



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

August 7, 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. Total production in Canada is forecast to be fall by 10% to 4.8 million tonnes (Mt). However, total supply is expected to fall by 5% to 5.6 Mt, as higher carry-in stocks partially offset the lower output. Exports are forecast to fall and domestic use to rise slightly. 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 canary seed which is forecast to average the same as 2008-09. Factors to watch include the higher than normal rise of frost damage, which combined with delayed crop development, would result in a significant decline in yields and quality.

### **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 but remain historically low. Supply is expected to fall for the third consecutive year. 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 fall marginally as lower Canadian supply is more than 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 compared to 2008-09, but remain high by historical standards.

### **CANARY SEED**

For 2009-10, production is expected to fall significantly as lower yields combine 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 fall slightly from 2008-09.

### **FURTHER INFORMATION:**

**Bobby Morgan** .....(204) 983-5713

**E-mail** ....[bobby.morgan@agr.gc.ca](mailto:bobby.morgan@agr.gc.ca)

[www.agr.gc.ca/gaod-dco/](http://www.agr.gc.ca/gaod-dco/)

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**CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION**
**August 7, 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		Stocks-to- Use Ratio %	Average Price (e) \$/t
								Domestic Use (d)	Carry-out Stocks		
<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	2,202	683	255	9	305
2008-2009f	1,617	1,582	2.26	3,571	15	3,841	2,600	741	500	15	235
2009-2010f	1,515	1,432	2.09	3,000	15	3,515	2,450	740	325	10	210-240
<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	8	973	850	113	10	1	760
2009-2010f	939	884	1.27	1,125	7	1,142	900	137	105	10	690-720
<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	300	47	20	6	725
2008-2009f	147	145	1.84	266	54	340	275	50	15	5	815
2009-2010f	105	100	2.00	200	50	265	200	45	20	8	780-810
<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	5	177	45	67	65	58	560
2009-2010f	71	66	1.29	85	8	158	55	63	40	34	530-560
<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	0	214	168	19	27	14	695
2008-2009f	194	186	0.87	161	1	189	130	39	20	12	845
2009-2010f	220	211	0.85	180	0	200	130	40	30	18	735-765
<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	440
2009-2010f	121	116	1.03	120	0	210	140	20	50	31	425-455
<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	17	141	85	41	15	12	635
2009-2010f	65	59	1.53	90	20	125	65	40	20	19	595-625
<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	122	5,348	3,865	966	517		
2008-2009f	2,900	2,828	1.88	5,306	100	5,922	4,135	1,072	715		
2009-2010f	3,036	2,868	1.67	4,800	100	5,615	3,940	1,085	590		

(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, August 7, 2009

Source: Statistics Canada and industry consultations.