



CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS

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Market Analysis Group/Grains and Oilseeds Division

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This report provides an update of AAFC's April estimates for the current 2012-13 crop year and the forecasts for the 2013-14 crop year which starts on August 1, 2013. The new crop season has started with a late spring, slow snow melt and delayed seeding. AAFC's estimates for area seeded are based on the seeding intentions report released by Statistics Canada (STC) on April 24 which was based on a survey of grain growers. AAFC's forecasts for harvested area and average yields are based on historical trends since it is too-early to tell how the growing season will progress.

For **2012-13**, the total crop supply in Canada decreased marginally, as low carry-in stocks from the previous crop year more-than offset the significant increase in production. Carry-out stocks are expected to decrease to a near-record low due to lower supply, increased exports and strong domestic use. Grain prices in Canada have been strongly supported by lower production in the US and the Black Sea region related to dry growing conditions.

For **2013-14**, in western Canada, the area left in summerfallow is expected to decrease. Higher area seeded to wheat and oats is expected to more than offset lower area seeded to canola and lentils. In eastern Canada, higher area seeded to wheat and corn more-than offsets lower area seeded to oilseeds and beans. World grain prices are expected to be pressured by higher production, as the US and some other grain producing countries are expected to recover from the very low production in 2012 which was related to dry growing conditions. In Canada, grain prices are forecast to average 10 to 20 percent lower than 2012-13 due to lower international prices. Oilseed prices are also forecast to decrease, but to a lesser extent due to strong international demand relative to supply.

Grains and Oilseeds (G&O) production in Canada is forecast to increase by 6% to 74.5 million tonnes (Mt), on higher area seeded/harvested and higher average yields. Exports are forecast to decrease but domestic use is forecast to increase. Carry-out stocks are expected to increase significantly.

Pulses and Special Crops (P&SC) production in Canada is forecast to decrease marginally to 4.93 Mt as lower area seeded/harvested more-than offsets higher average yields. Due to the lower supply, exports, domestic use and carry-out stocks are forecast to fall. On average, prices for all P&SC are forecast to increase except for dry peas, chickpeas and sunflower 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	23,821	22,916	2.94	67,482	1,337	82,401	34,280	37,734	10,387
2012-2013f	26,263	25,450	2.76	70,196	935	81,519	35,189	37,875	8,455
2013-2014f	26,851	25,718	2.90	74,465	878	83,799	34,465	38,248	11,086
Total Pulse And Special Crops									
2011-2012	2,411	2,345	1.94	4,552	121	6,159	3,779	1,299	1,081
2012-2013f	2,838	2,798	1.81	5,072	141	6,293	4,110	1,438	745
2013-2014f	2,646	2,580	1.91	4,930	118	5,793	4,040	1,043	710
All Principal Field Crops									
2011-2012	26,232	25,261	2.85	72,033	1,457	88,560	38,059	39,033	11,468
2012-2013f	29,101	28,248	2.66	75,268	1,076	87,812	39,299	39,314	9,200
2013-2014f	29,497	28,298	2.81	79,395	996	89,592	38,505	39,291	11,796

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

WHEAT

DURUM

For **2012-13**, exports are forecast to increase by 16% from 2011-12 to 4.15 Mt because of lower production in the EU, Morocco and several other countries. Carry-out stocks are forecast to decrease by 26% to 1.1 Mt, which is 38% lower than the past five-year average of 1.77 Mt and the lowest since 2007-08.

For **2013-14**, producers intend to increase seeded area by 9% from 2012-13 because of low carry-in stocks, good prices and lower area seeded to lentils. Harvested area is forecast to increase by 6%. Production is forecast to rise by 6% to 4.9 Mt. Supply is expected to fall by 2% due to lower carry-in stocks. Exports are forecast to decrease by 4% because of an expected increase in world production. Carry-out stocks are forecast to rise by 9% to 1.2 Mt. Average Canadian durum prices are forecast to decrease from 2012-13 due to higher world supply.

World durum production is forecast to increase by 0.9 Mt to 36 Mt, mostly because of higher production in Morocco, Canada and Kazakhstan. Supply is forecast to increase by 0.4 Mt to 43.1 Mt. Use is expected to increase by 0.2 Mt and carry-out stocks are forecast to increase by 0.2 Mt to 7.3 Mt. US durum production is expected to decrease from 2012-13 due to an expected 18% decrease in seeded area.

WHEAT (excluding durum)

For **2012-13**, exports are forecast to increase by 4% from 2011-12 to 14.5 Mt due to growing demand for wheat in the food market and lower production in some other exporting countries, especially Australia, Argentina, Kazakhstan, Russia and Ukraine. Domestic use is forecast to increase slightly. Carry-out stocks are forecast to decrease by 20% to 3.8 Mt, 17% lower than the past five-year average of 4.75 Mt and the lowest since 2007-08.

For **2013-14**, producers intend to increase the seeded area by 13% from 2012-13 because of good prices, low carry-in stocks and a shift out of canola. The winter wheat seeded area increased by only 1% as a sharp increase for Ontario was mostly offset by a sharp decrease for Saskatchewan. Producers intend to increase spring wheat area by

14%. Harvested area is forecast to increase by 11%. Production is forecast to increase by 9% to 24.5 Mt as the higher harvested area is partly offset by lower yields. Supply is expected to increase by 5% as the increase in production is partly offset by lower carry-in stocks. Domestic use is expected to decrease marginally because of lower feed use. Exports are forecast to increase by 2% as growing demand in the world food market more than offsets the increased competition in export markets due to increased world supply. Carry-out stocks are forecast to increase by 26% to 4.8 Mt. Average Canadian wheat prices are forecast to decrease from 2012-13 due to higher world supply.

World all wheat (including durum) production is forecast to increase by 45 Mt to 701 Mt due mostly to a higher seeded area and a recovery in production for Russia, Ukraine and Kazakhstan. The supply is forecast to rise by 26 Mt to 881 Mt, as the increase in production is partly offset by lower carry-in stocks. Total use is forecast to increase by 20 Mt to 695 Mt. Carry-out stocks are forecast to rise by 6 Mt to 186 Mt. The overall condition of the world winter wheat crop in the northern hemisphere is mostly good. The major exception is the US hard red winter crop which is significantly worse than a year ago due to drought.

US all wheat area is expected to increase by 1% from 2012-13. Winter wheat seeded area increased by 2%, with a 3% decrease for hard red winter wheat and a 19% increase for soft red winter wheat. Hard red spring wheat area is expected to increase by 3%, while white wheat area increases by 1%. US all wheat production is forecast to decrease by 5.8 Mt to 56 Mt because of the poorer condition of the hard red winter wheat crop. Domestic feed use is expected to decrease because of a recovery in corn production. Exports are forecast to decrease because of the recovery in world wheat production. Carry-out stocks are forecast to decrease by 1.6 Mt to 18.3 Mt.

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COARSE GRAINS

BARLEY

For **2012-13**, exports are forecast to increase 12% to 2.3 Mt, due an increase of feed barley exports especially to the United States as their feed supplies have been tight. Carry-out stocks are forecast to decrease 37% to a historically low of 0.8 Mt. The In-store Lethbridge barley price reached a record high and all-time high and has been priced similar to feed wheat in the southern Alberta market.

For 2013-14, seeded area is intended to decrease by 2% from 2012-13 due mainly to higher wheat area. Production is forecast to increase 6% or 8.5 Mt but, due to record low carry-in stocks, supply is forecast to increase only marginally. Total domestic use is forecast to increase due mainly to a slight increase in livestock feeding which is supported by lower feed costs. Exports are forecast to decrease by 9% due to a recovery in world barley production and a relatively good Canadian domestic price. Carry-out stocks are forecast to increase modestly from the record low expected for 2012-13 but remain below the previous 10-year average. Domestic feed barley prices are forecast to decrease from 2012-13 due to the higher production and overall decline in coarse grain prices.

Spring planting, as in the US, remains behind schedule as a wet, cold April limited fieldwork. In Europe, the winter barley crop is in good shape but similar to North America they are experiencing slow spring barley planting conditions. In the US the western part of the barley area, which is mainly 2Row, is more advanced as far as seeding whereas North Dakota and Minnesota, which is mainly 6Row, has barely began. This may lead is a greater than normal premium for 6Row vs. 2Row in the US market. In the past couple of years, US 6Row barley area has been under particular pressure as the US corn and soybean belt moves further west and north.

For 2013-14, for barley, the International Grains Council (IGC), forecasts world area seeded and production to ncrease by 4 and 6%, respectively. Total use and trade are forecast to remain near the previous three-year averages, which will allow a slight recovery in carry-out stocks. Assuming normal growing conditions world feed and malt barley prices are expected to decrease due to the recovery in world barley and corn production and supply,

CORN

For 2012-13, exports are forecast to increase dramatically to 1.0 Mt, due to increased demand from the US northeast states such as Michigan, New York and Ohio. Due to record production, carry-out stocks are forecast to increase to 1.9 Mt. The Chatham in-store elevator price reached a record high as it follows the drought-related high corn prices in the US.

For 2013-14, seeded area is intended to increase 8% to a record high. Production is also forecast to be a new record and increase 6% to 13.8 Mt as the larger area more than offsets slightly lower yields. Due to the higher domestic supply, imports are forecast to decrease by 20% to a level which is well-below the average of the previous 10 years. Total supply is forecast to increase of 8%. Total domestic use is forecast to increase by 3% as overall demand remains at trend levels. Exports are forecast to decrease due to a recovery in US corn production. Carryout stocks are forecast to increase substantially to a new record of 3.0 Mt. The Chatham in-store elevator price is forecast to decline due to lower corn prices in the US.

US Corn Belt moisture and soil conditions continued to improve in April and the drought areas shrank even further to the point where planting delays were now wide spread. Barge traffic on the Illinois and Mississippi rivers has been negatively affected by high river levels, which at the beginning of the calendar year would have been unheard of. At the end of April the top five US corn states, in terms of seeded area, had basically yet to start seeding.

For 2013-14, for corn, the IGC forecasts world production to increase by 10% from 2012 to a record high of 939 Mt. Area harvested is forecast to set a new record due to increased area seeded to corn in China, Mexico and the US. Due to record corn supply and lower prices, total use is also forecast to increase to a new record. The 8% increase in total supply will allow carry-out stocks to increase by 23% from 20112-13.

OATS

For 2012-13, exports are forecast to decrease slightly from last year due to lower total supplies. Carry-out stocks are forecast to decrease significantly to a record low of 0.3 Mt due to the tight supply situation.

For 2013-14, the area seeded to oats in Canada is intended to increase by 18% from 2012-13 due to the rebound in price levels and lower seeded area for competing crops. Production is forecast to increase by 19% to 3.2 Mt but supply is forecast to be similar to last year as higher production is offset by record low carry-in stocks. Total supply will be below the previous five-year average. Exports are forecast to decrease by 5% due to the tight supply, relatively flat US milling demand and higher oat production in the US. Carry-out stocks are forecast to increase but remain very low.

North American intended oat area is higher for 2013 but continued seeding delays are a factor to watch. To the end of April the northern US oat states had almost no oats seeded vs. the five-year average of about 50% and on the Canadian Prairies, virtually no oats had been seeded. The very slow pace of US corn seeding is supportive for coarse grain prices. However, oat prices are forecast to decrease due lower US corn prices and the recovery in US corn and world coarse grain production. With almost all North American spring seeded crops behind schedule the futures markets will continue to be very volatile until the various final seeded crop areas are reasonably known.

RYE

For 2012-13, exports are forecast to increase by 11% to 0.19 Mt due to increased supply. Carry-out stocks are forecast to increase. The premium-pricing trend for off-farm movement in April, was about \$40/tonne over elevator delivery.

For 2013-14, seeded area is forecast to decrease by 20% from 2012-13 due to very dry fall seeding conditions, which limited the potential for reasonable germination. Production is forecast to decrease by 30% due to lower area and lower yields. Despite higher carry-in stocks, total supply is forecast to decrease and remain well-below the 10-year average. Exports are forecast to decrease due to the very tight supply. Total domestic usage is forecast to decrease by 30% as lower supply limits feed use. Carry-out stocks are forecast to decrease to a near record low.

Rye prices should remain strong, as Canada's tight supply will put a premium on rye moving into its main export market the US. This will allow rye prices to increase slightly from 2012-13 although other coarse grain prices decrease.

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OILSEEDS

CANOLA

For **2012-13**, Canadian exports are forecast to decrease by 17% from 2011-12 due to tight domestic supplies. Domestic canola crush is also forecast to decrease to 6.5 Mt from 7.0 Mt for 2011-12, on reduced crush margins and tight supplies. Carry-out stocks are forecast at a record low 0.35 Mt vs. 0.74 Mt last year.

For **2013-14**, seeded area is forecast to decrease by 11% on concerns of overextended crop rotations, attractive returns for alternative crops and high input costs. By province, the decline in seeded area is: 16% in Manitoba, 11% in Saskatchewan and 9% in Alberta, respectively. At 4.1 million hectares, Saskatchewan is expected to account for 52% of the area seeded to canola in Canada. Production is forecast to rise by 6%, assuming normal crop abandonment and 5-year average yields. Supply is forecast to increase by only 3% as the increase in production is partly offset by very tight carry-in stocks. Exports are forecast to rise by 0.25 Mt on increased supply and a very tight world outlook for oilseeds and oilseed products. Similarly, domestic crush is forecast to rise by only 0.1 Mt as the tight supply of canola constrains the ability of processors to respond to strong world demand for canola oil and meal. Carry-out stocks are forecast to rise slightly, but remain the second lowest in 16 years. The stocks to use ratio is forecast at 2%, versus the 10-year average of 7%. Average Canadian canola prices are forecast to fall by about \$75/t on projected lower US prices for soybeans and soyoil. However, canola prices are expected to remain relatively strong due to continued tight supplies.

FLAXSEED (excluding solin)

For **2012-13**, exports are forecast to rise by 15% on an increase in shipments to China and the US. Carry-out stocks are forecast to fall with a stocks-to-use ratio of 10%.

For **2013-14**, seeded area in Canada is estimated to increase by 26% on support from higher prices. Cropping area is shifting westwards in response to increased Chinese demand combined with lower EU-27 imports. By province, flaxseed area in Manitoba is down by 29%, Saskatchewan up by 37% and Alberta up by 40%. Saskatchewan is expected to account for 86% of the area seeded to flaxseed. Production is forecast to rise by 23%, assuming normal abandonment and trend yields, due to lower area and reduced yields. Supply is forecast to increase by 15%

as the rise in output is moderated by slightly lower carry-in stocks. Exports are forecast to increase by 22% on stable Chinese and US buying. Total domestic use is forecast to remain steady. Carry-out stocks are forecast to be the same as 2012-13. The average price of flaxseed is forecast to decrease by 5 to 10% on lower world prices for vegetable oil, protein meal and oilseeds.

SOYBEANS

For **2012-13**, exports are forecast to rise by 13%, to a record 3.2 Mt, while domestic crush increases by 13% from last year. Prices, track Chatham, are forecast to average \$520/t versus \$478/t for 2011-12.

For **2013-14**, the area seeded to soybeans is expected to rise to a record 1.74 Mha in Canada. Soybean area continues to shift westwards, as intended area in Quebec and Ontario declines by 4% and 5%, respectively. Intended soybean area in Manitoba is up by 36% from last year and anecdotal estimates for Saskatchewan also show a significant increase. The increase in the area seeded to soybeans in western Canada is related to strong prices, improved varieties and a growing track record for withstanding extreme weather. Despite the rise in intended area, production is forecast to decline by 10% due to lower yields. Supply is forecast to decrease by 8%. Consequently, exports are forecast to fall by 16%, while domestic crush remains stable on strong world demand and constrained domestic supplies. Carry-out stocks are forecast unchanged from 2012-13. The average price of soybeans at Chatham is forecast to fall by 15% to \$420-470/t due to lower soybean prices in the US.

US soybean production is forecast to increase by about 12% from 3.0 billion bushels in 2012 due to higher area seeded and higher average yields. However, due to low carry-in stocks, the increase in supply is less dramatic. Carry-out stocks are forecast to increase but remain historically tight. The average on-farm price for soybeans is forecast to decrease to US\$10.50/bu from US\$14.30/bu for 2012-13. For 2013-14, the US and South America will need to produce bumper crop to ease the tight world situation. Moisture conditions across the key US growing regions have shown improvement

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PULSES AND SPECIAL CROPS

DRY PEAS

For **2012-13**, Canada's exports are expected to rise above the 2011-12 level to 2.3 Mt. Increased exports to India and the EU-27, particularly to Spain and Belgium, are expected to be offset by slightly lower exports to China. Carry-out stocks in Canada are expected to fall and remain historically tight. The average pea price is expected to increase from the record prices in 2011-12.

For **2013-14**, seeded area in Canada is forecast to increase marginally because of higher returns relative to other crops and continued recognition of the benefits of dry peas as part of crop rotation plan. Production is expected to rise by 10% to 3.1 Mt. However, supply is forecast to increase by only 4% due to lower carry-in stocks. Exports are forecast to rise marginally to 2.4 Mt. Carry-out stocks are also forecast to increase sharply due to lower expected domestic use. The average price is expected to decrease from 2012-13 due to the larger supply and carry-out stocks in Canada.

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 20% to 0.7 Mt.

LENTILS

For **2012-13**, lentil exports are forecast to rise marginally from 2011-12 to 1.2 Mt. The main markets are expected to be the Indian subcontinent, the Middle East, South America and the EU-27. Total domestic use is forecast at a record 0.5 Mt due to the continued disappearance of lower quality lentils. Carry-out stocks are forecast to fall but remain burdensome. The average Canadian lentil price is forecast to fall from 2011-12 due to the burdensome supply and carry-out stocks.

For **2013-14**, the area seeded to lentils in Canada is expected to decrease significantly, for the fourth consecutive year, to 0.84 Mha, due to lower returns in

2012-13, particularly for large green lentil types, compared to other crops. Production is forecast to fall sharply to 1.2 Mt but supply will remain burdensome due to high carry-in stocks. Exports are expected to fall to 1.1 Mt. Carry-out stocks are forecast to fall, but remain high due to the large supply and low domestic use. The average price is forecast to recover slightly from 2012-13 as Canada continues to reduce the burdensome carry-out stocks.

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 at 0.2 Mt, down 25% from this year.

DRY BEANS

For **2012-13**, dry bean exports are forecast to increase due to the increased 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. Large North American supply is expected to continue to pressure overall US and Canadian dry bean prices for 2012-13.

For **2013-14**, the area seeded in Canada is forecast to fall sharply from 2012-13 to less than 0.1 Mha because of lower potential returns compared to other crops, particularly soybeans and corn. Production is expected to decrease by 29% to 0.2 Mt but, due to large carry-in stocks, supply is expected to fall by only 18%. Exports are forecast to fall due to the decreased supply and carry-out stocks are also expected to shrink. The average Canadian dry bean price is forecast to rise due to lower supply in North America

In the US, area seeded to dry beans is forecast by the USDA to decrease by 16% to 1.3 mln acres due to lower area seeded in North Dakota. Assuming normal yields and abandonment, 2013-14 US total dry bean production (excluding chickpeas) is therefore forecast by AAFC at 1.0 Mt, up 23% from this year.

CHICKPEAS

For **2012-13**, Canadian chickpea exports are expected to increase sharply to 60 kt. The EU-27, the US, the Middle East and the Indian subcontinent are forecast to remain the main markets for Canadian chickpeas. As a result of the increase in supply, carry-out stocks are also expected to increase. The average price is forecast to fall sharply, due to higher Canadian and world supply.

For **2013-14**, the area seeded is forecast to fall from 2012-13 because of higher carry-in stocks and continuing decline in prices from the record set in 2011-12. As a result, production is expected to fall to 120 kt. Supply is forecast to rise from last year, however, due to the higher carry-in stocks. Exports are forecast to rise and carry-out stocks are expected to fall. The average price is forecast to fall, due to higher world supply.

Prospective plantings of US chickpea area for 2013-14 are forecast by the USDA at a record 0.2 mln acres, up 3% from 2012-13. This is largely due to an expected rise in area in Washington. Assuming normal yields and abandonment, 2013-14 US chickpea production is therefore forecast by AAFC at 0.15 Mt, similar to this year.

MUSTARD SEED

For **2012-13**, Canadian mustard exports are forecast at 115 kt, unchanged from last year. The US and the EU-27 are expected to remain the main export markets for Canadian mustard seed. Carry-out stocks are forecast to fall for the third consecutive year which has supported prices to-date in 2012-13.

For **2013-14**, the area seeded is expected to increase marginally due to higher expected prices. Production is forecast to rise by 9% to 130 kt due higher expected area and yields. Supply is expected to fall by 11%, however, due to lower carry-in stocks. Exports are expected to be unchanged at 115 kt and carry-out stocks are forecast to tighten for the fourth consecutive year. The average price is forecast to be higher than 2012-13.

CANARY SEED

For **2012-13**, exports are expected to be lower than last year due to reduced demand. The EU-27 and Mexico

are forecast to remain the main markets, followed by the US. Carry-out stocks are expected to fall for the fourth consecutive year. The average price is forecast to rise, due to tight carry-out stocks.

For **2013-14**, the area seeded is forecast to fall sharply despite good returns relative to other crops and lower carry-in stocks. Production is expected to fall by 36% to 80 kt. As a result, supply is forecast to fall by 33% despite low carry-in stocks. Exports are expected to fall due to the lower supply, and carry-out stocks are expected to remain tight. The average price is forecast to rise from the 2012-13 level.

SUNFLOWER SEED

For **2012-13**, sunflower seed exports are forecast to rise to 35 kt due to higher supply; however, carry-out stocks are expected to rise. Higher exports to the US and Turkey have been partially offset by lower exports to Mexico. The US is expected to remain Canada's main export market for sunflower seed. The average Canadian price for sunflower seed is forecast to fall from 2011-12, due to forecasts for larger sunflower seed supplies in North America.

For **2013-14**, the area seeded is expected to fall marginally from 2012-13 despite record yields for 2012 and expectations for good returns. Production is forecast to fall sharply to 55 kt, assuming average yields, and supply is expected to fall by 9% to 115 kt, compared to 2011-12. Exports and carry-out stocks are also forecast to fall. The average price is forecast to decrease marginally from 2012-13 despite lower North American sunflower seed supply.

US sunflower seed area for 2013-14 is forecast by the USDA at 1.7 mln acres, down 12% from 2012-13 due to lower area in North Dakota. The area seeded to oil type varieties is expected to fall sharply to 1.4 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 15% to 1.1 Mt.

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

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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	Waste &	Domestic		
	thousand ha	thousand ha	t/ha					Use (d)	Dockage	Use (e)		
Durum												
2011-2012	1,623	1,590	2.62	4,172	17	5,755	3,584	227	276	686	1,486	345
2012-2013f	1,894	1,878	2.46	4,627	40	6,153	4,150	235	469	903	1,100	275-305*
2013-2014f	2,066	2,000	2.45	4,900	30	6,030	4,000	240	396	830	1,200	255-285*
Wheat Except Durum												
2011-2012	7,112	6,962	3.03	21,116	61	26,971	13,916	3,539	4,285	8,609	4,446	290
2012-2013f	7,749	7,620	2.96	22,579	30	27,055	14,500	3,550	4,320	8,755	3,800	275-305*
2013-2014f	8,747	8,440	2.90	24,500	40	28,340	14,800	3,600	4,265	8,740	4,800	255-285*
All Wheat												
2011-2012	8,736	8,553	2.96	25,288	78	32,726	17,500	3,766	4,561	9,294	5,932	
2012-2013f	9,643	9,497	2.86	27,205	70	33,207	18,650	3,785	4,788	9,657	4,900	
2013-2014f	10,813	10,440	2.82	29,400	70	34,370	18,800	3,840	4,661	9,570	6,000	
Barley												
2011-2012	2,666	2,402	3.29	7,892	14	9,407	2,059	145	5,751	6,153	1,195	225
2012-2013f	2,997	2,751	2.91	8,012	15	9,223	2,300	143	5,770	6,173	750	260-290
2013-2014f	2,930	2,690	3.16	8,500	15	9,265	2,100	147	5,808	6,215	950	205-230
Corn												
2011-2012	1,292	1,272	8.93	11,359	894	13,516	474	5,220	6,442	11,677	1,365	250
2012-2013f	1,434	1,418	9.21	13,060	500	14,926	1,000	5,200	6,861	12,076	1,850	250-280
2013-2014f	1,543	1,525	9.05	13,800	400	16,050	600	5,300	7,134	12,450	3,000	175-205
Oats												
2011-2012	1,313	1,084	2.91	3,158	12	3,902	2,248	90	672	860	795	227
2012-2013f	1,155	956	2.81	2,684	15	3,493	2,200	85	858	1,043	250	245-275
2013-2014f	1,367	1,125	2.84	3,200	13	3,463	2,100	89	770	963	400	195-225
Rye												
2011-2012	122	96	2.52	241	0	292	170	46	41	98	25	183
2012-2013f	144	123	2.73	337	0	362	189	49	69	128	45	140-170
2013-2014f	115	93	2.53	235	0	280	165	45	36	91	25	155-185
Mixed Grains												
2011-2012	150	79	3.04	240	0	240	0	0	240	240	0	
2012-2013f	101	58	2.93	170	0	170	0	0	170	170	0	
2013-2014f	101	60	2.92	175	0	175	0	0	174	174	0	
Total Coarse Grains												
2011-2012	5,543	4,932	4.64	22,889	920	27,357	4,950	5,501	13,145	19,028	3,380	
2012-2013f	5,830	5,306	4.57	24,263	530	28,173	5,689	5,477	13,727	19,590	2,895	
2013-2014f	6,056	5,493	4.72	25,910	428	29,233	4,965	5,581	13,922	19,893	4,375	
Canola												
2011-2012	7,685	7,589	1.92	14,608	97	16,891	8,699	6,999	421	7,484	707	601
2012-2013f	8,713	8,585	1.55	13,310	125	14,142	7,200	6,500	31	6,592	350	640-670
2013-2014f	7,743	7,599	1.86	14,100	125	14,575	7,450	6,600	74	6,725	400	560-600
Flaxseed												
2011-2012	299	291	1.37	399	9	601	391	n/a	n/a	74	137	525
2012-2013f	397	384	1.27	489	10	636	450	n/a	n/a	126	60	550-580
2013-2014f	502	472	1.27	600	5	665	550	n/a	n/a	55	60	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
2012-2013f	1,680	1,678	2.94	4,930	200	5,361	3,200	1,600	136	1,911	250	510-530
2013-2014f	1,738	1,713	2.60	4,455	250	4,955	2,700	1,600	230	2,005	250	420-470
Total Oilseeds												
2011-2012	9,543	9,432	2.05	19,305	338	22,318	11,831	8,410	691	9,412	1,075	
2012-2013f	10,790	10,647	1.76	18,728	335	20,138	10,850	8,100	167	8,628	660	
2013-2014f	9,982	9,785	1.96	19,155	380	20,195	10,700	8,200	304	8,785	710	
Total Grains and Oilseeds												
2011-2012	23,821	22,916	2.94	67,482	1,337	82,401	34,280	17,676	18,397	37,734	10,387	
2012-2013f	26,263	25,450	2.76	70,196	935	81,519	35,189	17,362	18,682	37,875	8,455	
2013-2014f	26,851	25,718	2.90	74,465	878	83,799	34,465	17,621	18,887	38,248	11,085	

(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).

* Forecast for 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

May 21, 2013

Grain and Crop Year (a)	Area	Area	Yield	Production	Imports (b)	Total	Exports (b)	Total	Carry-out	Stocks-to-	Average
	Seeded	Harvested						Domestic			
	thousand ha	thousand ha	t/ha			thousand metric tonnes				%	\$/t
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	678	275	10	310
2012-2013f	1,316	1,311	2.16	2,830	15	3,120	2,300	720	100	3	325-355
2013-2014f	1,388	1,355	2.30	3,120	15	3,235	2,400	620	215	7	285-315
Lentils											
2010-2011	1,394	1,321	1.45	1,920	29	1,988	1,105	165	718	57	440
2011-2012	1,035	994	1.53	1,523	11	2,253	1,148	422	683	44	470
2012-2013f	1,018	994	1.48	1,473	10	2,166	1,200	516	450	26	425-455
2013-2014f	835	815	1.50	1,225	10	1,685	1,100	230	355	27	450-480
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
2012-2013f	125	125	2.26	281	75	361	285	41	35	11	790-820
2013-2014f	98	96	2.08	200	60	295	250	25	20	7	825-855
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
2012-2013f	81	79	2.00	158	8	177	60	57	60	52	645-675
2013-2014f	70	67	1.79	120	8	188	65	68	55	41	615-645
Mustard Seed											
2010-2011	190	182	1.00	182	1	265	124	25	116	78	570
2011-2012	133	129	1.01	130	1	247	115	48	83	51	685
2012-2013f	136	135	0.88	119	1	202	115	37	50	33	775-805
2013-2014f	140	136	0.96	130	0	180	115	35	30	20	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
2012-2013f	121	115	1.08	125	0	142	115	12	15	12	570-600
2013-2014f	77	74	1.08	80	0	95	80	10	5	6	585-615
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
2012-2013f	41	40	2.19	87	32	126	35	56	35	39	620-650
2013-2014f	38	37	1.49	55	25	115	30	55	30	35	605-635
Total Pulses and Special Crops (c)											
2010-2011	3,482	3,300	1.73	5,723	168	7,059	4,788	784	1,487		
2011-2012	2,411	2,345	1.94	4,552	121	6,159	3,779	1,299	1,081		
2012-2013f	2,838	2,798	1.81	5,072	141	6,293	4,110	1,438	745		
2013-2014f	2,646	2,580	1.91	4,930	118	5,793	4,040	1,043	710		

(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.