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CANADA: PULSE AND SPECIAL CROPS OUTLOOK

July 5, 2002

In its June 28, 2002 seeded area report, Statistics Canada (STC) revised its estimates of seeded area for 2001-02 to reflect the 2001 Agricultural Census. Consequently the estimates of harvested area, yields and production for 2001-02 were adjusted by AAFC. STC also released its estimates of area seeded for 2002-03 based on a survey conducted during May 24 to June 4. Area seeded to pulse and special crops in Canada decreased by 4% from 2001-02. Higher seeded area for dry beans, mustard seed, canary seed and sunflower seed, was more than offset by a lower area for dry peas, lentils, chick peas and buckwheat. Although soil moisture is generally good in Quebec, Ontario, Manitoba and southern Alberta and Saskatchewan, most areas of northern Alberta and Saskatchewan are short of moisture. For dry peas, lentils, chick peas, mustard seed and canary seed, average yields are forecast to be lower and abandonment rates higher than normal because a significant portion of these crops are grown in the dry areas. For dry beans, sunflower seed and buckwheat, normal yields and abandonment rates are forecast because these crops are mostly grown in areas with better moisture conditions. Crop development is one to two weeks behind normal. It is assumed for this outlook that precipitation will be normal for rest of the growing period. The most important factors to watch are precipitation and crop development for the rest of the growing period.

For 2002-03, total pulse and special crops production is forecast to increase by 3%, compared to 2001-02, to 3.7 million tonnes (Mt). Total supply is expected to decrease by 7% because of lower carry-in stocks. Total exports are forecast to decrease due to lower supply, while total domestic use increases slightly, resulting in lower carry-out stocks. Average prices, compared to 2001-02, are forecast to increase for lentils, chick peas and sunflower seed, but decrease for dry peas, dry beans, mustard seed and canary seed, and to be stable for buckwheat. However, prices are expected to be very sensitive to any production problems in Canada and importing and other exporting countries, due to low world carry-in stocks.

DRY PEAS

For 2002-03, production is forecast to decrease slightly, due to lower seeded area. Total supply is forecast to decrease by 7% because of lower carry-in stocks. Total world supply is expected to decrease slightly to 10.6 Mt. Canadian exports are forecast to decrease, with a larger portion going into the feed market as demand in the food market is expected to decrease because of better domestic pulse crops supply in India. Carry-out stocks are forecast to decrease to a very low level. Prices are expected to be pressured by lower food market demand. The average price, over all types, grades and markets, is forecast to decrease by about 10%, as compared to 2001-02.

LENTILS

Production is forecast to decrease by 6%, as a 15% decrease in seeded area is partly offset by higher yields. Production is expected to increase slightly for large and medium green lentils, but decrease for small green and red lentils. Total supply is forecast to decrease by 19% due to lower carry-in stocks. Total world supply is expected to decrease slightly to 3.6 Mt. Canadian exports are expected to decrease due to the lower supply. Carry-out stocks are forecast to decrease to a very low level. The average price, over all types and grades, is forecast to increase by about 10%, due to the lower supply.

DRY BEANS

Production is forecast to increase by 34%, due to a 26% increase in seeded area, lower abandonment and higher yields. Production of white pea beans is forecast to increase by 59% to 170,000 t, while production of coloured beans increases by 20% to 205,000 t. Total supply is expected to increase by only 13% because of lower carry-in stocks. Exports are forecast to be similar to 2001-02 and carry-out stocks are expected to increase, with a stocks-to-use (s/u) ratio of 11%. US production is expected to increase by 45%. Total US and Canadian supply is expected to increase by only 15%, due to lower carry-in stocks. The average price, over all classes and grades, is forecast to decrease by about 20% because of increased supply.

CHICK PEAS

Production is forecast to decrease by 45%, as a 55% decrease in seeded area is partly offset by higher yields. Although production of all types is expected to decrease, the largest decrease is expected for the small kabuli type, followed by the large kabuli and desi types. Total Canadian supply is forecast to decrease by only 26% due to higher carry-in stocks. Total world supply is expected to fall marginally to 7.9 Mt. Canadian exports are forecast to decrease due to the lower supply. Carry-out stocks are forecast to decrease, with a s/u ratio of 6%. Lower production is expected to support prices of the kabuli type, while prices of the desi type are expected to be similar to 2001-02. The average price over all types, sizes and grades is forecast to increase slightly.

MUSTARD SEED

Production is forecast to increase by 133% due to a 75% increase in seeded area and higher yields. Production is expected to increase for all three types, yellow, brown and oriental. Total supply is forecast to increase by only 17%, due to lower carry-in stocks. Exports are expected to increase because of the higher supply. Carry-out stocks are forecast to remain low, with a s/u ratio of 7%. The average price, over all types and grades, is forecast to decrease by about 30% because of expected increased supply in Canada, the US and Europe.

CANARY SEED

Production is forecast to increase by 107%, due to a 68% increase in seeded area and higher yields. Total supply is forecast to increase by only 29%, due to lower carry-in stocks. Total world supply is forecast to increase by 24% to 280,000 t. Exports are expected to increase, because of the higher supply. Carry-out stocks are forecast to increase, with a s/u ratio of 13%. The average price is forecast to decrease by about 40% because of increased supply.

SUNFLOWER SEED

Production is forecast to increase by 44%, due to a 33% in seeded area and higher yields. Confectionary sunflower seed production is expected to increase by 31% to 105,000 t, while oil sunflower seed production is expected to nearly double to 45,000 t. Total supply is forecast to increase by only 6% because of lower carry-in stocks. Exports are expected to increase, while domestic use remains stable. Carry-out stocks are forecast to remain low, with a s/u ratio of 6%. Total world supply is expected to increase slightly to 22.7 Mt. Total US and Canadian supply of the confectionary type is expected to decrease significantly, while the total supply for the oilseed type decreases only slightly. The lower total US and Canadian supply is expected to support prices for the confectionary type, while higher world supply is expected to pressure prices for the oilseed type. Therefore, the average price in Canada, over both confectionary and oilseed types, is forecast to increase by about 5% because of stronger prices for the confectionary type.

BUCKWHEAT

Production is forecast to decrease by 11%, as a 24% decrease in seeded area is partly offset by higher yields. Total use is forecast to remain stable. The average price over all grades and markets is forecast to be the same as in 2001-02, in line with stable world total supply of about 3.4 Mt.

FURTHER INFORMATION:

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CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

July 5, 2002

Grain and Crop Year (a)	Harvested Area	Yield	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (d)	Carry-out Stocks	Average 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	2,196	885	195	138
2001-2002f	1,290	1.57	2,030	20	2,245	1,450	695	100	180-190
2002-2003f	1,220	1.62	1,975	15	2,090	1,300	740	50	150-180
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	669	0.85	568	5	779	525	164	90	310-320
2002-2003f	575	0.93	535	5	630	450	165	15	330-360
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	164	1.70	279	30	359	280	69	10	715-725
2002-2003f	220	1.71	375	20	405	280	85	40	545-585
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	460	0.97	447	8	485	220	160	105	375-385
2002-2003f	215	1.14	245	10	360	200	140	20	370-400
Mustard Seed									
1998-1999	279	0.86	239	1	288	162	76	50	350
1999-2000	273	1.12	306	1	357	170	72	115	285
2000-2001	208	0.97	202	1	318	151	67	100	280
2001-2002f	148	0.67	99	2	201	140	56	5	635-645
2002-2003f	280	0.82	230	1	236	155	66	15	420-450
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	170	0.59	101	0	171	140	21	10	645-655
2002-2003f	260	0.81	210	0	220	160	35	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	67	1.55	104	25	160	85	70	5	350-360
2002-2003f	95	1.58	150	15	170	90	70	10	355-385
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	0.93	14	1	16	9	7	0	305
2001-2002f	13	1.15	15	1	16	8	7	1	320-330
2002-2003f	11	1.18	13	1	15	8	7	0	310-340
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	3,559	1,563	682	
2001-2002f	2,981	1.22	3,643	91	4,416	2,848	1,242	326	
2002-2003f	2,876	1.30	3,733	67	4,126	2,643	1,308	175	

(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, July 5, 2002.
Source: Statistics Canada and industry consultations.