



## CANADA: PULSE AND SPECIAL CROPS OUTLOOK 2008-09

September 3, 2008

For 2008-09, total production of pulse and special crops in Canada is expected to rise slightly to 5.0 million tonnes (Mt), as higher production for dry peas, lentils, dry beans, mustard, canary and sunflower seed are partly offset by lower production for chickpeas. Statistics Canada (STC) has provided estimates of area and production for most of the pulse and special crops for 2008, but for some crops the area and production has been forecast by AAFC.

Total supply is expected to rise marginally as the increase in production is partially offset by lower carry-in stocks. Exports are forecast to remain unchanged, while domestic use is expected to rise marginally. Carry-out stocks are expected to rise, 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 other main factors to watch are crop conditions in 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 3.3 Mt, due to record area and higher yields. Supply is expected to increase by 7% as lower carry-in stocks partly offset higher production. Yellow pea production is forecast to increase while production of green pea and other types remain relatively unchanged. Exports are projected to rise marginally to 2.4 Mt. Carry-out stocks are expected to more than double from the historically low levels seen in 2007-08. World supply is forecast to rise marginally to over 10 Mt, mostly due to higher production in Canada, the EU and Ukraine. This should result in the average price, over all types, grades, and food and feed markets, falling slightly from 2007-08.

### LENTILS

For 2008-09, total production is forecast to rise by 28% to 0.86 Mt due to an increase in area and higher yields. Production for red and large green lentils is expected to rise while medium and small green lentil production is projected to decline. Total supply is forecast to rise by 55,000 t as lower carry-in stocks partially offset the rise in production. Canadian exports are expected to rise slightly to 0.72 Mt due to higher exportable supply and carry-out stocks are forecast to rise but remain historically low. World supply is forecast to fall marginally to 3.9 Mt, as lower production 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.

### DRY BEANS

Production in 2008-09 is forecast to rise marginally but supply is expected to fall by 6% to 0.35 Mt due to lower carry-in stocks. Canadian exports are forecast to decline by 20,000 t due to the reduced supply. Carry-out stocks are also expected to remain unchanged. US production is forecast to fall by 9% to 1.0 Mt, largely due to lower production in North Dakota. The average price, over all types and grades, is forecast to rise.

### CHICKPEAS

For 2008-09, production is forecast to fall by 45% due lower area from the high stock levels and relatively lower prices for chickpeas vs other crops. Production is expected to fall for all types of lentils. However, supply is only expected to fall marginally as lower production will be partly offset by high carry-in stocks. Canadian exports are forecast to increase as Canada regains some of its traditional export markets. Carry-out stocks are also expected to fall by 23% to 85,000 t. The average price, over all types and grades, is forecast to rise.

### MUSTARD SEED

For 2008-09, production is forecast to rise by 55% to 0.18 Mt because of the higher seeded area and yields. Production is expected to increase for all types of mustard seed. Supplies are projected to be 12% lower than a year ago. Exports are expected to fall due to limited supply.

Carry-out stocks are forecast to remain unchanged at historically low levels. The average price, over all types and grades, is expected to increase.

### CANARY SEED

For 2008-09, production is forecast to rise by about 10% to 0.18 Mt because of the higher yields. Supply is expected to decrease by about 44,000 t to 0.24 Mt due to lower carry-in stocks. Canadian exports are expected to fall by 10% to 180,000 t, resulting in a 42% drop in carry-out stocks. As a result, the average price is forecast to increase.

### SUNFLOWER SEED

Production in 2008-09 is forecast to rise marginally due to higher yields. However, supply is forecast to fall by 6% due to reduced carry-in stocks. Canadian exports are forecast to decrease by 16%. Carry-out stocks are expected to remain at historically low levels at 10,000 t. The average price, over both types and all grades, is forecast to increase.

### FURTHER INFORMATION:

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## CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

September 3, 2008

Grain and Crop Year (a)	Area Seeded thousand ha	Area Harvested thousand ha	Yield t/ha	Production	Imports (b)	Total Supply	Exports (b)	Total		Stocks-to- Use Ratio %	Average Price (e) \$/t
								Domestic Use (d)	Carry-out Stocks		
<b>Dry Peas</b>											
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	1,495	2.19	3,272	50	3,422	2,350	822	250	8	270-300
<b>Lentils</b>											
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	623	1.39	863	10	878	715	118	45	5	740-770
<b>Dry Beans</b>											
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	725
2008-2009f	147	141	1.99	281	45	346	275	51	20	6	855-885
<b>Chickpeas</b>											
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	8	243	70	63	110	83	560
2008-2009f	83	83	1.48	123	5	238	90	63	85	56	570-600
<b>Mustard Seed</b>											
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	186	0.95	177	0	182	125	52	5	3	875-905
<b>Canary Seed</b>											
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	200	23	60	27	560
2008-2009f	164	160	1.12	179	0	239	180	24	35	17	560-590
<b>Sunflower Seed</b>											
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	71	1.82	129	21	155	95	50	10	7	630-660
<b>Buckwheat*</b>											
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**											
<b>Total Pulses and Special Crops (c)</b>											
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	3,829	1,139	305		
2008-2009***	2,830	2,759	1.82	5,024	131	5,460	3,830	1,180	450		

(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, September 3, 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.