2008	174	174	1.29	225	8	243	69	82	92	61	560
2008-2009f	53	51	1.56	80	6	178	40	68	70	65	540-570
2009-2010f	49	48	1.35	65	8	143	55	58	30	27	540-570
<b>Mustard Seed</b>											
2006-2007	134	130	0.83	108	2	300	153	56	91	44	380
2007-2008	176	176	0.70	123	1	215	168	20	27	14	695
2008-2009f	194	186	0.87	161	0	188	130	43	15	9	845-875
2009-2010f	223	216	0.86	185	0	200	135	45	20	11	655-685
<b>Canary Seed</b>											
2006-2007	136	131	1.02	133	0	323	178	25	120	59	335
2007-2008	178	174	0.93	162	0	282	204	13	65	30	560
2008-2009f	168	164	1.20	196	0	261	150	21	90	53	415-445
2009-2010f	120	118	1.02	120	0	210	145	20	45	27	415-445
<b>Sunflower Seed</b>											
2006-2007	77	77	2.04	157	12	196	121	57	18	10	395
2007-2008	81	79	1.58	125	17	160	112	36	12	8	585
2008-2009f	69	69	1.63	112	16	140	85	40	15	12	600-630
2009-2010f	57	56	1.61	90	20	125	70	40	15	14	560-590
<b>Total Pulses and Special Crops (c)</b>											
2006-2007	2,431	2,377	1.74	4,147	133	5,582	3,737	1,200	645		
2007-2008	2,771	2,732	1.68	4,581	123	5,349	3,859	973	517		
2008-2009f	2,900	2,828	1.88	5,306	100	5,922	3,660	1,282	980		
2009-2010f	3,058	3,000	1.78	5,335	100	6,415	3,945	1,325	1,145		

(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)

(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, April 30, 2009

Source: Statistics Canada and industry consultations.