



CANADA: PULSE AND SPECIAL CROPS OUTLOOK

July 31, 2002

Based on Statistics Canada's June 28 area seeded estimates, total pulse and special crops production for 2002-03 is forecast to decrease by 2%, compared to 2001-02, to 3.56 million tonnes (Mt). Total supply is expected to decrease by 10% because of lower production and carry-in stocks. Total exports, domestic use and carry-out stocks are forecast to decrease due to lower supply. 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 major producing areas of the world, due to low world carry-in stocks.

Although soil moisture is generally good in Quebec, Ontario, Manitoba, southern Alberta and southern Saskatchewan, most areas of northern Alberta and northern 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 has advanced with the hot weather in July and is now near normal. For dry peas, lentils, chick peas, mustard seed and canary seed, additional rainfall would not have a major impact on yields because of the advanced stage of crop development. However, timely rain will be needed to maintain good crop condition for dry beans, sunflower seed and buckwheat. Harvesting is expected to start in early August for dry peas, mid-August for lentils, chick peas and mustard seed, late August for canary seed, early September for dry beans, mid-September for buckwheat and late September for sunflower seed.

DRY PEAS

For 2002-03, production is forecast to decrease by 8% from 2001-02, due to lower seeded area and higher abandonment. Total supply is forecast to decrease by 11%, due to lower production and carry-in stocks. Total world supply is expected to decrease by 5% to 10.5 Mt. Canadian exports and domestic use are forecast 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, grades and markets, is forecast to remain high although slightly lower, as compared to 2001-02, due to expected increased competition from the EU in the food market.

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 green lentils, remain stable for medium green lentils, and decrease for small green and red lentils. Total supply is forecast to decrease by 18%, due to lower production and carry-in stocks. Total world supply is expected to decrease by 4% 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 29%, due mainly to an increase in seeded area. Production of white pea, dark and light red kidney, cranberry, black and pinto beans is expected to increase, while production of small red, pink and Great Northern beans decreases. Total supply is expected to increase by only 8% mainly 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 10%. US production is expected to increase by 35% to 1.1 Mt. Total US and

Canadian supply is expected to increase by only 13% to 1.6 Mt, due to lower carry-in stocks. The average price, over all classes and grades, is forecast to decrease by about 25% because of increased supply.

CHICK PEAS

Production is forecast to decrease by 46%, as a 55% decrease in seeded area is partly offset by higher yields. Production is expected to decrease for all three types, large kabuli, small kabuli and desi. Total Canadian supply is forecast to decrease by only 25% 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 7%. 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 108% 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 5%, due to lower carry-in stocks. Canadian exports are expected to be similar to 2001-02. Carry-out stocks are forecast to be very low. 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 83%, due to a 68% increase in seeded area and higher yields. Total supply is forecast to increase by only 14%, due to lower carry-in stocks. Total world supply is forecast to increase by 11% to 250,000 t. Canadian exports are expected to increase, because of the higher supply. Carry-out stocks

are forecast to remain low, with a s/u ratio of 5%. The average price is forecast to decrease by about 20% because of increased supply.

SUNFLOWER SEED

Production is forecast to increase by 44%, due mainly to higher seeded area. Production is expected to increase for both confectionary and oilseed types. 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 by 6% to 23.45 Mt. Total US and Canadian supply of the confectionary type is expected to decrease significantly and prices for the confectionary type are expected to rise. However, for the oilseed type, although North American supply is expected to decrease slightly, world supplies are expected to increase and pressure prices. The average price in Canada, is forecast to increase by about 10% because of the 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 31, 2002

Grain and Crop Year (a)	Harvested Area 000 ha	Yield t/ha	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (d)	Carry-out Stocks	Average Price (e) \$/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	25	2,250	1,450	700	100	185
2002-2003f	1,205	1.56	1,875	30	2,005	1,300	655	50	165-195
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	.85	568	5	779	515	164	100	320
2002-2003f	575	.93	535	5	640	460	165	15	335-365
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	35	364	280	69	15	725
2002-2003f	215	1.67	360	20	395	280	80	35	540-570
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	.97	447	10	487	210	162	115	380
2002-2003f	210	1.14	240	10	365	200	140	25	375-405
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	148	.67	99	2	201	145	51	5	685
2002-2003f	280	.73	205	1	211	145	61	5	455-485
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	152	.66	101	0	171	140	21	10	660
2002-2003f	260	.71	185	0	195	155	30	10	495-525
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	355
2002-2003f	95	1.58	150	15	170	90	70	10	380-410
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	13	1.15	15	1	16	8	7	1	325
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	2,963	1.23	3,643	103	4,428	2,833	1,244	351	
2002-2003f	2,851	1.25	3,563	82	3,996	2,638	1,208	150	

(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 31, 2002.

Source: Statistics Canada and industry consultations.