Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS

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

The production of field crops in Canada for 2013-14 is estimated at 87 million tonnes (Mt), 13% higher than last year due to higher average yields. This is 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 will be revised after the estimates of Principal Field Crop Production are revised by Statistics Canada (STC) in December.

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 by 3% 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		*t/ha*	*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 average grade quality of the durum crop is lower than normal with an estimated 53% grading No. 1 and 2, compared to 70% for 2012-13 and 63% for the past five year average. The average protein levels are estimated 11.9%, compared to 13% for 2012-13 and 12.8% for the past five year average.

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 1.9 Mt to 37.1 Mt, mostly because of higher production in Canada and Morocco. Supply is estimated to increase by 1.2 Mt to 43.7 Mt, as higher production is partly offset by lower carry-in stocks. Use is forecast to increase by 1.3 Mt to 37.2 Mt and carry-out stocks are forecast to decrease by 0.1 Mt to 6.5 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 STC. 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 STC'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, a102% 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 average grade quality of the hard red spring wheat crop (CWRS) crop is higher than normal with an estimated 84% grading No. 1 and 2, compared to 77% for 2012-13 and 71% for the past five year average. The average protein levels are estimated 12.9%, compared to 13.9% for 2012-13 and 13.6% for the past five year average.

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 51 Mt to 706 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 27 Mt to 882 Mt, as the increase in production is partly offset by lower carry-in stocks. Total use is forecast to increase by 24 Mt to 703 Mt. Carry-out stocks are forecast to rise by 3 Mt to 178 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 4.2 Mt to 15.4 Mt.

Stan Skrypetz: Wheat Analyst
204-259-4116
stan.skrypetz@agr.gc.ca

COARSE GRAINS

BARLEY

For 2013-14, production is estimated to increase 18% or 9.4 million tonnes (Mt) but record low carry-in stocks will limit the increase in total supply to 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 good Canadian domestic prices. Carryout stocks are forecast to increase sharply 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 the decline in US and world coarse grain prices.

The quality of the malting barley crop is reported to be high quality and protein is generally below average. The average selection rate for malting barley is expected to be higher than average. The amount selected could be 1.5 to 2 times above normal and the challenge will be to find a home for it. Strong competition from Argentina, Australia and the EU is expected to limit the growth for Canadian exports of malt and malting barley. To the end of September the Lethbridge cash feed barley price had fallen over $100/t since early summer but prices have stabilized since then.

The International Grains Council (IGC) has forecast 2013 world barley production to increase by 10% from 2012-13 or the largest crop in four years. Most of the major exporting countries are expecting higher production expect for Argentina. The world will be able to replenish stocks as total use is forecast to grow by only 5%, lower prices will encourage more feed use but food and industrial use is expected to increase only slightly. Saudi Arabia remains the world's largest barley importer followed by China, Japan, Iran and Jordan. The world malt barley price premium has been very similar to levels in 2012-13 which was only about half of the previous three-year average price.

CORN

For 2013-14, production is estimated to be unchanged from 2012-13 as higher area is offset by lower average yields. Imports are forecast to decrease 12% due to higher carry-in stocks which will cause total supply to increase marginally. Total domestic use is forecast to increase by 2% but exports are forecast to decrease significantly, from near record highs in 2012-13, due to a projected recovery in US corn production and lower world prices. Carry-out stocks are forecast to increase substantially to a new record level of 2.5 Mt. The corn price, Chatham in-store elevator, is forecast to decrease due to lower US corn prices.

The US corn futures contracts have traded in a relatively narrow range. However, it is expected as North American corn harvest pressure continues that elevator basis levels will widened out.

In its November WASDE report, the USDA decreased area by about 2.0 million acres but the forecast for average yield was increased from 160.4 from 155.3 bu/ac which slightly increased the forecast for production. There were only minor changes to the main demand factors; feed, ethanol and exports. As a result, the all-important ending stock projection only increased by 1.7% from 2012-13. The average US on-farm price of corn for 2013-14 was lowered to US$4.50 from $4.80/bu in the last report. The US corn market is very focused on the Environmental Protection Agency's decision on the renewable fuel standard for calendar year 2014. Recommendations have been made to lower it to 13.0 from the mandated 14.4 billion gallon level. A decrease of this magnitude could significantly reduce the use of corn for ethanol and increase US carry-out stocks by 0.5 billion bushels. Some analysts have forecasted an average US US$0.30/bu decline in corn prices if that happens.

OATS

For 2013-14, production is estimated to increase 16% to 3.3 Mt due to higher area and yields but due to record low carry-in stocks, supply will increase by only 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 US corn supply. Exports are forecast to increase by only 3% due to the tight supply, relatively flat US milling demand and higher US oat production. Carryout stocks are forecast to increase by 27% to 0.7 Mt. and remain at tight levels.

Oat prices for 2013-14 are forecast to decline but not to the extent as the decline in US corn prices. Canada's ongoing rail logistical concern has been price supportive especially to the nearby December 2013 oat futures contract, which is trading at an inversion. For the past three years, US oat prices have followed US corn prices and have been priced as a feed grain. Since the beginning of the crop year the premium for oats

relative to corn has returned to levels not seen since the fall of 2010. Tight North American oat supplies should sustain the premium for oats.

The November USDA WASDE report was bullish for US oats as 2013 production and carry-out stocks were both reduced significantly from the September report. Surprisingly, the forecast for oat imports was unchanged but the forecast for expected on-farm price of oats was increased from US $3.20 to $3.50/bu.

RYE

For 2013-14, production is estimated to decrease by 42% due to lower area. Despite higher carry-in stocks, total supply is forecast to decrease by 33%, the second lowest level on record. Total domestic use is forecast to fall by 35% due to lower supply. Exports are forecast to decrease due to the very tight supply after three years of stable export volumes. Carryout is forecast to decrease to a record low level.

US rye production increased by 10% from 2012-13 to 195,000 tonnes, similar to production in Canada , although area seeded in the US is more-than five times higher than in Canada. The majority of US rye is cut as a forage crop but it will be interesting to see if this changes in the future as the demand for spirits continues to increase the need for more rye grain. In its latest report the IGC showed higher world rye production, an increase of 13% over 2012-13 and this will allow stocks to rebuild after two tight crop years. World trade in rye will be down about 10% as the small Canadian crop will limit exports to the US and the good EU crops produced sufficient domestic supplies, which in turn limits their inter-country trade.

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

OILSEEDS

CANOLA

For 2013-14, production is estimated at a record 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. As higher average yields more-than offset lower areas seeded, production increased to a record high of 8.1 Mt in Saskatchewan, 5.2 Mt in Alberta and 2.6 Mt in Manitoba.

Carry-in stocks for 2013-14 were 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. The total supply of canola is forecast to rise to a near-record of 16.8 Mt. 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 due to lower 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 20% or $130/t due to lower prices for US soybeans, soyoil and soymeal on a sharp rebound in output.

FLAXSEED (excluding solin)

For 2013-14, production, of which about 85% is from Saskatchewan, is estimated to rise by 36% due to higher seeded area and yields. Production is the highest since the 2009-10 detection of GM material in flaxseed exports. 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 estimated to decrease by 13%, to 3.0 Mt, on a 10% drop in yields. In Quebec, production is forecast to decrease by 1% on lower yields. In Manitoba, production is expected to set a new record.

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 output forecast for South America and increased production in the US. The world supply of soybeans is 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

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

PULSES AND SPECIAL CROPS

DRY PEAS

For **2013-14**, production is estimated to increase 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 increase by only 9% due to tight carry-in stocks, to nearly 4.0 Mt, also a record. Exports are forecast to rise to 2.7 Mt, with India, China and Bangladesh remaining Canada's top three markets. The devaluation of the Indian rupee and expectations of a large Rabi pulse crop early in 2014 is expected to slow exports to India. Carry-out stocks are forecast to increase sharply despite higher exports and lower domestic use. The average price is expected to fall from 2012-13, due to expectations for much larger Canadian carry-out stocks in 2013-14. Green dry peas prices are expected to maintain a premium of C$150/t over yellow dry peas, which are above the historical average, but below the record C$200/t premium green peas had over yellow peas last year.

In the US, area seeded to dry peas for 2013-14 is forecast by the USDA to rise by 30% from 2012-13. This is largely due to an expected increase in area in Montana and North Dakota. Assuming normal yields and abandonment, US dry pea production is forecast by AAFC to rise by 21% to 0.7 Mt. Despite this, Canadian exports to the US are forecast to continue trend upward as evidenced by strong export demand in August and September of 2013.

LENTILS

For **2013-14**, production is estimated to increase 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 decrease from last year to below 0.6 Mt, while red lentil production is expected to increase 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 decrease by 16% due to lower carry-in stocks. Exports are expected to decrease to 1.5 Mt, but India, the EU-27 and Turkey are expected to remain the top three export markets. Although the devaluation of the Indian rupee and expectations of a large Rabi pulse crop early in 2014 is expected to slow exports to India. Domestic use is expected to decrease 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 rise in carry-out stocks. Large green lentil prices are forecast to maintain a C$25/t premium over red lentil prices, similar to 2012-13.

In the US, the area seeded to lentils for 2013-14 is forecast by the USDA at 0.3 mln acres, down 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 decrease 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 decrease 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 fall due to the lower supply. The US and the EU-27 are forecast to remain the main markets for Canadian dry beans, with smaller volumes exported to Japan, Mexico and countries in Africa. Carry-out stocks are also expected to decrease. The average Canadian dry bean price is forecast to increase due to lower supply in North America.

In the US, area seeded to dry beans is forecast by the USDA to fall by 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 decrease 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 abandon-

ment, 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 marginally higher than 2012-13 as firm export demand, despite some competition from the Black Sea region, is expected to support prices.

CANARY SEED

For **2013-14**, production 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 be limited 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 fall 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 just under 1.6 mln acres, down 18% from 2012-13 and largely due to lower area in North Dakota. The area seeded to oil type varieties is expected to fall sharply to below 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. For 2013-14, the global supply of sunflower seed is estimated by the USDA at a record 46 Mt. This is 16% higher than last year due to increased area and yields in Russia, Ukraine and the EU-27. As a result, world exports and domestic use are expected to rise by 46% and 13%, respectively. However, world carry-out stocks are expected to increase by 60% to 2.8 Mt, and pressure world sunflower seed prices.

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

CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

November 20, 2013

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (c)	Food & Industrial Use (d)	Feed, Waste & Dockage	Total Domestic Use (e)	Carry-out Stocks	Average Price (g)
	thousand ha		*t/ha*	*thousand metric tonnes*								*$/t*
Durum												
2011-2012	1,623	1,590	2.62	4,172	17	5,755	3,584	232	270	686	1,486	345
2012-2013p	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	434	860	1,400	220-250*
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	4,347	8,538	7,000	220-250*
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	4,781	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	257
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	220-250
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	470-510
Total Oilseeds												
2011-2012	9,543	9,432	2.05	19,305	338	22,318	11,831	8,410	690	9,412	1,075	
2012-2013p	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	18,590	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

November 20, 2013

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (c)	Carry-out Stocks	Stocks-to-Use Ratio	Average Price (d)
	thousand ha		***t/ha***	***thousand metric tonnes***						***%***	***$//t***
Dry Peas											
2011-2012	986	974	2.57	2,502	12	3,049	2,096	658	295	11	310
2012-2013p	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	265-295
Lentils											
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	390-420
Dry Beans											
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	945-975
Chickpeas											
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	590-620
Mustard Seed											
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	780-810
Canary Seed											
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	530-560
Sunflower Seed											
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	40	46	15	18	610-640
Total Pulses and Special Crops (c)											
2011-2012	2,411	2,355	1.95	4,602	121	6,321	3,779	1,264	1,278		
2012-2013p	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	4,790	1,153	965		

(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.