Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

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

July 10, 2009

For 2009-10, total area seeded to P&SC in Canada is expected to rise marginally from 2008-09. The areas seeded to lentils, chickpeas and mustard seed are expected to increase while areas seeded to dry peas, dry beans, canary seed and sunflower seed are expected to decrease. Statistics Canada's (STC) recently released its preliminary estimates of principal field crop areas for 2009, which provided estimates for most pulse and special crops by province, but in some cases the area seeded has been forecast by AAFC.

Total production in Canada is forecast to be fall by 10% to 4.8 million tonnes (Mt). However, total supply is expected to rise by 5% to 5.6 Mt, due to higher carry-in stocks. Exports and domestic use are forecast to rise due to the higher supply. Total carry-out stocks are expected to fall from 2008-09, largely due to lower expected dry pea stocks. Average prices are generally forecast to fall, but remain historically high, except for chickpeas, canary seed and sunflower seed which are forecast to average the same as 2008-09.

DRY PEAS

For **2009-10**, production is expected to decrease by 16% to 3.0 Mt. Yellow pea production is expected to fall, while production of green pea and other types is expected to rise. Supply is forecast to fall to 3.5 Mt, as record carry-in stocks are offset by lower production. Canadian exports are forecast to decrease marginally because of the lower supply. Carry-out stocks are forecast to fall to 0.3 Mt. The average price is expected to decrease from 2008-09.

LENTILS

For **2009-10**, production is forecast to increase for the fourth consecutive year. The production of all green type lentils is expected to rise slightly, while red lentil production is expected to rise sharply. Supply is expected to increase sharply to 1.1 Mt, due to the higher production. Canadian exports are expected to rise to a record 0.9 Mt, due to the increased supply. Carry-out stocks are also forecast to rise sharply. The average price is forecast to fall from the record prices in 2008-09 because of the higher world and Canadian supply, but remain historically high.

DRY BEANS

For **2009-10**, production and supply are expected to fall sharply. Canadian exports are forecast to decrease due to the lower supply and carry-out stocks are expected to rise marginally. The average price is forecast to decrease marginally, but remain historically high.

CHICKPEAS

For **2009-10,** production is expected to rise marginally. Supply is expected to fall for the second consecutive year due to lower carry-in stocks. Production of desi types is expected to increase while production of kabuli types is expected to fall. 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**, production and supply are forecast to increase. Production is expected to increase for yellow and oriental types, but fall for brown types. Exports are expected to remain unchanged and carry-out stocks are forecast to rise. The average price is expected to fall slightly compared to 2008-09, but remain high by historical standards.

CANARY SEED

For **2009-10**, production is expected to fall significantly as lower 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**, production and supply are forecast to decrease. As a result, Canadian exports are forecast to fall slightly. Carry-out stocks are expected to rise marginally. The average price is forecast to remain relatively unchanged from 2008-09, due to lower North American supply.

FURTHER INFORMATION:
Bobby Morgan ....(204) 983-5713
E-mail ....bobby.morgan@agr.gc.ca

www.agr.gc.ca/gaod-dco/

l:\mad\outlook\s&d\spcrops\2009\july10_sce.doc

CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

July 10, 2009

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											
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	2,202	683	255	9	305
2008-2009f	1,617	1,582	2.26	3,571	15	3,841	2,600	741	500	15	205-235
2009-2010f	1,515	1,432	2.09	3,000	15	3,515	2,450	740	325	10	195-215
Lentils											
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	745-775
2009-2010f	939	884	1.27	1,125	7	1,142	900	137	105	10	690-720
Dry Beans											
2006-2007	178	176	2.12	373	41	444	349	55	40	10	520
2007-2008	153	153	1.82	277	50	367	300	47	20	6	725
2008-2009f	147	145	1.84	266	54	340	275	50	15	5	765-795
2009-2010f	105	100	2.00	200	50	265	200	45	20	8	745-775
Chickpeas											
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	71	66	1.29	85	8	163	55	63	45	38	540-570
Mustard Seed											
2006-2007	134	130	0.83	108	2	300	153	56	91	44	380
2007-2008	176	176	0.70	123	0	214	168	19	27	14	695
2008-2009f	194	186	0.87	161	1	189	130	39	20	12	835-865
2009-2010f	220	211	0.85	180	0	200	130	40	30	18	785-815
Canary Seed											
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	121	116	1.03	120	0	210	140	20	50	31	415-445
Sunflower Seed											
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	610-640
2009-2010f	65	59	1.53	90	20	125	65	40	20	19	610-640
Total Pulses and Special Crops (c)											
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	122	5,348	3,865	966	517		
2008-2009f	2,900	2,828	1.88	5,306	101	5,923	4,130	1,073	720		
2009-2010f	3,036	2,868	1.67	4,800	100	5,620	3,940	1,085	595		

(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, July 10, 2009
Source: Statistics Canada and industry consultations.