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## CANADA: PULSE AND SPECIAL CROPS OUTLOOK

**April 4, 2002** 

For 2001-2002, total production of pulse and special crops in Canada decreased by 23% to 3.79 million tonnes (Mt), largely because of drought in most of Saskatchewan and Alberta and insufficient moisture in Ontario. Despite lower exports and domestic use, carry-out stocks are expected to fall sharply. Average prices, compared to 2000-01, are, in general, forecast to increase.

For 2002-2003, total area seeded to pulse and special crops in Canada is forecast to increase by 7% because net returns for most pulse and special crops are expected to be better than for competing crops. It is assumed that precipitation will be normal for the spring and summer. However, for Alberta and Saskatchewan, due to the current dry conditions, yields are forecast to be below trend but significantly higher than in 2001-02. For Manitoba and Eastern Canada, trend yields are assumed. In general, it has been assumed that an increased portion of the area seeded will be harvested. Total Canadian production is forecast to increase by 40% to 5.29 Mt. Exports, domestic use and carry-out stocks are forecast to increase in line with the higher supplies. In general, average prices, compared to 2001-02, are forecast to decrease but, due to extremely low carry-in stocks for most pulse and special crops, prices are expected to be very sensitive to any production problems. The main factor to watch will be precipitation during the spring in the Prairie provinces. If the dry conditions persist in Saskatchewan and Alberta, the seeded area for small seed crops, mustard seed and canary seed, is expected to be lower than forecast, while the area for large seed crops, dry peas, lentils and chick peas, could be higher.

#### **DRY PEAS**

For **2001-2002**, due to lower production and total supply, Canadian exports and domestic use are forecast to decrease. The average price is forecast to increase by about 30% as carry-out stocks decrease to a very low level.

For 2002-2003, the area seeded is forecast to increase by about 5%. Production and total supply are forecast to increase significantly. Total world supply is expected to increase by 5% to 11.5 Mt because of higher production in Canada and the EU, but this is expected to be mostly offset by increased use. Despite increased exports and domestic use, carry-out stocks in Canada are forecast to increase. The average price, over all types, grades and markets, is forecast to decrease by about 15%.

#### **LENTILS**

For 2001-2002, due to higher production in the Middle East and Australia, Canadian exports are forecast to decrease. Carry-out stocks are forecast to fall and the average price is forecast to increase by about 5%. For 2002-2003, the seeded area is forecast to fall by 10%. Production is forecast to increase significantly, but total supply is expected to increase by only 9% because of lower carry-in stocks. Total world supply is forecast to remain stable at about 3.8 Mt. Canadian exports are expected to increase, as Canada's share of total world supply increases. Carry-out stocks are forecast to increase. The average price, over all types and grades, is forecast to decrease slightly.

#### **DRY BEANS**

For **2001-2002**, production and total supply decreased in Canada and the US. Canadian exports are forecast to increase because of lower world supply of the classes of dry beans produced in Canada. Carry-out stocks are expected to decrease to a very low level and the average price is forecast to rise by about 50%.

For **2002-2003**, area seeded is forecast to increase by 30% and production is forecast

to increase by 40%. Total supply is expected to increase by only 17% due to lower carry-in stocks. Production and total supply are also forecast to increase in the US. Canadian exports are forecast to increase due to the higher supply and expected strong demand. Carry-out stocks are expected to remain low, although higher than in 2001-02. The average price, over all classes and grades, is forecast to decrease by about 15%.

#### **CHICK PEAS**

For 2001-2002, production and total supply increased. Canadian exports are forecast to increase because of higher Canadian supply and strong world demand. Carry-out stocks are forecast to increase. The average price is forecast to decrease by about 5%. For 2002-2003, the area seeded is forecast to decrease by 15%, with some shift in production to the desi type as the price of the kabuli type has decreased significantly. Production and total supply are forecast to increase due to higher expected yields. Total world supply is expected to increase slightly to 8.2 Mt. Canadian exports are forecast to increase due to an increase in Canada's share of world supply. Carry-out stocks are expected to remain stable. The average price, over all types, grades and sizes, is forecast to decrease slightly.

#### MUSTARD SEED

For **2001-2002**, due to lower production and total supply, exports are forecast to decrease. Carry-out stocks are expected to decrease to a very low level and the average price is forecast to increase by about 105%.

For 2002-2003, area seeded and production are forecast to increase sharply with the largest increase for the yellow and brown types. However, total supply is forecast to increase by a lesser extent due to lower carry-in stocks. Although exports are expected to rise, carry-out stocks are also forecast to increase. The average price, over all types and grades, is expected to decrease by about 30%.

#### CANARY SEED

For 2001-2002, due to lower production and total supply, Canadian exports are forecast to decrease. Carry-out stocks are expected to decrease to a very low level. The average price is forecast to rise by about 140%. For 2002-2003, area seeded and production are forecast to increase sharply. However, total supply is forecast to increase by a lesser extent due to lower carry-in stocks. Total world supply is forecast to increase by 34% to 291,000 t. Canadian exports are expected to increase in line with the higher supply. Carry-out stocks are forecast to increase and the average price is forecast to decrease by about 40%.

#### SUNFLOWER SEED

For **2001-2002**, due to lower production and total supply, Canadian exports and domestic use are expected to decrease. Carry-out stocks are forecast to decrease to a very low level and the average price is forecast to increase by about 10%. For **2002-2003**, area seeded and production are forecast to increase significantly. However, total supply is forecast to decrease slightly, due to lower carry-in stocks. Total world supply is expected to increase slightly due to higher production of the oilseed type. Canadian exports are expected to decrease, while domestic use remains stable. Carryout stocks are forecast to remain very low. The average price, over both types, is forecast to increase by about 5% because of stronger expected prices for the confectionary type.

### BUCKWHEAT

For 2001-2002, total supply decreased due to lower carry-in stocks. The average price, over all grades and markets, is forecast to increase by 5% due to stronger demand. For 2002-2003, production is forecast to rise due to higher seeded area. The average price is forecast to be similar to 2001-02.

#### **FURTHER INFORMATION:**

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Crip   Year   A   Area   Area   Area   Production   (b)   Supply   (b)   Domestic   Stocks   Price (c)   Price (c)	CANADA: SUPPLY AND DISPOSITION FOR PULSE AND SPECIAL CROPS								<b>APRIL 4, 2002</b>	
Crop Year (a)   Area   Vida   Production   (b)   Supply   (b)   Domestic Use   Stocks   Price (e)	Grain and	Harvested			Imports	Total	Exports	Total		•
Dy Peas   1989	Crop Year (a)	Area	Yield	Production	•	Supply	•		_	_
1998	,	000 ha	t/ha					nnes		
1998										
1999-2000	•	4.070	0.47	0.007	40	0.000	4 705	000	075	405
2000-2001										
2001-2002    1,394   1.88   2,196   10   2,401   1,500   801   100   170-190   2002-20031   1,500   2,05   3,080   10   3,190   2,000   940   250   135-165   139-1690   139-1690   139-1690   132-165   139-1690   132-165   139-1690   132-165   139-1690   132-165   139-1690   132-165   139-1690   132-165   139-1690   132-165										
2002-2003f   1,500   2,05   3,080   10   3,190   2,000   940   250   135-165   Enthits   1998-1999   372   1.29   480   77   552   372   120   80   381   1998-2000   497   1.46   724   10   794   563   241   80   380   2002-2002f   681   85   585   585   5   798   5530   711   95   300-320   2002-2003f   650   1.18   770   5   870   550   210   110   290-320   2002-2003f   650   1.8   770   5   870   550   210   110   290-320   2002-2003f   685   1.18   770   5   870   550   210   110   290-320   2002-2003f   685   1.18   770   5   870   550   210   110   290-320   2002-2003f   685   1.88   189   69   2.73   193   55   25   685   685   1999-2000   154   1.82   288   40   348   227   71   50   465   465   2002-2003f   205   1.70   255   20   325   255   65   5   865-705   2002-2003f   205   1.73   355   20   326   255   65   5   865-705   2002-2003f   205   1.73   355   20   326   255   65   5   865-705   2002-2003f   205   1.73   355   20   326   255   65   5   865-705   2002-2003f   205   1.73   355   20   326   255   65   5   685-705   2002-2003f   205   1.73   355   20   326   255   65   5   685-705   2002-2003f   205   1.73   355   20   326   255   65   5   685-705   2002-2003f   205   217   355   20   326   255   65   5   685-705   2002-2003f   205   217   355   20   326   255   65   5   685-705   2002-2003f   205				•						
				· ·			· ·			
1998-1999		1,500	2.05	3,080	10	3,190	2,000	940	250	135-165
1999-2000		070	4.00	400	7	550	270	400	60	204
2000-2001										
2001-2002  691 886 885 885 5 796 830 171 985 30-320										
2002-2003  660   1.18   770   5   870   550   210   110   290-320   PDy Beans   PDy Beans										
1998-1999   96   1.98   189   69   2.73   133   55   25   655		650	1.18	770	5	870	550	210	110	290-320
1999-2000	•	00	4.00	400	00	070	400		05	055
2000-2001										
2001-2002    150   1.70   2.55   20   325   2.55   65   5   688-705   2002-2003    205   1.73   355   20   380   280   80   20   580-610   2002-2003    205   360-610   2002-2003    39   3.42   1.97   5   2.07   56   366   366   15   390   399-2000   339   1.42   1.97   5   2.07   56   366   366   15   390   300-2001   283   1.37   388   5   408   1.79   1.99   30   410   2002-2003    410   1.22   500   5   507   300   205   65   360-390   2002-2003    410   1.22   500   5   507   300   205   65   360-390   2002-2003    410   1.22   500   5   507   300   205   65   360-390   2002-2003    410   1.22   500   5   507   300   205   65   360-390   2002-2003    410   1.22   500   5   507   300   205   65   360-390   2002-2003    410   1.22   306   1   357   170   72   115   285   2002-2001   208   97   202   1   318   151   67   100   280   2002-2003    255   30   230   1   236   155   66   15   395-425   2002-2003   255   30   230   1   236   155   66   15   395-425   2002-2003   255   30   230   1   236   155   66   15   395-425   2002-2003   255   30   230   1   236   155   66   15   395-425   2002-2003   255   300   230   250   250   250   155   66   15   395-425   2002-2003   255   300   230   250										
2002-2003    205   1.73   355   20   380   280   80   20   580-610   Chick Peas   1998-1999   40   1.33   53   2   2.56   14   37   5   390   390-2000   139   1.42   197   5   207   56   136   15   390   390-2000   283   1.37   388   5   408   179   199   90   0   410   2001-2002  476   98   465   7   502   250   187   65   380-400   2002-2003  410   1.22   500   5   570   300   250   65   380-300   2002-2003  410   1.22   300   5   570   300   205   65   380-300   2002-2003  410   1.22   300   5   570   300   205   65   380-300   2002-2003  410   1.22   300   1   288   162   76   50   350										
1998-1999		205	1.73	355	20	380	280	80	20	580-610
1995-2000   138   1.42   197   5   207   56   136   15   390     2000-2001   283   1.37   388   5   408   179   199   30   410     2002-2003f   476   .98   465   7   502   250   187   65   380-400     2002-2003f   410   1.22   500   5   570   300   205   65   360-390     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   350     300   300   305   305     300									_	
2000-2001         283         1.37         388         5         408         179         199         30         410           2001-2002f         476         .98         465         7         502         250         187         65         380-400           2002-2003f         410         1.22         500         5         570         300         205         65         380-390           Mustard Seed         ***********************************										
2001-2002f										
Nustard Seed										
Mustard Seed   1998-1999   279   .86   239   1   285   162   76   50   350   350   3999-2000   273   1.12   306   1   337   170   72   115   285   2000-2001   208   .97   202   1   318   151   67   100   280   2001-2002f   132   67   89   1   236   155   66   15   395-425   2000-2003f   255   .90   230   230   236   235   56   55   570-590   230   230   236   235   236   235   236   235   236   23										
1998-1999   279   3.6		410	1.22	500	5	570	300	205	65	360-390
1999-2000   273   1.12   306   1   357   170   72   115   285     2000-2001   208   97   202   1   318   151   67   100   280     2001-20021   132   67   89   1   190   135   50   5   570-590     2002-20031   255   90   230   1   236   155   66   15   395-425     2003-20031   255   90   230   1   236   155   66   15   395-425     2003-20031   255   90   230   1   236   155   66   15   395-425     2003-20031   255   90   230   1   236   155   66   15   395-425     2003-2000   146   1.14   166   0   276   157   29   90   240     2003-2001   164   1.04   171   0   261   170   21   70   265     2001-20021   140   .66   92   0   162   140   17   5   630-650     2002-20031   230   .96   220   0   225   170   30   25   380-410     2003-20031   230   .96   220   0   225   170   30   25   380-410     2004-2001   30   .96   220   0   225   170   30   25   380-410     2004-20021   30   .96   220   0   225   170   30   25   380-410     2004-20031   30   .96   220   0   225   170   30   25   380-410     2004-20031   30   .96   220   120   15   132   43   85   4   388     2009-2001   69   1.72   119   18   178   77   70   31   320     2001-20021   63   1.56   98   15   144   75   64   5   335-355     2002-20031   75   1.60   120   15   144   75   64   5   335-355     2002-20031   75   1.60   120   15   144   75   64   5   335-355     2002-20031   75   1.60   120   13   1   16   8   7   1   305     2002-20031   15   .93   14   1   16   9   7   0   305     2003-2001   15   .93   14   1   16   9   7   0   305     2003-20021   12   1.17   14   1   15   8   7   0   305     2003-20031   13   1.07   13   3.660   109   4.301   2.634   1.036   631     2003-20031   2.156   1.70   3.660   109   4.301   2.634   1.036   631     2003-2004   2.136   1.91   4.074   89   4.794   2.620   1.392   782     2004-2004   2.812   1.76   4.940   82   5.804   3.555   1.567   682     2001-20021   2.812   1.76   4.940   82   5.804   3.555   1.567   682     2001-20021   3.058   1.24   3.794   59   4.535   2.893   1.362   280					_					
2000-2001   208   .97   202   1   318   151   67   100   280										
2001-2002f   132   1.67   1.89   1   1.90   1.35   1.50					· ·					
\$\begin{array}{ c c c c c c c c c c c c c c c c c c c										
Canary Seed   1998-1999   208   1.13   235   0   299   137   52   110   248   1999-2000   146   1.14   166   0   276   157   29   90   240   2000-2001   164   1.04   171   0   261   170   21   70   265   2001-2002f   140   66   92   0   162   140   17   5   630-650   2002-2003f   230   96   220   0   225   170   30   25   380-410   2002-2003f   230   96   220   0   225   170   30   25   380-410   2002-2003f   230   96   220   203   25   203   25   2030-410   2030   25   2030-410   2030   25   2030-410   2030-4										
1998-1999   208		255	.90	230	1	236	155	66	15	395-425
1999-2000	•				_					
2000-2001										
2001-2002f										
2002-2003f   230   .96   220   0   225   170   30   25   380-410   Sunflower Seed										
Sunflower Seed   1998-1999										
1998-1999         69         1.62         112         17         132         43         85         4         388           1999-2000         79         1.54         122         19         145         49         55         41         295           2000-2001         69         1.72         119         18         178         77         70         31         320           2001-2002f         63         1.56         98         15         144         75         64         5         335-355           2002-2003f         75         1.60         120         15         140         70         65         5         340-370           Buckwheat           1998-1999         14         1.07         15         3         19         8         9         2         315           1999-2000         13         1.00         13         1         16         8         7         1         305           2000-2001         15         .93         14         1         16         9         7         0         315-330           2001-2002f         12         1.17         14         1         15         <		230	.96	220	0	225	170	30	25	380-410
1999-2000         79         1.54         122         19         145         49         55         41         295           2000-2001         69         1.72         119         18         178         77         70         31         320           2001-2002f         63         1.56         98         15         144         75         64         5         335-355           2002-2003f         75         1.60         120         15         140         70         65         5         340-370           Buckwheat           1998-1999         14         1.07         15         3         19         8         9         2         315           1999-2000         13         1.00         13         1         16         8         7         1         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2001-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156										
2000-2001         69         1.72         119         18         178         77         70         31         320           2001-2002f         63         1.56         98         15         144         75         64         5         335-355           2002-2003f         75         1.60         120         15         140         70         65         5         340-370           Buckwheat           1998-1999         14         1.07         15         3         19         8         9         2         315           1999-2000         13         1.00         13         1         16         8         7         1         305           2000-2001         15         .93         14         1         16         9         7         0         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1999-2000         2,136 <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>										
2001-2002f         63         1.56         98         15         144         75         64         5         335-355           2002-2003f         75         1.60         120         15         140         70         65         5         340-370           Buckwheat           1998-1999         14         1.07         15         3         19         8         9         2         315           1999-2000         13         1.00         13         1         16         8         7         1         305           2000-2001         15         .93         14         1         16         9         7         0         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91<										
2002-2003f         75         1.60         120         15         140         70         65         5         340-370           Buckwheat           1998-1999         14         1.07         15         3         19         8         9         2         315           1999-2000         13         1.00         13         1         16         8         7         1         305           2000-2001         15         .93         14         1         16         9         7         0         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2001-2002f         3,058         1.24										
Buckwheat           1998-1999         14         1.07         15         3         19         8         9         2         315           1999-2000         13         1.00         13         1         16         8         7         1         305           2000-2001         15         .93         14         1         16         9         7         0         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2000-2001         2,812         1.76         4,940         82         5,804         3,555         1,567         682           2001-2002f         3,058         1.24         3,										
1998-1999         14         1.07         15         3         19         8         9         2         315           1999-2000         13         1.00         13         1         16         8         7         1         305           2000-2001         15         .93         14         1         16         9         7         0         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2000-2001         2,812         1.76         4,940         82         5,804         3,555         1,567         682           2001-2002f         3,058         1.24         3,794         59         4,535		75	1.60	120	15	140	70	65	5	340-370
1999-2000         13         1.00         13         1         16         8         7         1         305           2000-2001         15         .93         14         1         16         9         7         0         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2000-2001         2,812         1.76         4,940         82         5,804         3,555         1,567         682           2001-2002f         3,058         1.24         3,794         59         4,535         2,893         1,362         280		4.4	4.07	4.5		4.0		•		0.4.5
2000-2001         15         .93         14         1         16         9         7         0         305           2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2000-2001         2,812         1.76         4,940         82         5,804         3,555         1,567         682           2001-2002f         3,058         1.24         3,794         59         4,535         2,893         1,362         280										
2001-2002f         12         1.17         14         1         15         8         7         0         310-330           2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2000-2001         2,812         1.76         4,940         82         5,804         3,555         1,567         682           2001-2002f         3,058         1.24         3,794         59         4,535         2,893         1,362         280										
2002-2003f         13         1.15         15         1         16         9         7         0         305-335           Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2000-2001         2,812         1.76         4,940         82         5,804         3,555         1,567         682           2001-2002f         3,058         1.24         3,794         59         4,535         2,893         1,362         280										
Total Pulse and Special Crops (c)           1998-1999         2,156         1.70         3,660         109         4,301         2,634         1,036         631           1999-2000         2,136         1.91         4,074         89         4,794         2,620         1,392         782           2000-2001         2,812         1.76         4,940         82         5,804         3,555         1,567         682           2001-2002f         3,058         1.24         3,794         59         4,535         2,893         1,362         280										
1998-1999     2,156     1.70     3,660     109     4,301     2,634     1,036     631       1999-2000     2,136     1.91     4,074     89     4,794     2,620     1,392     782       2000-2001     2,812     1.76     4,940     82     5,804     3,555     1,567     682       2001-2002f     3,058     1.24     3,794     59     4,535     2,893     1,362     280			1.15	15	1	16	9	7	0	305-335
1999-2000     2,136     1.91     4,074     89     4,794     2,620     1,392     782       2000-2001     2,812     1.76     4,940     82     5,804     3,555     1,567     682       2001-2002f     3,058     1.24     3,794     59     4,535     2,893     1,362     280									<b>.</b>	
2000-2001     2,812     1.76     4,940     82     5,804     3,555     1,567     682       2001-2002f     3,058     1.24     3,794     59     4,535     2,893     1,362     280		•								
2001-2002f 3,058 1.24 3,794 59 4,535 2,893 1,362 280										
2002-2003f 3,338 1.58 5,290 57 5,627 3,534 1,603 490										
	2002-2003f	3,338	1.58	5,290	57	5,627	3,534	1,603	490	

Aug-July crop year.

<sup>(</sup>a) Aug-outy crop year.

(b) Excludes products.

(c) Includes Pulse Crops (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.

(e) Producer price, FOB plant. Average over all types, grades and markets.

f: forecast, Agriculture and Agri-Food Canada, April 4, 2002.

Source: Statistics Canada and industry consultations.