

**CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS**

November 19, 2019

**Market Analysis Group / Crops and Horticulture Division  
Sector Development and Analysis Directorate / Market and Industry Services Branch****Executive Director: Nathalie Durand****Deputy Director: Fred Oleson**

This report is an update of Agriculture and Agri-Food Canada's (AAFC) October outlook report that provides the outlook for the 2019-20 crop year. For most crops in Canada, the crop year started on August 1 and ends on July 31, although for corn and soybeans, the crop year started on September 1 and ends on August 31.

**For 2019-20**, the final estimates of yield and production will not be available until December 6 when Statistics Canada (STC) publishes the results of its survey of several thousand farmers. Therefore, the forecasts in AAFC's current report do not account for the cold wet conditions which have prevailed on the Prairies since September and the heavy snow that occurred in some provinces in early-October. In Western Canada, harvest is mostly complete but the quality of the crop for some commodities is well-below last year, especially for the grains. For the Prairie Provinces, there are concerns that a portion of the crop may not be harvested until the spring unless favorable weather conditions facilitate the completion of harvest. In Eastern Canada, harvest is underway for corn and soybeans.

The forecasts below for production and yield are running off STC's September 12 model-based report which incorporates agro-climatic data to the end of August. The production of all field crops in Canada is expected to be 95.6 million tonnes (Mt), an increase of about 2 percent from last year. However, supply is expected to decrease due to lower imports and carry-in stocks. Partly due to the decrease in supply, total exports and total domestic use are forecast to decrease slightly. For grains and oilseeds (G&O), exports are expected to decrease as lower exports of wheat excluding durum, barley, corn and soybeans more-than offset higher exports of durum, oats and canola. However, for pulses and special crops (P&SC), exports are expected to increase slightly, mostly due to higher exports of dry peas, and to a lesser extent, lentils. Total domestic use of field crops is forecast to decrease slightly as the significant decrease in domestic use for corn and soybeans more-than offsets the increase in domestic use for barley, peas and lentils. Total carry-out stocks are forecast to increase to 16.9 Mt, well-above the 10-year average. Average prices for field crops in Canada are expected to continue to be strongly supported by the weakness of the Canadian dollar. Based on a survey of several thousand producers, Statistics Canada will provide final estimates for yields and production on December 6, 2019. These estimates will form the foundation for AAFC's December outlook report.

**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 tonnes -----					
<b>Total Grains And Oilseeds</b>									
2017-2018	27,149	26,336	3.27	86,187	2,504	103,046	45,370	43,356	14,320
2018-2019	27,820	26,861	3.22	86,584	4,261	105,165	46,841	44,191	14,133
2019-2020f	27,561	26,343	3.32	87,504	2,382	104,018	45,320	43,398	15,300
<b>Total Pulse And Special Crops</b>									
2017-2018	3,927	3,897	1.90	7,419	211	8,407	5,365	1,315	1,727
2018-2019	3,652	3,576	1.88	6,714	293	8,733	6,077	1,340	1,316
2019-2020f	3,849	3,756	2.15	8,079	290	9,686	6,230	1,901	1,555
<b>All Principal Field Crops</b>									
2017-2018	31,076	30,233	3.10	93,606	2,715	111,453	50,735	44,672	16,047
2018-2019	31,472	30,437	3.07	93,298	4,553	113,898	52,918	45,531	15,449
2019-2020f	31,410	30,099	3.18	95,583	2,672	113,704	51,550	45,299	16,855

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

f: forecast by AAFC except for area, yield and production which are from STC

## All Wheat

---

### Durum

**For 2019-20**, production is estimated to decrease by 13% from 2018-19 to 5 million tonnes (Mt), as the 21% lower seeded area is partly offset by higher average yields. Saskatchewan accounts for 85.5% of the production, Alberta for 14% and Manitoba for 0.5%.

Total supply is estimated to decrease by 7%, as the lower production is partly offset by higher carry-in stocks. Exports are forecast to increase by 4% to 4.7 Mt due to stronger demand resulting from a decrease in world production. Carry-out stocks are forecast to fall by 40% from 2018-19 to 1 Mt, 29% lower than the past five year average of 1.4 Mt.

World durum production is estimated by the International Grains Council to fall by 2.6 Mt from 2018-19 to 35.6 Mt, while supply decreases by 1.8 Mt to 46.1 Mt. Use is expected to rise by 0.4 Mt to 37.8 Mt. Carry out stocks are forecast to fall by 2.3 Mt to 8.2 Mt, the lowest since 2014-15. The United States Department of Agriculture (USDA) is forecasting US durum production at 1.48 Mt, down 0.64 Mt from 2018-19.

The average Canadian crop year producer price for durum is forecast to rise from 2018-19 due to lower world, Canadian and US supply.

### Wheat (excluding durum)

**For 2019-20**, Canadian wheat production is estimated to rise by 4% from 2018-19 to 27.5 Mt, as the 7.5% higher seeded area is partly offset by higher abandonment for winter wheat and lower average yields. Saskatchewan accounts for 39.5% of the wheat production, Alberta 35.5%, Manitoba 18%, Ontario 5.5%, Quebec 1%, with the remaining 0.5% in the Maritimes and British Columbia.

Production by class of wheat, with 2018-19 production in brackets, is estimated at:

winter (hard red, soft red and soft white) 1.74 Mt (2.51 Mt); Canada Western Red Spring (CWRS), premium quality hard wheat, 22.23 Mt (20.03 Mt); Canada Prairie Spring (CPS) 1.56 Mt (1.59 Mt), Canada Northern Hard Red Spring (CNHR) 0.77 Mt (1.06 Mt); soft white spring (CWSWS) 0.52 Mt (0.47 Mt), other western spring wheat 0.24 Mt (0.27 Mt), eastern spring wheat, mainly hard red spring (CERS), 0.41 Mt (0.39 Mt).

Total supply is estimated to increase by only 1%, as lower carry-in stocks partly offset the increase in production. Exports are forecast to fall by 4% to 19 Mt, as more competition is expected from other exporters because of higher production. Carry-out stocks are forecast to increase by 18% to 5 Mt, but only 2% higher than the past five year average of 4.92 Mt.

World all wheat (including durum) production is forecast to increase by 35 Mt to 766 Mt, while the supply increases by 29 Mt to 1,043 Mt, according to USDA. Total use is expected to increase by 19 Mt to 755 Mt. Carry out stocks are forecast to rise by 10 Mt to 288 Mt. Excluding China, world all wheat stocks are expected to increase by 5 Mt to 143 Mt.

US all wheat production is estimated to rise by 1 Mt from 2018-19 to 52.3 Mt, according to USDA. Supply is expected to be unchanged at 84.9 Mt. Domestic use is forecast to increase by 1.5 Mt, while exports increase by 0.4 Mt. Carry out stocks are forecast to decrease by 1.8 Mt to 27.6 Mt.

Average Canadian producer prices for wheat for the crop year are forecast to fall from 2018-19 because of the higher world supply.

**Stan Skrypetz: Wheat Analyst**  
[stan.skrypetz@canada.ca](mailto:stan.skrypetz@canada.ca)

## Coarse Grains

---

### Barley

**For 2019-20**, total barley production in Canada is estimated to increase by almost 20% from 2018-19 to close to 10 Mt. About 60% of the increase is anticipated to come from Alberta, the leading barley producing province in Canada, and almost 39% from Saskatchewan. Total supply is expected to increase by 13% as the increase in production more-than offsets the historically low level of carry-in stocks.

The Prairie barley harvest has been struggling with wet weather. It was nearly 95% complete, as of the last week of October. Average yields varied across the Prairie Provinces. Barley production in the Prairie Provinces accounts for about 95% of total barley production in Canada. Considering the unharvested area in the Prairie Provinces at this time and the continued wet and cold weather in November, barley production in Canada will likely be lower than Statistics Canada's (STC) September estimate. The quality of the early harvested barley crop is generally good but the late harvested crop is expected to show a decrease in quality.

Domestic use of barley is expected to increase from 2018-19, reflecting stronger feed use. Exports are expected to decrease due to the increased supply of barley in competing countries and a decline in the supply of good quality barley in Canada. Carry-out stocks are anticipated to increase sharply.

Over the past few weeks, the average feed barley price in Lethbridge feedlots has been on the upward trend due to the concern over the level of production as well as quality issues. For 2019-20, to the end of October, the cumulative average price of feed barley is 10% lower than the same period of 2018-19. This is related to the anticipation of a plentiful supply of feed grains in 2019-20. As a result, the crop year average price of feed barley for 2019-20 is expected to be lower than for 2018-19.

World barley production for 2019-20 is projected to reach its highest level since 2008-09, largely due to increased output from the major exporting countries, including the EU, Australia, Russia and Ukraine. World trade is projected to rise due to higher supply

and stronger demand. Increased imports from Saudi Arabia, China and Morocco will more-than offset decreased deliveries to other countries. World carry-out stocks are expected to increase to the highest level in the recent three years.

### Corn

**For 2019-20**, corn production in Canada is estimated to increase by 2% from 2018-19 to 14.1 Mt as the increase in harvested area more-than offsets the decrease in average yields. The total supply of corn is forecast to decrease significantly from 2018-19 due to lower carry-in stocks and imports. The amount of corn imported in 2019-20 by Western Canada is expected to fall sharply, because the feed barley supply for 2019-20 is anticipated to recover.

As of the end of October, only a small amount of corn was harvested in Ontario, Canada's leading corn producing province. In Quebec, only 2% of corn was harvested. In Manitoba, the third largest corn producing province, the harvest was about 21% complete with varied yields reported, compared with 61% complete at this time of last year. With more rain and snow forecast in both Eastern and Western Canada in November, the corn production in Canada is anticipated to be much lower than STC's September production estimate.

Corn domestic use is expected to decrease from 2018-19 due to reduced food and industrial use, as well as feed use, as a result of a smaller supply. Exports are forecast to fall significantly, mainly due to lower exports to the EU. Carry-out stocks are forecast to decline due to smaller supply.

For 2019-20, the average corn price for the crop year is expected to be higher than last year due to a significant decline in domestic corn supply and the support from the higher US corn price forecast for 2019-20.

Corn production in the US for 2019-20 is projected to decrease by 5% from 2018-19 due largely to a decline forecast for yields, according to the USDA. The average farmgate price for corn in the US is projected at US\$3.85/bu, increased from US\$3.61/bu

for last year. Corn production in the other major world exporters, Argentina and Brazil, remains abundant and will increase in Russia and Ukraine, which is expected to pressure corn prices.

### **Oats**

**For 2019-20**, the supply of oats in Canada is expected to increase from 2018-19, as the increase in production exceeds the decrease in carry-in stocks. Oat production increased in the three Prairie Provinces, as well as in Ontario and Quebec. The Prairie Provinces, particularly Saskatchewan, accounted for most of the increase.

The oat harvest in the Prairie Provinces, where about 90% of total Canadian oat production originates, has experienced wet field conditions. Harvest is nearly 90% complete with varied yields reported and high possibilities of quality issues. Given the unharvested area in the Prairie Provinces and continued wet and cold weather throughout the rest of the harvest season, oat production for 2019-20 in Canada is anticipated to be lower than the estimated production in the STC's September report.

Domestic use of oats for 2019-20 is expected to remain flat. Exports are anticipated to increase due to larger supply. Carry-out stocks are forecast to increase but will remain tight.

Oat prices in the Prairie Provinces have been strong for the time being, due to delayed harvest and quality issues in the Prairie Provinces. The 2019-20 cumulative average prices in the Prairie Provinces were 3 to 9% higher than those for the same period

in 2018-19 and was 6% higher for oat futures in the Chicago Board of Trade (CBOT). The crop year average price of oats for 2019-20 is expected to be slightly lower than for 2018-19

US oat production for 2019-20 is estimated to decrease by 5% from 2018-19, according to the USDA. US oat imports are projected to increase. Oat production in the EU and Australia is forecast to increase.

### **Rye**

**For 2019-20**, rye production in Canada is estimated to increase by 19% from 2018-19 to 281 Kt, however, total supply is expected to decrease slightly due to a significant decline in carry-in stocks. Exports, domestic use and carry-out stocks are expected to be similar to 2018-19, due to the flat supply.

Rye prices in Saskatchewan and Manitoba elevators have declined from a year ago but still remained strong. For 2019-20, the rye price is anticipated to decrease by 9% from 2018-19 to an average of \$215/t.

The 2019-20 rye production in the US, the leading importer of Canadian rye, increased by 56 Kt. Domestic use in the US is forecast to increase by 46 Kt and imports are expected to decline.

**Mei Yu: Coarse Grains**  
[mei.vu@canada.ca](mailto:mei.vu@canada.ca)

### Canola

**For 2019-20**, canola production is estimated at 19.4 million tonnes (Mt), 5% below last year but slightly above the five year average, as the 8% shift in crop area out of canola was partly offset by an expected 0.07 t/ha increase in yields. Yields are tentatively estimated at 2.3 t/ha despite the abnormal growing conditions which affected different parts of the growing region during the crop year.

As of November 1, AAFC estimates about 3.2 Mt (16%) of the Canadian canola crop remains unharvested in the field with delays increasing as we move from east to west across Western Canada. November 1 harvest progress by province was: Manitoba 90% complete, Saskatchewan 88% and Alberta 71%. The grade distribution for Canadian canola is 94% No.1, 4% No. 2 and 1% No.3 based on the Canadian Grain Commission's 934 sample harvest survey as of early November.

The grade distribution is similar for Eastern and Western Canada with the oil content averaging 45.4% in the East and 44.3% in the West. The proportion of canola grading No.1 by western Canadian province is Manitoba 97%, Saskatchewan 96% and Alberta 90%. Most samples in the survey were collected from early harvested canola and quality is expected to deteriorate as samples from later harvested crops are submitted. Moisture content from late harvested canola is expected to be a challenge and a significant portion of the late harvested crop will require artificial drying.

Total canola supplies are estimated at a record 23.6 Mt, including the unharvested crop in the field, based on the production estimate, higher carry-in stocks and stable imports.

On the demand side, domestic processing of canola is forecast at about 9.3 Mt, largely unchanged from last year, as the industry operates at near full capacity. Canola exports are forecast at 9.2 Mt, versus the five year average of 10.1 Mt, as burdensome global supplies and reduced world demand limit shipments. For the crop year to Oct 27<sup>th</sup>, canola exports are running marginally ahead of

last year's pace. Exports to the European Union are expected to increase following last summer's drought and sharply reduced production across key European growing regions. Exports to China are expected to remain sharply below year ago levels as trade issues between the two countries remain unresolved and a sharp decrease in Chinese hog numbers due to African Swine Fever reduces protein meal consumption.

Carry-out stocks are forecast to rise to 4.7 Mt, with about 3.7 Mt remaining on farm. The stocks-to-use ratio is estimated at 25% versus 20% in 2018-19 and 22% in 2009-10. The average canola price is forecast to fall to \$455-485/t from \$497/t in 2018-19, as pressure from lower world vegetable oil and protein meals prices is partly offset by the low value of the Canadian dollar.

For 2019-20, European imports of canola-rape seed will increase by 22%, to 5.2 Mt, says Oil World. Due to the severe mid-summer drought across Europe, output is expected to fall by 15% while crush volumes remain stable. The supply shortfall is expected to be filled through higher imports. Ukraine is the largest shipper of canola into the EU and exports are forecast to rise by 24% to a modern day record of 2.7 Mt. Australian exports into the EU are expected to be constrained to about 1.0 Mt due to drought down under. Canadian exports to the EU are forecast to rise by 270%, to about 1.6 Mt, easing pressure on Canada's expected canola carry-out for 2019-20.

### Flaxseed

**For 2019-20**, flaxseed production is estimated at 577 Kt up from 492 Kt in 2018-19 and up slightly from 2017-18. The rise in output is mostly due to the 9% rise in seeded area, to 0.38 Mha. About 79% of the flaxseed area is located in Saskatchewan, with Alberta and Manitoba accounting for 12% and 9% of the remaining area, respectively. Above normal yields are assumed. Supplies are forecast to rise slightly to 648 Kt, as the increase in output more-than exceeds the drop in carry-in stocks.

Exports are forecast to remain stable at 0.50 Mt while total domestic use decrease due to lower feed, waste and dockage. Carry-out stocks are forecast to rise to 70 Kt. Flaxseed prices are forecast at \$455-495/t.

For 2019-20, world crushing of flaxseed-linseed is expected to rise slightly, to 2.48 Mt, producing 0.81 Mt of linseed oil and 1.56 Mt of linseed meal, says Oil World. China is the world's largest flaxseed crusher and is expected to process 0.78 Mt of flaxseed-linseed in 2019-20, similar to previous years. The European Union is expected to crush 0.70 Mt of flaxseed-linseed while the US crush is estimated at 0.27 Mt. Other significant processors of flaxseed-linseed are Kazakhstan, India and Russia, in order of size at between 0.1 Mt to 0.2 Mt per country. Aggregate other countries are expected to crush about 0.21 Mt of flaxseed-linseed in 2019-20.

### **Soybeans**

**For 2019-20**, production is estimated at 6.49 Mt, a 13% drop from the 7.42 Mt grown last year due to a significant drop in planted area and slightly lower expected yields. Total supplies of soybeans in Canada are forecast to fall by 18%, to 7.59 Mt, as sharply lower imports, 0.4 Mt vs 1.1 Mt for 2018-19, supplement the drop in output and negate the slight increase in carry-in stocks which rose to 0.70 Mt.

Domestic processing of soybeans is forecast to decline marginally to 1.9 Mt but could easily rise to last year's pace of 2.1 Mt. Exports are forecast to fall sharply to 4.7 Mt from the record 5.6 Mt shipped out of the country in 2018-19, due to constrained

supplies. Feed, waste and dockage is also forecast to fall sharply to 0.29 Mt while carry-out is estimated at 0.45 Mt. Soybean prices are forecast to range from to \$395/t to \$425/t versus \$406/t in 2018-19 and \$434/t in 2017-18.

At the world level, the USDA forecasts 2019-20 soybean production to decline by 20 Mt, to 339 Mt, due to a sharply lower US output of about 97 Mt, versus 121 Mt last year. Brazilian soybean production is forecast at a record 123 Mt as that country recovers from last year's drop. Argentine production is expected to decline slightly to 53 Mt as the country recovers fully from the 2017-18 drought when output fell to 37.8 Mt. China is projected to increase its soybean output slightly, to 17.1 Mt, as it seeks to reduce dependence on imported oilseeds. India is expected to produce 11.0 Mt of soybeans, production will be helped by the elongated monsoon season which eased drought concerns. Similarly, Paraguayan production is projected to increase slightly to 10.2 Mt, assuming a return to normal growing conditions in that country. Production by other countries is expected to decline marginally to 21.5 Mt

Factors to watch are: (1) the quality of the Canadian and US soybean harvest; (2) the percentage of crop abandoned due to bad harvest weather; (3) strength of import country buying; (4) Canadian and US export shipping pace and (5) soybean planting intentions in South America.

**Chris Beckman: Oilseeds Analyst**  
[Chris.beckman@agr.gc.ca](mailto:Chris.beckman@agr.gc.ca)

### Dry Peas

**For 2019-20**, production is estimated to rise by 30% to 4.7 million tonnes (Mt). This is largely due to higher area and yields, especially in Saskatchewan and Alberta where 95% of the peas are grown. Yellow pea production is forecast to rise from last year to nearly 4.1 Mt, while green pea production is also expected to rise to nearly 0.6 Mt. Production of the other remaining dry pea types is expected to fall sharply to about 50 thousand tonnes (Kt). Supply is forecast to rise to a record 5.1 Mt despite lower carry-in stocks. Exports are forecast to increase to 3.4 Mt. From August to September 2019, China, US and India were Canada's top three markets. Due to higher supply, carry-out stocks are forecast to rise. The average price is expected to fall from 2018-19.

During October, the on-farm price of yellow peas in Saskatchewan rose \$10/t while the price of green pea types rose \$15/t. Current indications of crop quality suggest there will be a decrease in the supply of No.1 and No.2 grade Canadian dry peas when compared to last year. For the crop year to-date, the premium for green dry peas has been \$60/t above the price for yellow dry peas versus \$130/t last year.

Area seeded to dry peas in the US for 2019-20 is forecast by the USDA to rise by 26% from last year to 1.1 million acres. This is largely due to higher seeded area in Montana and North Dakota. Yields are expected to be above average and US dry pea production is forecast by the USDA to rise sharply to just over 1.0 Mt. The main export markets for US dry peas are Canada, the Philippines and India.

### Lentils

**For 2019-20**, production is estimated to rise by 20% to 2.5 Mt, due to higher yields. Production of red lentils rose sharply from last year to 1.7 Mt, while large green lentil production fell to 0.6 Mt. Production of the other remaining lentil types is expected to decrease to below 0.3 Mt.

Imports, largely from the US, are forecast at 75 Kt. However, supply is expected to increase by only 7% due to lower carry-in stocks. Exports are expected to rise to 2.1 Mt. To-date, India, United Arab Emirates,

Bangladesh and Turkey are the top export markets. Domestic use is expected to be higher than the previous year due to the lower crop quality. Carry-out stocks are forecast to fall to 550 Kt and remain burdensome. The overall average price is forecast to fall from 2018-19, largely due to a below average grade distribution.

During the month of October, the on-farm price in Saskatchewan for large green lentils rose by \$30/t while red lentil prices rose by \$35/t. This was largely due to higher export demand and quality concerns for the new crop. Compared to last year, a decrease in the supply of No.1 or No.2 grade Canadian lentils is expected for 2019-20. To-date, large green lentil prices have maintained a premium of \$130/t over red lentil prices, compared to a premium of \$85/t in 2018-19.

For 2019-20, US area seeded to lentils is forecast by the USDA at below 0.5 million acres, down sharply from 2018-19, largely due to lower area seeded in Montana. With above normal yields and lower abandonment, 2019-20 US lentil production is therefore forecast by the USDA at 0.3 Mt, down 44% from the production in 2018-19. The main US export markets for lentils to-date are the EU, Canada, India and Mexico.

### Dry Beans

**For 2019-20**, production is estimated to increase to 356 Kt. This includes 94 Kt of white pea bean types and 262 Kt of colored bean types. Production in Ontario decreased due to lower yields and increased in Manitoba due to higher yields. In Alberta, colored dry bean production increased due to higher yields. Supply is forecast to rise by 12%, due to higher carry-in stocks.

Exports are forecast to be marginally lower than last year. Based on data for August and September, the EU and the US are the top two markets, with smaller volumes exported to Angola and Mexico. Carry-out stocks are expected to increase significantly due to the higher level of supply. The average Canadian dry bean price is forecast to fall despite slightly lower North American supply.

Area seeded to dry beans in the US is estimated by the USDA to increase by 7% to 1.3 million acres, mostly due to larger area seeded in Minnesota. US total dry bean production (excluding chickpeas) is forecast by the USDA at 1.1 Mt, down marginally from 2018-19. The largest decreases are expected for white pea beans and pinto beans. The main US export markets continue to be Canada, EU and Mexico.

### **Chickpeas**

**For 2019-20**, production is estimated at 263 Kt, a sharp decrease from last year due to lower area seeded and yields. The production of kabuli types is estimated to be lower than the previous year, while desi type production is expected to be marginally higher. Despite this, the total supply is forecast to increase, due to large carry-in stocks. Exports are forecast at 150 Kt with the US and Pakistan as the top markets. Carry-out stocks are expected to rise largely, due to increased supply and continue to be burdensome. The average price is forecast to decrease sharply, due to expectations for record world production and below average Canadian crop quality.

The USDA has estimated US chickpea area seeded at a 0.45 million acres, 48% lower than in 2018-19. With higher yields and lower abandonment, 2019-20 US chickpea production is forecast by the USDA at 0.33 Mt, down sharply from 2018-19.

### **Mustard Seed**

**For 2019-20**, production is estimated to have fallen sharply to 141 Kt due to lower area seeded. Production of each of the three major types of mustard (yellow, brown and oriental) is expected to decrease. However, total supply is forecast to fall by only 6% due to higher carry-in stocks. Exports are expected to be similar to last year at 120 Kt and, as of August and September, the US and the EU are the top two markets. Carry-out stocks are forecast to fall and, as a result, the average price is forecast to be slightly higher than in 2018-19.

### **Canary Seed**

**For 2019-20**, production is estimated to be cut by half to 80 Kt due to lower area and yields. Exports are expected to be lower than the previous year. Based on data for August and September, Mexico and the EU are the top two export markets, followed by Brazil. Carry-out stocks are expected to tighten. The average price is forecast to be sharply higher than last year.

### **Sunflower Seed**

**For 2019-20**, production is estimated to fall to 47 Kt as lower harvested area is offset by higher yields. When compared to 2018-19, supply is expected to decrease to 162 Kt due to lower carry-in stocks and production. Exports are forecast to be similar to the previous year, but carry-out stocks are forecast to fall. The US is expected to remain Canada's main export market for sunflower seed. The price is forecast to be higher on average from last year, due to stronger oilseed type prices than in 2018-19.

US sunflower seed production for 2019-20 is forecast by the USDA at just over 1.0 Mt, up 7% from 2018-19. This is largely due to higher production in North Dakota. Production of oil type varieties is estimated to have risen to 0.9 Mt and the production of confectionery type varieties is estimated to have increased to over 0.1 Mt. Total supply in the US supply is expected to be unchanged at 1.2 Mt. Domestic use is estimated to increase and exports are expected to fall. As a result, US sunflower seed carry-out stocks are expected to fall and be supportive for North American prices.

The world supply of sunflower seed for 2019-20 is estimated by the USDA at 56.5 Mt. This is marginally lower than last year, due to decreased production in Ukraine. World domestic use is expected to rise to a record 51.5 Mt and world exports are forecast to fall to 2.6 Mt. World carry-out stocks are expected to decrease sharply to 2.5 Mt, below the five-year average.

**Bobby Morgan: Pulse and Special Crop Analyst**  
[Bobby.Morgan@agr.gc.ca](mailto:Bobby.Morgan@agr.gc.ca)



# CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

November 19, 2019

Grain and Crop Year (a)	Area		Yield t/ha	Production	Imports (b)	Total Supply	Exports (c)	Food & Industrial Use (d)	Feed, Waste & Dockage	Total Domestic Use (e)	Carry-out Stocks	Average Price (g) \$/t
	Seeded ----- thousand ha	Harvested										
<b>Durum</b>												
2017-2018	2,106	2,088	2.38	4,962	8	6,798	4,342	201	587	1,030	1,426	265
2018-2019	2,503	2,456	2.34	5,745	24	7,194	4,526	206	596	993	1,676	235
2019-2020f	1,980	1,929	2.59	4,998	25	6,699	4,700	210	570	999	1,000	245-275
<b>Wheat Except Durum</b>												
2017-2018	7,020	6,895	3.69	25,415	75	30,593	17,570	3,212	3,977	7,969	5,053	240
2018-2019	7,570	7,425	3.56	26,456	95	31,605	19,764	3,309	3,457	7,601	4,240	245
2019-2020f	8,141	7,847	3.50	27,494	95	31,829	19,000	3,310	3,687	7,829	5,000	215-245
<b>All Wheat</b>												
2017-2018	9,126	8,983	3.38	30,377	82	37,391	21,913	3,413	4,564	8,999	6,479	
2018-2019	10,073	9,881	3.26	32,201	119	38,799	24,289	3,515	4,053	8,593	5,916	
2019-2020f	10,121	9,776	3.32	32,492	120	38,528	23,700	3,520	4,257	8,828	6,000	
<b>Barley</b>												
2017-2018	2,334	2,114	3.73	7,891	59	10,072	2,823	62	5,716	6,005	1,244	227
2018-2019	2,628	2,395	3.50	8,380	43	9,667	3,068	104	5,345	5,707	893	260
2019-2020f	2,996	2,701	3.70	9,987	40	10,920	3,000	111	5,868	6,220	1,700	210-240
<b>Corn</b>												
2017-2018	1,447	1,406	10.02	14,096	1,699	18,291	1,845	5,173	8,841	14,030	2,417	174
2018-2019	1,468	1,431	9.70	13,885	2,800	19,102	1,617	5,786	9,699	15,502	1,983	194
2019-2020f	1,495	1,463	9.64	14,110	1,700	17,793	1,500	5,400	9,077	14,493	1,800	190-220
<b>Oats</b>												
2017-2018	1,295	1,052	3.55	3,733	14	4,450	2,368	112	1,088	1,304	778	218
2018-2019	1,235	1,005	3.42	3,436	10	4,225	2,475	186	1,031	1,338	412	254
2019-2020f	1,459	1,158	3.47	4,016	10	4,438	2,580	185	1,047	1,358	500	235-265
<b>Rye</b>												
2017-2018	144	101	3.39	341	1	507	194	57	119	188	124	162
2018-2019	136	79	2.99	236	2	363	146	19	108	142	74	236
2019-2020f	175	97	2.88	281	2	356	140	19	104	136	80	200-230
<b>Mixed Grains</b>												
2017-2018	123	54	2.77	149	0	149	0	0	149	149	0	
2018-2019	144	69	2.82	195	0	195	0	0	195	195	0	
2019-2020f	145	66	3.03	199	0	199	0	0	199	199	0	
<b>Total Coarse Grains</b>												
2017-2018	5,342	4,726	5.55	26,210	1,773	33,469	7,230	5,404	15,913	21,676	4,564	
2018-2019	5,610	4,979	5.25	26,132	2,855	33,551	7,305	6,095	16,378	22,883	3,362	
2019-2020f	6,269	5,485	5.21	28,592	1,752	33,706	7,220	5,715	16,294	22,406	4,080	
<b>Canola</b>												
2017-2018	9,313	9,273	2.30	21,328	108	22,778	10,783	9,269	160	9,496	2,499	539
2018-2019	9,232	9,120	2.23	20,343	146	22,988	9,141	9,295	397	9,754	4,094	497
2019-2020f	8,479	8,413	2.30	19,358	100	23,551	9,200	9,250	350	9,651	4,700	455-485
<b>Flaxseed</b>												
2017-2018	421	419	1.33	555	7	802	516	0	145	160	127	463
2018-2019	347	342	1.44	492	9	628	466	0	85	102	61	496
2019-2020f	379	373	1.55	577	10	648	500	0	58	78	70	455-495
<b>Soybeans</b>												
2017-2018	2,947	2,935	2.63	7,717	534	8,606	4,929	1,969	795	3,026	651	434
2018-2019	2,558	2,540	2.92	7,417	1,131	9,199	5,640	2,058	563	2,859	700	406
2019-2020f	2,313	2,296	2.82	6,485	400	7,585	4,700	1,900	285	2,435	450	395-425
<b>Total Oilseeds</b>												
2017-2018	12,681	12,627	2.34	29,600	649	32,186	16,227	11,238	1,100	12,682	3,277	
2018-2019	12,137	12,001	2.35	28,252	1,286	32,815	15,246	11,354	1,045	12,715	4,854	
2019-2020f	11,171	11,082	2.38	26,420	510	31,784	14,400	11,150	693	12,164	5,220	
<b>Total Grains And Oilseeds</b>												
2017-2018	27,149	26,336	3.27	86,187	2,504	103,046	45,370	20,056	21,576	43,356	14,320	
2018-2019	27,820	26,861	3.22	86,584	4,261	105,165	46,841	20,963	21,475	44,191	14,133	
2019-2020f	27,561	26,343	3.32	87,504	2,382	104,018	45,320	20,385	21,244	43,398	15,300	

(a) Crop year is August-July, except corn and soybeans, for which the crop year is September-August.

(b) Imports exclude products.

(c) Exports include grain products but exclude oilseed products.

(d) Food and Industrial use for soybeans is based on data from the Canadian Oilseed Processors Association.

(e) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use + Loss in Handling

(g) Crop year average prices: Wheat (No.1 CWRS, 13.5% protein) and Durum (No.1 CWAD, 13% protein), both are average Saskatchewan producer spot prices. 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)

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

f: forecast by AAFC except for area, yield and production which are from STC

# CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

November 19, 2019

Grain and Crop Year (a)	Area Seeded ----- thousand ha -----	Area Harvested	Yield t/ha	Production	Imports (b)	Total Supply ----- thousand tonnes -----	Exports (b)	Total Domestic Use (c)	Carry-out Stocks	Stocks-to- Use Ratio %	Average Price (d) \$/t
<b>Dry Peas</b>											
2017-2018	1,656	1,642	2.50	4,112	12	4,424	3,085	691	648	17	265
2018-2019	1,463	1,431	2.50	3,581	62	4,291	3,247	718	326	8	270
2019-2020f	1,753	1,722	2.71	4,673	60	5,059	3,400	1,059	600	13	225-255
<b>Lentils</b>											
2017-2018	1,783	1,774	1.44	2,559	35	2,908	1,538	497	873	43	475
2018-2019	1,525	1,499	1.40	2,092	51	3,016	2,032	350	634	27	390
2019-2020f	1,530	1,501	1.68	2,520	75	3,228	2,100	578	550	21	365-395
<b>Dry Beans</b>											
2017-2018	135	132	2.45	322	86	409	350	34	25	7	760
2018-2019	143	137	2.49	341	97	463	348	36	80	21	815
2019-2020f	147	142	2.51	356	85	521	345	36	140	37	770-800
<b>Chickpeas</b>											
2017-2018	68	68	1.49	102	48	151	116	21	13	10	950
2018-2019	179	176	1.77	311	51	376	147	129	100	36	480
2019-2020f	159	155	1.70	263	40	403	150	128	125	45	425-455
<b>Mustard Seed</b>											
2017-2018	156	153	0.80	122	9	211	112	45	53	34	770
2018-2019	204	197	0.88	174	9	236	121	42	73	45	690
2019-2020f	161	157	0.90	141	8	222	120	42	60	37	685-715
<b>Canary Seed</b>											
2017-2018	103	103	1.41	145	0	165	147	2	16	11	465
2018-2019	109	109	1.45	158	0	174	156	7	11	7	505
2019-2020f	77	58	1.39	80	0	91	90	1	0	0	615-645
<b>Sunflower Seed</b>											
2017-2018	26	26	2.26	58	22	139	17	25	98	234	590
2018-2019	29	27	2.13	57	24	179	26	59	94	110	585
2019-2020f	23	22	2.14	47	22	162	25	57	80	97	585-615
<b>Total Pulses and Special Crops (c)</b>											
2017-2018	3,927	3,897	1.90	7,419	211	8,407	5,365	1,315	1,727	26	
2018-2019	3,652	3,576	1.88	6,714	293	8,733	6,077	1,340	1,316	18	
2019-2020f	3,849	3,756	2.15	8,079	290	9,686	6,230	1,901	1,555	19	

(a) Crop year is August-July. Grains include pulses (dry peas, lentils, dry beans, chickpeas) 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

(d) Producer price, FOB plant, average over all types, grades and markets.

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

f: forecast by AAFC except for area, yield and production which are from STC