Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS

December 20, 2013

Market Analysis Group/Grains and Oilseeds Division
Sector Development and Analysis Directorate/Market and Industry Services Branch
Director: Steve Lavergne **Deputy Director: Fred Oleson**

The production of field crops in Canada for 2013-14 is estimated at 96.5 million tonnes (Mt), based on Statistics Canada's December 4 release of its November estimates of production of Principal Field Crops. This is about 20% higher than last year due mainly to significantly higher average yields attributable to ideal growing conditions, despite late seeding. Crop development progressed well after a period of above-normal temperatures and average-to-excessive moisture. In general, the completion of harvest in Western Canada and Eastern Canada was slightly later than normal. The average quality and protein content of the grain crops is expected to be slightly below average but the oil content of the canola crop is expected to be near normal. Transportation, storage and marketing issues are expected to be the main challenges facing the sector this crop year.

The production of Grains and Oilseeds (G&O) in Canada is estimated at 90 million tonnes (Mt), an increase of 27% from 2012 due to higher average yields, which reached a record for many crops. Supply is expected to rise by 21% despite extremely low carry-in stocks. Exports and domestic use are forecast to rise significantly due to increased supply. Carry-out stocks are expected to increase significantly to exceed the 10 year average.

World grain prices are expected to decline due to higher production related to normal to good growing conditions across the major grain producing countries. In Canada, grain and oilseed prices are forecast to average 10 to 30 percent lower than 2012-13 due to lower international prices and record supplies in Canada. Canadian prices will receive some offsetting support from the weaker Canadian dollar.

The production of Pulses and Special Crops (P&SC) in Canada increased by 14% to 6.5 Mt as significantly higher yields more-than offset lower area harvested. However, supply increased only marginally due to extremely low carry-in stocks. Exports are expected to rise but domestic use is forecast to fall. Carry-out stocks are expected to increase sharply, especially for dry peas. Prices are expected to fall when compared to 2012-13, except for dry beans and mustard seed.

Canada: Principal Field Crops Supply and Disposition

	Area Seeded	Area Harvested	Yield	Production	Imports	Total Supply	Exports	Total Domestic Use	Carry-out Stocks
	thousand hectares		*t/ha*	*thousand metric tonnes*					
Total Grains And Oilseeds									
2011-2012	23,813	22,916	2.94	67,482	1,337	82,401	34,280	37,719	10,402
2012-2013	26,455	25,693	2.76	71,040	1,074	82,516	36,779	36,915	8,821
2013-2014f	26,796	26,059	3.46	90,073	962	99,856	39,568	38,723	21,565
Total Pulse And Special Crops									
2011-2012	2,411	2,355	1.95	4,602	121	6,321	3,779	1,264	1,278
2012-2013	3,045	2,989	1.90	5,676	141	7,095	4,955	1,507	633
2013-2014f	2,726	2,686	2.40	6,457	122	7,212	5,030	1,207	975
All Principal Field Crops									
2011-2012	26,224	25,271	2.85	72,083	1,457	88,722	38,059	38,983	11,680
2012-2013	29,500	28,682	2.67	76,716	1,215	89,611	41,734	38,423	9,454
2013-2014f	29,521	28,745	3.36	96,529	1,084	107,068	44,598	39,930	22,540

Source: Statistics Canada, f: forecast by Agriculture and Agri-Food Canada

WHEAT

DURUM

For **2013-14**, production increased by 40% from 2012-13 to 6.5 Mt, due to a 6% increase in seeded area and 32% higher yields. The yields and production are a new record. The average grade quality of the durum crop was lower than normal with an estimated 52% grading No. 1 and 2, compared to 70% for 2012-13 and 63% for the past five year average. The average protein level is estimated at 11.9%, compared to 13% for 2012-13 and 12.8% for the past five year average.

Supply increased by 25% to 7.68 Mt as lower carry-in stocks partly offset the increase in production. Exports are forecast to rise by 10% to 4.65 Mt due to strong world demand and Canada's higher share of world durum production. Carry-out stocks are forecast to increase by 91% to 2.2 Mt. Average Canadian durum prices are forecast to fall due to the higher world and Canadian supply, with wider spreads for grades and protein levels than in 2012-13.

World durum production increased by 2.9 Mt from 2012-13 to 38.1 Mt mostly because of higher production in Canada, Morocco and Kazakhstan. Supply increased by 2.2 Mt to 44.7 Mt, as higher production was partly offset by lower carry-in stocks. Use is forecast to increase by 1.2 Mt to 37.3 Mt and carry-out stocks are forecast to rise by 0.8 Mt to 7.4 Mt. US durum production fell by 25% to 1.68 Mt due to a drop in seeded area.

WHEAT (excluding durum)

For **2013-14**, production increased by 37% from 2012-13 to 31 Mt due to an 11% increase in the seeded area and a 46% increase in yields. The yields and production are new records. Winter wheat production rose by 1% to 3.79 Mt. Spring wheat production is increased by 44% to 27.24 Mt. In eastern Canada, wheat production increased by 25% to 2.62 Mt, with soft red winter wheat being the main wheat class produced, followed by hard red winter, hard red spring and soft white winter. In western Canada, wheat production increased by 39% to 28.41 Mt, with a 45% increase for spring wheat to 26.94 Mt and a 25% decrease for winter wheat (hard red) to 1.47 Mt. Hard red spring wheat production increased by 35% to 22.1 Mt, with a 131% increase for soft white spring wheat to 2.22 Mt, a 102% increase for prairie spring wheat to 1.93 Mt, a105% increase for extra strong wheat to 0.23 Mt, and a 160% increase for other spring wheat to 0.46 Mt. Western Canada accounted for 92% of the total wheat production and eastern Canada for 8%. The average grade quality of the hard red spring wheat (CWRS) crop was higher than normal with an estimated 83% grading No. 1 and 2, compared to 77% for 2012-13 and 71% for the past five year average. The average protein levels are estimated 12.9%, compared to 14% for 2012-13 and 13.6% for the past five year average. The average grade quality of the western Canadian winter wheat and Canada Prairie Spring wheat crops was better than for 2012-13 and the average protein levels are slightly higher.

Supply increased by 29% to 34.96 Mt as the increase in production was partly offset by lower carry-in stocks. Domestic use is expected to rise by 6% with increases in all markets, food, feed and industrial. Exports are forecast to increase 14% due to growing world demand, especially in the food market. Carry-out stocks are forecast to increase by 135% to 9.2 Mt. Average Canadian wheat prices are forecast to decrease from 2012-13 due to higher world and Canadian supply, with wider spreads for grades and protein levels than for 2012-13.

Canadian winter wheat area seeded in the fall of 2013 decreased by 5% from the fall of 2012 to 0.86 million hectares, mainly because of the late harvest.

World all wheat (including durum) production increased by 55 Mt to 711 Mt due mostly to higher production in Russia, EU28, Canada, Ukraine and Kazakhstan. The supply rose by 32 Mt to 887 Mt, as the increase in production was partly offset by lower carry-in stocks. Total use is forecast to increase by 25 Mt to 704 Mt. Carry-out stocks are forecast to rise by 7 Mt to 183 Mt.

US all wheat production decreased by 3.7 Mt to 58 Mt. Production of soft red winter wheat increased by 35% to 15.37 Mt, while production of hard red winter wheat decreased by 26% to 20.25 Mt due to drought, the production of hard red spring decreased by 3% to 13.45 Mt and white wheat production increased by 4% to 7.31 Mt. Domestic feed use is expected to decrease because of a recovery in corn production. Exports are forecast to rise due to stronger world demand. Carry-out stocks are forecast to decrease by 3.9 Mt to 15.6 Mt.

Stan Skrypetz: Wheat Analyst
(204) 259-4116
Stan.Skrypetz@agr.gc.ca

COARSE GRAINS

BARLEY

For 2013-14, production increased 28% to 10.2 million tonnes (Mt) due to record yields. Area seeded and harvested decreased by 4% from 2012-13 due to mainly to higher seeded area of other cereals. Despite record low carry-in stocks, total supply increased by 20% over 2012-13. Total domestic use is forecast to increase by 2% due mainly to trend increases in livestock feeding and industrial use. Exports are forecast to increase by 7% due to a recovery in world feed and malt barley production and lower world feed barley trade. Carryout stocks are forecast to increase sharply from the previous crop year's record low and are higher than the both previous five and ten-year averages. Domestic feed barley prices are forecast to decrease from 2012-13 due to the higher production and the overall decline in North American and world coarse grain prices.

Average barley yields reached a record 3.86 tonnes/hectare (t/ha). The average yield on the Canadian Prairies and British Columbia were well above average, over 20% higher than the previous five-average and 15% higher than the previous single year record in 2008. In Eastern Canada, yields were slightly above average. The increase in supply represents a turn-around for Canadian barley after three straight years of declining total supply. After early seasonal price declines, the Lethbridge cash barley price remains stable and is expected to remain relatively flat into the beginning of 2014. So far this crop year the spot basis to Lethbridge remains wider than average in both Alberta and Saskatchewan but prices in Manitoba have been near the long-term average. With much larger North American and world coarse grains supplies this crop year, there seems little chance for higher prices.

The International Grains Council (IGC) has forecasted that 2013-14 world barley ending stocks will increase by nearly 20% due to higher production but only trend growth in total use. Although world malting barley trade is forecast to grow, total barley trade will decrease because of lower exports of feed barley. Other factors are the approximately US$30/t price premium that FOB feed barley has held over corn this crop year and the world's general preference for feeding corn. With record 2013 world corn production, rationing is no longer necessary.

CORN

For 2013-14, production increased by 9% to a new record of 14.2 Mt due to higher area and near record yields. Both seeded and harvested areas increased by 4% and exceeded the records established last year. Total supply is forecast to increase by 8% to a record 16.2 Mt due to higher production and higher carry-in stocks. Imports are forecast to decrease 12% due to higher domestic supply and are expected to remain below the average of the previous five and 10-years. Total domestic use is forecast to increase by 3% as overall feed and industrial demand remains at trend levels. Exports are forecast to decrease significantly from the record high in 2012-13 due to a projected recovery in US and world corn production along with lower prices in the world's main corn exporting countries. Carryout stocks are forecast to increase substantially to a record level of 3.4 Mt. The Chatham in-store elevator price is forecast to decrease with the large North American and world corn crop that was produced in 2013.

The nearby Chatham market price has been posting basis gains over the last month and the nearby basis is trading above the previous three-year average. Ontario's Corn Belt had less than ideal fall conditions and this had been complicated by snow squall activity, slowing the harvest and producer deliveries. In November, the US Environmental Protection Agency (EPA) did not propose a specific 2014 volume for ethanol made from corn. However, the proposed change in advanced biofuels implies a corn ethanol mandate of 12.7 to 13.2 billion gallons vs. the previous 2014 mandate of 14.4 billion gallons. The EPA expects to release a final rule next spring after a 60-day public comment period.

Based on their latest reports, the IGC and USDA are offering very similar outcomes for 2013-14 world coarse grains. On a world basis; coarse grain total supply, total use and ending stocks are all forecasted higher for 2013-14 when compared to the previous year. World trade in coarse grains is forecast to increase, especially for corn which forecast to increase by 10%. The US represents nearly 30% of world corn production and as such the Chicago corn futures is the "price point" for world corn and grain trade in general. The large increase in world corn ending stocks can be attributed almost entirely to the higher production and stock position in the US.

OATS

For 2013-14, production increased by 38% to 3.9 Mt due to the increase in area and record yields. Seeded and harvested area increased by 10 and 12%, respectively from 2012-13. Due to near record low carry-in stocks, total supply increased by only 21%, slightly above the previous five-year average. Total domestic use is forecast to increase marginally due to higher feed use and food and industrial use. Exports are forecast to increase only 3% due to relatively flat US food and industrial demand. Carry-out stocks are forecast to increase sharply to 1.2 Mt, well above both previous five and ten-year averages.

Average oat yields reached a record of 3.51 t/ha. Oat yields in Eastern Canada were near average but on the Canadian Prairies average yields were over 22% higher than the previous five-year average and 19% higher than the previous single year record in 2009. This crop year will represent a turn-around for Canadian oats after three years of tight carryout stocks. Slow Canadian rail movement has been supportive for oats as the US commercials add to their fall supplies before the seasonal mid-winter slowdown. As oat futures prices remain strong relative to US corn futures, oats is being priced for food and industrial use and not for feed, as had been for the previous couple of years.

Exports from Canada to US represents the majority of world trade in oats. Based on Canada's oat and oat product exports in the first quarter of the crop year, oat grain exports will have significant "catching up" to do to meet export projections. Oat products exports are slightly ahead of the previous five-year average but somewhat slightly behind last crop year. The very strong movement of canola and wheat has restricted movement of the smaller volume and/or less valuable crops, for the first quarter oat grain movement was about only two-thirds for the previous five-year average.

RYE

For 2013-14, production decreased by 38% to near record low levels due to the smaller area and a slightly below average yield. Seeded area decreased by 22% to an all-time record low and harvested area decreased by 31% to near record low levels from crop year 2012-13. Even with higher carry-in stocks, the sharp drop in production will cause total supply to decrease by 30% which will be the second lowest level on record. Total domestic usage is expected to decrease by 20% to record low levels, as lower supply limits feed and industrial use. Exports are forecast to decrease by 32% due to the very tight supply after three years of steady export volumes. Carry-out stocks of rye are forecast to decrease to record low levels.

Compared to the 1990's, the area seeded to rye is only one-third of the level of that era and average production has been cut in half. For the past three crop years, rye prices have been very good and reflective of the tight supply. High prices on the prairies for milling and industrial use rye could encourage higher area seeded to rye in the spring of 2014. With a forecast for an even smaller fall rye area in the next crop, spring seeded rye may be the only opportunity to try to re-build stocks.

Based the IGC's November Monthly Grain Market Report, Canada is the world's only major rye producer to have suffered production problems this crop year. World rye production is forecasted 18% higher and even with an 11% increase in total use, world rye carryout is forecast to increase by nearly 130%. Similar to oats, the Canada to US movement of rye is the majority of world trade. Given the record low supply of rye in Canada, the US may look at Russia or the EU to source meet its import needs. Based on carry-out stock forecasts, the EU will have nearly 0.9 Mt more rye available than the last two crop years and would be in a better position to supply the US.

John Pauch: Coarse Grains Analyst
(204) 259-4150
John.Pauch@agr.gc.ca

OILSEEDS

CANOLA

For 2013-14, production is estimated at a record 18.0 million tonnes (Mt), up 29% from 2012-13 on record yields of 2.2 t/ha, up 42% from last year, which more than offsets the drop in harvested area. The production estimates are based on Statistics Canada survey of producers in all provinces compared to the October release which included AAFC estimates for British Columbia and the Maritimes. By province, the highest production occurred in Saskatchewan, at 8.9 Mt, Alberta at 6.0 Mt and Manitoba at 2.9 Mt.

The supply of canola increased by 27% as the gains in output were moderated by lower carry-in stocks and stable imports. Exports are forecast at a record 8.2 Mt, up slightly from last month and 0.9 Mt from 2012-13, on strong world demand for vegetable oils and protein meal. As of week 16 in the marketing year for Canadian crops, the Canadian Grain Commission reports that the pace of canola exports was 26% above the 5 year average. As of Nov 24, 2.3 Mt of canola were exported from Canada with over 80% moving through the Pacific Coast. Producer deliveries by province were Manitoba 20%, Saskatchewan 46%, and Alberta 33%, similar to output by province. The shipping pace is expected to slow down with the arrival of winter, but the pace of exports is expected to be above normal during the final quarter of 2013-14.

Domestic crush is forecast to rise to a record 7.2 Mt on large seed supplies, expanded capacity and strong vegetable oil and protein meal demand. Carry-out stocks are forecast at a record 3.0 Mt, with a stocks-to-use ratio of 19%, up sharply from last year but below 2009-10. Average Canadian canola prices are forecast to fall by 22% or $140/t due to lower prices for US soybeans, soyoil and soymeal on a sharp rebound in world output.

FLAXSEED (excluding solin)

For 2013-14, production, of which about 85% is from Saskatchewan, increased by 46% on sharply higher yields. Production is the highest since the 2009-10, when the presence of unauthorized genetically modified material was detected in flaxseed exports. Supplies of flaxseed are forecast to rise by 23%, as sharply higher output more than offsets lower carry-in stocks and imports. Exports are forecast to increase by 20%, mainly to China and the US. Total domestic use is forecast to decline while carry-out stocks rise from 2012-13. The average price of flaxseed is forecast to decrease by about 10% on increased supplies and lower world prices for vegetable oils, protein meals and oilseeds.

SOYBEANS

For 2013-14, production increased marginally to a record 5.2 Mt. Production by province was: Quebec 0.85 Mt, Ontario 3.1 Mt, Manitoba 1.1 Mt and Saskatchewan 0.1 Mt. Supply is forecast to increase marginally as lower carry-in stocks and stable imports moderate the rise in output. Domestic processing is forecast to increase slightly due to higher supply. Exports are forecast at 3.4 Mt, slightly above last year. This forecast is supported by the current export shipments to-date, although the pace is expected to decrease in the second half of 2013-14 following the harvest in South America. Carry-out stocks are forecast to increase slightly from 2012-13. The average price of soybeans at Chatham is forecast to fall to $510-550/t under pressure from lower US soybean prices.

For 2013-14, world production of soybeans is forecast at a record 284 Mt, up 6% from last year, on increased US output and expected record production for South America. The world supply of soybeans is forecast at a record 344 Mt due to support from higher carry-in stocks. In turn, this is expected to support a record world crush of 240 Mt, up 11 Mt from last year. World trade is expected to rise by 8 Mt on support from increased Chinese imports. Carry-out stocks are forecast at a record 70 Mt for a stocks-to-use ratio of 26% vs 24% for 2012-13. The sustained rally in world soybean prices above levels implied by carry-out stocks and stocks-to-use ratios reflects the strong and growing world demand for oilseeds in general. World consumption of protein meals and vegetable oils are forecast at 275 Mt and 164 Mt, up 4% from 2012-13, respectively.

Chris Beckman: Oilseed Analyst
(204) 259-4115
Chris.Beckman@agr.gc.ca

PULSES AND SPECIAL CROPS

DRY PEAS

For **2013-14**, production increased by 15% to a record 3.8 Mt, as record high yields more-than offset the lower harvested area, particularly in Saskatchewan. Yellow pea types are estimated to account for about 3.2 Mt and green types are estimated to account for 0.5 Mt, with the remainder being other varieties. Supply has increased by only 11% due to tight carry-in stocks, to nearly 4.0 Mt, also a record. Exports are forecast to rise to 2.8 Mt, with China, India and Bangladesh remaining Canada's top three markets. The devaluation of the Indian rupee and expectations of a large Rabi pulse crop early in 2014 is expected to slow exports to India. Carry-out stocks are forecast to increase sharply despite higher exports and lower domestic use. The average price is expected to fall from 2012-13, due to expectations for much larger Canadian carry-out stocks in 2013-14. Green dry peas prices are expected to maintain a premium of C$150/t over yellow dry peas, which are above the historical average, but below the record C$200/t premium green peas had over yellow peas last year.

In the US, area seeded to dry peas for 2013-14 is forecast by the USDA to rise by 29% from 2012-13. This is largely due to an estimated increase in area in Montana and North Dakota. With estimates of above average yields, US dry pea production is forecast by USDA to rise by 28% to 0.7 Mt. Despite this, Canadian exports to the US are forecast to continue to trend upward as evidenced by strong export demand from the August-October period of 2013.

LENTILS

For **2013-14**, production increased by 22% to 1.9 Mt as record high yields more than offset lower harvested area. Large green production is estimated to have decreased, from last year, to below 0.7 Mt, while red lentil production increased sharply to over 1.0 Mt. Production of the other remaining lentil types is estimated to have fallen to 0.2 Mt.

Supply decreased by 9% due to lower carry-in stocks. Exports are forecast to increase to 1.7 Mt. India, the EU-27 and Turkey are expected to remain the top three export markets. However, the devaluation of the Indian rupee, and expectations of a large Rabi pulse crop early in 2014, is expected to slow exports to India. Domestic use is expected to fall to more historical levels due to expectations of an above average grade distribution. Carry-out stocks are forecast to decrease marginally. The overall average price is forecast to be lower than 2012-13 due to similar carry-out stocks. Large green lentil prices are forecast to maintain a C$30/t premium over red lentil prices, similar to 2012-13.

In the US, the area seeded to lentils for 2013-14 is forecast by the USDA at 0.3 mln acres, down 27% from 2012-13 due to lower area seeded in Montana and North Dakota. With estimates of above average yields, 2013-14 US lentil production is forecast by the USDA to decrease below 0.2 Mt, down 18% from 2012-13.

DRY BEANS

For **2013-14**, production fell by 26% to 209 thousand tonnes (kt), consisting of 68 kt of white pea bean types and 141 kt of colored bean types. Production in Ontario decreased sharply mostly due to a fall in area for both bean types. In Manitoba, production fell by 33%, due to lower areas for colored and white pea bean types.

Supply decreased by only 18%, due to large carry-in stocks. Exports are forecast to fall due to the lower supply. The US and the EU-27 are forecast to remain the main markets for Canadian dry beans, with smaller volumes exported to Japan, Mexico and countries in Africa. Carry-out stocks are also expected to decrease. The average Canadian dry bean price is forecast to increase due to lower supply in North America.

In the US, area seeded to dry beans is forecast by the USDA to fall by 27% to 1.1 mln acres, largely due to lower area seeded in North Dakota. US total dry bean production (excluding chickpeas) is forecast by the USDA to decrease below 1.0 Mt, down 26% from 2012-13.

CHICKPEAS

For **2013-14,** production is estimated to rise by 13% to 182 kt, due to above average yield estimates for the second consecutive year. Production for desi types is estimated to have risen sharply while kabuli chickpea production is estimated to have fallen compared to 2012-13. However, supply is forecast to rise by 35% from last year due to the large carry-in stocks. Exports are forecast to fall marginally from 2012-13, with the EU-27, the US, the Middle-East and the Indian subcontinent expected to remain the main markets for Canadian chickpeas. Carry-out stocks are expected to rise for the third year in a row. The average price is forecast to decline, for the third consecutive year, due to higher world and Canadian supply.

US chickpea area seeded is estimated by the USDA at a record 0.21 mln acres, up 4% from 2012-13. This is largely due to higher area seeded in the state of Washington. Assuming normal yields and abandonment, 2013-14 US chickpea production is forecast by AAFC at 0.15 Mt, similar to 2013-14.

MUSTARD SEED

For **2013-14**, production increased by 39% to 165 kt as near record yields more than offset lower harvested area. Production of all three major types of mustard, yellow, brown and oriental are expected to rise. Supply fell marginally due to lower carry-in stocks. Exports are expected to rise to 130 kt and carry-out stocks are forecast to tighten for the second consecutive year. The US and the EU-27 are expected to remain the main export markets for Canadian mustard seed. The average price is forecast to be marginally higher than 2012-13 as firm export demand, despite some competition from the Black Sea region, is expected to support prices.

CANARY SEED

For **2013-14**, production fell by 21% to 119 kt, due to sharply lower harvested area, but was partly offset by record yields. Supply decreased by only 16% as lower production was partly offset by higher carry-in stocks. Exports are expected to be limited due to the lower supply. The EU-27 and Mexico are forecast to remain the main export markets, followed by South America. Carry-out stocks are expected to tighten. The average price is forecast to decrease from the 2012-13 level.

SUNFLOWER SEED

For **2013-14**, production fell sharply to 52 kt, due to lower yields and harvested area. Supply, however, declined by only 22% to 94 kt, compared to 2012-13, due to large carry-in stocks. Exports are forecast to be similar to last year and carry-out stocks are forecast to fall sharply. The US is expected to remain Canada's main export market for sunflower seed. The average price is forecast to fall from 2012-13 due to a large expected increase in world sunflower seed carry-out stocks.

Area seeded to sunflower in the US is forecast by the USDA at just under 1.6 mln acres, down 18% from 2012-13 and largely due to lower area in North Dakota. The area seeded to oil type varieties is estimated to have fall sharply to below 1.3 mln acres and the area seeded to confectionery type varieties is estimated to have risen to 0.3 mln acres. With yields similar to the five year average, 2013-14 US sunflower seed production is forecast by AAFC to decrease by 20% to 1.0 Mt.

For 2013-14, the global supply of sunflower seed is estimated by the USDA at a record 46 Mt. This is 16% higher than last year due to increased area and yields in Russia, Ukraine and the EU-27. As a result, world exports and domestic use are expected to rise by 32% and 13%, respectively. However, world carry-out stocks are expected to rise significantly by 49% to 2.9 Mt, and pressure world sunflower seed prices.

Bobby Morgan: Pulse and Special Crop Analyst
(204) 259-4149
Bobby.Morgan@agr.gc.ca

CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

December 20, 2013

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (c)	Food & Industrial Use (d)	Feed, Waste & Dockage	Total Domestic Use (e)	Carry-out Stocks	Average Price (g)
	thousand ha		*t/ha*	*thousand metric tonnes*								*$/t*
Durum												
2011-2012	1,623	1,590	2.62	4,172	17	5,755	3,584	232	270	686	1,486	345
2012-2013	1,894	1,878	2.46	4,627	36	6,149	4,245	238	320	752	1,151	290*
2013-2014f	2,009	1,997	3.26	6,505	20	7,675	4,650	245	393	825	2,200	205-235*
Wheat Except Durum												
2011-2012	7,103	6,962	3.03	21,116	61	26,971	13,916	3,539	4,285	8,609	4,446	290
2012-2013	7,736	7,619	2.96	22,579	38	27,063	15,197	3,183	3,891	7,959	3,906	285*
2013-2014f	8,616	8,444	3.67	31,025	30	34,961	17,300	3,430	4,150	8,461	9,200	200-230*
All Wheat												
2011-2012	8,726	8,553	2.96	25,288	78	32,726	17,500	3,771	4,555	9,294	5,932	
2012-2013	9,630	9,497	2.86	27,205	74	33,211	19,442	3,421	4,211	8,712	5,057	
2013-2014f	10,626	10,441	3.59	37,530	50	42,637	21,950	3,675	4,544	9,287	11,400	
Barley												
2011-2012	2,666	2,402	3.29	7,892	14	9,407	2,059	145	5,751	6,153	1,195	225
2012-2013	2,997	2,751	2.91	8,012	19	9,227	2,154	154	5,858	6,262	811	279
2013-2014f	2,866	2,652	3.86	10,237	17	11,065	2,300	159	6,153	6,565	2,200	180-210
Corn												
2011-2012	1,292	1,272	8.93	11,359	894	13,516	474	5,220	6,442	11,677	1,365	250
2012-2013	1,434	1,418	9.21	13,060	568	14,993	1,748	5,315	6,370	11,700	1,545	257
2013-2014f	1,493	1,480	9.59	14,194	500	16,239	800	5,400	6,623	12,039	3,400	165-195
Oats												
2011-2012	1,313	1,084	2.91	3,158	12	3,902	2,248	92	656	845	810	227
2012-2013	1,165	985	2.86	2,812	18	3,640	2,137	79	811	992	511	263
2013-2014f	1,282	1,107	3.51	3,888	15	4,414	2,200	83	825	1,014	1,200	220-250
Rye												
2011-2012	124	96	2.52	241	0	292	170	46	41	98	25	183
2012-2013	140	123	2.73	337	0	362	196	43	68	119	46	155
2013-2014f	109	85	2.45	208	0	254	143	40	47	96	15	155-185
Mixed Grains												
2011-2012	150	79	3.04	240	0	240	0	0	240	240	0	
2012-2013	101	58	2.93	170	0	170	0	0	170	170	0	
2013-2014f	105	54	2.69	146	0	146	0	0	146	146	0	
Total Coarse Grains												
2011-2012	5,544	4,932	4.64	22,889	920	27,357	4,950	5,502	13,129	19,013	3,395	
2012-2013	5,836	5,334	4.57	24,391	605	28,391	6,235	5,592	13,276	19,243	2,913	
2013-2014f	5,855	5,379	5.33	28,672	532	32,118	5,443	5,682	13,793	19,860	6,815	
Canola												
2011-2012	7,685	7,589	1.92	14,608	97	16,891	8,699	6,999	420	7,484	707	601
2012-2013	8,912	8,799	1.58	13,869	128	14,704	7,261	6,717	59	6,834	608	650
2013-2014f	8,068	8,007	2.24	17,960	125	18,693	8,200	7,200	242	7,493	3,000	490-530
Flaxseed												
2011-2012	299	291	1.37	399	9	601	391	n/a	n/a	74	137	525
2012-2013	397	384	1.27	489	15	640	481	n/a	n/a	88	71	580
2013-2014f	419	412	1.73	712	5	788	575	n/a	n/a	63	150	510-550
Soybeans												
2011-2012	1,559	1,551	2.77	4,298	232	4,826	2,741	1,410	270	1,854	231	478
2012-2013	1,680	1,678	3.03	5,086	253	5,570	3,359	1,541	316	2,038	172	532
2013-2014f	1,829	1,820	2.86	5,198	250	5,621	3,400	1,600	246	2,021	200	470-510
Total Oilseeds												
2011-2012	9,543	9,432	2.05	19,305	338	22,318	11,831	8,410	690	9,412	1,075	
2012-2013	10,989	10,861	1.79	19,444	395	20,914	11,102	8,258	375	8,961	851	
2013-2014f	10,315	10,238	2.33	23,871	380	25,102	12,175	8,800	488	9,577	3,350	
Total Grains and Oilseeds												
2011-2012	23,813	22,916	2.94	67,482	1,337	82,401	34,280	17,683	18,373	37,719	10,402	
2012-2013	26,455	25,693	2.76	71,040	1,074	82,516	36,779	17,270	17,862	36,915	8,821	
2013-2014f	26,796	26,059	3.46	90,073	962	99,856	39,568	18,157	18,825	38,723	21,565	

(a) Crop year is August-July, except corn and soybeans, of which crop year is September-August.
(b) Imports exclude products.
(c) Exports include grain products, while excluding oilseed products.
(d) Food and Industrial Use for soybeans is based on data from the Canadian Oilseed Processors Association. Total number excludes flaxseed food and industrial use due to data confidentiality.
(e) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use + Loss in Handling
(g) Specification of crops for crop year average prices: Wheat (No.1 CWRS, 12.5% protein, CWB final price, I/S St. Lawrence/Vancouver) , Durum (No.1 CWAD, 12.5% protein, CWB final price, I/S St. Lawrence/Vancouver), Barley (No. 1 feed, cash, I/S Lethbridge), Corn (No.2 CE, cash, I/S Chatham), Oats (US No. 2 Heavy, CBOT nearby futures); Rye (No. 1 CW, cash, I/S Saskatoon); Canola (No. 1 Canada, cash, Track Vancouver); Flaxseed (No. 1 CW, cash, I/S Saskatoon); Soybeans (No. 2 CE, cash, I/S Chatham).
***** No.1 CWRS 13.5% protein and No.1 CWAD 13% protein averages Saskatchewan producer spot prices, not comparable with previous years.
f: forecast, by Agriculture and Agri-Food Canada

Source: Statistics Canada

CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

December 20, 2013

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (c)	Carry-out Stocks	Stocks-to-Use Ratio	Average Price (d)
	------- thousand ha -------		***t/ha***	***---------- thousand metric tonnes ----------***						***%***	***$//t***
Dry Peas											
2011-2012	986	974	2.57	2,502	12	3,049	2,096	658	295	11	310
2012-2013	1,509	1,475	2.26	3,341	16	3,652	2,651	827	174	5	340
2013-2014f	1,329	1,311	2.94	3,849	20	4,043	2,750	773	520	15	265-295
Lentils											
2011-2012	1,035	1,005	1.57	1,574	11	2,415	1,148	407	860	55	470
2012-2013	1,018	1,004	1.53	1,538	9	2,407	1,638	469	300	14	440
2013-2014f	968	954	1.97	1,881	8	2,189	1,650	244	295	16	380-410
Dry Beans											
2011-2012	84	78	2.07	162	55	247	224	18	5	2	1,000
2012-2013	125	125	2.26	281	79	365	297	38	30	9	835
2013-2014f	87	87	2.41	209	60	299	265	29	5	2	980-1010
Chickpeas											
2011-2012	48	47	1.83	86	9	116	37	69	11	10	830
2012-2013	81	80	2.01	161	9	181	69	58	54	43	690
2013-2014f	80	79	2.29	182	9	245	65	65	115	89	590-620
Mustard Seed											
2011-2012	133	128	1.01	130	1	247	115	48	83	51	685
2012-2013	136	135	0.88	119	1	203	120	47	36	22	790
2013-2014f	152	147	1.13	165	0	201	130	41	30	18	780-810
Canary Seed											
2011-2012	111	109	1.18	129	0	159	126	15	17	12	580
2012-2013	136	132	1.14	150	0	167	137	8	22	15	585
2013-2014f	81	81	1.47	119	0	141	125	11	5	4	515-545
Sunflower Seed											
2011-2012	14	14	1.43	20	33	89	33	49	7	9	710
2012-2013	41	40	2.19	87	27	121	44	60	17	16	635
2013-2014f	28	28	1.89	52	25	94	45	44	5	6	610-640
Total Pulses and Special Crops (c)											
2011-2012	2,411	2,355	1.95	4,602	121	6,321	3,779	1,264	1,278		
2012-2013	3,045	2,989	1.90	5,676	141	7,095	4,955	1,507	633		
2013-2014f	2,726	2,686	2.40	6,457	122	7,212	5,030	1,207	975		

(a) Crop year is August-July. Grains Include pulses (dry peas, lentils, dry beans, chick peas) and special crops (mustard seed, canary seed, sunflower seed).
(b) Imports and exports exclude products.
(c) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use + Loss in Handling. Total domestic use is calculated residually.
(d) Producer price, FOB plant, average over all types, grades and markets.
f: forecast, by Agriculture and Agri-Food Canada
Source: Statistics Canada and industry consultations.