



CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS

November 19, 2021

**Market Analysis Group / Crops and Horticulture Division
Sector Development and Analysis Directorate / Market and Industry Services Branch**

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This report is an update of Agriculture and Agri-Food Canada’s (AAFC) October outlook report for the 2020-21 crop year, which has ended for all crops, and provides the outlook for the 2021-22 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. The economic outlook, for the world and Canadian grain markets, is expected to be affected by the domestic and international uncertainty caused by COVID-19, rising energy prices as well as increased fertilizer and transportation costs.

For the 2021-2022 crop year, the outlook incorporates yield estimates from Statistics Canada’s (STC) September 14, 2021 report, which are based on a model that incorporates coarse resolution satellite data from STC’s Crop Condition Assessment Program, data from STC’s field crop reporting series, and agro-climatic data. The outlook was completed before the severe flooding encountered in British Columbia which led the province to declare a state of emergency and also resulted in a disruption in grain transportation to the port of Vancouver.

Total field crop production in Canada is estimated to have declined by 30%, with Western Canadian production declining by 40% due to severe drought and Eastern Canadian production rising marginally due to favorable growing conditions. In Eastern Canada, the corn and soybean harvest has been slowed due to excess precipitation and is not expected to be complete until the end of November.

For all principal field crops, a low level of carry-in stocks (beginning-year inventories) combined with the drought-induced decrease in production results in a sharp decline in total supplies, more-than offsetting the significant decline in both exports and domestic use, and resulting in carry-out stocks (ending-year inventories) dropping to record low levels.

Grain prices in Canada are forecast to remain strong as tight Canadian supplies for most crops, more comfortable but still relatively tight global grain supplies and strong international demand provide support.

The next AAFC Outlook for Principal Field Crops is scheduled to be released on December 17, 2021. STC publishes its final principal field crop production estimates for the year on December 3, 2021, based on a survey in November of approximately 28,600 farmers across Canada.

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 -----					
Total Grains And Oilseeds									
2019-2020	27,660	26,263	3.34	87,752	2,643	104,919	44,827	46,491	13,601
2020-2021	27,491	26,536	3.44	91,205	2,619	107,424	51,041	44,950	11,434
2021-2022f	27,691	26,453	2.47	65,379	3,952	80,765	31,715	42,120	6,930
Total Pulse And Special Crops									
2019-2020	3,912	3,804	1.99	7,559	328	9,425	7,219	1,311	896
2020-2021	4,000	3,949	2.16	8,545	344	9,784	6,771	1,547	1,467
2021-2022f	3,827	3,744	1.34	5,005	305	6,776	4,960	1,321	495
All Principal Field Crops									
2019-2020	31,571	30,067	3.17	95,312	2,972	114,344	52,046	47,802	14,497
2020-2021	31,491	30,485	3.27	99,750	2,962	117,209	57,812	46,496	12,901
2021-2022f	31,518	30,197	2.33	70,384	4,257	87,541	36,675	43,441	7,425

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

f: forecasts by AAFC except for area, yield and production for 2021-2022 which are STC

All Wheat

Durum

For 2021-22, production is estimated to decrease 46% to 3.5 Mt, due to lower yields in western Canada caused by the drought. The average yield for 2021-22 is estimated at 1.62 t/ha, compared to 2.6 t/ha over the last five years. Saskatchewan accounts for 87% of the production, Alberta for 12% and Manitoba for 1%.

According to the Canadian Grain Commission, the short crop did produce high quality durum with the preliminary harvest report, as of November 1, placing 70% of the 736 samples in the top two tiers with an average protein content of 15.7%.

Total supply is estimated to decrease by 41%, as the lower production is compounded by tight carry-in stocks. Exports are forecast to decline to 3.1 Mt, as a result of lower supply and high prices. Carry out stocks are forecast to fall by 40% from 2020-21 to 0.45 Mt, the lowest on record since 1984-85.

World durum production is estimated by the International Grains Council to fall by 5% year over year to 32.1 Mt due to lower harvests in North America, the lowest production of durum on record in the last 20 years. This, compounded with tight carry-in stocks, leads to a total supply of 40.3 Mt, also 5% less than the previous year. With the tight supply and high prices, trade is projected to contract 19% year over year to 7.2 Mt, and domestic use to fall 2% to 33.6 Mt. Closing stocks are projected at 6.7 Mt, 18% less than in 2020-21 with top exporters' ending stocks projected to decline to 2.3 Mt, from 3.89 Mt in 2020-21.

The United States Department of Agriculture (USDA) is forecasting US durum production at 1.01 Mt, down from 1.8 Mt in 2020-21.

Pricing for durum has moved sideways over the last month. The average spot price for 1 CWAD 13.5% is increased to \$600/tonne.

Wheat (excluding durum)

For 2021-22, Canadian wheat production is estimated to decline 36% from 2020-21 to approximately 18.2 Mt, as drought across the Prairies negatively impacted yields this past harvest; over 80% of the crop is produced in Western Canada. By province, Saskatchewan accounted for 33% of the wheat produced this year, Alberta for 30%, Manitoba 19%, Ontario 15%, Quebec 2%, and the remaining is spread across the Maritimes and British Columbia.

Despite the shortfall in production, the Canadian Grain Commission's preliminary harvest report of November 1, placed the bulk of Canadian western red spring wheat within the top two tiers, averaging 14.7% protein content. CWRS makes up approximately 64% of all non-durum wheat in Canada and 76% of all non-durum wheat produced across the Prairies.

Total supply is estimated to decrease 30% year over year to 23.3 Mt as the short production is compounded by low carry-in stocks. Exports are forecast to fall to 13 Mt and carry out stocks are forecast to drop 39% to 3Mt.

World all wheat (including durum) production is forecast at 775.3 Mt, while the supply declines about 1% to 1,063.2 Mt, according to USDA. Trade is forecast to reach a record 203.2 Mt and total use to increase 5 Mt to 787.2 Mt. Carry out stocks are forecast to decline 4% to 275.8 Mt, with over half of stocks held by China.

US all wheat production is estimated to fall by 4.9 Mt to 44.8 Mt, and supply is projected at 70.9 Mt, down 10 Mt from the previous year. With total use remaining relatively stable, carry-out stocks are projected to contract 30% to 15.8 Mt

The 2021-22 forecasted average price for CWRS 1 13.5% is increased to \$400/tonne.

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Coarse Grains

Barley

For 2021-22, Canadian barley supply is projected at 8.00 million tonnes (Mt), down sharply from 2020-21 and reaching a record low, primarily due to production issues in Canada's Prairie provinces, as well as record low carry-in stocks.

To reflect the tight supply, demand for both domestic feed consumption and exports will be sharply lower than last year. Canadian Grain Commission (CGC)'s weekly statistics show that, as of November 1st, 2021, Canadian barley grain exports are close to 1.00 Mt, 23% higher than the same period last year when barley grain exports had been active and exports for the entire crop year reached 3.80 Mt. We expect the exporting pace will slow down for the rest of the year.

Carry-out stocks are expected to be at a record low level. The 2021-22 barley carry-out stocks are projected at 300 thousand tonnes (Kt), which is much lower than the average monthly demand in the past five years. This level of ending stocks would meet less than one month of domestic use.

The average price of feed barley for 2021-22 is projected at a new record of \$400/t, up sharply from the previous record set in 2020-21. Prices are supported by tight carry-in stocks, significant crop production problems due to drought, robust demand and stronger prices of other grains.

Compared to the October forecast, the November forecast includes increased exports, decreased domestic feed use and an increase in the average price.

The 2021-22 barley production estimates for the EU, Russia and Ukraine were lowered by the USDA in its November report, relative to October estimates. Worldwide, the 2021-22 barley situation includes lower production, demand, ending stocks and stocks-to-use ratio, compared to 2020-21.

Corn

For 2021-22, Canadian corn supply is projected at 19.54 Mt, up sharply from 2020-21 and reaching a

record high, primarily due to estimates for a bumper corn crop in Eastern Canada, as well as a sharp increase in expected imports from Western Canada. According to Statistics Canada (STC)'s September trade data, corn imports in September are lower than the level a year ago, but we expect the importing pace will catch up.

Domestic use is projected to increase mainly due to higher volume for feed use. Exports are expected to increase from last year. The STC September trade data and the CGC weekly statistics both show an increase in exports for the reporting period. Carry-out stocks are predicted to decrease slightly.

Following the forecast for a surge in the 2021-22 US corn price, the 2021-22 corn price in the Chatham region is projected at a new record of \$275/t, up slightly from the old record set in 2020-21.

Compared to the October forecasts, the November forecasts include an increase in exports and a decrease in domestic feed use.

The 2021-22 corn production estimates for Argentina, the EU and the US were raised by the USDA in its November report, relative to October estimates. Compared to 2020-21, the 2021-22 global corn situation includes higher production, demand and ending stocks, as well as unchanged stocks-to-use ratio.

The USDA expects that the US will consume more corn for domestic feed use and ethanol production, but exports will be lower than 2020-21. The season-average farm price for US corn was unchanged at US\$5.45/bu, up from US\$4.53/bu for 2020-21 and US\$3.56/bu for 2019-20.

Oats

For 2021-22, Canadian oat supply is projected at 3.25 Mt, down 35% from 2020-21 and 28% from the previous five-year average. This is primarily due to production issues in Canada's Prairie provinces, despite a normal level of carry-in stocks. Accordingly, total demand, including exports and domestic use, is anticipated to drop sharply.

Carry-out stocks are projected at 200 Kt, drastically down from last year and a new record low level.

The average price of oats for 2021-22 is projected at a new record of \$470/t, up sharply from the old record set in 2020-21, due to significant crop production problems in North America and stronger prices of other grains.

Compared to the October forecasts, the November forecasts include increased exports of oat products, decreased domestic feed use and an increase in the average price.

Rye

For 2021-22, Canadian rye supply is forecast at 486 Kt, down 8% from 2020-21 but up 7% from the previous five-year average. Domestic use (mostly for feed use), exports and carry-out stocks are predicted to drop from 2020-21 on lower supply. The 2021-22 average price is projected at \$310/t, up sharply from 2020-21 and a new record, due to robust demand and stronger prices of other grains.

Compared to the October report, the November report includes an increase in the average price.

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Canola

For 2021-22, production is estimated at a 13-year low of 12.8 Mt on seeded and harvested areas of 9.1 Mha and 9.0 Mha, respectively. Harvest wrapped up across western Canada on widespread warm and dry weather, with some combining delayed by green undergrowth. As of early November, western Canada has experienced only light frosts and forecasts call for above normal temperatures for the remainder of the fall.

The grade distribution for canola is near normal with the Canadian Grain Commission's Harvest Sample Survey reporting 91% of the crop grading Number 1, while canola oil content is significantly lower than normal at an average 41.9%, versus 44.1% last year and the 5-year average of 44.2%. The modern day record oil content for canola was set in 2011 at 45.2%. The distribution of canola oil content is relatively even across all grades and significantly higher for canola grown in eastern Canada compared to that grown across the western provinces.

Canadian supplies are estimated at 14.7 Mt, the lowest since the 2008-09 crop year, on a combination of tight carry-in stocks, reduced output and modest imports. Canola supplies were 23.0 Mt in 2020-21 and the 5-year average is 23.1 Mt.

Canadian exports are forecast to fall 48% from last year to 5.5 Mt on tight Canadian supplies despite strong world demand. Domestic crush is forecast to decline from last year's record of 10.4 Mt to 8.5 Mt as supplies are rationed among users. Ending stocks are forecast to tighten to 0.50 Mt, with 0.3 Mt in commercial position and 0.2 Mt stored on farm, for a stocks-to-use ratio of 4%. Tight canola stocks combined with strong US soybean prices are forecast to support a canola price of \$1,000/t for 2021-22, compared to \$730/t in 2020-21 and the 5-year average of \$556/t.

This outlook contains higher-than normal uncertainty given the expansion in world vegetable oil consumption and the adverse growing conditions experienced across various growing regions over the past year. Volatility for canola prices is expected to

remain high with the market vulnerable to sharp corrections from either demand or supply shocks.

Flaxseed

For 2021-22, flaxseed production is estimated at 0.38 Mt, a 19-year low, on seeded and harvested areas of 0.42 Mha and 0.40 Mha respectively. Yields are estimated at 0.95 t/ha compared to 1.56 t/ha for 2020-21 and the 5-year average of 1.5 t/ha. The grade distribution for flaxseed is near normal with 99% of the crop grading No.1. The mean oil content is 44.2%, ranging from a minimum of 40.6% to a maximum of 47.3%.

Flaxseed supplies are estimated at 0.45 Mt on the decline in carry-in stocks and production, combined with modest imports. Supplies are 33% below last year and 37% under the 5-year average.

Exports are forecast down 28% from 2020-21, to 0.38 Mt, as Canada is forced to ration sales to its traditional Chinese, European and United States customers. Total domestic use is forecast to fall by 44% to 51,100 tonne (t) on lower feed, waste and dockage. Carry-out stocks are forecast to decrease by 65% to 20,000 t, with 5,000 t remaining on farm and 15,000 t in commercial position. The outlook for flaxseed prices strengthened sharply on tight supplies and inelastic world demand, increasing to \$1,150/t from \$693/t in 2020-21 and the 5-year average of \$526/t. If realized, this would be a record price for flaxseed, however, this price forecast carries a high degree of uncertainty and is vulnerable to a sharp correction.

Soybeans

For 2021-2022, production is estimated at 5.9 Mt on planted and harvested areas of about 2.15 Mha and 2.14 Mha, respectively. Yields are estimated at 2.75 t/ha, down slightly from the 3.12 t/ha for 2020-21 but similar to the 5-year average of 2.82 t/ha.

Total supply is forecast to decrease to 6.6 Mt, a 12% decline from last year's supply of 7.5 Mt on lower production, reduced imports and lower carry-in stocks. The tightening of supplies is forecast to result in a 11% decline in exports to 4.0 Mt despite strong world

demand. Domestic processing is forecast to rise to 1.8 Mt while carry-out stocks fall to 0.25 Mt. Soybean prices are forecast to decline modestly to \$550/t, in line with US prices and the Canadian-American exchange rate.

The USDA lowered its 2021-22 farm gate price estimates for soybeans to US\$12.10/bu from US\$12.45/bu last month. US soybean production is forecast at 4.42 billion bushels, down 23 million bushels from last month on lower yields. Exports were also reduced reflecting lower than expected shipments through October. With the drop in usage exceeding the decline in supply, soybean stocks were raised 20 million bushels to 340 million bushels versus the 256 million bushels carried out in 2020-21. At the world level, world soybean production was lowered to 384 million tonnes on lower US and Argentine production. World exports of soybeans were lowered by 1.0 million tonnes to 172.1 million tonnes on reduced demand from China which is expected to import 100 million tonnes of soybeans for 2021-22. World soybeans stocks were lowered 0.8 million tonnes to 103.8 million tonnes.

In the recently released Agricultural Projections to 2031, the USDA projects US soybean production to

increase by 9% to 4.84 billion bushels by 2031 on stable planted area and strong yields. Soybean yields are projected to rise to 55.5 bushels per acre by 2031 compared to the 51.5 bushels per acre for 2021-22. With projected tight beginning stocks and minimal imports, US soybean supplies are projected to increase by 9% to 5.15 billion bushels by the end of the projection period. Domestic crush is forecast to increase by 13%, to 2.48 billion bushels while exports rise 8% to 2.25 billion bushels by 2031-32. Soybean prices are projected to decline modestly and remain stable at US\$10 a bushel for the second half of the 10-year outlook period.

For 2021-22, factors to watch are: (1) US export sales and shipping pace, (2) Canadian export and domestic processing pace, (3) South American planting intentions, (4) the strength of Chinese buying, (5) price volatility and (6) US policy developments in support of the American biodiesel and renewable diesel sectors.

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Pulse and Special Crops

Dry Peas

For 2021-22, production is estimated to fall by 45% to 2.5 million tonnes (Mt), the lowest since 2011-12. This is largely due to poor yields from the drought, especially in Saskatchewan where 52% of the peas are grown. Yellow pea production is forecast to be lower than last year at 2.0 Mt, while green pea production is expected to fall below 0.4 Mt. Production of the other remaining dry pea types is expected higher at 220 thousand tonnes (Kt). Supply is forecast to be only 37% lower than last year at 3.1 Mt due to higher carry-in stocks. Exports are forecast to decrease significantly to 2.3 Mt. From August to September 2021, China and the US were Canada's top two markets. With the smaller supply, carry-out stocks are forecast to fall sharply. The average price is expected to increase by 76% from 2020-21 to a record \$600/t.

During October, the on-farm price of yellow peas in Saskatchewan rose \$55/t while the price of green pea types rose \$10/t. Current indications of crop quality suggest a smaller percentage of dry peas that will grade No.1 and No.2 grade Canadian dry peas when compared to last year. This coupled with the sharply lower Canadian output will result in a lower supply of No.1 and No. 2 dry peas for this crop year. For the crop year to-date, there has been a small discount for green dry peas to yellow dry peas, versus a green pea premium of \$5/t over yellow peas in 2020-21.

Area seeded to dry peas in the US for 2021-22 is forecast by the USDA to fall by 3% from last year to below 1.0 million acres. This is largely due to lower seeded area in North Dakota. Yields are estimated to be below average and US dry pea production is forecast by the USDA to fall by 44% to just over 0.5 Mt. The main export markets for US dry peas are Canada, the Philippines and India.

Lentils

For 2021-22, production is estimated to fall by over 1.0 Mt (-37%) to 1.8 Mt, due to poor yields from the drought in western Canada. Production of red lentils fell sharply from last year to 1.3 Mt, while large green lentil production decreased to just over

0.3 Mt. Production of the other remaining lentil types is expected to fall to below 0.2 Mt.

However, supply is expected to fall by only 28% due to higher carry-in stocks. Exports are expected to be rationed to 1.9 Mt. To-date, India, Turkey and United Arab Emirates are the top export markets. Domestic use is expected to be limited by the tight supply. Carry-out stocks are forecast to fall to 50 Kt. The overall average price is forecast to rise by 67% from 2020-21, to a record \$1080/t, with an above average grade distribution.

During the month of October, the on-farm price in Saskatchewan for large green lentils and red lentil prices were unchanged. This was largely due to below average export demand. Compared to last year, an decrease in the supply of No.1 or No. 2 grade Canadian lentils is expected for 2021-22. To-date, large green lentil prices have maintained a premium of \$280/t over red lentil prices, compared to a \$135/t premium in 2020-21.

For 2021-22, US area seeded to lentils is forecast by the USDA at over 0.7 million acres, up 35% from 2020-21, largely due to higher area seeded in Montana. With poor yields and higher abandonment, 2021-22 US lentil production is therefore forecast by the USDA at 0.23 Mt, down 31% from the production in 2020-21. The main US export markets for lentils to-date are the EU, Canada and Mexico.

Dry Beans

For 2021-22, production is estimated to have decreased by 28% to 352 Kt. This includes 103 Kt of white pea bean types and 249 Kt of colored bean types. Production in Ontario and Manitoba decreased due to lower yields. In Alberta, colored dry bean production increased due to higher area. Supply is forecast to fall by only 5%, due to higher carry-in stocks.

Exports are forecast to be marginally higher 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 decrease due to the lower level of supply and higher demand. The

average Canadian dry bean price is forecast to rise by 27% to a record \$1180/t due to lower North American supply.

Area seeded to dry beans in the US is estimated by the USDA to decrease by 20% to 1.4 million acres, mostly due to smaller area seeded in North Dakota. US total dry bean production (excluding chickpeas) is forecast by the USDA at just over 1.0 Mt, down 31% from 2020-21. The largest decreases are expected for white pea beans and pinto beans. The main US export markets continue to be the EU and Mexico.

Chickpeas

For 2021-22, production is estimated at 64 Kt, a 70% decrease from last year due to lower area seeded and yields. The production of both kabuli and desi types is estimated to be lower than the previous year. Total supply is forecast to decrease by 24%, due to record carry-in stocks. Exports are forecast at 120 Kt with the US and Turkey as the top markets. Carry-out stocks are expected to fall, largely due to decreased supply. The average price is forecast to rise by 66%, to a record \$1065/t, due to below average Canadian crop quality, and expectations for decreased world production.

The USDA has estimated US chickpea area seeded at a 0.38 million acres, 39% lower than in 2020-21. With below average yields, 2021-22 US chickpea production is forecast by the USDA at 0.14 Mt, down 29% from 2020-21.

Mustard Seed

For 2021-22, production is estimated to have fallen 28% to 71 Kt due to lower yields and area seeded. Production of yellow, brown and oriental types of mustard decreased. However, total supply is forecast to fall by 29% to 118 Kt. Exports are expected to be rationed and lower than last year at 70 Kt and, as of August and September, the US and the EU are the top two markets. Carry-out stocks are forecast to fall sharply in Canada and in the US as a result, the average price is forecast to be almost double the price from 2020-21, at a record \$1700/t.

Canary Seed

For 2021-22, production is estimated to be cut by 37% to 112 Kt due to lower area and yields. Exports are expected to be sharply lower than the previous year. Based on data for August and September, Mexico and the EU are the top two export markets, followed by US. Carry-out stocks are expected to tighten. The average price is forecast to be 74% higher than last year at a record \$1200/t.

Sunflower Seed

For 2021-22, production is estimated to have fallen to 77 Kt as lower harvested area combines with decreased yields. When compared to 2020-21, supply is expected to decrease to 228 Kt due to higher carry-in stocks but lower production. Exports are forecast to be slightly lower than the previous year, and 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 a record \$800/t, 29% higher on average from last year, mostly due to stronger oilseed type prices than in 2020-21.

US sunflower seed production for 2021-22 is forecast by the USDA at 862 Kt Mt, down 36% from 2020-21. This is largely due to lower production in North and South Dakota. Production of oil type varieties is estimated to have fallen to below 800 Kt and the production of confectionery type varieties is estimated to have decreased to below 70 Kt. Total supply in the US is expected to decrease by 25% at 1.2 Mt. Domestic use is expected to fall. US sunflower seed carry-out stocks are expected to fall and support North American prices.

The world supply of sunflower seed for 2021-22 is estimated by the USDA at a record 61.4 Mt. This is 12% higher than last year, due to increased production in Ukraine and Russia. World domestic use is expected to rise to a record 55.8 Mt and world exports are forecast to rise to a record 3.7 Mt. World carry-out stocks are expected to decrease by 7% to 1.9 Mt, the lowest in 20 years.

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

November 17, 2021

Grain and Crop Year (a)	Area Seeded ----- thousand ha	Area Harvested ----- thousand ha	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
Durum												
2019-2020	1,980	1,908	2.63	5,017	96	6,946	5,268	216	504	941	737	270
2020-2021	2,302	2,295	2.86	6,571	13	7,321	5,773	194	387	796	752	302
2021-2022f	2,238	2,186	1.62	3,545	25	4,322	3,100	190	358	772	450	600
Wheat Except Durum												
2019-2020	8,145	7,754	3.57	27,653	179	32,040	19,081	3,369	4,009	8,197	4,763	225
2020-2021	7,892	7,723	3.70	28,612	100	33,474	20,634	3,190	3,942	7,886	4,954	271
2021-2022f	7,254	6,984	2.60	18,170	200	23,324	13,000	3,000	3,599	7,324	3,000	400
All Wheat												
2019-2020	10,126	9,662	3.38	32,670	275	38,986	24,349	3,585	4,513	9,138	5,499	
2020-2021	10,194	10,018	3.51	35,183	113	40,795	26,407	3,383	4,329	8,682	5,705	
2021-2022f	9,493	9,170	2.37	21,715	225	27,645	16,100	3,190	3,957	8,095	3,450	
Barley												
2019-2020	2,996	2,728	3.81	10,383	63	11,308	3,054	277	6,759	7,298	957	232
2020-2021	3,060	2,809	3.82	10,741	295	11,992	4,572	291	6,131	6,709	711	294
2021-2022f	3,357	3,029	2.36	7,141	150	8,002	2,250	319	4,854	5,452	300	400
Corn												
2019-2020	1,496	1,451	9.24	13,404	1,870	17,254	677	5,303	8,698	14,017	2,560	195
2020-2021	1,440	1,408	9.63	13,563	1,512	17,636	1,412	5,376	8,664	14,055	2,169	272
2021-2022f	1,413	1,384	10.38	14,368	3,000	19,537	1,500	5,400	10,471	15,887	2,150	275
Oats												
2019-2020	1,459	1,171	3.61	4,227	13	4,637	2,615	143	1,324	1,597	426	274
2020-2021	1,554	1,314	3.48	4,576	16	5,018	2,928	141	1,175	1,431	659	301
2021-2022f	1,385	1,128	2.29	2,579	15	3,252	1,850	140	936	1,202	200	470
Rye												
2019-2020	175	103	3.25	333	3	386	165	19	140	180	40	221
2020-2021	237	153	3.19	488	2	530	150	41	245	308	72	225
2021-2022f	245	160	2.58	412	2	486	140	44	219	285	60	310
Mixed Grains												
2019-2020	145	68	2.84	192	0	192	0	0	192	192	0	
2020-2021	168	97	2.41	233	0	233	0	0	233	233	0	
2021-2022f	132	41	2.84	117	0	117	0	0	117	117	0	
Total Coarse Grains												
2019-2020	6,271	5,520	5.17	28,539	1,950	33,777	6,510	5,743	17,113	23,284	3,982	
2020-2021	6,459	5,780	5.12	29,601	1,825	35,408	9,062	5,848	16,447	22,736	3,610	
2021-2022f	6,533	5,742	4.29	24,618	3,167	31,394	5,740	5,903	16,598	22,944	2,710	
Canola												
2019-2020	8,572	8,471	2.35	19,912	155	24,502	10,040	10,129	838	11,028	3,435	484
2020-2021	8,410	8,325	2.34	19,485	123	23,042	10,534	10,410	265	10,741	1,767	730
2021-2022f	9,097	9,002	1.42	12,782	150	14,699	5,500	8,500	148	8,699	500	1,000
Flaxseed												
2019-2020	379	339	1.43	486	22	568	350	N/A	138	154	64	518
2020-2021	377	371	1.56	578	26	668	519	N/A	73	92	57	693
2021-2022f	415	400	0.95	379	10	446	375	N/A	31	51	20	1,150
Soybeans												
2019-2020	2,313	2,271	2.71	6,145	242	7,087	3,578	1,742	933	2,888	621	419
2020-2021	2,052	2,041	3.12	6,359	532	7,512	4,518	1,636	841	2,700	294	605
2021-2022f	2,153	2,139	2.75	5,886	400	6,580	4,000	1,800	330	2,330	250	550
Total Oilseeds												
2019-2020	11,263	11,081	2.40	26,544	419	32,157	13,968	11,871	1,908	14,070	4,119	
2020-2021	10,839	10,738	2.46	26,421	681	31,222	15,571	12,045	1,179	13,532	2,118	
2021-2022f	11,665	11,541	1.65	19,047	560	21,725	9,875	10,300	509	11,080	770	
Total Grains And Oilseeds												
2019-2020	27,660	26,263	3.34	87,752	2,643	104,919	44,827	21,198	23,534	46,491	13,601	
2020-2021	27,491	26,536	3.44	91,205	2,619	107,424	51,041	21,276	21,955	44,950	11,434	
2021-2022f	27,691	26,453	2.47	65,379	3,952	80,765	31,715	19,393	21,064	42,120	6,930	

(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: forecasts by AAFC except for area, yield and production for 2021-2022 which are STC

CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

November 17, 2021

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
Dry Peas											
2019-2020	1,753	1,711	2.48	4,237	82	4,631	3,709	689	233	5%	265
2020-2021	1,722	1,685	2.73	4,594	83	4,910	3,580	851	479	11%	340
2021-2022f	1,546	1,508	1.68	2,527	73	3,078	2,300	728	50	2%	600
Lentils											
2019-2020	1,530	1,489	1.60	2,382	90	3,327	2,734	384	209	7%	485
2020-2021	1,713	1,705	1.68	2,868	114	3,190	2,326	459	406	15%	645
2021-2022f	1,743	1,714	1.05	1,802	75	2,283	1,900	333	50	2%	1,080
Dry Beans											
2019-2020	160	150	2.11	317	75	442	361	56	25	6%	985
2020-2021	185	183	2.68	490	63	578	395	63	120	26%	930
2021-2022f	173	168	2.09	352	75	547	400	62	85	18%	1,180
Chickpeas											
2019-2020	159	156	1.61	252	48	440	105	85	250	132%	490
2020-2021	121	120	1.79	214	42	506	150	77	280	124%	640
2021-2022f	75	72	0.89	64	40	384	120	79	185	93%	1,065
Mustard Seed											
2019-2020	161	155	0.87	135	7	214	112	42	61	39%	700
2020-2021	104	101	0.98	99	6	166	111	15	40	32%	885
2021-2022f	124	119	0.60	71	7	118	70	38	10	9%	1,700
Canary Seed											
2019-2020	118	115	1.52	175	0	186	161	10	15	9%	630
2020-2021	111	110	1.62	178	0	193	158	9	26	16%	690
2021-2022f	127	123	0.91	112	0	139	120	9	10	8%	1,200
Sunflower Seed											
2019-2020	31	29	2.18	63	26	186	37	45	103	125%	615
2020-2021	45	45	2.25	101	36	241	52	73	116	93%	620
2021-2022f	41	40	1.92	77	35	228	50	73	105	85%	800
Total Pulses and Special Crops (c)											
2019-2020	3,912	3,804	1.99	7,559	328	9,425	7,219	1,311	896	11	
2020-2021	4,000	3,949	2.16	8,545	344	9,784	6,771	1,547	1,467	18	
2021-2022f	3,827	3,744	1.34	5,005	305	6,776	4,960	1,321	495	8	

(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

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

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

f: forecasts by AAFC except for area, yield and production for 2021-2022 which are STC