

July 29, 2020

Canada: Outlook for Principal Field Crops

Market Analysis Group/Grains and Oilseeds Division
Sector Development and Analysis Directorate/Market and Industry Services Branch

This report is an update of Agriculture and Agri-Food Canada's (AAFC) June outlook report for the current 2019-20 crop year and the up-coming 2020-21 crop year.

For the 2019-20 crop year, which closes for most crops at the end of July, total carry-out stocks (inventories) are forecast at 13.8 million tonnes (Mt), about 10 percent lower than last year. This is largely due to the decrease in total supply and the increase in the total domestic use, specifically for the grains and oilseeds (G&O). Total exports of all field crops are expected to decrease by about 7 percent compared to last year as lower exports of wheat, corn and oilseeds more than outweigh higher exports of peas and lentils. In general, world grain prices are expected to continue to be pressured downward by abundant supplies of grains at the global level. The economic outlook for world and Canadian grain markets is expected to continue to be strongly tempered by the domestic and international uncertainty caused by COVID-19.

For 2020-21, based on Statistics Canada's June 29 preliminary estimates of principal field crop areas, the areas seeded to durum, barley, oats and lentils in 2020 are expected to increase, compared with 2019, but decrease for wheat ex-durum, canola, soybeans and dry peas. Seeding was complete in early June across all the provinces and growing conditions to-date have been near normal. The total area seeded to field crops in Canada is expected to be marginally lower than it was in 2019-20. However, average yields are forecast to increase so that total crop production increases by 2 percent to 95.2 Mt.

Total exports are forecast to increase largely due to higher exports of wheat ex-durum and corn. Total domestic use is expected to decrease significantly due to lower domestic use of all wheat and oilseeds. Total carry-out stocks are forecast to increase to 15 Mt, which is only slightly above the 10-year average. World grain prices will continue to be pressured by an abundant supply of grains at the global level but the impact on grain prices in Canada will continue to be mitigated by the low value of the Canadian dollar.

f: forecast by AAFC except for area, yield and production for 2019-2020 and area seeded for 2020-2021 which are STC" to the end of English input

Canada: Principal Field Crops Supply and Disposition

Crop Years: 2018-2019 to 2020-2021 (forecast)

Units (Thousand Tonnes, unless otherwise specified)

Section	Crop Year	Seeded Area (thousand ha)	Harvested Area (thousand ha)	Yield (t/ha)	Production	Imports	Total Supply	Exports	Total Domestic Use	Carry-out Stocks
Grains and Oilseeds	2018-2019	27,815	26,842	3.22	86,533	4,043	105,155	46,881	44,353	13,921
	2019-2020f	27,514	26,043	3.30	86,046	2,597	102,564	43,658	45,876	13,030
	2020-2021f	27,450	26,153	3.35	87,602	2,482	103,114	44,820	43,991	14,304
Pulse and Special Crops	2018-2019	3,643	3,566	1.88	6,697	292	8,716	6,101	1,312	1,303
	2019-2020f	3,880	3,775	1.95	7,363	311	8,977	6,897	1,340	740
	2020-2021f	3,948	3,878	1.95	7,574	277	8,591	6,265	1,326	1,000
Total Principal Field Crops	2018-2019	31,458	30,409	3.07	93,230	4,335	113,871	52,982	45,665	15,224
	2019-2020f	31,394	29,818	3.13	93,409	2,908	111,541	50,555	47,215	13,770
	2020-2021f	31,397	30,031	3.17	95,176	2,759	111,705	51,085	45,317	15,304

ha: Hectares

t/ha: Tonnes per hectare

N/A: Not available

f: forecasts by AAFC

Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)

Calculations compiled by Agriculture and Agri-Food Canada, Crops and Horticulture Division/Market Analysis Group

Wheat

Durum

For 2020-21, the area seeded to durum in Canada increased by 16% from 2019-20, according to Statistics Canada's (STC) seeded area survey. The seeded area was 9% higher than in STCs seeding intentions survey. Production is forecast to rise by 20% to 6 Mt as the increase in seeded area is compounded by higher trend yields and a return to normal abandonment rate. Supply is projected to rise by 2% as the higher production is mostly offset by lower carry-in stocks. Exports are expected to rise by 2% to 5.1 Mt due to the higher supply and strong world demand. Carry-out stocks are forecast to rise by 11% to 1 Mt.

World durum production is forecast to increase by 0.4 Mt from 2019-20 to 34 Mt, according to IGC. Supply is expected to fall by 1.7 Mt to 41.7 Mt because of lower carry-in stocks. Use is expected to fall by 0.5 Mt to 35.2 Mt because of lower feed use, while carry-out stocks fall by 1.2 Mt to 6.5 Mt, the lowest since 2007-08. US durum production is forecast by USDA to rise by 0.06 Mt to 1.52 Mt.

The average Canadian crop year producer price for durum is forecast to decrease from 2019-20 due to the higher Canadian production.

Wheat (excluding durum)

For 2020-21, Canadian area seeded to wheat decreased by 3% from 2019-20, as a 17% increase in the winter wheat area was more than offset by a 5% decrease for spring wheat area, based on the STC seeded area survey. The spring wheat seeded area was 5% lower than in STCs seeding intentions survey.

Seeded area by class of wheat, with 2019-20 area in brackets: winter wheat (hard red, soft red and soft white) 636 thousand hectares (kha) (545 kha); Canada Western Red Spring (CWRS), premium quality hard wheat, 6,185 kha (6,679 kha); Canada Prairie Spring (CPS) 463 kha (366 kha), Canada Northern Hard Red Spring (CNHR) 229 kha (210 kha); soft white spring (CWSWS) 119 kha (135 kha), other western spring wheat 95 kha (80 kha), eastern spring wheat, mainly hard red spring (CERS), 165 kha (129 kha).

Production is projected to rise by 1% to 27.6 Mt. The winter wheat production is projected to increase by 59% to 2.7 Mt due to higher seeded area and a return to a normal abandonment rate. Spring wheat production is expected to fall by 3% to 24.9 Mt.

Supply is forecast to increase by 3% because of higher production and carry-in stocks. Exports are expected to rise by 4%. Carry-out stocks are forecast to increase by 8% to 5.4 Mt.

World all wheat production is forecast to rise by 5 Mt from 2019-20 to 769 Mt, while supply increases by 22 Mt to 1,066 Mt due to higher carry-in stocks, according to USDA. Total use is expected to rise by 4 Mt to 752 Mt, as higher food use is partly offset by lower feed use. Carry-out stocks are forecast to rise by 18 Mt to 315 Mt. Excluding China, carry-out stocks are projected to rise by 7 Mt to 153 Mt.

US all wheat production is forecast to fall by 2.7 Mt from 2019-20 to 49.6 Mt, according to USDA. Imports are forecast to increase by 0.9 Mt. Supply of all wheat is projected to fall by 2.6 Mt to 81.9 Mt. Exports are forecast to fall by 0.4 Mt, while domestic use increases by 0.5 Mt. Carry-out stocks are forecast to decrease by 2.7 Mt to 25.7 Mt.

Average Canadian producer prices for wheat for the crop year are forecast to rise from 2019-20 because of the forecast for a weaker Canadian dollar for 2020-21 as compared to 2019-20.

Coarse Grains

Barley

For 2020-21, the area seeded to barley in Canada is marginally higher than the previous crop year and the highest

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since 2009-10, according to Statistics Canada's (STC) seeded area survey. A total of 3.04 million hectares (Mha) were seeded to barley versus the intended area of 2.94 Mha reported in May acreage report. Most of the increase is in Alberta and Saskatchewan. Barley area in Alberta is the highest since 2013. In Saskatchewan, barley area fell from last year but is still close to the record level since 2010. Manitoba barley area rose from last year and is on par with the five year average.

Using the five-year (2015-16 to 2019-20) averages for yield and area harvested, production is projected to decrease from last year but remain high. Combined with high carry-in stocks, supply is forecast to increase to a record level over the past decade. This is anticipated to encourage exports. Domestic use is expected to fall due to lower feed use. Carry-out stocks are expected to rise due to large supplies.

The average price of feed barley for 2020-21 is expected to drop from 2019-20 due to high domestic and world supplies. In addition, large corn supplies around the world will restrict feed grain prices.

According to the United States Department of Agriculture (USDA), world barley production for 2020-21 is expected to fall slightly but, due to higher carry-in stocks, total supply is expected to approach a record level, with more than 80% of the increase coming from the world major exporters. World feed use is expected to be virtually unchanged from the previous year, albeit larger supplies, as relatively cheaper corn is anticipated to replace some of the feed barley. The demand for food, seed, and industrial use is forecast to increase marginally. Carry-out stocks are expected to rise, with approximately 30% of the increase coming from the world major exporters.

Corn

For 2020-21, Canadian corn seeded area was estimated by STC at 1.44 Mha, down 4% from a year earlier and on par with the five-year average. Actual seeded area is below intentions in the primary production provinces, including Ontario, Quebec and Manitoba. Ontario corn area fell from last year but is above the five-year average and still in the high range. Quebec corn area slipped to the lowest level over the past two decades. In Manitoba, corn area dropped from last year and is slightly below the five-year average.

Using the five-year (2015-16 to 2019-20) averages for yield and area harvested, production is projected to increase from last year. Imports are expected to decrease due to expectations for larger carry-in stocks and higher production. The supply of corn is projected to increase on expectations for good production, which could be the third largest crop on record. Domestic use is projected to increase slightly, due to expectations for expanded industrial use. Given the increase in domestic supply and the steady increase in world demand, exports are expected to increase. Carry-out stocks are forecast to drop due to expanded use and exports.

The average price of corn in Canada is expected to fall in-line with lower corn prices in the US. The low value of the Canadian dollar will continue to support Canadian corn prices.

The USDA projected the US corn acres for 2020-21 at 92 million acres, down 5% from intentions but up from the level in prior year and the five-year average. Combined with forecasts for higher area harvested and improved yields, US corn production is pegged at 10% higher, and supplies at 9% higher than 2019-20. The main categories of demand are forecast to recover. Ending stocks are expected to increase by 10%. The US corn price for 2020-21 is projected at US\$3.35/bu, versus US\$3.60/bu for 2019-20.

At the world level, the USDA forecasts the 2020-21 world corn crop will be the largest ever, mainly due to the expanded output in the world major exporters. World consumption, including feed use and industrial use, is tentatively seen a fresh peak. Carry-out stocks are set to rise marginally as the increase in stocks for the world major exporters, led by the US, is anticipated to be largely offset by the decline in stocks in the major importers, led by China. World trade volume is forecast to expand to a record level, owing to ample supplies and lower prices.

Oats

For 2020-21, Canadian oat seeded area for 2020-21 was pegged by STC at 1.55 Mha, the highest since 2008-09. It is on par with intentions but higher than the 1.46 Mha seeded last year. Oat area in Alberta dropped from last



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year but it is still in the high range since 2011. Oat area in Saskatchewan and Manitoba increased from last year and are the highest since 2008.

Production is forecast to increase by only 3%, as higher area harvested is partly offset by lower yields. Due to higher production and higher carry-in stocks, supply is projected to increase by 7%, a new record since 2008-09. Domestic use is expected to drop by 5% due to a reduced outlook for food uptake. Exports are projected to remain strong despite expectations for higher supplies in the major exporting countries, as well as in the US. Carry-out stocks are forecast to rise to a seven-year high.

The CBOT oat futures price for 2020-21 is expected to be lower than 2019-20 due to ample supplies in Canada, the US and around the world.

Rye

For 2020-21, the area seeded to winter rye in Canada increased by 32% from 2019-20. Production is forecast to increase to 445 thousand tonnes (Kt), the highest in three decades. Supply is expected to increase to 506 Kt, a record level since 2006. Domestic use, exports and carry-out stocks are projected to rise on bumper supplies. The rye price is expected to decrease from 2019-20 due to higher supplies in Canada and around the world.

The USDA forecasts less rye will be shipped into the US in 2020-21, due to lower demand for feed. The world trade volume is expected to expand. Exports from the EU are projected to decline significantly, but increase sharply in the Black Sea region. The increase in 2020-21 world rye supply is forecast to exceed the increase in total use, which will result in a significant increase in carry-out stocks.

Oilseeds

Canola

For 2020-21, seeded area in Canada is estimated by Statistics Canada to have fallen marginally to 8.4 million hectares (Mha), as farmers shift into wheat and coarse grains away from oilseeds. By province, Saskatchewan accounts for 55 percent of the canola seeded in Canada, followed by Alberta and Manitoba with 28 percent and 16 percent, respectively, of the total canola area in Canada. Minor areas are seeded to canola in British Columbia, Ontario and Quebec.

The revisions to the seeded area estimates for canola versus those based on the seeding intentions survey are unusually small for the 2020-21 crop year. Normally, farmers plant more canola than indicated from Statistics Canada's seeding intentions survey, with the exceptions of 2007 when farmers scaled back due to drought, and in 2019 when trade issues with China flared up. Over the past 15 years, farmers planted on average an extra 0.26 Mha to canola than indicated in the seeding intentions survey; for 2020-21 the increase is 67,000 ha.

AAFC forecasts a harvested area of 8.3 mln ha for canola, assuming a normal rate of crop abandonment. Yields are projected at 2.27 tonnes per hectare (t/ha), up marginally from 2019-20, based on 5 year average yields. Despite a slightly later start than normal to field operations due to a cold spring, seeding of canola wrapped up in late May or early June for most regions of western Canada. Moisture conditions are adequate to drier than-normal across most of the oilseed growing region and temperatures were significantly warmer than normal for June across western Canada. Canola production is forecast to rise slightly to 18.9 Mt while total supplies fall to 21.5 Mt on a sharp decline in carry-in stocks and expected slightly lower imports.

Exports are forecast to decline marginally to 9.5 Mt, partly as a function of tighter domestic supplies but also due to strong domestic crush and an expected weakening of demand, assuming European rapeseed production returns to normal following last year's drought. Domestic crush is forecast to fall to 9.6 Mt, on competition from large world soybean oil and palm oil supplies. Carry-out stocks are forecast to tighten slightly to 2.3 Mt for a stocks-to-use ratio of 12% supporting a modest rise in canola prices to \$480-520/t.

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Flaxseed

For 2020-21, farmers seeded 0.37 Mha to flaxseed, down slightly from last year despite higher prices. About 84% of Canada's flaxseed was seeded in Saskatchewan, with Alberta and Manitoba accounting for the rest of the crop area. Production is forecast to rise by 5% to 0.51 Mt, assuming a normal abandonment and five-year average historical yields. Supplies are forecast to increase by 6% to 0.59 Mt on higher output and carry-in stocks.

Exports are forecast up by 29% from 2019-20, to 0.45 Mt, on steady to stronger world consumption. Total domestic use is forecast to fall sharply to 0.04 Mt, on lower feed, waste and dockage. Carry-out stocks are forecast at 0.10 Mt while prices range from \$490-530/t for 2020-21.

Soybeans

For 2019-20, Canadian exports are forecast to decline to 4.3Mt, versus 5.6 Mt last year, on tighter domestic supplies and competition from large US and South American supplies. Canadian soybean crush is estimated down by 13%, to 1.8 Mt. Carry-out stocks are estimated at 0.3 Mt, while soybean prices are forecast to rise slightly to \$410-430/t versus \$406/t for 2018-19.

The factors to watch are: (1) Canadian weather forecasts, (2) North American crop conditions, (3) US soybean export sales, (4) state of US-China trade negotiations.

For 2020-21, Statistics Canada estimates Canadian soybean area to have declined by 0.2 Mha, to 2.1 Mha, based on producer surveys. 56% of Canada's soybean area is in the province of Ontario, followed by Manitoba, Quebec and Saskatchewan, which account for 23%, 17% and 2.5% of domestic soybean area respectively.

Under the assumptions of normal abandonment and normal yields, production is forecast at 5.9 Mt, vs 6.0 Mt in 2019-20 and 7.4 Mt in 2018-19. Total supply is forecast to decrease to 6.7 Mt, as the sharp drop in carry-in stocks compounds the decline in production and imports. Exports are forecast at 4.1 Mt and will head to a variety of countries. Domestic processing is forecast up slightly at 1.9 Mt as crushers swing back to a normal processing pace for soybeans.

Carry-out stocks are forecast to decrease slightly too 0.27 Mt versus 0.30 Mt for 2019-20 and 0.70 Mt in 2018-19. Soybean prices are forecast to decline to \$385-425/t under pressure from lower US prices, with losses muted by the devalued Canadian dollar versus its American counterpart.

For 2020-21, US soybean planted area is estimated up 10 percent from last year at 83.8 million acres. Compared with last year, planted area is unchanged or up in 24 of the 29 estimating states. Based on USDA's planted area and yield estimates, US soybean production is estimated at 4.1 billion bushels (Bbu) for the upcoming crop year versus 3.6 Bbu for 2019-20 and 4.4 Bbu for 2018-19. The USDA estimates total soybean supplies of 4.8 Bbu based on revised beginning stocks and production estimates, supporting a 24% rise in exports, a 0.2% rise in domestic crush and ending stocks of 425 Mbu. The USDA estimates a farm-gate price for soybeans of US\$8.50/bu, down slightly from US\$8.55/bu for 2019-2020.

Over the past 40 years, the Canadian cropping sector has been transformed as the industry diversified into growing more broad-leafed crops such as canola and soybeans, away from narrow-leafed, grass-based cereals such as wheat and barley. This expansion into broadleaved crops was driven by growing world demand for protein and vegetable oils combined with the introduction of crops such as canola into western Canada and the expansion of soybean area in eastern Canada.

Some of the major factors supporting this shift included the repeal of the CROW Rate transportation subsidy under the Western Canadian Transportation Act 25 years ago, which increased rail freight rates for grains. This shift was reinforced in the last 1990s and early 2000s by the release of hardier and higher-yielding canola and soybeans cultivators combined with the expansion of pea and lentil area across western Canada.

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Pulses and Special Crops

Dry Peas

For 2020-21, dry pea seeded area in Canada decreased to 1.7 million hectares (Mha), down marginally from 2019-20 due to good returns relative to other crops and continued recognition of the benefits of dry peas as part of crop rotation plan. Saskatchewan accounts for 55% of the dry pea area, Alberta for 39%, with the remainder seeded across Canada. Production is forecast to rise marginally to 4.25 Mt due to expectations of higher yields. However, supply is forecast to fall marginally to 4.6 Mt due to lower carry-in stocks combined with an increase in production. Exports are forecast to be lower at 3.4 Mt, with China, Bangladesh and the US continuing to be Canada's top markets. Carry-out stocks are forecast to rise and be higher than the five and ten year averages. The average price is expected to be unchanged from 2019-20, due primarily to expectations for increased world supply.

In the US, area seeded to dry peas for 2020-21 is forecast by the USDA to fall from 2019-20 to 0.95 million acres.



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This is largely due to an expected fall in area in North Dakota and Montana. Assuming normal yields and abandonment, US dry pea production is forecast by AAFC to fall by nearly 25% to below 0.8 Mt. The US has been successful in exporting small amounts of dry peas to common Canadian export markets in Yemen, China and the Philippines, and it is expected the US will maintain its market share in 2020-21.

Lentils

For 2020-21, Canadian lentil seeded area rose by 12% to 1.7 Mha, due to good forecasted returns compared to other crops. By province, Saskatchewan accounts for 90% of the lentil area, with the remainder seeded in Alberta and Manitoba. Production is forecast to increase to 2.48 Mt, with supply lower due to smaller carry-in stocks. Exports are forecast to be lower at 2.1 Mt. Carry-out stocks are forecast to rise to nearly 0.2 Mt. The average price for all grades and types is forecast to rise from 2019-20, with higher prices from large green and red types. There is an expectation that import demand in the Indian subcontinent will continue to be similar to higher in 2020-21.

In the US, the area seeded to lentils for 2020-21 is forecast by the USDA at 0.49 million acres, up marginally from 2019-20 due to higher area seeded in Montana. Assuming normal yields and abandonment, 2020-21 US lentil production is forecast by AAFC at 255 thousand tonnes (Kt), up marginally from the previous year. The main US export markets for lentils are expected to continue to be Canada, the EU, India and Mexico.

Dry Beans

For 2020-21, the area seeded in Canada decreased marginally from 2019-20 at 156 thousand hectares (Kha). By province, Ontario accounted for 37% of the dry bean area, Manitoba 43%, Alberta 14%, with the remainder seeded in Saskatchewan, Quebec and the Maritimes. Production is forecast to rise to nearly 0.35 Mt, and supply is expected to increase, due to the large production. Exports are forecast to be lower. Carry-out stocks are expected to rise. The average Canadian dry bean price is forecast to fall due to larger expected supply in North America.

In the US, area seeded to dry beans is forecast by the USDA to rise by 23% to 1.59 million acres due to a rise in area seeded in North Dakota. Assuming normal yields and abandonment, 2020-21 US total dry bean production (excluding chickpeas) is therefore forecast by AAFC to rise to 1.3 Mt, up 40% from 2019-20.

Chickpeas

For 2020-21, the area seeded fell by 24% from 2019-20 due to the lower farmgate prices received in the previous year. Saskatchewan is expected to account for the majority of the chickpea area, with the remainder in Alberta. Production is forecast by AAFC at 200 Kt, down 21% from the previous year, due to lower seeded area despite higher expected yields. Supply is forecast to rise from 2019-20. Exports are forecast to rise and carry-out stocks are forecast to fall. The average price is forecast to fall marginally due to a larger world supply, with the expectation of an average grade distribution.

US chickpea area for 2020-21 is forecast by the USDA to fall to 0.3 million acres, down 33% from 2019-20. This is largely due to an expected fall in area in Idaho, North Dakota and Washington. Assuming normal yields and abandonment, US chickpea production is forecast by AAFC at 200 Kt, a 30% decrease from the previous year. The US is expected to continue to export to the EU, Canada and Pakistan.

Mustard Seed

For 2020-21, the area seeded fell sharply to 104 Kha, despite mustard seed returns similar to the previous year. By province, Saskatchewan accounts for 67% of the mustard seed area, with 31% seeded in Alberta and the remainder seeded in Manitoba. Due to the lower area and despite expectations for higher average yields, production is forecast to decrease sharply to 90 Kt. Supply is expected to fall but not as sharply as production, however, due to large carry-in stocks. Exports are expected to be unchanged at 115 Kt and carry-out stocks are forecast to fall. The average price is forecast to be lower than in 2019-20.



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Canary Seed

For 2020-21, the area seeded rose by 5%, to 109 Kha, due to solid returns relative to other crops and lower carry-in stocks. Production is expected to increase by 5% to 155 Kt. Supply is forecast to decrease. Exports are expected to be limited by supply and decline, while carry-out stocks are expected to remain tight. The average price is forecast to be lower than 2019-20.

Sunflower Seed

For 2020-21, the area seeded was lower at 28 Kha, due to competitive returns compared to other crops. Production is forecast to fall to 59 Kt and supply is expected to be marginally lower at 183 Kt, compared to 2019-20. Exports are expected to decrease and carry-out stocks are forecast to be unchanged. The average price is forecast to be lower than 2019-20, due to expectations for higher North American sunflower seed supply. Lower oil type prices are anticipated along with decreased confectionery prices in the US and Canada.

US sunflower seed area for 2020-21 is forecast by the USDA to rise to 1.54 million acres, up 14% from 2019-20, largely due to higher area in North and South Dakota. The area seeded to oil type varieties is expected to increase to nearly 1.4 million acres and the area seeded to confectionery type varieties is forecast to rise to nearly 0.2 million acres. Assuming normal yields and abandonment, 2020-21 total US sunflower seed production is forecast by AAFC to increase by 20% to nearly 1.1 Mt.



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Units (Thousand Tonnes, unless otherwise specified)

Commodity	Crop Year [a]	Seeded Area (thousand ha)	Harvested Area (thousand ha)	Yield (t/ha)	Production	Imports [b]	Total Supply	Exports [c]	Food and Industrial Use[d]	Feed, Waste, and Dockage	Total Domestic Use[e]	Carry-out Stocks	Average Price[g] (\$/t)
Durum	2018-2019	2,499	2,452	2.34	5,731	24	7,231	4,526	204	518	913	1,792	235
	2019-2020f	1,980	1,902	2.62	4,977	100	6,869	5,000	210	538	969	900	265-275
	2020-2021f	2,302	2,256	2.66	6,000	100	7,000	5,100	210	468	900	1,000	250-280
Wheat (excluding durum)	2018-2019	7,570	7,425	3.56	26,456	95	31,806	19,750	3,294	3,681	7,809	4,247	245
	2019-2020f	8,101	7,712	3.55	27,371	170	31,788	18,200	3,360	4,433	8,588	5,000	220-230
	2020-2021f	7,886	7,643	3.61	27,600	120	32,720	19,000	3,390	3,800	8,020	5,700	215-245
All Wheat	2018-2019	10,069	9,877	3.26	32,187	119	39,037	24,276	3,498	4,199	8,722	6,039	
	2019-2020f	10,081	9,614	3.36	32,348	270	38,657	23,200	3,570	4,970	9,557	5,900	
	2020-2021f	10,188	9,899	3.39	33,600	220	39,720	24,100	3,600	4,268	8,920	6,700	
Barley	2018-2019	2,628	2,395	3.50	8,380	43	9,666	3,057	114	5,374	5,746	863	260
	2019-2020f	2,996	2,728	3.81	10,383	50	11,296	2,800	316	6,319	6,896	1,600	220-240
	2020-2021f	3,036	2,697	3.68	9,933	40	11,573	2,900	316	6,217	6,773	1,900	195-225
Corn	2018-2019	1,468	1,431	9.71	13,885	2,582	18,884	1,617	5,786	9,482	15,284	1,983	194
	2019-2020f	1,488	1,445	9.26	13,375	1,700	17,058	650	5,300	9,092	14,408	2,000	185-205
	2020-2021f	1,440	1,403	9.80	13,750	1,600	17,350	1,000	5,400	9,034	14,450	1,900	170-200
Oats	2018-2019	1,235	1,005	3.42	3,436	10	4,225	2,475	182	1,049	1,353	397	254
	2019-2020f	1,459	1,171	3.62	4,237	10	4,644	2,600	270	1,044	1,444	600	260-280
	2020-2021f	1,554	1,229	3.55	4,360	10	4,970	2,600	190	1,063	1,370	1,000	220-250
Rye	2018-2019	136	79	2.99	236	2	362	146	19	133	167	49	236
	2019-2020f	175	103	3.25	333	2	384	158	15	130	166	60	200-220
	2020-2021f	237	141	3.16	445	2	507	170	39	163	217	120	160-190
Mixed Grains	2018-2019	144	56	2.84	158	0	158	0	0	158	158	0	-
	2019-2020f	145	56	3.44	192	0	192	0	0	192	192	0	-
	2020-2021f	166	68	2.75	187	0	187	0	0	187	187	0	-
Total Coarse Grains	2018-2019	5,610	4,965	5.26	26,096	2,638	33,296	7,295	6,102	16,197	22,709	3,292	
	2019-2020f	6,263	5,502	5.18	28,520	1,762	33,574	6,208	5,901	16,777	23,106	4,260	
	2020-2021f	6,433	5,538	5.18	28,675	1,652	34,587	6,670	5,945	16,664	22,997	4,920	
Canola	2018-2019	9,232	9,120	2.23	20,343	146	22,995	9,202	9,295	605	9,962	3,831	497
	2019-2020f	8,481	8,319	2.24	18,649	150	22,630	9,600	9,850	629	10,530	2,500	475-495
	2020-2021f	8,409	8,323	2.27	18,875	100	21,475	9,500	9,250	325	9,626	2,349	480-520
Flaxseed	2018-2019	346	341	1.44	491	9	627	468	0	82	99	60	496
	2019-2020f	378	338	1.43	484	15	559	350	0	123	138	70	510-530
	2020-2021f	368	344	1.49	512	10	592	450	0	52	72	70	490-530
Soybeans	2018-2019	2,558	2,540	2.92	7,417	1,131	9,200	5,640	2,058	565	2,861	699	406
	2019-2020f	2,312	2,270	2.66	6,045	400	7,144	4,300	1,800	494	2,544	300	410-430
	2020-2021f	2,052	2,049	2.90	5,940	500	6,740	4,100	1,900	275	2,375	265	385-425
Total Oilseeds	2018-2019	12,136	12,000	2.35	28,250	1,286	32,821	15,310	11,354	1,252	12,922	4,590	
	2019-2020f	11,171	10,928	2.30	25,178	565	30,333	14,250	11,650	1,246	13,212	2,870	
	2020-2021f	10,829	10,716	2.36	25,327	610	28,807	14,050	11,150	653	12,074	2,684	
Total Grains and Oilseeds	2018-2019	27,815	26,842	3.22	86,533	4,043	105,155	46,881	20,953	21,647	44,353	13,921	
	2019-2020f	27,514	26,043	3.30	86,046	2,597	102,564	43,658	21,121	22,994	45,876	13,030	
	2020-2021f	27,450	26,153	3.35	87,602	2,482	103,114	44,820	20,695	21,585	43,991	14,304	

Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
Calculations compiled by Agriculture and Agri-Food Canada, Crops and Horticulture Division/Market Analysis Group



July 29, 2020

Canada: Grains and Oilseeds Supply and Disposition

Crop Years: 2018-2019 to 2020-2021 (forecast)

Units (Thousand Tonnes, unless otherwise specified)

[a] Crop year is August-July, except corn and soybeans, for which the 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 food and industrial use for flaxseed due to data confidentiality.

[e] Total Domestic Use = Food and Industrial Use + Feed Waste and Dockage + Seed Use + Loss in Handling

[g] Crop year average prices: Wheat (No.1 CWRS, 13.5% protein) and Durum (No.1 CWAD, 13% protein), both are average Saskatchewan producer spot prices and are not comparable to CWB pool returns for previous years: 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).

ha: Hectares

t/ha: Tonnes per hectare

\$/t: Dollars per tonne

N/A: Not available

f: forecasts by AAFC

July 29, 2020

Canada: Pulses and Special Crops Supply and Disposition

Crop Years: 2018-2019 to 2020-2021 (forecast)
Units (Thousand Tonnes, unless otherwise specified)

Commodity	Crop Year [a]	Seeded Area (thousand ha)	Harvested Area (thousand ha)	Yield (t/ha)	Production	Imports [b]	Total Supply	Exports [b]	Total Domestic Use[c]	Carry-out Stocks	Stocks-to-Use Ratio %	Average Price[d] (\$/t)
Dry Peas	2018-2019	1,463	1,431	2.50	3,581	62	4,290	3,270	708	312	8	270
	2019-2020f	1,753	1,711	2.48	4,237	70	4,619	3,700	669	250	6	260-270
	2020-2021f	1,722	1,690	2.51	4,250	60	4,560	3,400	710	450	11	250-280
Lentils	2018-2019	1,525	1,499	1.40	2,092	51	3,016	2,033	352	631	26	390
	2019-2020f	1,528	1,488	1.46	2,166	85	2,882	2,400	382	100	4	465-485
	2020-2021f	1,712	1,685	1.47	2,475	50	2,625	2,100	350	175	7	500-530
Dry Beans	2018-2019	143	137	2.48	341	97	463	348	35	80	21	815
	2019-2020f	147	142	2.51	356	78	514	365	74	75	17	975-995
	2020-2021f	156	151	2.28	345	85	505	345	40	120	31	790-820
Chickpeas	2018-2019	179	176	1.77	311	51	376	147	129	100	36	480
	2019-2020f	159	155	1.70	263	45	408	125	123	160	65	470-490
	2020-2021f	121	118	1.69	200	50	410	125	135	150	58	455-485
Mustard Seed	2018-2019	204	197	0.88	174	8	235	121	41	73	45	690
	2019-2020f	161	155	0.87	135	7	215	115	45	55	34	700-720
	2020-2021f	102	100	0.90	90	8	153	115	33	5	3	680-710
Canary Seed	2018-2019	100	100	1.46	146	0	162	156	-5	11	7	505
	2019-2020f	104	99	1.49	148	0	158	158	0	N/A	N/A	620-640
	2020-2021f	108	107	1.45	155	0	155	150	5	N/A	N/A	540-570
Sunflower Seed	2018-2019	28	25	2.08	52	24	174	26	52	96	123	585
	2019-2020f	28	26	2.25	59	26	181	34	47	100	123	595-615
	2020-2021f	26	27	2.19	59	24	183	30	53	100	120	575-605
Total Pulses and Special Crops	2018-2019	3,643	3,566	1.88	6,697	292	8,716	6,101	1,312	1,303	18	
	2019-2020f	3,880	3,775	1.95	7,363	311	8,977	6,897	1,340	740	9	
	2020-2021f	3,948	3,878	1.95	7,574	277	8,591	6,265	1,326	1,000	13	

[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] Exclude products.

[c] Total Domestic Use = Food and Industrial Use + Feed Waste and Dockage + Seed Use + Loss in Handling. Total domestic use is calculated residually.

[d] Producer price, Free-on-board (FOB) plant, average over all types, grades and markets.

ha: Hectares

t/ha: Tonnes per hectare

\$/t: Dollars per tonne

N/A: Not available

f: forecasts by AAFC