Agriculture and Agri-Food Canada Agriculture et Agroalimentaire Canada

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

October 8, 2009

For 2009-10, total production of P&SC in Canada is estimated by Statistics Canada at 5.4 million tonnes (Mt), marginally lower than last year. However, total supply is expected to rise marginally to 6.2 Mt due to higher carry-in stocks. The increased supplies of lentils, chickpeas, mustard and sunflower seed are expected to more-than offset the lower supplies for dry peas, dry beans and canary seed. Total exports are forecast to decrease while domestic use increases. Total carry-out stocks are forecast to rise sharply. On average, prices are forecast to be lower than in 2008-09.

DRY PEAS
For **2009-10**, production is estimated to decrease by about 10% at 3.2 Mt, due to lower harvested area and yields. Supply is also expected to decrease significantly although the decrease in production is partly offset by higher carry-in stocks. Yellow pea production is expected to fall, while production of green pea and other types is expected to rise. Exports are forecast to decrease because of the lower supply. Carry-out stocks are forecast to fall. The average price is expected to decrease from 2008-09.

LENTILS
For **2009-10**, production is estimated at a record 1.4 Mt as a result of a sharp rise in harvested area. Supply is expected to increase, due to the record production. The production of all green type lentils is expected to rise slightly and red lentil production is expected to rise sharply. Canadian exports are expected to rise marginally and carry-out stocks are forecast to rise sharply. The average price is forecast to fall sharply from the record prices in 2008-09 because of the large carry-out stocks.

DRY BEANS
For **2009-10**, production and supply are expected to fall sharply. Canadian exports are forecast to decrease due to 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 compared to 2008-09.

CHICKPEAS
For **2009-10,** production is expected to nearly double from last year. 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 increased sharply. For the yellow and oriental types, output is expected to increase but decrease for the brown types. Exports and carry-out stocks are 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**, production and supply are expected to fall despite large carry-in stocks. Exports and carry-out stocks are expected to decrease. The average price is forecast to fall from 2008-09.

SUNFLOWER SEED
For **2009-10**, production is estimated to be marginally lower than last year, due to lower harvested area, but supply is expected to increase due to higher carry-in stocks. Exports are forecast to fall marginally and carry-out stocks are expected to The supply of oil-type sunflower seed is forecast to rise as high carry-in stocks offset the lower production. The average price is forecast to fall sharply from 2008-09.

FURTHER INFORMATION:
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CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

October 8, 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
2008-2009	1,617	1,582	2.26	3,571	15	3,841	2,825	571	445	13	235
2009-2010f	1,515	1,487	2.13	3,161	20	3,626	2,550	611	465	15	180-210
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	811	80	51	6	635
2008-2009	706	700	1.49	1,043	8	1,102	972	98	32	3	760
2009-2010f	939	935	1.50	1,407	7	1,446	975	141	330	30	600-630
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
2008-2009	128	125	2.12	266	54	340	280	50	10	3	815
2009-2010f	105	105	2.02	212	50	272	200	47	25	10	760-790
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
2008-2009	53	51	1.30	67	4	163	53	43	67	70	560
2009-2010f	71	71	1.81	128	5	200	60	70	70	54	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
2008-2009	194	186	0.87	161	1	189	131	13	45	31	845
2009-2010f	218	200	1.09	219	0	264	150	24	90	52	700-730
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
2008-2009	168	164	1.20	196	0	261	153	25	83	47	445
2009-2010f	128	128	1.14	145	0	228	145	23	60	36	420-450
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
2008-2009	69	69	1.63	112	20	144	88	34	22	18	635
2009-2010f	65	65	1.70	110	20	152	85	37	30	25	495-525
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	3,866	960	522		
2008-2009	2,935	2,878	1.88	5,416	102	6,040	4,502	834	704		
2009-2010f	3,041	2,990	1.80	5,382	102	6,188	4,165	953	1,070		

(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, October 8, 2009
Source: Statistics Canada and industry consultations.