



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. Carry-out 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.

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CANADA: SUPPLY AND DISPOSITION FOR PULSE AND SPECIAL CROPS

APRIL 4, 2002

Grain and Crop Year (a)	Harvested		Production	Imports	Total	Exports	Total	Ending	Average	
	Area	Yield		(b)	Supply	(b)	Domestic Use	Stocks	Price (e)	
000 ha		t/ha	----- thousand metric tonnes -----							\$/t
Dry Peas										
1998-1999	1,078	2.17	2,337	10	2,682	1,705	602	375	135	
1999-2000	835	2.70	2,252	12	2,639	1,417	822	400	135	
2000-2001	1,220	2.35	2,864	12	3,276	2,192	889	195	138	
2001-2002f	1,394	1.58	2,196	10	2,401	1,500	801	100	170-190	
2002-2003f	1,500	2.05	3,080	10	3,190	2,000	940	250	135-165	
Lentils										
1998-1999	372	1.29	480	7	552	372	120	60	381	
1999-2000	497	1.46	724	10	794	503	211	80	380	
2000-2001	688	1.33	914	5	999	550	243	206	295	
2001-2002f	691	.85	585	5	796	530	171	95	300-320	
2002-2003f	650	1.18	770	5	870	550	210	110	290-320	
Dry Beans										
1998-1999	96	1.98	189	69	273	193	55	25	655	
1999-2000	154	1.91	294	41	360	260	60	40	500	
2000-2001	165	1.62	268	40	348	227	71	50	465	
2001-2002f	150	1.70	255	20	325	255	65	5	685-705	
2002-2003f	205	1.73	355	20	380	280	80	20	580-610	
Chick Peas										
1998-1999	40	1.33	53	2	56	14	37	5	493	
1999-2000	139	1.42	197	5	207	56	136	15	390	
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	360-390	
Mustard Seed										
1998-1999	279	.86	239	1	288	162	76	50	350	
1999-2000	273	1.12	306	1	357	170	72	115	285	
2000-2001	208	.97	202	1	318	151	67	100	280	
2001-2002f	132	.67	89	1	190	135	50	5	570-590	
2002-2003f	255	.90	230	1	236	155	66	15	395-425	
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	
Sunflower Seed										
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	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		
2002-2003f	3,338	1.58	5,290	57	5,627	3,534	1,603	490		

(a) Aug-July 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.