

**CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS**

November 21, 2023

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

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This report updates Agriculture and Agri Food Canada's (AAFC) October outlook for the 2023-2024 crop year. For most crops in Canada, the crop year starts on August 1 and ends on July 31, although for corn and soybeans, the crop year starts on September 1 and ends on August 31. Volatility in the world's grain markets remains above normal due to continued uncertainty as a result of Russian aggression against Ukraine.

The outlook incorporates current information from (i) Statistics Canada's (STC) Model Based Principal Field Crop Estimates released on September 14, 2023, and STC's September 8, 2023, Survey of Stocks of Principal Field Crops in Canada as of July 31, 2023; (ii) the United States Department of Agriculture (USDA) - World Agriculture Supply and Demand Estimates (WASDE) released on November 9, 2023; (iii) International Grains Council (IGC) Grain Market Report released on October 19, 2023; (iv) Agricultural Market Information Systems (AMIS) Market Monitor released November 2, 2023.

**For the 2023-24** crop year, the outlook incorporates yield estimates from STC's September 14, 2023, Model Based Principal Field Crop Estimates release, based on information as of the end of August. Production of all principal field crops in Canada is estimated to have decreased 13% year-over-year (y/y), falling 8.3% below the previous five-year average, largely due to widespread drought across the Prairies. Exports of all principal field crops are forecast to decrease by 14.2% y/y due to lower production but are still expected to remain relatively strong on firm world demand. In general, prices are projected to decrease as higher global supplies pressure prices lower, with support provided by continued strong world demand.

Harvest in Western Canada is largely complete at 98% to 99% done with only some longer season crops such as corn and sunflower seed remaining in the field when the provinces wrapped up their seasonal reports in late October. Initial indications from the Canadian Grain Commission (CGC) on [grain harvest and export quality](#) suggest that the quality of the 2023 Western Canadian crop is generally good with normal wheat protein and canola oil content. In Eastern Canada, the corn and soybean harvest is largely complete with Ontario having released the results of its [corn-ear mould survey](#), with 77% of the samples testing low for deoxynivalenol mycotoxin (DON).

The next AAFC Outlook for Principal Field Crops is scheduled to be released on December 15, 2023. STC is scheduled to publish its final principal field crop production estimates for the year on December 4, 2023, based on a survey in November of approximately 28,600 farmers across Canada.

**Canada: Principal Field Crops Supply and Disposition**

	Area Seeded ----- <i>thousand hectares</i> -----	Area Harvested	Yield <i>t/ha</i>	Production	Imports	Total Supply ----- <i>thousand tonnes</i> -----	Exports	Total Domestic Use	Carry-out Stocks
<b>Total Grains and Oilseeds</b>									
2021-2022	27,831	26,578	2.57	68,314	7,225	87,250	31,866	46,320	9,064
2022-2023	27,669	26,814	3.38	90,521	2,863	102,448	47,453	45,520	9,475
2023-2024 <sup>f</sup>	28,263	27,185	2.94	79,897	3,712	93,083	41,243	43,845	7,995
<b>2022-2023</b>									
2021-2022	3,798	3,698	1.23	4,555	227	6,403	4,286	1,072	1,045
2022-2023	3,707	3,649	1.80	6,570	284	7,900	5,637	1,262	1,001
2023-2024 <sup>f</sup>	3,377	3,294	1.39	4,595	297	5,893	4,035	1,173	685
<b>All Principal Field Crops</b>									
2021-2022	31,629	30,276	2.41	72,869	7,451	93,652	36,152	47,391	10,110
2022-2023	31,376	30,462	3.19	97,091	3,147	110,347	53,090	46,782	10,476
2023-2024 <sup>f</sup>	31,640	30,479	2.77	84,492	4,009	98,976	45,278	45,018	8,680

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

**f:** forecasts by AAFC except for area, yield, and production for 2023-24 which are STC

## All Wheat

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### Durum

**For 2023-24**, total supply is forecast at 4.5 million tonnes (Mt), down 29% from 2022 due to dry weather affecting production in the Prairies, particularly in Southern Alberta and South-west Saskatchewan (SK). At just 4.1 Mt, this year's crop is down 30% compared to the 2022 harvest and 23% below the last five-year average. That being said, the crop is showing good quality and protein content.

As of October 23, 2023, 83% of Canadian Western Amber Durum (CWAD) was rated in the top two grades according to the Canadian Grain Commission's Harvest Quality Report. The average protein content for the top two grades came in at 14.8%, up from 14.7% last year and also above the last five-year average of 14.1%.

Exports are pegged at 3.3 Mt, down 35% compared to 2022 due to the smaller harvest. Demand is expected from Europe and North Africa, whose harvests came in lower than expected. However, competitive shipments out of Turkey are keeping the market and export prices at very competitive levels. For the period of August to September 2023, exports of durum are reported at 0.3 Mt, 46% less than the same time period in 2022 and 37% below the five-year average. Domestic use is forecast to remain within average levels, and stocks are expected to close the year out at 4.0 Mt.

The International Grains Council (IGC) forecasts global production of wheat to contract by 8% year-on-year (y/y) due to poor harvests in Canada and the EU. Total production is pegged at 31.3 Mt and total supply at 37.9 Mt, down 9% compared to 2022. Global consumption is projected at 33.9 Mt, down 2% y/y and 3% below the last five-year average. Trade, however, is expected to expand to 4.3 Mt thanks to a large export program out of Turkey who has been offering high quality durum to Europe at very competitive prices and exports from other non-traditional suppliers, such as Russia. World inventories of durum are expected to close out the year at just 4.1 Mt, down 39% y/y with major exporter's portion to drop to 1.4 Mt, from opening levels of 2.2 Mt.

The US durum crop came in at 1.6 Mt, 7% less than in 2022. Exports are projected to reach 0.7 Mt, and ending stocks to fall from 0.8 Mt to 0.5 Mt.

The 2023-24 spot price for CWAD 1, 13% protein in SK is forecast at \$475/tonne.

### Wheat (excluding durum)

**For 2023-24**, total wheat supply is forecast at 29.1 Mt, down 8% compared to 2022 and 6% below average levels. Total wheat production came in at just under 25.8 Mt, 2.7 Mt less than in 2022 due to lower yields caused by the dry weather across the Prairies. The quality of 2023 Canadian Western Red Spring (CWRS) wheat, the most popular class of wheat grown in Canada, is excellent.

According to the Canadian Grain Commission's Harvest Quality Report as of October 23, 2023, over 71% of CWRS rated as No. 1 and another 27% as No. 2. The average protein content for the top two grades came in at 13.8%, slightly below the 13.9% obtained in 2022 and the last five-year average of 13.7%.

According to STC, for the period of August to September 2023, exports of wheat are moving 25% ahead of last year's pace and 15% above average, despite the smaller harvest. However, producer deliveries are down 2% y/y according to the Canadian Grain Commission. For the crop year, Canadian exports are forecast to reach 18 Mt, down 13% y/y but only 2% below average levels.

Domestic use is forecast at 8.0 Mt, 5% lower than average, and carry-out stocks remain relatively in line with opening levels, that is 3.2 Mt.

In their latest World Agricultural Supply and Demand Estimates (WASDE) report, the United States Department of Agriculture (USDA) expanded global supplies and ending stocks while lowering consumption and trade. For 2023-24, the world supply projection for wheat (including durum) was increased to 1,051.5 Mt, up 0.6 Mt compared to their previous report, but remains 1% lower than 2022 levels. The larger supply is a result of an expansion

in opening stocks and imports offsetting the reduced production forecast, which at 782 Mt, is down 1.5 Mt compared to October's report. Consumption is reduced marginally (0.02 Mt) to 792.8 Mt while trade is lowered 1.3 Mt to 205 Mt on reduced shipments from Argentina, India, and Egypt. Closing stocks are forecast at 259.7 Mt, 10.9 Mt less than opening levels.

In the US, the total supply of wheat (including durum) is increased 0.3 Mt, as a result of higher imports. It is now pegged at 69.09 Mt. Total use is

reduced to 31.4 Mt on a reduction in food use; exports are forecast to reach 19.05 Mt by year-end; ending-stocks to come in at 18.6 Mt, 17% more than opening levels.

The 2023-24 forecasted average price for CWRS 1, 13.5% protein in SK is reduced to \$350/tonne, pressured by increased global supplies.

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## Coarse Grains

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### Barley

**For 2023-24**, Canadian barley production is estimated at 7.84 million tonnes (Mt) by Statistics Canada (STC) according to its September 14, 2023, model-based yield and production estimates report. This implies a decrease of 21% year-over-year (y/y) and 16% above from the previous five-year average, primarily reflecting significant declines in yield estimates. Nevertheless, the Prairies provincial governments' final crop reports for the 2023 growing season indicated better than expected yields. Details of 2023 barley yields in the Prairie provinces are as follows, with provincial government estimates outside the brackets and STC's estimates followed by five-year averages in the brackets: Alberta 3.30 tonnes per hectare (t/ha) (3.28 t/ha, 3.62 t/ha), Saskatchewan 2.99 t/ha (2.42 t/ha, 3.22 t/ha), and Manitoba 4.04 t/ha (3.44 t/ha, 3.89 t/ha). The Prairies provincial governments also reported generally good quality. For Alberta, barley is estimated at 26.2% malt grade. For Saskatchewan, the majority of the crops are above the 10-year average for quality and are in the top two categories. For Manitoba, the quality of the barley crop is good.

Despite an expected increase in carry-in stocks and imports, the significant decline in production will lead to a total supply of only 8.8 million tonnes (Mt) for 2023-24, down sharply from last year and the average, and the second lowest on record. Total demand is predicted to decrease y/y, linked to lower feed use and exports, and a smaller supply. Carry-out stocks are projected at 0.55 Mt, near the historical-low set in 2021-22.

For the current crop year to-date, Canada exported 0.59 Mt of barley, according to the weekly statistics from the Canadian Grain Commission. This volume is significantly lower than those in the same period last year and the year before, and below the previous five-year average. So far for the current crop year, the largest destination for Canadian barley exports was China, followed by the US. Malt exports remained relatively stable, according to the monthly trade data from Statistics Canada. The major destinations have been the US, Japan, Mexico, and South Korea.

The 2023-24 Lethbridge average price is projected at

\$350/t, lower than the historical highs seen in the previous two years, primarily under pressure from lower 2023-24 US corn prices and slow exports. Nevertheless, this level remains considerably above the five-year average.

World barley production for 2023-24 was estimated by the United States Department of Agriculture (USDA) at 142 Mt, up slightly from the October estimate, but remaining down significantly from the 2022-23 and average levels. Among the major barley exporters, the USDA raised its production estimates for Russia and Ukraine, lowered these for Argentina and the EU, and kept Australia's unchanged when compared to the October estimates. Global demand will decline to the lowest level in five years due to lower feed use, despite increased food and industrial consumption. Ending stocks will fall to a historical low.

### Corn

**For 2023-24**, Canadian corn production is estimated by STC at 14.9 Mt, an increase of 3% y/y and 7% from the previous five-year average, primarily due to larger seeded area on the Canadian Prairies and the expected good yield potential for the Ontario corn crop.

Due to a sharp decrease in carry-in stocks offsetting the expected increase in production and imports, total supply for 2023-24 is projected at 19.4 Mt, down slightly y/y and marginally above the five-year average. Total domestic use is forecast to increase by 2.3% y/y due to an expected increase in feed and industrial use. Exports are projected to decline y/y on prospects for larger global corn output but remain above average. Carry-out stocks are projected at 2.0 Mt, up 23% from 2022-23's low but still remain 11% below average.

The 2023-24 Chatham average price is projected to fall y/y to \$240/t due to the anticipated lower 2023-24 US corn price.

For 2023-24 US corn, the USDA raised its estimates for yield and production, major demand categories, and ending stocks. So far, ending stocks are projected at 2,156 million bushels (54.8 Mt), well above 2022-

23 and the average level. The average farm price is projected at US\$4.85/bushel (US\$191/t), lower from the October projection of US\$4.95/bushel (US\$195/t) and down sharply from that in 2022-23 and 2021-22. However, it remains above the levels from 2013-14 to 2020-21.

Globally, the USDA projects world corn production at 1,221 Mt, up more than 6.0 Mt from the October estimate largely due to increased estimates for the US, Ukraine, and Russia. So far, global corn production is anticipated to be 6% higher than the 2022-23 and average levels, also the highest on record. Demand is predicted to increase considerably to an all-time high due to a significant increase in feed use and, to a lesser extent, food, and industrial use. Ending stocks are predicted to rise significantly y/y to a five-year high.

### **Oats**

**For 2023-24**, Canadian oat production is estimated by STC at 2.44 Mt, 53% and 40%, respectively, below last year and the five-year average, due to sharply lower seeded area and significantly reduced yield potential. However, the Prairies provincial governments reported better-than-expected yield potentials for the 2023 growing season. Details of 2023 oat yields in the Prairie provinces are as follows, with provincial government estimates outside the brackets and STC's estimates and following five-year averages in the brackets: Alberta 3.12 t/ha (2.86 t/ha, 3.18 t/ha), Saskatchewan 3.12 t/ha (2.80 t/ha, 3.29 t/ha), and Manitoba 3.43 – 5.34 t/ha (3.50 t/ha, 3.90 t/ha). As for quality, Alberta government reported 43% of oats at #1 CW. For Saskatchewan, the majority of the crops are above the 10-year average for quality and are in the top two categories. The Manitoba government reported oat test weights ranging between 42 to 44 lbs/bushel.

Total supply for 2023-24 is projected at 3.74 Mt, down sharply from last year and the five-year average. Total demand, typically for feed, is expected to significantly decline y/y, following lower supply. Carry-out stocks are projected at 0.35 Mt, down sharply y/y and significantly below average.

According to the Canadian Grain Commission, Canadian oats saw good exports in the first few weeks of the current crop year but experienced a significant fall in the following weeks. Total exports to-date are 0.52 Mt, which is significantly higher than those exported in the same period last year and the year before and is close to the previous five-year average. So far for the current crop year, the major destinations for Canadian oat exports included the US, Chile, and Mexico, with the majority of the remaining exports going to Peru, Japan, and South Korea. Oat product exports in the first two months of the current crop year were the lowest in four years but remained strong, according to Statistics Canada. The major destinations were the US, Mexico, Japan, and South Korea.

The CBOT oat price for 2023-24 is projected at CAN\$370/t, up notably y/y due to tight North American oat supplies, despite lower row crop prices predicted for 2023-24.

### **Rye**

**For 2023-24**, Canadian rye production is estimated by STC at 353 thousand tonnes (Kt), 32% and 10%, respectively, below last year and the five-year average, due to sharply lower seeded area and significantly reduced yield potential. However, the Manitoba government reported a record-high average rye yield in the province, and the Saskatchewan government also reported a significant increase in the average rye yield compared to STC's estimate. Crop quality in the two provinces is generally good.

Total supply is projected at 459 Kt, down 24% y/y and slightly below the five-year average. Total demand is expected to decline y/y following the smaller supply. Carry-out stocks are projected at 70 Kt, down sharply y/y.

The 2023-24 rye average price on the Canadian Prairies is projected at CAN\$230/t, down y/y due to lower row crop prices predicted for 2023-24.

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## Oilseeds

### Canola

For 2023-24, production is estimated by Statistics Canada at 17.4 million tonnes (Mt) based on a September satellite image-based estimate employing Normalized Difference Vegetation Index (NDVI) technology as a surrogate for the photosynthetic potential of crops. Production is down 7% from last year and the five-year average of 18.6 Mt due to lower yields resulting from significantly lower than normal moisture received during the growing season across the southern regions of Western Canada.

By province, Alberta yields declined by 1% from 2022-23 while Saskatchewan was down 14%. Nationally, mid-harvest yields are estimated at 1.96 tonnes per hectare (t/ha), the lowest in 10 years with the exception of the 2021-22 drought. In contrast, yields for 2022-23 were 2.17 t/ha and the five-year average was 2.15 t/ha. Seeded area increased slightly for 2023-24, rising by 3% to 8.9 million hectares (Mha) versus 8.66 Mha for 2022-23 and up slightly from the five-year average of 8.8 Mha.

Supplies for the crop year are estimated at 19.0 Mt, versus 20.1 Mt for 2022-23 and the five-year average of 21.5 Mt, as slightly higher carry-in stocks moderated the drop in production. Imports are estimated at 0.1 Mt, down slightly from the previous crop year.

Crop quality appears normal to above normal with 97% of the canola submitted to the Canadian Grain Commission Harvest Sample Survey grading No. 1. The remaining 3% of the harvest samples were evenly distributed across the No. 2, No. 3 and Sample grades. By province, the quality of the crop is uniform with 96.5%, 98.8% and 94.8% of the survey samples from Manitoba, Saskatchewan, and Alberta grading No. 1, respectively.

This year's canola crop has a mean oil content of 43.3% based on 1,133 samples from the Harvest Survey, ranging from a low of 33% to a high of 52.3%. Protein across all samples averaged 21.8%, with variability ranging from a minimum of 15.5% to a maximum of 29.6%. The samples had an average chlorophyll count of 9.0 milligrams per kilogram (mg/kg) varying from a low of 0.0 mg/kg

to a high of 80.3 mg/kg. Glucosinolate ( $\mu\text{mol/g}$ ) content across all grades averaged 9.0 and ranged from 0 to 80.3.

Total domestic use of canola is estimated down 4% with consumption constrained by the tighter domestic supplies. Domestic crush is forecast at 10.0 Mt on growing world demand for canola oil for food and fuel. Compared to previous years, seed and loss in handling are forecast steady at minor volumes while feed, waste and dockage declines sharply.

Exports for 2023-24 are scaled back from previous crop years to 7.7 Mt under pressure from reduced production and competition from major world oilseeds which outweighs support from increased carry-in stocks. Exports are concentrated in a few key markets with the strength and stability of Chinese demand for canola and co-products a key factor to monitor.

Carry-out stocks are estimated at a relatively tight 1.0 Mt, down 34% from last year and 60% below the five-year average. The simple average price, No. 1, track Vancouver, is forecast at \$715/t; down from \$857/t in 2022-23 and under the five-year average of \$729/t, under pressure from rapidly declining world soybean oil prices.

Factors to watch are; (i) volatility of world vegetable oil prices, (ii) strength of commercial versus export buying, (iii) the pace of Chinese buying, (iv) South American crop developments and (v) impact of assorted armed conflicts on world oilseed and co-product demand.

### Flaxseed

For 2023-24, production is estimated at 268 thousand tonnes (Kt) down 43% from 473 Kt in 2022-23 and the lowest since 1967-68 due to lower seeded area and reduced yields. For the crop year, farmers seeded a modern-day record-low 0.25 Mha, implying a harvested area of 0.24 Mha. Yields are estimated at 1.11 t/ha versus 1.52 t/ha for 2022-23 and the five-year average of 1.36 t/ha.

Total supplies are estimated at 497 Kt, versus 567

Kt for 2022-23 and the 615 Kt average over the previous five years, as the lower output is moderated by sharply higher carry-in stocks. Total domestic use is forecast to decline by 26% on a sharp drop in feed, waste and dockage, and stable other usage. Exports are optimistically forecast to increase to 0.30 Mt on strengthening world demand and lower prices.

Carry-out stocks are forecast to fall to 100 Kt for a stocks-to-usage ratio of 25%. The simple average price for flaxseed No.1, in-store, Saskatoon cash is forecast at \$585/t versus \$635/t for 2022-23 and the five-year average of \$710/t.

### **Soybeans**

**For 2023-24**, soybean production is estimated at 6.7 Mt, up 0.2 Mt from last year and the five-year average output of 6.5 Mt. Nearly 2.28 Mha were planted to soybeans, inferring a harvested area of slightly under 2.28 Mha. Yields are estimated at 2.95 t/ha, versus 3.1 t/ha for 2022-23 and the five-year average of 2.95 t/ha, as warm temperatures and good moisture supported growing conditions across the mostly Eastern Canadian grown crop. Total supplies are forecast up 4% from last year to 7.55 Mt but remain slightly under the five-year average of 7.61 Mt on a steady carry-in of stocks and stable imports.

Total domestic use is forecast to fall slightly despite a slight forecasted rise in crush to 1.9 Mt due to a sharp drop in feed, waste, and dockage to about 0.32

Mt. Exports are forecast up 14% from 2022-23 to 4.80 Mt and are 7% above the five-year average. Carry-out stocks are forecast at 0.33 Mt for a stocks-to-use ratio of 4%. The Canadian simple average price for soybeans, track Chatham, is forecast to fall by \$86/t from last year to \$615/t, remaining above the five-year average of \$562/t.

For 2023-24, the United States Department of Agriculture (USDA) raised its projections for world oilseed production by 2.1 Mt with 0.6 Mt of that increase occurring in the US. US soybean production increased by 0.68 Mt from October, to 112.4 Mt (4.128 Bbu) on a 0.02 t/ha increase in yields. Supplies are up 0.68 Mt (25 Mbu) from last month on unchanged beginning stocks and imports.

US soybean crush and exports are forecast at 62.6 Mt (2.30 Bbu) and 47.9 Mt (1.76 Bbu), respectively. Ending stocks fall to 6.7 Mt (0.25 Bbu) from 7.3 Mt (0.27 Bbu) last year. The USDA projects the farm-gate price for soybeans at US\$474.00/t (US\$12.90/bu), unchanged from last month but below 2022-23 at US\$521.76/t (US\$14.20/bu) and the five-year average of US\$406.76/t (US\$11.07/bu).

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## Pulse and Special Crops

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### Dry Peas

**For 2023-24**, production is estimated to fall by 34% to 2.3 million tonnes (Mt). This is largely due to lower yields, especially in Saskatchewan where 51% of the peas are grown. Yellow pea production is forecast to be lower than last year at 2.0 Mt and green pea production is expected to fall to 0.25 Mt. Production of the other remaining dry pea types is also expected to be lower at 55 thousand tonnes (Kt). Supply is forecast to be only 26% below last year at 2.8 Mt due to higher carry-in stocks. Exports are forecast to decrease significantly to 1.9 Mt. From August to September 2023, 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 5% from 2022-23 to \$420/tonne (t) due to stronger spot prices.

During October, the on-farm price of yellow peas in Saskatchewan fell by \$5/t while the price of green pea types fell by \$10/t. Current indications of crop quality suggest a higher percentage of Canadian dry peas will grade No. 1 and No. 2 when compared to last year. Despite this, the sharply lower Canadian output will result in a smaller supply of No.1 and No. 2 dry peas for this crop year. For the crop year to-date, there has been a \$185/t premium for green dry peas to yellow dry peas, versus a green pea premium of \$65/t to yellow peas in 2022-23.

Area seeded to dry peas in the US for 2023-24 is forecast by the United States Department of Agriculture (USDA) to rise by 3% from last year to 0.95 million acres (0.38 million hectares (Mha)). This is largely due to higher seeded area in North Dakota and Montana. US dry pea yields are estimated to be above average and dry pea production is forecast by the USDA to rise from last year by 14% to 0.78 Mt. The main export markets for US dry peas are Canada, the Philippines, and India.

### Lentils

**For 2023-24**, production is estimated to fall by nearly 0.8 Mt (33%) to 1.5 Mt, due to lower yields in Western Canada. Production of red lentils fell sharply from last year to below 1.0 Mt, while large

green lentil production increased to just below 0.4 Mt. Production of the other remaining lentil types is expected to fall to 0.2 Mt.

However, supply is expected to fall by 32% due to lower carry-in stocks. Exports are expected to decrease to 1.4 Mt. To-date, India, US, and the EU are the top export markets. Carry-out stocks are forecast to fall to 0.1 Mt. The overall average price is forecast to rise by 20% to a record level of \$980/t, with an above-average grade distribution.

During the month of October, the on-farm price in Saskatchewan for large green lentils rose by \$50/t and red lentil prices decreased by \$60/t. This was largely due to below-average export demand for red lentils. Compared to last year, a decrease in the supply of No. 1 or No. 2 grade Canadian lentils is expected for 2023-24. To-date, large green lentil prices have maintained a premium of \$445/t over red lentil prices, compared to a \$350/t premium in 2022-23.

For 2023-24, US area seeded to lentils is forecast by the USDA to fall by 17% from 2022-23, largely due to lower area seeded in Montana. With higher yields and lower abandonment, 2023-24 US lentil production is therefore forecast by the USDA at 0.26 Mt, up 4% from the production in 2022-23. The main US export markets for lentils to-date are the European Union (EU), Canada and Mexico.

### Dry Beans

**For 2023-24**, production is estimated to have decreased by 12% to 277 thousand tonnes (Kt). This includes 70 Kt of white pea bean types and 207 Kt of colored bean types. Production in Ontario fell due to lower seeded area while production decreased in Manitoba mostly due to lower yields. In Alberta, colored dry bean production increased due to higher area and yields. Supply is forecast to fall by 17% due to lower carry-in stocks.

Exports are forecast to be lower than last year. Based on data for August and September, the EU and the US are the top two markets. Carry-out stocks are expected to decrease. The average



Canadian dry bean price is forecast to rise to \$1,180/t due to lower North American supply.

Area seeded to dry beans in the US is estimated by the USDA to decrease by 5% to 1.18 million acres (0.48 Mha), 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 13% from 2022-23. 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 2023-24**, production is estimated at 134 Kt, 6 Kt above last year due to higher seeded area but lower yields. The production of both kabuli and desi types is estimated to be higher than the previous year. Total supply, however, is forecast to decrease by 36% due to sharply lower carry-in stocks. Exports are forecast at 120 Kt with the US and Pakistan as the top markets. Carry-out stocks are expected to fall, largely due to decreased supply. The average price is forecast to be higher than the previous year, at a record \$1,060/t, with an above-average Canadian crop quality, due to expectations for decreased world production.

The USDA has estimated US chickpea area seeded at 0.38 million acres (0.15 Mha), 8% higher than in 2022-23. With average yields, 2022-23 US chickpea production is forecast by the USDA at 0.23 Mt, up 36% from 2022-23.

### **Mustard Seed**

**For 2023-24**, production is estimated to have risen by 6 Kt to 168 Kt due to lower yields offsetting higher seeded area. Production of yellow, brown, and oriental types of mustard seed increased. Total supply is forecast to rise by 13% to 214 Kt. Exports are expected to be higher at 125 Kt and, as of August and September, the US and the EU are the top two markets. Carry-out stocks are forecast to rise sharply in Canada and in the US; as a result, the average price is forecast to fall from 2022-23 to \$1,700/t, the third highest on record.

### **Canary Seed**

**For 2023-24**, production is estimated to fall by 22% to 124 Kt due to lower area and yields. Exports are expected to be lower than the previous year with lower available supply. Based on data for August and September, Mexico and the EU are the top two export markets, followed by the US. Carry-out stocks are expected to tighten. The average price is forecast to be 8% higher than last year at \$970/t.

### **Sunflower Seed**

**For 2023-24**, production is estimated to have fallen to 78 Kt on lower harvested area and yields. When compared to 2022-23, supply is expected to increase to 263 Kt, as higher carry-in stocks offset lower production. Exports are forecast to be higher than the previous year and carry-out stocks are forecast to rise. The US is expected to remain Canada's main export market for sunflower seed. The average price is forecast to be \$600/t, slightly lower than last year, mostly due to weaker oilseed and confectionary type prices than in 2022-23.

US sunflower seed production for 2023-24 is forecast by the USDA at under 1.0 Mt, down 20% from 2022-23. This is largely due to lower production in North and South Dakota. Production of oil-type varieties is estimated to have fallen to 0.87 Mt and the production of confectionery-type varieties is estimated to have increased to 0.12 Mt. However, total US supply is expected to decrease by 14% to 1.3 Mt. Domestic use is expected to fall. US sunflower seed carry-out stocks are expected to fall but lower world veg-oil prices are expected to pressure North American sunflower seed prices.

The world supply of sunflower seed for 2023-24 is estimated by the USDA at 64.1 Mt. This is marginally lower than the record set last year, due to increased production in the Ukraine, Russia, and the EU. World domestic use is expected to rise to a record 56.8 Mt and world exports are forecast to fall to 3.1 Mt. World carry-out stocks are expected to be similar to the previous year at 4.1 Mt.

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# CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

Unclassified / Non classifié

November 21, 2023

Grain and Crop Year (a)	Area Seeded ----- thousand ha -----	Area Harvested ----- t/ha -----	Yield ----- t/ha -----	Production ----- thousand metric tonnes -----	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (c)	Carry-out Stocks	Stocks-to- Use Ratio ----- % -----	Average Price (d) ----- \$/t -----
<b>Dry Peas</b>											
2021-2022	1,560	1,505	1.49	2,244	29	2,832	1,912	581	339	14%	590
2022-2023	1,363	1,348	2.54	3,423	35	3,797	2,562	737	498	15%	440
2023-2024f	1,233	1,204	1.89	2,272	40	2,810	1,900	635	275	11%	420
<b>Lentils</b>											
2021-2022	1,700	1,675	0.95	1,594	51	2,083	1,602	258	223	12%	970
2022-2023	1,749	1,715	1.34	2,301	87	2,610	2,198	266	147	6%	820
2023-2024f	1,485	1,463	1.05	1,542	95	1,784	1,400	284	100	6%	980
<b>Dry Beans</b>											
2021-2022	172	162	2.25	364	71	535	324	71	140	35%	1,210
2022-2023	120	117	2.67	313	70	523	368	75	80	18%	1,165
2023-2024f	129	119	2.33	277	75	432	320	77	35	9%	1,180
<b>Chickpeas</b>											
2021-2022	90	88	1.04	91	30	395	176	64	155	65%	975
2022-2023	95	95	1.35	128	42	325	225	73	27	9%	1,000
2023-2024f	128	124	1.08	134	45	207	120	72	15	8%	1,060
<b>Mustard Seed</b>											
2021-2022	117	110	0.55	61	9	130	92	22	16	14%	2,885
2022-2023	225	219	0.74	162	11	189	117	33	40	26%	2,140
2023-2024f	258	248	0.68	168	7	214	125	24	65	44%	1,700
<b>Canary Seed</b>											
2021-2022	122	121	1.05	127	0	201	139	8	54	37%	1,125
2022-2023	118	117	1.36	159	0	213	146	8	59	39%	900
2023-2024f	104	101	1.22	124	0	183	135	13	35	24%	970
<b>Sunflower Seed</b>											
2021-2022	37	37	2.04	75	37	228	41	68	118	108%	900
2022-2023	38	38	2.24	84	40	242	22	70	151	165%	800
2023-2024f	40	35	2.23	78	35	263	35	68	160	155%	600
<b>Total Pulse And Special Crops (c)</b>											
2021-2022	3,798	3,698	1.23	4,555	227	6,403	4,286	1,072	1,045		
2022-2023	3,707	3,649	1.80	6,570	284	7,900	5,637	1,262	1,001		
2023-2024f	3,377	3,294	1.39	4,595	297	5,893	4,035	1,173	685		

(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 2023-24 which are STC