

CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS, 2024**December 19, 2024**

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

Executive Director: Nicole Howe**Deputy Director: Tony McDougall**

This report is an update of Agriculture and Agri-Food Canada's (AAFC) November outlook report for the 2024-25 crop year, based on information available up to December 11, 2024. 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. Uncertainty in Canadian and international grain markets remains elevated due to ongoing geopolitical risks and increasing uncertainty around trade.

For the 2024-25 the outlook incorporates the results of Statistics Canada's (STC) [November Farm Survey](#) of crop production, which was released on December 5, 2024, and was based on a survey of approximately 27,200 Canadian farms, conducted from October 4 to November 7, 2024. These are the last official estimates for crop production from STC for 2024 and replace the model-based estimates that were released on September 16, 2024. The estimate for total principal field crop production increased by 1.2% from the previous model-based estimate released in September. Production of all principal field crops is now estimated to have increased 2.7% year-over-year (y/y), which would be 3.3 % above the previous five-year average. The increase was largely due to improved yields in Western Canada, as overall production in this region increased 3.3% y/y and was 2.5% higher than the five-year average.

By major crop commodity groups, wheat production increased by 6.1% y/y, largely due to a 43.6% increase in durum output. Production of oilseeds declined 2.9% y/y, driven lower by a 7% decline in canola due to a reduction in yields as area was relatively stable. This more than offsets an 8.4% increase in soybean production. Coarse grains production decreased marginally by 0.2% y/y, as declines in corn and barley production managed to just offset increases in oats and rye production. Pulse and special crops production is up significantly by 24.3% y/y as higher production for all pulse and special crops (other than sunflower seeds) is expected on improved yields and an increase in areas.

Exports of all principal field crops are expected to rise 5% from last year, with notable increases projected for durum, canola, and lentils. Carry-out stocks (ending-year inventories) for all principal field crops are forecast to decline by 3% as lower carry-out stocks for grains and oilseeds more than offset a rise in pulse and special crops carry-out. Prices for all principal field crops are significantly lower year-over-year, with the exception of sunflower seed.

The next AAFC Outlook for Principal Field Crops is scheduled to be released on January 20, 2025. STC is scheduled to publish stocks of principal field crops as of December 31 on February 7, 2025, and a first estimate of the area of principal field crops for 2025 on March 12, 2025.

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									
2022-2023	27,668	26,827	3.40	91,148	2,986	103,861	47,539	44,532	11,790
2023-2024	28,273	27,279	3.18	86,871	3,639	102,299	44,735	45,793	11,772
2024-2025f	27,831	27,001	3.26	88,048	3,107	102,926	46,792	46,449	9,685
Total Pulse And Special Crops									
2022-2023	3,707	3,649	1.81	6,618	284	7,971	5,620	1,170	1,182
2023-2024	3,376	3,309	1.60	5,284	379	6,844	4,903	1,120	821
2024-2025f	3,749	3,712	1.77	6,568	309	7,698	5,335	1,148	1,215
All Principal Field Crops									
2022-2023	31,376	30,476	3.21	97,766	3,270	111,832	53,159	45,702	12,971
2023-2024	31,649	30,588	3.01	92,155	4,018	109,144	49,638	46,913	12,593
2024-2025f	31,580	30,712	3.08	94,616	3,416	110,624	52,127	47,597	10,900

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

f: forecasts by AAFC except for area, yield, and production for 2024-25 which are STC

All Wheat

Durum

For 2024-25, Statistics Canada (STC) estimated durum production at 5.9 million tonnes (Mt) in their December 5th report, representing a 3% decrease from their September estimate. Canadian production is now 44% more than the 2023 harvest, 20% above average and the sixth largest on record. The two largest producing provinces were Saskatchewan and Alberta, who accounted for 76% and 22% of total production. Total supply is now forecast at 6.3 Mt, 35% higher compared to 2023-24, and 8% more than the last five-year average.

The average quality in terms of grades is below last year's level but above the last five-year average. According to the Canadian Grain Commission's (CGC) sample survey analysis up to December 2, 2024, 72% of the durum was graded No. 1 and 2 compared to 82% last year. In total, the CGC collected 895 samples from farmers across the Prairies. The protein content of all samples averaged 15.3%.

Compared to last month's report, exports remain pegged at 4.9 Mt. From August to October, STC reported durum shipments at 0.53 Mt, 39% more than in 2023-24, and 7% above average; the CGC put durum shipments through the licensed elevator system at 1.50 Mt from August 1st to November 30th.

Although domestic use and stocks were reduced as a result of lower supply, they still remain above 2023-24 levels and above the five-year average. Domestic use is forecast at 0.75 Mt, and closing stocks are 0.65 Mt.

World durum production grew by 12% over 2023-24 due to an increase in seeded area and higher yields, especially in North America, and to a lesser extent in Turkey and Russia. Total supply is seen at 41 Mt, 4% more than the previous year. Total use is forecast to grow 2% to 34.7 Mt on higher food use. Carry-out stocks are projected at 6.2 Mt, 13% more than opening levels. Global durum trade is projected to drop to 9.5 Mt this year, just 1% lower than in 2023-24 with a reduction in Algerian imports.

In the US, durum production grew by 0.6 Mt, to 2.2 Mt, according to the United States Department of Agriculture (USDA). US exports of durum are forecast at 0.68 Mt.

The forecasted average 2024-25 Saskatchewan (SK) spot price for No. 1 Canadian Western Amber Durum remains unchanged at \$325/tonne (t). Factors to watch moving forward include the pace of exports through the licensed elevator system, competition from the United States, and import demand from Europe and Algeria.

Wheat (excluding durum)

For 2024-25, Canadian wheat production rose by 1% from 2023-24 to 29.1 Mt, due to an increase in area and above-average yields. This is the second largest crop on record after the record crop in 2013. Compared to last month's report, total supply grew 3% to 33.4 Mt. STC's most recent production estimate is 3% larger than in its September report. Saskatchewan accounts for 41% of Canada's wheat production, Alberta 30%, Manitoba 19%, Ontario 9%, and Quebec 1%; the remaining 1% is found in the Maritimes and British Columbia.

STC estimates that winter wheat seeded this fall came in at 682.8 thousand hectares (Kha), up 15% relative to last fall due to an expansion in the area seeded to winter wheat in Ontario (+70.7 kha), Saskatchewan (+11.4 kha), Quebec (+5.2 kha) and Alberta (4.7 kha).

The average quality for Canada Western Red Spring (CWRS) wheat in terms of grades is slightly lower than last year, but better than the past five-year average. According to the CGC's sample survey analysis up to December 2, 2024, 93% of the CWRS wheat graded No. 1 and 2, compared to 97% last year. The protein content of the total 2,620 samples averaged 14%.

With Canadian consumption of wheat relatively stable year-on-year, domestic use is forecast at 8.3 Mt, about a quarter of available supply. The forecast for exports is raised to 21.25 Mt due to the strong demand for high quality wheat worldwide.

According to STC, exports of wheat, from August to October are reported at just under 5.0 Mt, 8% less than in 2023-24, but 7% above the last five-year average. The CGC reports of international shipments of wheat through the licensed elevator system are at 6.9 Mt from August to November, in line with last year's level over the same period. Closing stocks remain pegged at 3.8 Mt.

This month, the USDA, in their influential World Agricultural Supply and Demands Estimate (WASDE) report, lowered their estimates for global wheat supply, consumption, and trade. Compared to November's projections, the 2024-25 global wheat supply is reduced by 0.6 to 1,060.4 Mt, with lower production in the EU and Brazil. Total consumption is reduced by 0.94 Mt to 802.5 Mt, and trade is 1 Mt lower to 213.7 Mt with reduced shipments from

Russia. Global ending stocks for wheat are pegged at 257.9 Mt, the lowest since 2015-16.

The US wheat supply forecast for 2024-25 expanded marginally to 76.0 Mt, with exports projected at 23.1 Mt, domestic use at 31.2 Mt, and ending stocks at 21.6 Mt, up 14% year-on-year (y/y).

The average Saskatchewan spot price for CWRS 1, 13.5% protein remains forecast at \$310/t, with continued attention on the pace of Canadian deliveries, quality of the crop in the southern hemisphere, and impact of Russia's reduced export quota on wheat trade.

Romina Code, Wheat Analyst
Romina.Code@agr.gc.ca

Coarse Grains

Barley

For 2024-25, Canadian barley production is estimated at 8.144 million tonnes (Mt) by Statistics Canada (STC) in its December survey-based yield and production estimate report. The December estimate is more than half a million tonnes or 7% higher from the September model-based result, due to lower abandonment rates and higher yield estimates. Nevertheless, a significant year-on-year (y/y) decline in barley production was observed in the Canadian Prairie provinces, primarily due to a reduction of area planted in the region and that Alberta, the largest barley growing province in Canada, experienced the lowest yield since 2012 (excluding 2021 when an unprecedented drought on the Canadian Prairies severely impacted crop development). As a result, 2024 Canadian barley production is down 9% from last year, and down 13% from the five-year average. Alberta remains the largest barley-growing province, accounting for 52% of total barley production in Canada, with 37% in Saskatchewan, 6% in Manitoba and the remainder in other provinces.

Due to the annual decline in production that is only partly offset by a significant increase in carry-in stocks, total supply for 2024-25, at 9.4 Mt, is down 3% y/y and 9% below average. Total domestic use is projected to rise from last year, despite smaller supplies. Exports are projected to fall, limited by smaller supplies. Carry-out stocks are forecast at 0.8 Mt, down 31% y/y to reflect smaller supplies.

The 2024-25 Lethbridge average price is projected at \$290/tonne (t), the lowest in five years, due to pressure from price weakness in other crops.

Internationally, the United States Department of Agriculture (USDA) put the 2024-25 world barley supply estimate at 190 Mt in its December supply and demand update. This is down 3% y/y and 7% below the five-year average, also the lowest in six years. World feed use is projected to rise y/y, with food and industrial use to fall marginally. World ending stocks are projected at 18 Mt, down sharply from last year, and the five-year average to an all-time low.

Corn

For 2024-25, Canadian corn production is estimated by STC at 15.345 Mt, up 1% from the September forecast, and up 7% from the five-year average. This is primarily supported by good yield results for this season in major corn-growing provinces, including Ontario, Quebec, and Manitoba. National production for 2024 is only slightly below last year's record high, despite reduced acreage.

With the slightly smaller production, larger carry-in stocks, and lower imports, Canadian corn supply for 2024-25 is at 19.6 Mt, down slightly y/y, but remains above average. Total demand is projected at 17.6 Mt, down slightly from last year, primarily due to smaller domestic industrial and feed use, while exports are projected to rise y/y. Carry-out stocks are forecast at 2.0 Mt, nearing last year's level.

The 2024-25 Chatham average price is projected at \$210/t, the lowest in five years, mostly due to lower US corn prices.

For the US, the USDA significantly lowered its 2024-25 US corn ending stock forecast on rising demand for ethanol production and exports. So far, the 2024-25 ending stocks are, at 44 Mt, down slightly y/y, but remain 12% above average. The weighted average price forecast to be received by US farmers for the marketing year is unchanged from November and is pegged at slightly above US\$160/t, the lowest in five years.

Internationally, the USDA pegged world corn supply for 2024-25 at 1,718 Mt, down 1% y/y but the second largest on record. Argentina and Brazil will see a y/y increase in their corn supply for 2024-25, while the EU and the Black Sea region will experience a significant decrease. Despite the expected sharp reduction in imports, China's corn supplies for 2024-25 are estimated at a historical high on expanded production. World feed use will rise to an all-time high, with food and industrial use remaining steady. World ending stocks, at 296 Mt, were lowered noticeably from the November forecast and are 6% lower from 2023-24 and 4% below the five-year average.

Oats

For 2024-25, Canadian oat production is estimated by STC at 3.358 Mt. This is a 11% increase from the September forecast, due to lower abandonment rates and higher yield estimates. This, along with the expansion in seeded area, brings 2024 oat production up 27% from last year but 14% below the five-year average. Saskatchewan remains the largest oat-growing province, accounting for 44% of total oat production in Canada for this season, with 28% in Manitoba, 19% in Alberta, and the remainder in other provinces.

The estimated annual increase in production is completely offset by significantly smaller carry-in stocks, leading to a tighter supply for 2024-25. At 3.8 Mt, the 2024-25 oat supply is down 3% y/y and 16% below average, also the lowest since 2012-13, excluding 2021-22. Total domestic use is expected to rise, and exports are predicted to fall. Carry-out stocks are forecast at a tight level of 0.4 Mt, down 10% y/y and 36% below the average.

The 2024-25 Chicago Board of Trade (CBOT) oat price is projected at \$330/t, the lowest in four years, due to pressure from price weakness in other crops.

Internationally, the USDA put world oat supply for 2024-25 at 27 Mt, up 7% from the record low in 2023-24, but 5% below the five-year average. Australia and the EU will see a y/y increase in oat supplies. The US will also have a larger oat supply in 2024-25, despite imports remaining steady y/y and nearing a record low. World feed use, as well as food and industrial use, are projected to rise y/y. World ending stocks are projected at 2.5 Mt, up 4% y/y but 10% below the five-year average.

Rye

For 2024-25, Canadian rye production is estimated by STC at 421 thousand tonnes (Kt). It is 21% above the September forecast, largely due to higher yield estimates. Compared to last year, it is up by 18% and

in line with the five-year average. Manitoba, Saskatchewan, Alberta, Ontario, and Quebec remain the major rye-growing provinces.

STC also released its estimates for fall rye area seeded. Fall rye represents the majority of total rye production in Canada, with spring rye accounting for only a fraction. A significant y/y expansion in fall rye area was observed in all major rye-growing provinces. Totaled at 282 thousand hectares (Kha), rye area seeded this fall is up 57% from last fall, 40% higher from the previous five-year average, which is also an all-time high.

With the increase in production more than offsetting the decline in carry-in stocks, total rye supply for 2024-25, estimated at 513 Kt, is up 10% y/y and 5% above average. Total domestic use, primarily feed use, is expected to increase due to larger supplies, while exports are anticipated to decrease. Carry-out stocks are projected at 95 Kt, up slightly from last year, and 16% above average.

The 2024-25 rye average price on the Canadian Prairies is projected at \$200/t, down y/y, due to pressure from price weakness in other crops.

Internationally, the USDA put world rye supply for 2024-25 at 13 Mt, down 7% y/y and 8% below the five-year average, also the lowest in six years. Rye supply in the EU is estimated to decline by 5% from last year and the five-year average. The US will have the largest rye supply on an all-time high production, despite a significant decrease in expected imports. World feed use, as well as food and industrial use, are projected to fall y/y. World ending stocks are projected at 1.4 Kt, falling sharply y/y but remaining close to the five-year average.

Mei Yu: Coarse Grains Analyst
Mei.Yu@agr.gc.ca

Oilseeds

Canola

For 2024-25, canola area decreased slightly to 8.9 million hectares (Mha) with harvested area estimated at 8.8 Mha. The crop was mostly grown in western Canada with Saskatchewan accounting for 55% of the canola area in Canada, followed by Alberta and Manitoba at 29% and 14% of total area, respectively.

Canola production is estimated at 17.8 million tonnes (Mt) compared to 19.2 Mt for 2023-24 and the five-year average of 17.9 Mt. Lower yields across western Canada due to the hot and dry summer accounted for most of the decrease in output year-on-year. Production by province was: Saskatchewan 9.8 Mt, Alberta 5.1 Mt, Manitoba 2.8 Mt, while British Columbia and Eastern Canada grew 71 thousand tonnes (Kt) and 99.7Kt, respectively. Supplies are forecast to fall from last year to 20.7 Mt as higher carry-in moderates the impact of lower production.

Statistics Canada reports 2.88 Mt of canola was crushed to October 30th, producing 1.22 Mt of canola oil and 1.69 Mt of canola meal, for an oil and meal content of 42.2%, and 58.7%, respectively.

Domestic crush is forecast at a record 11.5 Mt as expanded processing capacity comes on stream. The export projection for canola seed remains unchanged from last month at 7.5 Mt with the impact of the China's announced anti-dumping investigation on Canadian canola remaining unknown at this time. Carry-out is forecast to fall to 1.25 Mt, below 2023-24 and the five-year average of 1.82 Mt. The simple average price, No.1 track Vancouver is forecast notably lower from last year at \$615/tonne (t).

Factors to observe are: (i) strength of Chinese buying, (ii) farmer delivery pace, (iii) crush pace, (iv) possible tariff and non-tariff barriers to trade for seed, oil, and meal (v) size of Brazil and Argentina soybean crops.

Flaxseed

For 2024-25, flaxseed seeded area decreased by 17% from last year to 0.20 Mha with an estimated

harvested area of 0.20 Mha. Production was 258 thousand tonnes (Kt), down slightly from last year, with the decrease in seeded area partly offset by higher yields. Supplies are projected to fall sharply to 432 Kt on lower carry-in and production.

Total domestic use is forecast to fall to 92 Kt, while exports are estimated at 250 Kt, an increase from last year. Carry-out stocks fall to 90 Kt for a stocks-to-use ratio of 26%. The simple average price forecast for flaxseed No.1 in-store Saskatoon cash is \$565/t, down from last year's \$581/t and less than the five-year average of \$727/t.

Soybeans

For 2024-25, soybean area in Canada increased slightly to 2.31 Mha, as support from steady crusher and export buying, lower corn prices, and good soil moisture offset lower prices. The major growing provinces were: Ontario at 1.26 Mha, Manitoba 0.58 Mha and Quebec at 0.42 Mha. The Maritime provinces and the remaining western Canadian provinces grew 24.7 thousand hectares (Kha) and 27.6 Kha, respectively.

Production is estimated up from last year to 7.57 Mt on a combination of normal yields in Eastern Canada and sharply higher-than-normal Manitoba yields. Supplies rise to 8.58 Mt, the third highest on record, as higher carry-in complements the rise in output.

Total domestic use is forecast to rise on higher processing and a slightly higher feed, waste, and dockage of 0.43 Mt. Domestic crush is optimistically projected at 1.85 Mt on steady food and fuel demand for soy-oil. Exports are forecast at 5.5 Mt, the second highest on record compared to the 2018-19 out-of-country shipments of 5.64 Mt. Carry-out is forecast up slightly to 0.60 Mt for a stocks-to-use ratio of 8%. The Canadian simple average price for soybeans, track Chatham, is projected \$97/t lower from last year to \$475/t, versus the five-year average of \$595/t.

The United States Department of Agriculture (USDA) updated its World Agricultural Supply and

Demand Estimates (WASDE) outlook for 2024-25 in December, leaving its prediction for a 7% rise in US soybean production, to 121.4 Mt, unchanged from November. Total supplies are up 10.1 Mt year-over-year (y/y) to 131.1 Mt. Domestic crush and exports are unchanged from November and are up 5% and 8% respectively from last year to 65.6 Mt and 49.7 Mt. Ending stocks are up 3.5 Mt from 2023-24 to 12.8 Mt, pressuring a US\$81/t drop in the average farm price to US\$375/t.

The USDA's bearishness extended to the world oilseed market, with global oilseed production rising

by 25.9 Mt year-over-year on higher soybean production. World oilseed supplies increased to 814.8 Mt versus 777.8 Mt for 2023-24, and total usage rose by 12.8 Mt to 558.2 Mt for 2024-25. World trade is likewise projected to rise to 207.3 Mt compared to 204.9 Mt for 2023-24. Ending stocks rose by 15.8 Mt to 147.2 Mt, for a stocks-to-use ratio of 26%, maintaining pressure on world prices.

Chris Beckman: Oilseeds Analyst
Chris.Beckman@agr.gc.ca

Pulse and Special Crops

Dry Peas

For 2024-25, production increased 15% to 3.0 million tonnes (Mt) due to higher yields and harvested area. Yields were 8% higher than the previous year due to better conditions. Yellow and green pea types are expected to account for about 2.4 Mt and 0.45 Mt, respectively, with the remainder spread across other varieties. Supply has risen by only 2% to 3.36 Mt, due to smaller carry-in stocks offsetting the larger output. Exports are forecast to be unchanged at 2.4 Mt, despite the rise in supply. As a result, carry-out stocks are forecast to rise with the increased supply. The average price is expected to decrease by 8% to \$425/tonne (t) from 2023-24, with lower dry pea prices for all types.

During November, the on-farm price of yellow and green pea types in Saskatchewan rose by \$5/t and \$15/t, respectively. Prices have been steady with above average export demand and expectations for an average-sized Indian winter pulse crop. For the crop year-to-date, green dry peas prices have been maintaining a premium of \$175/t above yellow dry peas. Last year, green peas were at a \$185/t premium to yellow peas.

In the US, area seeded to dry peas for 2024-25 is estimated by the United States Department of Agriculture (USDA) to have risen by 2% to 0.99 million acres (0.4 Mha). This is largely due to an increase in area in North Dakota. With estimates of above average yields, US dry pea production is estimated by the USDA to rise by 7% to 0.87 Mt. US dry peas compete, on a smaller scale, in Canadian export markets such as China and the Philippines.

Lentils

For 2024-25, production increased by 35% to 2.4 Mt due to higher area and yields. Large green lentil production is estimated to be higher than last year at 0.45 Mt and red lentil production rose to about 1.7 Mt. Production of the other remaining lentil types is estimated to have risen to 0.25 Mt.

Supply is expected to be only 28% higher than last year due to smaller carry-in stocks but higher imports. Exports are forecast to increase sharply to 2.1 Mt. India and Turkey are currently the top export markets. Imports are expected to be higher than the previous year despite an above-average grade distribution. Carry-out stocks are expected to rise sharply, despite the larger exportable supply. The overall average price is forecast to fall by 12% to \$885/t, with lower prices for all types, when compared to last year.

During the month of November, the on-farm price in Saskatchewan for No. 1 grade large green and red lentils rose by about \$20/t when compared to last month. The quality of the Canadian lentil crop is considered to be above average. There is a larger proportion in the supply of No. 1 and No. 2 grade Canadian lentils for 2024-25 when compared to last year. No. 1 large green lentil prices are forecast to maintain a premium of \$525/t over No. 1 red lentil prices, compared to \$785/t in 2023-24.

In the US, the area seeded to lentils for 2024-25 was forecast by the USDA at over 0.9 million acres (0.38 Mha), up 71% from 2023-24 due to higher area seeded in Montana. With estimates of below average yields, 2024-25 US lentil production is estimated by the USDA at 0.43 Mt, up 66% from the 2023-24 level.

Dry Beans

For 2024-25, production rose 25% to 424 thousand tonnes (Kt), consisting of 68 Kt of white pea bean types and 356 Kt of colored bean types. Production in Ontario was 134 Kt, up 9% from 2023, with higher area but lower yields. In Manitoba, production rose due to higher yields for colored bean and white pea bean types. In Alberta, colored bean production rose due to an increase in area and yields.

Supply is expected to rise with lower carry-in stocks partly offsetting the larger production. Exports are forecast to be lower than the previous year. The US and the EU are expected to remain the main markets

for Canadian dry beans, with smaller volumes exported to Mexico and Japan. Carry-out stocks are expected to be higher. The average Canadian dry bean price is forecast to be lower at \$1,100/t due to the higher North American supply.

In the US, area seeded to dry beans is estimated by the USDA to have increased by 30% to 1.53 million acres (0.62 Mha), largely due to higher area seeded in North Dakota. US total dry bean production (excluding chickpeas) is estimated by the USDA to rise by 23%, to just over 1.3 Mt. US export markets continue to be Canada, EU, and Mexico.

Chickpeas

For 2024-25, production rose by 80% to 287 Kt due to higher harvested area and yields. Crop quality is above average when compared to the previous year. Supply is forecast to rise by 21% as lower carry-in stocks partly offset the higher production. Exports are forecast to be lower at 175 Kt, with the US, Turkey, and the EU as the main importers. Carry-out stocks are expected to rise sharply to 100 Kt. The average price for all grades of chickpeas is forecast to fall by 19%, to \$815/t, due to higher world supply.

US chickpea area seeded is estimated by the USDA at 0.5 million acres (0.2 Mha), up 35% from 2023-24. With below average yields, 2024-25 US chickpea production is forecast by USDA at 0.28 Mt, up 30% from the previous year.

Mustard Seed

For 2024-25, production rose by 13% to 192 Kt, with lower area, but higher yields. Production of yellow, brown and oriental types of mustard seed rose. Supply increased by 28% to 290 Kt. Exports are expected to be higher at 100 Kt. Due to the increased supply, carry-out stocks are forecast to rise sharply to 145 Kt. The US and the EU are expected to remain the main export markets for Canadian mustard seed. The average price is forecast to fall significantly to \$830/t.

Canary Seed

For 2024-25, production rose by 65% to 185 Kt with higher yields and area. Exports are expected to be higher than last year at 125 Kt, due to the increased supply. The EU and Mexico are forecast

to remain the main export markets. The average price is forecast to fall from the 2023-24 level to \$730/t due to larger supply and expectations for increased carry-out stocks.

Sunflower Seed

For 2024-25, production was lower than the previous year at 51 Kt due to a fall in area and yields. Supply fell 7% despite larger carry-in stocks. Exports are forecast to rise from last year to 35 Kt. Carry-out stocks are forecast to fall to 150 Kt. The US is expected to continue to be Canada's main export market for sunflower seed. The average price is forecast to be 9% higher than 2023-24, at \$595/t, largely due to higher oilseed type prices.

US sunflower seed production is estimated by the USDA at 0.6 Mt, down 42% from 2023-24, largely due to decreased production in North and South Dakota. It is estimated by AAFC that US production of oil type varieties fall to 0.46 Mt, and confectionery type varieties decrease to about 130 Kt. US supply is forecast by the USDA to be 24% lower at 1.0 Mt. US exports are expected to fall and domestic use is expected to decrease. US sunflower seed carry-out stocks are expected to fall and support North American prices.

For 2024-25, the global supply of sunflower seed is estimated by the USDA at 56 Mt. This is 11% lower than last year, due to reduced output by Ukraine and Russia. World exports are expected to decrease by 18% to 2.3 Mt and domestic use is expected to fall 9% to 51 Mt. World carry-out stocks are expected to fall to 2.3 Mt, lower than the five-year average.

Bobby Morgan: Pulse and Special Crops Analyst
Bobby.Morgan@agr.gc.ca

CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

December 19, 2024

Grain and Crop Year (a)	Area Seeded ----- thousand ha -----	Area Harvested	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												
2022-2023	2,431	2,400	2.41	5,790	1	6,378	5,059	194	317	745	574	445
2023-2024	2,442	2,375	1.72	4,087	5	4,666	3,558	192	263	701	407	425
2024-2025f	2,576	2,565	2.29	5,870	25	6,302	4,900	200	324	752	650	325
Wheat Except Durum												
2022-2023	7,844	7,696	3.77	29,016	64	32,663	20,476	3,258	3,005	7,135	5,051	401
2023-2024	8,505	8,324	3.47	28,859	88	33,997	21,776	3,250	3,919	8,014	4,208	316
2024-2025f	8,259	8,083	3.60	29,088	100	33,396	21,250	3,200	4,419	8,346	3,800	310
All Wheat												
2022-2023	10,274	10,096	3.45	34,807	65	39,041	25,536	3,452	3,323	7,880	5,625	
2023-2024	10,947	10,700	3.08	32,946	92	38,664	25,334	3,442	4,181	8,715	4,615	
2024-2025f	10,835	10,648	3.28	34,958	125	39,699	26,150	3,400	4,743	9,099	4,450	
Barley												
2022-2023	2,851	2,636	3.79	9,987	26	10,556	3,890	106	5,598	5,957	709	417
2023-2024	2,967	2,703	3.29	8,905	118	9,731	3,064	89	5,205	5,515	1,152	314
2024-2025f	2,592	2,394	3.40	8,144	100	9,395	2,890	319	5,155	5,705	800	290
Corn												
2022-2023	1,466	1,444	10.00	14,539	2,227	19,512	2,861	5,327	9,681	15,024	1,628	300
2023-2024	1,548	1,519	10.15	15,421	2,788	19,837	1,969	5,999	9,857	15,872	1,996	211
2024-2025f	1,478	1,449	10.59	15,345	2,300	19,641	2,100	5,550	9,975	15,541	2,000	210
Oats												
2022-2023	1,593	1,402	3.73	5,227	25	5,584	2,670	90	1,462	1,639	1,275	353
2023-2024	1,026	826	3.20	2,643	15	3,933	2,377	79	937	1,114	442	354
2024-2025f	1,174	993	3.38	3,358	20	3,820	2,230	90	996	1,190	400	330
Rye												
2022-2023	237	152	3.42	520	2	606	199	42	244	303	105	287
2023-2024	178	116	3.09	358	4	466	198	30	132	177	91	217
2024-2025f	183	117	3.60	421	2	513	172	35	186	247	95	200
Mixed Grains												
2022-2023	138	72	2.82	203	0	203	0	0	203	203	0	
2023-2024	145	60	2.53	153	0	153	0	0	153	153	0	
2024-2025f	149	62	2.46	152	0	152	0	0	152	152	0	
Total Coarse Grains												
2022-2023	6,286	5,705	5.34	30,475	2,280	36,460	9,619	5,564	17,187	23,125	3,716	
2023-2024	5,863	5,223	5.26	27,480	2,924	34,120	7,608	6,196	16,284	22,831	3,681	
2024-2025f	5,575	5,015	5.47	27,419	2,422	33,522	7,392	5,994	16,465	22,835	3,295	
Canola												
2022-2023	8,659	8,596	2.19	18,850	151	20,485	7,950	9,961	651	10,678	1,858	857
2023-2024	8,938	8,857	2.17	19,192	276	21,325	6,683	11,033	797	11,894	2,748	715
2024-2025f	8,908	8,846	2.02	17,845	100	20,692	7,500	11,500	391	11,942	1,250	615
Flaxseed												
2022-2023	315	312	1.52	473	6	561	214	N/A	117	128	220	635
2023-2024	247	239	1.14	273	10	502	211	N/A	117	127	164	581
2024-2025f	204	201	1.28	258	10	432	250	N/A	73	92	90	565
Soybeans												
2022-2023	2,135	2,118	3.09	6,543	483	7,313	4,220	1,768	718	2,722	372	701
2023-2024	2,279	2,261	3.09	6,981	336	7,688	4,899	1,652	333	2,227	563	572
2024-2025f	2,311	2,290	3.31	7,568	450	8,581	5,500	1,850	431	2,481	600	475
Total Oilseeds												
2022-2023	11,108	11,026	2.35	25,866	641	28,360	12,384	11,729	1,486	13,527	2,449	
2023-2024	11,463	11,356	2.33	26,445	622	29,516	11,793	12,685	1,248	14,248	3,475	
2024-2025f	11,422	11,337	2.26	25,670	560	29,706	13,250	13,350	896	14,516	1,940	
Total Grains And Oilseeds												
2022-2023	27,668	26,827	3.40	91,148	2,986	103,861	47,539	20,746	21,995	44,532	11,790	
2023-2024	28,273	27,279	3.18	86,871	3,639	102,299	44,735	22,323	21,713	45,793	11,772	
2024-2025f	27,831	27,001	3.26	88,048	3,107	102,926	46,792	22,744	22,104	46,449	9,685	

(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 (Average Prairie producer price, FOB farm); 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 2024-25 which are STC

CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

Unclassified / Non classifié

December 19, 2024

Grain and Crop Year (a)	Area Seeded ----- thousand ha -----	Area Harvested ----- thousand ha -----	Yield t/ha	Production	Imports (b)	Total Supply ----- thousand metric tonnes -----	Exports (b)	Total Domestic	Carry-out Stocks	Stocks-to- Use Ratio %	Average Price (d) \$/t
								Use (c)			
Dry Peas											
2022-2023	1,363	1,348	2.54	3,423	35	3,797	2,564	684	550	17%	440
2023-2024	1,233	1,200	2.17	2,609	127	3,286	2,401	586	299	10%	460
2024-2025f	1,300	1,281	2.34	2,997	60	3,357	2,400	632	325	11%	425
Lentils											
2022-2023	1,749	1,715	1.36	2,331	87	2,642	2,209	222	211	9%	820
2023-2024	1,485	1,460	1.23	1,801	92	2,104	1,674	265	165	9%	1,000
2024-2025f	1,704	1,693	1.44	2,431	100	2,696	2,100	246	350	15%	885
Dry Beans											
2022-2023	120	117	2.67	313	70	523	371	72	80	18%	1,165
2023-2024	129	129	2.63	339	70	489	408	61	20	4%	1,215
2024-2025f	163	160	2.65	424	70	514	400	59	55	12%	1,100
Chickpeas											
2022-2023	95	95	1.54	146	42	364	198	73	93	34%	1,000
2023-2024	128	127	1.25	159	47	299	183	87	30	11%	1,005
2024-2025f	194	194	1.48	287	45	361	175	86	100	38%	815
Mustard Seed											
2022-2023	225	219	0.74	162	11	189	110	40	40	26%	2,140
2023-2024	258	251	0.68	171	16	226	96	42	88	64%	1,280
2024-2025f	245	243	0.79	192	9	290	100	45	145	100%	830
Canary Seed											
2022-2023	118	117	1.36	159	0	213	147	9	57	36%	900
2023-2024	104	103	1.09	112	0	170	112	13	44	35%	930
2024-2025f	118	118	1.57	185	0	229	125	14	90	65%	730
Sunflower Seed											
2022-2023	38	38	2.24	84	40	242	22	70	151	165%	800
2023-2024	40	40	2.32	92	27	270	30	66	175	184%	545
2024-2025f	24	24	2.13	51	25	251	35	66	150	149%	595
Total Pulse And Special Crops (c)											
2022-2023	3,707	3,649	1.81	6,618	284	7,971	5,620	1,170	1,182		
2023-2024	3,376	3,309	1.60	5,284	379	6,844	4,903	1,120	821		
2024-2025f	3,749	3,712	1.77	6,568	309	7,698	5,335	1,148	1,215		

(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, averages 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 2024-25 which are STC