

CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS

October 16, 2013

Market Analysis Group/Grains and Oilseeds Division

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The production of field crops in Canada for 2013-14 is estimated to be significantly higher than last year due to higher average yields. This is largely attributable to extremely good 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 is expected to be 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. The outlook incorporates information from Statistics Canada's (STC) estimates of Principal Field Crop Production, released on October 4, 2013 which were based on a survey of producers in September.

The production of Grains and Oilseeds (G&O) in Canada is estimated at 80.8 million tonnes (Mt), an increase of 14% from 2012 due to higher average yields, which reached a record for many crops. Supply is expected to rise by about 10% despite extremely low carry-in stocks. Exports and domestic use are forecast to increase slightly 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 above-normal 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. Canadian prices will receive some offsetting support from the weaker Canadian dollar.

The production of Pulses and Special Crops (P&SC) in Canada is estimated to increase by 8% to 6.2 Mt as significantly higher yields more-than offset lower area harvested. However, supply is expected to decrease slightly due to extremely low carry-in stocks. Exports and domestic use are also forecast to fall. Carry-out stocks are expected to increase, especially for dry peas. Prices are expected to fall 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 ----	---- thousand hectares ----	tha	----- thousand metric tonnes -----					
Total Grains And Oilseeds									
2011-2012	23,812	22,916	2.94	67,482	1,337	82,401	34,280	37,719	10,402
2012-2013p	26,459	25,693	2.76	71,040	1,074	82,516	36,779	36,915	8,821
2013-2014f	26,652	25,333	3.19	80,834	982	90,638	37,510	38,363	14,765
Total Pulse And Special Crops									
2011-2012	2,411	2,355	1.95	4,602	121	6,321	3,779	1,264	1,278
2012-2013p	3,045	2,989	1.90	5,676	141	7,095	4,955	1,507	633
2013-2014f	2,749	2,658	2.31	6,152	123	6,908	4,785	1,153	970
All Principal Field Crops									
2011-2012	26,223	25,271	2.85	72,083	1,457	88,722	38,059	38,983	11,680
2012-2013p	29,504	28,682	2.67	76,716	1,215	89,611	41,734	38,423	9,454
2013-2014f	29,400	27,991	3.11	86,987	1,105	97,546	42,295	39,516	15,735

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

WHEAT

DURUM

For **2013-14**, production is estimated to increase by 21% from 2012-13 to 5.58 Mt, due to a 6% increase in seeded area and 15% higher yields. The yields are a new record and the production is the highest since 2000-01. The Canadian durum harvest is about 97% complete. The average quality of the durum crop in terms of grades and the average protein levels are lower than last year and lower than normal.

Supply is estimated to increase by 10% to 6.76 Mt as lower carry-in stocks partly offset the increase in production. Exports are forecast to rise by 6% to 4.5 Mt due to strong world demand and Canada's higher share in world durum production. Carry-out stocks are forecast to increase by 22% to 1.4 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 is estimated by the International Grains Council (IGC) to increase by 1.2 Mt to 36.4 Mt, mostly because of higher production in Canada and Morocco. Supply is estimated to increase by 0.5 Mt to 43 Mt, as higher production is partly offset by lower carry-in stocks. Use is forecast to increase by 1 Mt to 36.9 Mt and carry-out stocks are forecast to decrease by 0.6 Mt to 6.1 Mt. US durum production is estimated to fall by 26% to 1.67 Mt due to a drop in seeded area.

WHEAT (excluding durum)

For **2013-14**, production is estimated to increase by 22% from 2012-13 to 27.6 Mt. The production estimate includes a forecast of 0.144 Mt for the Maritimes and B.C. which were not surveyed by Statistics Canada. A 12% increase in the seeded area and a 12% increase in yields account for the increase production. The yields are a new record and the production is the highest since 1990-91. Winter wheat production is estimated to fall by 3% to 3.63 Mt because a larger portion of the seeded area did not survive the winter due to dry conditions in western Canada. Spring wheat production is estimated to increase by 27% to 23.96 Mt. In eastern Canada, wheat production is estimated to increase by 25% to 2.61 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 is estimated to increase by 22% to 24.98 Mt, with a 28% increase for spring wheat to 23.65 Mt and a 32% decrease for winter wheat (hard red) to 1.33 Mt. Based on Statistics

Canada's June seeded area estimates for each class of wheat and its September yield estimates for spring wheat, AAFC is forecasting a 20% increase for hard red spring wheat production to 19.56 Mt, a 100% increase for soft white spring wheat to 1.92 Mt, a 60% increase for prairie spring wheat to 1.54 Mt, a 102% increase for extra strong wheat to 0.23 Mt, and a 125% increase for other spring wheat to 0.4 Mt. Western Canada accounts for 91% of the total wheat production and eastern Canada for 9%. The Canadian wheat harvest is about 95% complete. The average quality of the wheat crop in terms of grades is lower than last year, but near normal. Average protein levels are lower than last year and lower than normal.

Supply is estimated to increase by 17% to 31.5 Mt as the increase in production is partly offset by lower carry-in stocks. Domestic use is expected to rise by 7% with increases in all markets, food, feed and industrial. Exports are forecast to increase 5% due to growing world demand, especially in the food market. Carry-out stocks are forecast to increase by 79% to 7 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.

World all wheat (including durum) production is estimated by USDA to increase by 54 Mt to 709 Mt due mostly to a recovery in production for Russia, Ukraine and Kazakhstan from the drought reduced 2012-13 crop, and significant increases in production for the EU and Canada. The supply is forecast to rise by 28 Mt to 883 Mt, as the increase in production is partly offset by lower carry-in stocks. Total use is forecast to increase by 26 Mt to 706 Mt. Carry-out stocks are forecast to rise by 2 Mt to 176 Mt.

US all wheat production is estimated to decrease by 3.9 Mt to 57.9 Mt. Production of soft red winter wheat is estimated to increase by 35% to 15.37 Mt, while production of hard red winter wheat decreases by 26% to 20.25 Mt due to drought, the production of hard red spring decreases by 3% to 13.3 Mt and white wheat production increases 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 4.3 Mt to 15.3 Mt.

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COARSE GRAINS

BARLEY

For 2013-14, production is estimated to increase 18% or 9.4 Mt due to record yields but record low carry-in stocks will limit total supply to an increase of 11%. Total domestic use is forecast to increase by 3% due mainly to a slight increase in livestock feeding and trend industrial use. Exports are forecast to increase by 7% due to a recovery in world feed and malt barley production and a comparatively good Canadian domestic price. Carryout stocks are forecast to increase sharply from the previous crop year's record low but remain below the previous five-year average. Domestic feed barley prices are forecast to decrease from 2012-13 due to the higher production and overall decline in North American and world coarse grain prices.

Alberta, Manitoba and Saskatchewan are expecting record barley yields for 2013. The Lethbridge barley price has decreased from setting records highs in June 2013, to date declining over 40%. Due to expected above average yields on the Canadian Prairies, barley basis levels have widened out and are running below the previous five-year average. Much of the decline is related to seasonality and strong harvest pressure, the Lethbridge price will bounce back but how much will depend on the final production totals for Canadian barley and to some extent the size of the US corn crop.

Generally, most of the world's barley exporting countries had average to above average crops this year, which translates into a 10% production increase year-to-year. Higher forecasted world feed and industrial use will limit the rebuilding of stocks and 2013-14 carryout is forecast grow by only 2% above the previous three-year average. The world malt barley price premium has returned to 2012-13 levels after posting strong gains at the end of last crop year.

CORN

For 2013-14, production is estimated to be unchanged from 2012-13 due to the larger area seeded but with only a slightly below average yield. Imports are forecast to decrease 12% due to the slightly higher domestic supply and would be well below the previous five and 10-year averages. Higher carry-in stocks will cause total supply to increase only slightly or 1%. Total domestic use is forecast to increase by 2% as overall feed and industrial demand remains at trend levels. Exports are forecast to decrease significantly from near record highs due to a projected recovery in US corn production and lower world prices. Carryout stocks are forecast to increase substantially to a new

record level of 2.5 Mt. The Chatham in-store elevator price is forecast to decrease with the potentially large North American and world corn crop on the way in 2013.

The September Statistics Canada Field Crop report is estimating slightly below the five-year average for Canadian corn yields. The less than ideal weather throughout the growing season in Eastern Canada and Manitoba lowered the overall yield after a relatively good start last spring. Even with record seeded and harvested area, the expected yield in Manitoba is lower than its previous five-average. As such, Manitoba will fail to surpass its record production level of 2012.

The USDA had released their September Grain Stocks report and increased expected 2012-13 US corn stocks. Contributing to the higher ending stocks estimate was 2012-13's much lower level of US corn exports and lower feed and industrial use for ethanol. For example, large cattle feedlots limited or delayed re-populating and ethanol plants slowed production or extended maintenance periods, all of which contributed to lower corn use. US corn conditions in September were favorable with the CME corn futures prices steadily declining through the month. Early harvest reports, in the southern states, are indicating that yields are better-than expected but harvest progress is behind the previous five-year average, especially in the heart of the corn belt.

OATS

For 2013-14, production is estimated to increase 16% to 3.3 Mt due to the increase in area seeded and an estimated record yield. However, due to record low carry-in stocks, the higher production will only allow total supply to increase by 4% and remain well-below the previous five-year average. Total domestic use is forecast to decrease 6% mainly due to a drop in feed use because of greater barley and North American corn supplies. Exports are forecast to increase only 3% due to the tight supply, relatively flat US milling demand and a USDA forecast for higher US oat production. Carryout stocks are forecast to increase by 27% to 0.7 Mt. and remain at tight levels.

The September Statistics Canada Field Crop report is estimating an all-time record Canadian oat yield. As with barley, the prairies are leading the way as all three provinces Alberta, Manitoba and Saskatchewan are expecting record oat yields for 2013. In a recent report by AAFC's International Markets Bureau (IMB),

the trend growth for milling oat demand should continue and will be supported by the US snack bar market. Canadian oats are a key ingredient in this market and should contribute to trend growth for oat exports. For the 10-year period of 2007-17, AAFC-IMB is forecasting total growth in the US snack bar market of over 50%.

In late September, the USDA released their Small Grains Summary for 2013, for US oats it estimated only a small increase in production over 2012-13. Although seeded area was higher for 2013 vs. 2012 there was a higher rate of abandonment and this created the decline in projected oat production to 66 million bushels. The September WASDE report had projected 2013 US oat production at 75 million bushels, this shortfall has the potential to increase Canadian exports to meet the US need for food and industrial oats.

RYE

For 2013-14, seeded area is estimated to decrease by 24% from 2012-13 but harvested area is estimated to decrease by 43%. Production is estimate to decrease by 42% due to the smaller harvested area and this is despite an estimated record average yield. Despite higher carry-in stocks, total supply is forecast to decrease by 33% due to the sharp drop in production and fall to the second lowest level on record. Total domestic usage is forecast to decrease by 35% and fall to record lows as the smaller total supply will limit feed and industrial use. Exports are forecast to decrease by 31% due to the very tight supply after three years of steady export volumes. Carryout is

forecast to decrease to record low levels, as stocks will be drawn down.

Average yields for rye in Canada are estimated at a record level. As with barley and oats, the prairies are leading the way. Alberta and Manitoba are expecting near record yields and Saskatchewan is expecting a new record rye yield for 2013. The 2013-14 rye price is forecasted to increase in relation to last crop year as the carryout will be at record lows. Fall seeding conditions on the prairies improved in September due to better moisture conditions improved but there will be a limited ability to rebuild supplies in the 2014-15 crop year.

The USDA Small Grains Summary for 2013 estimated US rye production to be 10% higher than in 2012-13, mainly due to an increase in seeded area. Georgia and Oklahoma remain the single largest rye producing states but the majority of rye production is spread throughout the US. Including 2013, the three-year average rate of US rye-for-grain production is only 19.1% this compares to Canada, which has a previous three-year average of 79.4%. Although Canada will continue to be the main source of rye for the US, in 2013-14 the US will have to look towards the EU and Russia to meet its entire import needs.

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OILSEEDS

CANOLA

For 2013-14, production is estimated to set a new record of about 16.0 Mt, up 16% from 2012-13, as the lower harvested area is more-than offset by a 31% rise in yields. The estimate includes production of 0.14 Mt from the Maritimes and British Columbia which are not included in STC's September report. In Saskatchewan, canola production is expected to increase by 24%, to a record 8.1 Mt, with average yields estimated at a record 1.97 t/ha. This higher yield more-than offsets a lower harvested area, down 11.4%, of about 4.1 mln ha. In Manitoba, canola production is estimated at 2.6 Mt, while in the province of Alberta canola production is anticipated to increase to 5.2 Mt. Carry-in stocks for 2013-14 were unchanged at 0.61 Mt, with 0.41 Mt in commercial positions and 0.20 Mt on farm. Imports of canola are forecast to be similar to last year. As a result, the total supply of canola is forecast to rise to 16.8 Mt, slightly below the record 16.9 Mt set in 2011-12. Exports are forecast to rise by 10% on strong world vegetable oil and protein meal demand. Price sensitive countries are expected to resume buying Canadian canola with the anticipated 20% drop in prices. Domestic crush is forecast to rise to a record 7.2 Mt on increased supplies and under-utilized capacity following the recent expansion of the processing sector. Carry-out stocks are forecast to more than double, but will not become burdensome, allowing the industry to maintain an active export and processing pace. Average Canadian canola prices are forecast to fall by \$130/t due to lower prices for US soybeans, soyoil and soymeal following a sharp rebound in production.

FLAXSEED (excluding solin)

For 2013-14, production is estimated to rise by 36% on an increase in seeded area and yields. Production is the highest following the 2009-10 detection of GM material in flaxseed exports. Saskatchewan is the dominant flaxseed producing province, accounting for about 85% of the area. The total supply of flaxseed is forecast to rise by 16%, as the significant rise in production more than offsets the drop in 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 10% on increased supplies and lower world prices for vegetable oils, protein meals and oilseeds.

SOYBEANS

For 2013-14, production is estimated to fall slightly from 2012-13, to 4.9 Mt. This estimate includes an AAFC production forecast for the Maritime region of Canada not included in the STC October report. In Ontario, soybean production is set to decrease by 13%, to 3.0 Mt, on a 10% drop in yields. Meanwhile, Quebec farmers are expecting production to decrease by 1% on lower yields. Manitoba is expected to harvest a record crop. Harvest has started but is being delayed by sporadic rain falls and uneven maturing of the crop in places. Supply is forecast to decrease by 5% due to a slight drop in carry-in stocks and imports. Domestic processing is forecast to increase slightly on an increase in domestic supply. Exports are forecast to decline by 8%, but soybeans remain the 4th largest crop exported from Canada, and are expected to account for 8% of total shipments of grains and oilseeds out of the country. Carry-out stocks are forecast to increase slightly from 2012-13. The average price of soybeans at Chatham is forecast to fall to \$500-540/t under pressure from lower US soybean prices.

For 2013-14, world production of soybeans is forecast at a record 282 Mt, up 5% from last year, with record production expected for South America. Production in the US is lower than expected due to late-season dryness which has affected the developmentally delayed crop. World supplies of soybeans are forecast at a record 343 Mt due to support from higher carry-in stocks. World crush is forecast at a record 238 Mt, up 10 Mt from last year while world trade is expected to rise by 10 Mt, to 107 Mt. Carry-out stocks are forecast at a record 72 Mt for a stocks-to-use ratio of 26% vs 24% for 2012-13. The sustained rally in world soybean prices reflects strong world demand in combination with expected lower US production resulting from the dry conditions affecting key growing states. World consumption of protein meals and vegetable oils are forecast at 274 Mt and 163 Mt, up 3% and 4% from 2012-13 respectively

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PULSES AND SPECIAL CROPS

DRY PEAS

For **2013-14**, production is estimated to rise by 13% to a record 3.8 Mt, as lower harvested area has been offset by record yields, particularly in Saskatchewan. Supply is forecast to rise by only 9% due to tight carry-in stocks, to nearly 4.0 Mt, also a record. Exports are forecast to increase to 2.8 Mt, with India, China and Bangladesh remaining Canada's top three markets. Carry-out stocks are forecast to rise 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\$100/t over yellow dry peas, which are above the historical average, but well 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 30% from 2012-13. This is largely due to an expected rise in area in Montana and North Dakota. Assuming normal yields and abandonment, US dry pea production is forecast by AAFC to increase by 21% to 0.7 Mt. As a result, Canadian exports to the US are forecast to decrease due to an expected rise in US dry pea production.

LENTILS

For **2013-14**, production is estimated to rise by 11% to 1.7 Mt. This is largely due to estimates for record yields, which have more than offset lower harvested area. Large green production is forecast to fall from last year to below 0.6 Mt, while red lentil production is expected to rise sharply to nearly 0.9 Mt. Production of the other remaining lentil types is expected to remain below 0.3 Mt.

Supply is expected to fall by 16% due to lower carry-in stocks. Exports are expected to fall to 1.5 Mt, but India, the EU-27 and Turkey are expected to remain the top three export markets. 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 rise for the first time in three years. The overall average price is forecast to be lower than 2012-13 due to an expected increase in carry-out stocks. Large green lentil prices are forecast to maintain a C\$10/t premium over red lentil prices, compared to a C\$25/t premium in 2012-13.

In the US, the area seeded to lentils for 2013-14 is forecast by the USDA at 0.3 mln acres, down 28% from 2012-13 due to lower area seeded in Montana.

Assuming normal yields and abandonment, 2013-14 US lentil production is therefore forecast by AAFC to fall below 0.2 Mt, down 26% from 2012-13.

DRY BEANS

For **2013-14**, production is estimated to fall by 33% to 187 thousand tonnes (kt), consisting of 71 kt of white pea bean types and 116 kt of colored bean types. Production in Ontario is expected to fall sharply mostly due to a fall in area for both bean types. In Manitoba, production is estimated to have fallen by over 50%, due to lower areas for colored and white pea bean types.

Supply is forecast to decrease by only 24%, due to large carry-in stocks. Exports are forecast to decrease 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 fall. 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 21% to 1.2 mln acres, largely due to lower area seeded in North Dakota. US total dry bean production (excluding chickpeas) is forecast by the USDA to fall below 1.0 Mt, down 26% from 2012-13.

CHICKPEAS

For **2013-14**, production is estimated to rise by 6% to 171 kt, due to above average yield estimates for the second consecutive year. Production for desi types is expected to remain unchanged while kabuli chickpea production is expected to rise compared to 2012-13. However, supply is forecast to rise by 29% from last year due to the large carry-in stocks. Exports are forecast to rise from 2012-13, with the EU-27, the US, the Mid-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 is estimated to increase by 29% to 154 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 is forecast to rise by only 6%, due to lower carry-in stocks. Exports are expected to be unchanged at 120 kt and carry-out stocks are forecast to be tight 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 higher than 2012-13.

CANARY SEED

For **2013-14**, production is estimated to fall by 35% to 98 kt, due to sharply lower harvested area. Supply is forecast to decrease by only 28% as lower production was partly offset by higher carry-in stocks. Exports are expected to fall due to the lower supply. The EU-27 and Mexico are forecast to remain the main export markets, followed by the US. Carry-out stocks are expected to tighten. The average price is forecast to decrease from the 2012-13 level due a lack of export demand.

SUNFLOWER SEED

For **2013-14**, production is estimated to fall sharply to 54 kt, due to lower estimated yields and harvested area. Supply, however, is expected to decline by only 17% to 101 kt, compared to 2012-13, due to large carry-in stocks. Exports are forecast to decrease and carry-out stocks are forecast to rise marginally. 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 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 expected to fall sharply to 1.3 mln acres and the area seeded to confectionery type varieties is forecast to rise to 0.3 mln acres. Assuming normal yields and abandonment, 2013-14 US sunflower seed production is forecast by AAFC to decrease by 20% to 1.0 Mt.

The global supply of sunflower seed is estimated by the USDA at 40 Mt. This is 11% 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 31% and 7%, respectively. However, world carry-out stocks are expected to increase by 32% to 1.7 Mt, and pressure world sunflower seed prices.

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

October 16, 2013

Grain and Crop Year (a)	Area	Area	Yield	Production	Imports (b)	Total Supply	Exports (c)	Food &	Feed,	Total	Carry-out Stocks	Average Price (g) \$/t
	Seeded	Harvested						Industrial Use (d)	Waste & Dockage	Domestic Use (e)		
	thousand ha	thousand ha	t/ha				thousand metric tonnes					
Durum												
2011-2012	1,623	1,590	2.62	4,172	17	5,755	3,584	232	270	686	1,486	345
2012-2013p	1,894	1,878	2.46	4,627	36	6,149	4,245	238	320	752	1,151	290*
2013-2014f	2,011	1,967	2.84	5,579	30	6,760	4,500	240	426	860	1,400	230-260*
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
2012-2013p	7,736	7,620	2.96	22,579	38	27,063	15,197	3,183	3,891	7,959	3,906	285*
2013-2014f	8,661	8,307	3.32	27,591	40	31,538	16,000	3,320	4,338	8,538	7,000	230-260*
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	
2012-2013p	9,630	9,497	2.86	27,205	74	33,211	19,442	3,421	4,211	8,712	5,057	
2013-2014f	10,672	10,274	3.23	33,171	70	38,298	20,500	3,560	4,764	9,398	8,400	
Barley												
2011-2012	2,666	2,402	3.29	7,892	14	9,407	2,059	145	5,751	6,153	1,195	225
2012-2013p	2,997	2,751	2.91	8,012	19	9,227	2,154	154	5,858	6,262	811	279
2013-2014f	2,859	2,556	3.69	9,433	17	10,261	2,300	158	6,050	6,461	1,500	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
2012-2013p	1,434	1,418	9.21	13,060	568	14,993	1,748	5,315	6,370	11,700	1,545	240-270
2013-2014f	1,469	1,445	9.04	13,060	500	15,105	700	5,400	6,489	11,905	2,500	165-195
Oats												
2011-2012	1,313	1,084	2.91	3,158	12	3,902	2,248	92	656	845	810	227
2012-2013p	1,165	985	2.86	2,812	18	3,640	2,137	79	811	992	511	263
2013-2014f	1,219	1,041	3.13	3,254	15	3,780	2,200	83	741	930	650	205-235
Rye												
2011-2012	122	96	2.52	241	0	292	170	46	41	98	25	183
2012-2013p	144	123	2.73	337	0	362	196	43	68	119	46	155
2013-2014f	109	71	2.78	197	0	243	135	40	44	93	15	155-185
Mixed Grains												
2011-2012	150	79	3.04	240	0	240	0	0	240	240	0	
2012-2013p	101	58	2.93	170	0	170	0	0	170	170	0	
2013-2014f	102	51	2.88	146	0	146	0	0	146	146	0	
Total Coarse Grains												
2011-2012	5,543	4,932	4.64	22,889	920	27,357	4,950	5,502	13,129	19,013	3,395	
2012-2013p	5,840	5,334	4.57	24,391	605	28,391	6,235	5,592	13,276	19,243	2,913	
2013-2014f	5,758	5,164	5.05	26,090	532	29,535	5,335	5,681	13,470	19,535	4,665	
Canola												
2011-2012	7,685	7,589	1.92	14,608	97	16,891	8,699	6,999	420	7,484	707	601
2012-2013p	8,912	8,799	1.58	13,869	128	14,704	7,261	6,717	59	6,834	608	650
2013-2014f	7,988	7,756	2.07	16,029	125	16,762	8,000	7,200	111	7,362	1,400	500-540
Flaxseed												
2011-2012	299	291	1.37	399	9	601	391	n/a	n/a	74	137	525
2012-2013p	397	384	1.27	489	15	640	481	n/a	n/a	88	71	580
2013-2014f	415	401	1.66	664	5	740	575	n/a	n/a	65	100	500-540
Soybeans												
2011-2012	1,559	1,551	2.77	4,298	232	4,826	2,741	1,410	270	1,854	231	478
2012-2013p	1,680	1,678	3.03	5,086	253	5,570	3,359	1,541	316	2,038	172	532
2013-2014f	1,819	1,739	2.81	4,881	250	5,304	3,100	1,600	229	2,004	200	480-520
Total Oilseeds												
2011-2012	9,543	9,432	2.05	19,305	338	22,318	11,831	8,410	690	9,412	1,075	
2012-2013p	10,989	10,861	1.79	19,444	395	20,914	11,102	8,258	375	8,961	851	
2013-2014f	10,221	9,896	2.18	21,574	380	22,805	11,675	8,800	339	9,430	1,700	
Total Grains and Oilseeds												
2011-2012	23,812	22,916	2.94	67,482	1,337	82,401	34,280	17,683	18,373	37,719	10,402	
2012-2013p	26,459	25,693	2.76	71,040	1,074	82,516	36,779	17,270	17,862	36,915	8,821	
2013-2014f	26,652	25,333	3.19	80,834	982	90,638	37,510	18,041	18,573	38,363	14,765	

(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

p: preliminary, by Agriculture and Agri-Food Canada

Source: Statistics Canada

CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

October 16, 2013

Grain and Crop Year (a)	Area	Area	Yield	Production	Imports (b)	Total Supply	Exports (b)	Total	Carry-out Stocks	Stocks-to- Use Ratio %	Average Price (d) \$/t
	Seeded	Harvested						Domestic Use (c)			
	thousand ha	thousand ha	t/ha			thousand metric tonnes					
Dry Peas											
2010-2011	1,467	1,389	2.17	3,018	33	3,961	3,012	414	535	16	250
2011-2012	986	974	2.57	2,502	12	3,049	2,096	658	295	11	310
2012-2013p	1,509	1,475	2.26	3,341	16	3,652	2,651	827	174	5	340
2013-2014f	1,354	1,304	2.90	3,781	15	3,970	2,750	720	500	14	270-330
Lentils											
2010-2011	1,394	1,340	1.50	2,005	29	2,073	1,105	139	830	67	440
2011-2012	1,035	1,005	1.57	1,574	11	2,415	1,148	407	860	55	470
2012-2013p	1,018	1,004	1.53	1,538	9	2,407	1,638	469	300	14	440
2013-2014f	963	942	1.81	1,709	10	2,019	1,450	244	325	19	410-440
Dry Beans											
2010-2011	134	126	2.01	254	64	323	238	56	29	10	655
2011-2012	84	78	2.07	162	55	247	224	18	5	2	1,000
2012-2013p	125	125	2.26	281	79	365	297	38	30	9	835
2013-2014f	89	87	2.14	187	60	277	240	32	5	2	900-930
Chickpeas											
2010-2011	83	77	1.67	128	9	158	86	50	22	16	655
2011-2012	48	47	1.83	86	9	116	37	69	11	10	830
2012-2013p	81	80	2.01	161	9	181	69	58	54	43	690
2013-2014f	90	86	1.99	171	8	233	85	63	85	57	605-635
Mustard Seed											
2010-2011	190	182	1.00	182	1	265	124	25	116	78	570
2011-2012	133	128	1.01	130	1	247	115	48	83	51	685
2012-2013p	136	135	0.88	119	1	203	120	47	36	22	790
2013-2014f	138	131	1.17	154	0	190	120	40	30	19	790-820
Canary Seed											
2010-2011	160	154	1.00	154	0	223	179	14	30	16	560
2011-2012	111	109	1.18	129	0	159	126	15	17	12	580
2012-2013p	136	132	1.14	150	0	167	137	8	22	15	585
2013-2014f	85	79	1.24	98	0	120	105	10	5	4	560-590
Sunflower Seed											
2010-2011	55	51	1.32	68	33	142	46	61	36	34	630
2011-2012	14	14	1.43	20	33	89	33	49	7	9	710
2012-2013p	41	40	2.19	87	27	121	44	60	17	16	635
2013-2014f	30	30	1.82	54	30	101	35	46	20	25	600-630
Total Pulses and Special Crops (c)											
2010-2011	3,482	3,319	1.75	5,808	168	7,144	4,788	758	1,599		
2011-2012	2,411	2,355	1.95	4,602	121	6,321	3,779	1,264	1,278		
2012-2013p	3,045	2,989	1.90	5,676	141	7,095	4,955	1,507	633		
2013-2014f	2,749	2,658	2.31	6,152	123	6,908	4,785	1,153	970		

(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

p: preliminary, by Agriculture and Agri-Food Canada

Source: Statistics Canada and industry consultations