



CANADA: SPECIAL CROPS OUTLOOK

OCTOBER 11, 2001

Total Canadian production of special crops in 2001-02 is estimated to decrease by 21% to 3.91 million tonnes (Mt), based on Statistics Canada's September production estimate for dry peas, lentils, mustard seed and canary seed, and AAFC's forecast for dry beans, chick peas, sunflower seed and buckwheat. For most special crops, lower yields and higher abandonment rates, because of drought in most of Saskatchewan and Alberta, and insufficient moisture in Ontario, more than offset the increase in seeded area. The special crops harvest is nearly complete, with the exception of sunflower seed.

Despite projected lower exports and domestic use, carry-out stocks are forecast to fall sharply due to lower supplies. Compared to 2000-01, average prices are forecast to increase for dry peas, lentils, dry beans, mustard seed, canary seed, sunflower seed and buckwheat, but decrease for chick peas.

DRY PEAS

Canadian production decreased by 24%, as the higher harvested area was more than offset by lower yields. Production of the yellow and green types decreased proportionately. The quality is generally good, but there are reports of bleaching in some green peas. Total supply decreased by 27%. Total world supply is forecast to decrease by 8% to 10.6 Mt, due to lower world production, mainly because of lower Canadian production, and carry-in stocks. Canadian exports and domestic use are forecast to decrease because of lower supply. Carry-out stocks are forecast to decrease to a very low level. The average price over all types, grades and markets is forecast to increase by about 25%, due to the lower Canadian and world supply.

LENTILS

Canadian production decreased by 32%, as the slightly higher harvested area was more than offset by lower yields. Production of all types decreased, with large decreases for the green types and a small decrease for the red type. The quality is generally good, but, on average, the seed size for large green lentils is smaller than in 2000-01. Total supply is forecast to decrease by only 17% because of higher carry-in stocks. Total world supply is forecast to decrease by 2% to 3.4 Mt, as lower production in Canada more than offsets higher production in the Middle East and higher world carry-in stocks. Canadian exports are expected to decrease, as Canada's share of total world supply decreases to 24.4% from 28.7% in 2000-01. Carry-out stocks are forecast to decrease, with a s/u ratio of 12%. The average price, over all types and grades, is forecast to increase slightly because of higher expected prices for the large green type.

DRY BEANS

Canadian production is forecast to be similar to 2000-01, as a slightly lower harvested area is offset by slightly higher yields. Production of white pea and coloured beans is forecast to be similar to 2000-01, at about 110,000 t and 160,000 t, respectively. The quality is generally good, but the size of kidney and cranberry beans is more variable than in 2000-01 and, on average, smaller. Total supply is expected to decrease by 5% because of lower carry-in stocks and imports. Exports are forecast to increase because of a smaller world supply

for the classes of dry beans produced in Canada. Carry-out stocks are expected to decrease significantly to a very low level. US production is expected to decrease by about 20%. Total US and Canadian supply is expected to decline by nearly 25%. Therefore, the average price, over all classes and grades, is forecast to increase by about 25%.

CHICK PEAS

Canadian production is forecast to increase by 29%, as a larger harvested area more than offsets lower yields. The largest increase in production is expected for the small kabuli type, with a smaller increase for the large kabuli type. Production of the desi type is expected to decrease. The quality is generally good and better than in 2000-01, although the seed size of the large kabuli type is, on average, smaller than in 2000-01. Total supply is forecast to increase by 29%. Total world supply is forecast to increase by 9% to 7.6 Mt, due to higher expected production in Canada, the Middle East, India and Australia. Canada's share of total world supply is expected to increase to 6.8% from 5.8% in 2000-01. Canadian exports are forecast to increase sharply because of strong demand, especially during the first half of 2001-02, and the increase in Canada's share of world total supply. Carry-out stocks are forecast to increase with a s/u ratio of 10%. The average price, over both kabuli and desi types and all sizes and grades, is forecast to decrease by about 5%, as pressure from higher world supply is partly offset in Canada by higher quality and a shift to the production of the higher priced kabuli type.

MUSTARD SEED

Canadian production decreased by 46% due to lower harvested area and yields. The quality is generally good. Production decreased sharply for the oriental and brown types, but was stable for the yellow type. However, carry-in stocks for the yellow type were much lower than for the brown and oriental types. Total supply is forecast to decrease by 34%. Exports are expected to decrease because of the lower supply. Carry-out stocks are forecast to decrease sharply to a very low level. The average price, over all types and grades, is forecast to increase by about 35% because of the lower supply and a shift to the production of the higher priced yellow type.

CANARY SEED

Canadian production decreased by 36%, due to lower harvested area and yields. Total supply decreased by 31%. The quality is generally good. Total world supply is forecast to decrease by 26% to 245,000 t. Canadian exports are expected to decrease because of the smaller supply. Carry-out stocks are forecast to decrease sharply to a very low level. The average price is forecast to rise by about 85%.

SUNFLOWER SEED

Canadian production is forecast to decrease by 8%, due to lower harvested area and yields. Production of confectionary type is expected to decrease by 5% to 85,000 t, while production of the oil type drops by 17% to 25,000 t. The quality is expected to be good, although only a small portion has been harvested. The late harvest is normal for sunflower seed. Total supply is forecast to decrease by 12%. Total world supply is forecast to decrease by 8% to 22.9 Mt. US total supply of the confectionary type is expected to remain stable, while the total supply of the oilseed type decreases. Canadian exports and domestic use are expected to increase slightly. Carry-out stocks are forecast to decrease significantly to a very low level. Stronger world demand is expected to support prices. Therefore, the average Canadian price over both confectionary and oilseed types is forecast to increase by about 5%.

BUCKWHEAT

Canadian production is forecast to remain stable, as lower harvested area is offset by higher yields, because the crop is produced mainly in Manitoba. The quality is generally good. Total supply and use are forecast to decrease. The average price over all grades and markets is forecast to increase slightly, in line with a slightly lower world total supply of about 3.1 Mt.

FURTHER INFORMATION:

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CANADA: SUPPLY AND DISPOSITION FOR SPECIAL CROPS

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Grain and Crop Year (a)	Harvested		Production	Imports	Total	Exports	Total	Ending	Average	
	Area	Yield		(b)	Supply	(b)	Domestic Use (d)	Stocks	Price (e)	
	000 ha	t/ha	----- thousand metric tonnes -----							\$/t
Dry Peas										
1997-1998	848	2.06	1,747	12	1,974	1,116	523	335	180	
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 E	1,220	2.35	2,864	11	3,275	2,100	980	195	137	
2001-2002 F	1,397	1.56	2,175	10	2,380	1,500	850	30	155-185	
Lentils										
1997-1998	329	1.15	379	4	523	349	109	65	324	
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 E	688	1.33	914	5	999	570	223	206	295	
2001-2002 F	693	.90	623	5	834	560	184	90	290-320	
Dry Beans										
1997-1998	90	1.82	163	20	193	127	51	15	485	
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 E	165	1.62	268	40	348	250	63	35	465	
2001-2002 F	162	1.67	270	25	330	260	65	5	570-600	
Chick Peas										
1997-1998	11	1.36	15	3	18	3	14	1	400	
1998-1999	38	1.34	51	2	54	14	35	5	493	
1999-2000	139	1.42	197	5	207	56	136	15	390	
2000-2001 E	283	1.37	387	5	407	200	187	20	410	
2001-2002 F	480	1.04	500	5	525	290	185	50	380-410	
Mustard Seed										
1997-1998	292	.83	243	2	283	166	69	48	385	
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 E	208	.97	202	1	318	155	63	100	280	
2001-2002 F	133	.83	110	1	211	150	56	5	370-400	
Canary Seed										
1997-1998	113	1.01	115	0	245	134	47	64	322	
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 E	164	1.04	171	0	261	171	20	70	265	
2001-2002 F	141	.78	110	0	180	155	20	5	470-500	
Sunflower Seed										
1997-1998	51	1.29	65	12	88	45	40	3	344	
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 E	69	1.72	119	17	177	77	69	31	320	
2001-2002 F	65	1.69	110	15	156	80	71	5	325-355	
Buckwheat										
1997-1998	14	1.14	16	1	19	9	9	1	305	
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 E	15	.93	14	1	16	9	7	0	305	
2001-2002 F	13	1.08	14	1	15	8	7	0	295-325	
Total Special Crops (c)										
1997-1998	1,748	1.57	2,743	54	3,343	1,949	862	532		
1998-1999	2,154	1.70	3,658	109	4,299	2,634	1,034	631		
1999-2000	2,136	1.91	4,074	89	4,794	2,620	1,392	782		
2000-2001 E	2,812	1.76	4,939	80	5,801	3,532	1,612	657		
2001-2002 F	3,084	1.27	3,912	62	4,631	3,003	1,438	190		

(a) Aug-July crop year.

(b) Excludes products.

(c) Includes dry peas, lentils, dry beans, chick peas, mustard seed, canary seed, sunflower seed and buckwheat.

(d) Includes food, feed, seed, waste and dockage.

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

E: estimate F: forecast, Agriculture and Agri-Food Canada, October 11, 2001

Source: Statistics Canada and industry consultations.