



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

August 28, 2009

For 2009-10, total production of P&SC in Canada is expected to fall marginally from 2008-09 to 5.2 million tonnes (Mt) as lower production for dry peas, dry beans, canary and sunflower seed are only partially offset by higher production for lentils, chickpeas and mustard seed.

Total supply is expected to fall by 6% from 2008-09 due to lower carry-in stocks and production. Exports are forecast to fall and domestic use is expected to remain unchanged from 2008-09. Total carry-out stocks are forecast to rise sharply. Average prices are generally forecast to fall, but remain historically high. Factors to watch are the higher than normal risk 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 13% to 3.1 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 3.3 Mt, as lower carry-in stocks combine with lower production. Exports are forecast to decrease because of the lower supply. Carry-out stocks are forecast to rise marginally. The average price is expected to decrease marginally from 2008-09.

LENTILS

For 2009-10, production is forecast to increase for the fourth consecutive year to a record 1.3 Mt. The production of all green type lentils is expected to rise slightly and red lentil production is expected to rise sharply. Supply is expected to increase sharply, due to the higher production. Canadian exports are expected to remain unchanged and 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. Carry-out stocks are expected to rise. US production is forecast to fall by 5% to 1.0 Mt, largely due to lower production in North Dakota. The average price is forecast to decrease marginally, but remain historically high.

CHICKPEAS

For 2009-10, production is expected to rise sharply from 2008-09. Supply is expected to rise. Production of desi and kabuli types is expected to increase. Canadian exports and carry-out stocks are forecast to rise. The average price is forecast to fall marginally due to higher Canadian and 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 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 due to lower harvested 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 decrease marginally from 2008-09.

SUNFLOWER SEED

For 2009-10, production and supply are forecast to decrease. As a result, Canadian exports are forecast to fall. Carry-out stocks are expected to rise marginally. US oil-type sunflower seed supply is forecast to rise as high carry-in stocks offset the lower expected production. The average price is forecast to fall slightly from 2008-09.

FURTHER INFORMATION:

Bobby Morgan(204) 983-5713

E-mailBobby.Morgan@agr.gc.ca

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

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CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION
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Grain and Crop Year (a)	Area Seeded thousand ha	Area Harvested thousand ha	Yield t/ha	Production	Imports (b)	Total Supply	Exports (b)	Total	Carry-out Stocks	Stocks-to- Use Ratio %	Average Price (e) \$/t
								Domestic Use (d)			
-----thousand metric tonnes-----											
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	3,000	691	150	4	235
2009-2010f	1,515	1,499	2.08	3,113	30	3,293	2,450	683	160	5	210-240
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	706	700	1.49	1,043	6	1,095	975	110	10	1	760
2009-2010f	939	935	1.40	1,307	7	1,324	975	119	230	21	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	128	125	2.12	266	54	340	280	50	10	3	815
2009-2010f	105	100	2.18	218	50	278	200	48	30	12	780-810
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	4	176	50	71	55	45	560
2009-2010f	71	71	1.81	128	8	191	55	71	65	52	530-560
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	845
2009-2010f	220	212	0.98	209	0	229	140	44	45	24	735-765
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	445
2009-2010f	128	123	1.15	142	0	232	140	22	70	43	425-455
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	19	143	90	43	10	8	635
2009-2010f	65	65	1.58	102	20	132	75	42	15	13	585-615
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	2,935	2,878	1.89	5,429	99	6,045	4,675	1,025	345		
2009-2010f	3,042	3,005	1.74	5,219	115	5,679	4,035	1,029	615		

(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 28, 2009

Source: Statistics Canada and industry consultations.