



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

May 5, 2010

For 2010-11, total area seeded to P&SC in Canada is forecast to increase by 6% from 2009-10. The areas seeded to lentils, chickpeas, canary seed, sunflower and dry white beans are expected to increase. The areas seeded to dry peas, mustard seed and coloured beans are expected to decrease. Average yields are generally assumed to decrease to a trend level for both western and eastern Canada. Total production in Canada is forecast to decrease to 5.3 million tonnes (Mt) but supply is expected to increase slightly to 6.7 Mt due to high carry-in stocks. Exports and domestic use are forecast to rise slightly due to the higher supply. Average prices are generally forecast to fall due to the higher supply. The main factors to watch are: commodity prices, input costs, the Canada-US dollar exchange rate and planting progress in major producing regions.

### **DRY PEAS**

For 2010-11, producers intend to decrease the area seeded to dry peas from 2009-10 because of lower prices and record carry-in stocks. Production is expected to decrease slightly, however supply is expected to increase due to the large carry-in stocks. Canadian exports are forecast to remain at high levels because of strong demand. Carry-out stocks are forecast to decrease but remain high. The average price is expected to fall from 2009-10 due to the large Canadian supply.

### **LENTILS**

For 2010-11, area seeded is expected to increase by 20% and set a new record. However, production is expected to decrease marginally due to lower yields. Supply is forecast to increase marginally due to higher carry-in stocks. Exports are expected to decrease modestly due to lower exports to the Middle East. Carry-out stocks are forecast to increase as a result of the lower exports. The average price is forecast to fall from 2009-10 because of the higher world and Canadian supply.

### **DRY BEANS**

For 2010-11, total area seeded is forecast to fall due to lower prices and higher carry-in stocks. The area seeded to white beans is expected to increase sharply while the area seeded to the coloured

varieties is expected to decrease sharply. Total production is expected to decline as lower seeded area more-than offsets higher average yields. Supply is expected to decline modestly. Exports are forecast to increase due to higher North American demand and, as a result, carry-out stocks are expected to fall. Although the average price, over all types and grades, is forecast to remain unchanged, the price for the coloured varieties is expected to increase compared to 2009-10 due strong demand.

### **CHICKPEAS**

For 2010-11, area seeded is expected to increase modestly. Despite higher production, supply is expected to fall sharply due to very low carry-in stocks. Canadian exports are forecast to be lower as a result of lower supply. Stocks are expected to fall to near record lows. The average price is forecast to remain unchanged as lower Canadian supply is offset by higher world supply.

### **MUSTARD SEED**

For 2010-11, the area seeded is expected to decrease by about 13% due to declining prices and high carry-in stocks. Production is forecast to decrease significantly but supply is forecast to increase due to high carry-in stocks. Exports are expected to rise slightly because of strong demand

for the yellow variety. Carry-out stocks are forecast to increase to burdensome levels. The average price is expected to decrease compared to 2009-10 due to the high supply.

### **CANARY SEED**

For 2010-11, the area seeded is forecast to increase dramatically from 2009-10 due to good returns relative to other crops. Production is expected to increase sharply and supply is also forecast to increase. Exports are expected to increase and carry-out stocks are expected to rise. The average price is forecast to decline slightly from 2009-10.

### **SUNFLOWER SEED**

For 2010-11, the area seeded is expected to rise from 2009-10. Production and supply are forecast to fall marginally due to lower harvested area and yields. Exports are forecast to remain unchanged while carry-out stocks are expected to rise. The average price is forecast to decrease from 2009-10 because of larger US supplies.

### **FURTHER INFORMATION:**

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**CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION**
**May 05, 2010**

Grain and Crop Year (a)	Area Seeded thousand ha	Area Harvested	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>											
2007-2008	1,469	1,443	2.03	2,935	38	3,139	2,202	683	255	9	305
2008-2009	1,617	1,582	2.26	3,571	15	3,841	2,826	571	445	13	250
2009-2010f	1,522	1,487	2.27	3,379	32	3,856	2,250	631	975	34	185-215
2010-2011f	1,465	1,394	2.23	3,116	15	4,106	2,600	622	884	27	170-200
<b>Lentils</b>											
2007-2008	540	534	1.37	734	9	942	811	80	51	6	635
2008-2009	706	700	1.49	1,043	7	1,102	972	98	32	3	750
2009-2010f	971	963	1.57	1,510	6	1,548	1,349	129	70	5	620-640
2010-2011f	1,163	1,108	1.34	1,482	7	1,559	1,179	177	203	15	510-550
<b>Dry Beans</b>											
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	119	113	1.88	212	50	272	200	47	25	10	720-760
2010-2011f	103	99	1.92	190	45	260	199	46	15	6	720-760
<b>Chickpeas</b>											
2007-2008	174	174	1.29	225	8	243	69	83	92	61	560
2008-2009	53	51	1.30	67	4	163	53	48	62	61	560
2009-2010f	42	40	1.87	76	5	143	58	68	17	14	560-600
2010-2011f	51	47	1.35	64	7	88	45	38	5	6	560-600
<b>Mustard Seed</b>											
2007-2008	176	176	0.70	123	0	215	168	20	27	14	695
2008-2009	194	186	0.87	161	1	189	131	14	44	30	845
2009-2010f	212	208	1.00	208	0	252	115	22	115	84	510-550
2010-2011f	184	178	0.86	153	0	268	125	21	122	83	470-510
<b>Canary Seed</b>											
2007-2008	178	174	0.93	162	0	282	204	13	65	30	560
2008-2009	168	164	1.19	196	0	261	153	25	83	47	480
2009-2010f	128	128	1.11	142	0	225	150	20	55	32	360-400
2010-2011f	206	197	1.05	206	0	261	165	21	75	40	270-310
<b>Sunflower Seed</b>											
2007-2008	81	79	1.58	125	18	160	112	37	12	8	585
2008-2009	69	69	1.63	112	20	144	88	34	22	18	630
2009-2010f	65	64	1.60	102	20	144	76	43	25	21	530-570
2010-2011f	69	63	1.58	99	15	139	76	33	30	28	510-550
<b>Total Pulses and Special Crops (c)</b>											
2007-2008	2,771	2,732	1.68	4,581	123	5,348	3,865	962	522		
2008-2009	2,935	2,878	1.88	5,416	101	6,040	4,502	840	698		
2009-2010f	3,059	3,003	1.87	5,629	113	6,440	4,198	960	1,282		
2010-2011f	3,241	3,085	1.72	5,309	89	6,681	4,389	958	1,333		

(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

May 05, 2010

Source: Statistics Canada and industry consultations.