Agriculture and Agri-Food Canada   Agriculture et Agroalimentaire Canada

CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS, 2025   December 17, 2025

Market Analysis Group / Crops and Horticulture Division
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This report is an update of Agriculture and Agri-Food Canada's (AAFC) November outlook report for the 2025-26 crop year, based on information available up to December 10, 2025. 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 global grain markets remains elevated, primarily due to persistent geopolitical factors that continue to disrupt trade flows and market stability.

For 2025-26, the outlook incorporates results from Statistics Canada's November Field Crop Survey on crop production, released on December 4, 2025. The survey, conducted from October 3 to November 6, covered approximately 27,200 Canadian farms. Production of all principal field crops is estimated at 107.0 million tonnes (Mt), an increase of 10.4% from 2024 and 16.2% above the 2020–2024 average of 92.1 Mt. This marks the largest crop on record, surpassing the previous high of 100.1 Mt set in 2020 by 7%. Western Canada is projected to lead growth, with production rising 16% year-over-year to 85.3 Mt, which is 23% above the five-year average, as nearly all crops posted gains. In contrast, Eastern Canada's output is expected to decline 6.5% from 2024, driven by lower corn and soybean production that outweighed gains in wheat.

The primary driver of higher production was improved yields, as the total harvested area remained largely unchanged. Year-over-year, production by commodity group showed notable gains: wheat rose 11%, with growth in both durum and non-durum varieties, oilseeds were up 7%, as canola and flaxseed gains offset a smaller soybean crop, coarse grains were higher by 7% with increases across all coarse grains except corn, and pulse and special crops (P&SC) increased by 32%, largely due to higher pea and lentil production. Exports of principal field crops are projected to decline 4% from last year yet remains 9% above the previous five-year average. Carry-out stocks (year-end inventories) are forecast to rise 68%, driven by higher production and reduced export volumes.

Prices for most principal field crops are forecast to decline year-over-year, with the exception of soybeans and mustard, which are expected to post slight increases.

The next AAFC Outlook for Principal Field Crops is scheduled to be released on January 20, 2026. Statistics Canada is scheduled to publish stocks of principal field crops as of December 31, 2025, on February 6, 2026.

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									
2023-2024	28,273	27,289	3.21	87,611	3,815	103,529	44,864	45,537	13,129
2024-2025	27,831	27,004	3.35	90,424	2,454	106,006	52,537	43,639	9,830
2025-2026f	27,914	26,906	3.66	98,385	2,337	110,552	50,127	45,200	15,225
Total Pulse And Special Crops									
2023-2024	3,376	3,309	1.60	5,284	379	6,845	4,907	1,116	821
2024-2025	3,749	3,712	1.77	6,568	311	7,700	4,868	1,314	1,518
2025-2026f	3,890	3,818	2.27	8,661	239	10,418	5,145	1,323	3,950
All Principal Field Crops									
2023-2024	31,649	30,598	3.04	92,894	4,195	110,374	49,771	46,653	13,950
2024-2025	31,580	30,716	3.16	96,991	2,765	113,706	57,405	44,953	11,349
2025-2026f	31,804	30,724	3.48	107,046	2,576	120,970	55,272	46,523	19,175

Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
f: forecasts by AAFC except for area, yield and production for 2025-26 which are STC.

All Wheat

Durum

For 2025-26, production of Canadian durum is now estimated at 7.1 million tonnes (Mt), 12% more than last year's volume and the largest since 2016-2017, due to timely rainfall during the growing season, boosting yields in Saskatchewan and Alberta. Statistics Canada's (STC) December estimate was revised up 9% from the 6.5 Mt forecast in their September report. Average yield is estimated at 2.75 tonnes per hectare (t/ha), up from 2.49 t/ha last year. Saskatchewan accounted for 76% of the production, Alberta for 22%, 1% in Manitoba, with the remainder in Ontario and Quebec who have been trialing durum production over the last few years. Total supply is forecast at 7.6 Mt, 8% more than in 2024-25.

The quality of all Canadian western amber durum samples collected in the Canadian Grain Commission's (CGC) Harvest Sample program was average, with 22% of samples rated as No. 1, 23% rated No. 2, and 38% rated No. 3. Midge damage, darkened kernels, and mildew were the main downgrading factors. The average protein content was above the ten-year average at 14.6%.

With domestic use relatively stable in Canada, it is pegged at 0.8 Mt, or 10% of total supply. The export forecast was raised from last month's report but remains below the record set in 2024-25. For this crop year to date, the CGC reports durum exports at 1.4 Mt, 8% less than in 2024-25, but in line with the last five-year average, due to reduced demand from Europe and North Africa. Carry-out stocks are pegged at 1.5 Mt, bringing the stocks-to-use ratio up to 24%.

According to the International Grains Council, world durum production rose 2% to a nine-year high of 37.3 Mt as a result of good yields in parts of the EU, North Africa, and North America. Total supply is forecast at 44.4 Mt, up 4% year-on-year. Consumption has also increased to a nine-year high of 8.3 Mt, with significant growth in food use more than outweighing a reduction in feed use. Following improved harvests in the EU, Algeria, Tunisia, and Morocco, global exports are seen dropping 5% compared to 2024-25 to 8.6 Mt. Closing stocks are currently pegged at 8.3 Mt, with major exporters' share increasing to 3.1 Mt, 20% more than opening levels.

The average spot price for Canadian Western Amber Durum No. 1, 13% protein content in Saskatchewan for the 2025-26 crop year remains unchanged at $280/tonne.

Wheat (excluding durum)

For 2025-26, Canadian wheat production increased by 11% from 2024-25 to 32.8 Mt with upward revisions to yields in Statistics Canada's December 4th report, despite a reduction in harvested area. STC's final production number is a record 32.8 Mt, 9% higher than its September estimate, with yields estimated at 4.09 t/ha, compared to the 3.72 t/ha in September. Saskatchewan is the largest producer of wheat in Canada, accounting for 39% of the total, followed by Alberta (33%) and Manitoba (18%). Ontario accounted for 9% of total production, while the remaining is scattered throughout Quebec, the Maritimes, and British Columbia.

Production by class of wheat, with 2024-25 production in brackets is estimated at: winter (hard red, soft red and soft white) 3.3 Mt (3.2 Mt); Canada Western Red Spring (CWRS), premium quality hard wheat, 24.4 Mt (22.3 Mt); Canada Prairie Spring (CPS) 2.2 Mt (2.0 Mt), Canada Northern Hard Red Spring (CNHR) 1.2 Mt (1.2 Mt); soft white spring (CWSWS) 0.7 Mt (0.4 Mt).

As of November 28, the CGC's harvest sample report shows that the quality of Canadian Red Spring Wheat, the most common type of wheat grown in Canada, is excellent, with 91% of the crop rated in the top two grades. Average protein content is 13.8% equal to the last ten-year average.

Total supply is forecast at a record 36.5 Mt, up 7% from 2024-25 and 14% higher than the last five-year average. According to the CGC, wheat exports are outpacing last year's volume by 5% on average for this crop year to date. Whether this upward trend will persist once the harvests in Argentina and Australia are concluded remains uncertain. This month, wheat exports were raised by an additional 500 thousand tonnes, bringing the total to 23 Mt. Further revisions may be warranted should the strong pace of shipments continue. Domestic use is forecast at 7.5 Mt, or 21% of total supply and carry out stocks are expanded to 6.0 Mt bringing the stocks-to-use ratio up to 20%.

According to the United States Department of Agriculture's most recent World Agricultural Supply and Demand Estimates (WASDE) report, total world wheat supply (including durum) is projected at 1,097.8 Mt, up 7.5 Mt compared to last month's report, on account of higher production estimates for Canada (+3Mt), Argentina (+2 Mt), the EU (+1.7 Mt), Australia (+1.0 Mt) and Russia (+1.0 Mt). Total production is estimated at 837.8 Mt, almost 15 Mt more than the anticipated demand. This month, world use was raised 4.1 Mt to 823 Mt, 2% more than in 2024-25 with increased feed and residual use; trade is forecast at 218.7 Mt, up 4% year-on-year with increased demand from South East Asia, the Middle East, China, North Africa, Bangladesh and Nigeria. Closing stocks are pegged at 274.9 Mt, +6% more than opening levels.

The 2025-26 forecasted average spot price for CWRS 1, 13.5% protein in Saskatchewan remains unchanged at $265/tonne.

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Coarse Grains

Barley

For 2025-26, Canadian farmers produced approximately 9.7 million tonnes (Mt) of barley, according to Statistics Canada's (STC) December 4 survey-based production estimates. This volume is about 1.5 Mt higher than STC's September model-based production estimates, supported by better-than-expected yields, which are record high, and a larger-than-expected harvested area. Of the total increase, slightly less than 1.0 Mt is from Alberta, with the rest from Saskatchewan and Manitoba. So far, the 2025 production is 19% higher than the 2024 production, thanks to the record-high yields, despite a smaller sown area. Compared to the previous five-year average, production in 2025 is 9% higher. By province, Alberta accounts for more than half of the national production, followed by Saskatchewan (35%) and Manitoba (5%), with the remaining from other provinces.

Supply is projected at 11.0 Mt, up sharply year-over-year (y/y), supported by higher carry-in stocks, which sit at an eight-year high, and higher production, despite a decline in imports. Moreover, the 2025-26 supply is significantly above the five-year average. The abundant supplies are expected to encourage domestic feed consumption and exports. Carry-out stocks are projected at 1.5 Mt, up sharply from the previous season's 1.2 Mt and the five-year average of 0.9 Mt.

According to Canadian Grain Commission (CGC) export data, exports of barley in the first four months (August – November) of the crop year are close to 1.2 Mt, up sharply from those exported in the same period a year ago. Major destinations include China, Saudi Arabia, and Japan.

The 2025-26 Lethbridge average feed barley price is projected at $270/tonne (/t), down $26/t from 2024-25, primarily due to pressure from ample local feed supplies, strong competition from rivals in the global market, and expected bumper global cereal grain and corn output.

Worldwide, data from the United States Department of Agriculture (USDA) shows global barley production for 2025-26 at over 150 Mt, up notably y/y. This increase is due to increased output across key exporting locations, particularly the EU, Russia, Australia, and Canada. Trade is expected to be more active. Consumption is expected to get stronger, driven by increased feed use and, to a lesser extent, food, seed, and industrial use. Ending stocks are projected at about 20 Mt, a substantial increase compared to the previous season, with stocks expected to be abundant in most major exporting countries.

Corn

For 2025-26, Canadian farmers have harvested approximately 14.9 Mt of corn. This volume is about 0.6 Mt lower than STC's September estimate, mainly due to drier late-season conditions in Eastern Canada, which reduced yields and outputs in the region, particularly in Ontario and Québec. However, corn output in the western province of Manitoba is above earlier expectations thanks to improved yields. Nationwide, average yield is below the earlier estimate and down from the previous season's record high, but remains in the upper range. So far, the 2025 production is 3% lower than in 2024, with the 1% decrease in Ontario and the 18% decrease in Québec more than offsetting the 22% increase in Manitoba. Compared to the previous five-year average, production in 2025 is slightly higher. By province, Ontario accounts for almost 65% of the national production, followed by Québec (20%) and Manitoba (15%), with the remaining from other provinces.

Supply is projected at 18.1 Mt, down notably y/y due to lower carry-in stocks, production, and imports. Domestic feed consumption and exports are expected to decline significantly y/y. Carry-out stocks are projected at 1.6 Mt, little changed y/y, but well below the five-year average of 2.0 Mt.

The 2025-26 Chatham average corn price is projected at $220/t, down $5/t from 2024-25, mainly due to pressure from expected lower US corn prices.

Worldwide, the United States Department of Agriculture's (USDA) data shows global corn production for 2025-26 at almost 1,300 Mt, up notably y/y. This rise is due to increased output across most key exporting and importing origins, particularly the US, while a drop is estimated for Brazil and the EU. Trade is expected to be more active. Consumption is expected to get stronger, driven by increased feed use and food, seed, and industrial use. Ending stocks are projected at about 280 Mt, a substantial decrease compared to the previous season. Stocks are expected to decline significantly in China, Brazil, Argentina, and the EU, while they are expected to increase sharply in the US and Mexico. The USDA projected the US corn price for 2025-26 at above US$155/t, down US$10/t y/y and the lowest in six years.

Oats

For 2025-26, Canadian farmers have harvested more than 3.9 Mt of oats. This volume is 0.56 Mt higher than STC's September estimate, supported by better-than-expected yields, which are record high, and a larger-than-expected harvested area. Of the total increase, almost half is from Saskatchewan, with 0.2 Mt from Alberta, and the majority of the rest from Manitoba. So far, the 2025 production is 17% higher than the 2024 crop, thanks to the record-high average yield and larger sown area. Compared to the previous five-year average, production in 2025 is 5% higher. By province, Saskatchewan accounts for 45% of the national production, followed by Manitoba (25%) and Alberta (20%), with the remaining from other provinces.

Supply is projected at 4.4 Mt, up significantly y/y, primarily due to higher production despite lower carry-in stocks. This level is close to the five-year average. Total domestic use and exports are expected to increase, supported by abundant supplies. Carry-out stocks are forecast at 0.8 Mt, up sharply y/y and close to the five-year average.

The 2025-26 Chicago Board of Trade (CBOT) oat price is projected at $305/t, down $40/t y/y and the lowest in five years.

Worldwide, the USDA data shows global oat production for 2025-26 at less than 25 Mt, up notably y/y. This rise is due to increased output across key exporting and importing origins, particularly Canada. Trade could see a limited increase. Consumption is expected to get stronger, driven by increased feed use and food, seed, and industrial use. Ending stocks are projected at over 3.0 Mt, a substantial increase compared to the previous season.

Rye

For 2025-26, Canadian farmers have harvested approximately 683 thousand tonnes (Kt) of rye. This volume is about 140 Kt higher than STC's September estimate, mainly due to higher-than-expected output in Manitoba and Saskatchewan. So far, the 2025 production is 62% higher than the 2024 harvest and 58% above the previous five-year average, also the highest since 1990. Western Canada makes up almost 85% of the national production, with the rest in the East.

This fall, Canadian farmers have seeded approximately 230 thousand hectares (Kha) of rye, down significantly from last season due to smaller area seeded in Western Canada offsetting larger area in the East. However, the area remains well above the five-year average. Western Canada makes up almost 60% of the total area, with the rest in the East. Fall rye represents the vast majority of the total rye area and will be harvested for 2026-27.

Supply for 2025-26 is projected at 827 Kt, up sharply from the previous season's level and the five-year average, primarily supported by abundant production and carry-in stocks. This level is also the highest since 1990-91. The abundant supplies are expected to encourage domestic feed consumption and exports. Carry-out stocks are forecast at 250 Kt, up significantly y/y and also the highest since 1990-91.

The 2025-26 Prairie average rye price is projected at $155/t, down $10/t from 2024-25 and the lowest in fifteen years, mainly due to pressure from abundant supplies and the expected decline in the prices of other grains.

Worldwide, the USDA data shows global rye production for 2025-26 at over 10 Mt, slightly up y/y. Trade could move more slowly. Consumption is expected to get softer, driven by lower food, seed, and industrial use. Ending stocks are projected at over 1.0 Mt, down significantly y/y and well below the five-year average.

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Oilseeds

Canola

For 2025-26, farmers seeded 8.75 million hectares (Mha) to canola, with the largest area sown in Saskatchewan, who accounted for 56% of the national area, followed by Alberta (29%) and Manitoba (14%). In their latest release, Statistics Canada (STC) raised harvested area to 8.70 Mha and bumped the national yield from 2.31 tonnes per hectare (t/ha) to 2.51 t/ha. As a result, canola production is estimated at a record high of 21.8 million tonnes (Mt), 19% above the five-year average of 18.3 Mt and surpassing the previous record of 21.5 Mt in 2017-18. Total supplies are now estimated at a five-year high of 23.5 Mt, with the large output offsetting the sharp decline of carry-in stocks.

According to the Canadian Grain Commission's harvest sample program as of November 21, 2025, 97% of the 1,098 submitted samples were rated No.1 with an average oil content of 43.6%, higher than last year's oil content by 3%. The protein content of No.1 canola averages 21.4%, lower than last year by 7%, while the chlorophyll content averages 8.6 milligrams per kilogram. Glucosinolates, a measure of feed quality, averages 11 micromoles per gram (µmol/g), an improvement from last year's 13 µmol/g.

For the crop year to the end of October, 2.9 Mt of canola seed has been crushed, according to STC, resulting in 1.2 Mt of canola oil and 1.7 Mt of canola meal. The current crush pace is just slightly ahead of last year and 13% ahead of the five-year average.

Given the expansion in domestic processing and abundant canola supplies, the crush projection has been raised to a record 12 Mt, up 5% from last year and notably higher than the five-year average of 10.3 Mt. Increased supplies have also supported a rise in the export forecast from last month to 8 Mt. If realized, exports would still be sharply below last year's 9.3 Mt, accounting for strong domestic use combined with the assumption that China's preliminary anti-dumping duty remains in place. Total carry-out stocks for 2025-26 are up from last month to 2.95 Mt, well above last year and the five-year average of 1.98 Mt.

The simple average price, No.1 Track Vancouver, is forecast at $660/tonne (/t), down from last year's $677/t and well below the five-year average price of $811/t.

Factors to observe are: (i) farmer delivery pace, (ii) crush and export pace, (iii) US soybean and soy-product prices, (iv) Brazil and Argentina soybean planting progress, (v) progress towards resolution of China's anti-dumping duty on Canadian canola.

Flaxseed

For 2025-26, area seeded to flaxseed expanded to 250.9 thousand hectares (Kha), up 23% from last year, with most of Canada's flax grown in Saskatchewan (87%). In STC's latest release, both area harvested and yields were raised to 249.1 Kha and 1.82 t/ha, respectively. As a result, flaxseed production is estimated at a 454.5 thousand tonnes (Kt), a sharp increase from last year's 258 Kt and 18% higher than the five-year average. Total supplies are now estimated at a five-year high of 598.5 Kt.

Total domestic use is forecast slightly lower this month at 88.5 Kt, a rise of 24% from last year. Given the increase in supply, exports have been raised to 235 Kt. Carry-out is higher this month at 275 Kt, sharply higher than last year and the five year average of 132 Kt.

The simple average price for flaxseed, No.1 in-store Saskatoon cash, is forecast lower this month to a six-year low of $550/t.

Soybeans

For 2025-26, the area seeded to soybeans rose slightly from last year to 2.34 Mha. In STC's latest release, the department raised harvested area slightly but lowered the national yield from 3.1 t/ha to 2.9 t/ha, citing hot and dry conditions in Ontario and Quebec. As a result, Canadian soybean production is estimated at 6.8 Mt, down 10% from last year although up slightly when compared to the five-year average. As lower carry-in for the year combines with lower output, total supply declines 8% from last year to 7.7 Mt.

Total domestic use is forecast at 2.1 Mt on lower feed, waste, and dockage. The domestic crush forecast remains projected at 1.7 Mt for now, up slightly from last year and on par with the five-year average. Exports have been lowered from last month to 5.25 Mt, the third highest on record, if realized. Carry-out stocks are expected to close the year at 400 Kt.

The Canadian simple average price forecast for soybeans, track Chatham, is raised $15/t from last month to $535/t.

In their December World Agricultural Supply and Demand Estimates report, the United States Department of Agriculture raised their global soybean production forecast from 421.75 Mt to 422.54 Mt on higher output for Russia and India. Despite the adjusted figure, it remains below last year's estimate of 427.2 Mt. The department raised their global crush forecast by 26 Kt to 365.2 Mt, up from last year's crush of 358.2 Mt. While trade is expected up from last year, global soybean exports were lowered slightly from last month to 187.7 Mt on reduced shipments for Ukraine and Benin. Global ending stocks were raised from 122.0 Mt to 122.37 Mt on higher anticipated stocks for Brazil and Russia. The US average soybean price forecast for 2025-26 remains unchanged at US$10.50/bushel (US$386/t).

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Pulse and Special Crops

Dry Peas

For 2025-26, production increased 31% to 3.9 million tonnes (Mt) due to higher yields and harvested area. Yields were 22% higher than the previous year due to better conditions. Yellow and green pea types are expected to account for about 3.1 Mt and 0.6 Mt, respectively, with the remainder spread across other varieties. Supply has risen by 33% to 4.4 Mt, due to larger carry-in stocks combining with the larger output. Exports are forecast to be only marginally higher at 2.2 Mt, largely due to import tariffs by China and India. As a result, carry-out stocks are forecast to rise to record levels with the increased supply. The average price is expected to decrease by 31% to $280/tonne (/t) from 2024-25, with lower dry pea prices for all types.

During November, the on-farm price of yellow and green pea types in Saskatchewan rose $5/t and $15/t, respectively. Prices have been steady despite slower export demand, helped by expectations for a below-average-size Indian winter pulse crop. For the crop year-to-date, green dry peas prices have been maintaining a premium of $125/t above yellow dry peas. Last year, green peas were at a record $208/t premium to yellow peas.

In the US, area seeded to dry peas for 2025-26 is estimated by the United States Department of Agriculture (USDA) to have risen by 21% to 1.18 million acres (0.48 Mha). This is largely due to an increase in area in North Dakota and Montana. With estimates of above-average yields, US dry pea production is estimated by the United States Department of Agriculture (USDA) to rise by 23% to 0.93 Mt. US dry peas compete, on a smaller scale, in Canadian export markets such as China and the Philippines.

Lentils

For 2025-26, production increased by 38% to 3.4 Mt due to higher area and yields. Large green lentil production is estimated to be higher than last year at 1.0 Mt and red lentil production rose to nearly 1.8 Mt. Production of the other remaining lentil types is estimated to have risen to 0.6 Mt. Supply is expected to be 47% higher than last year as larger carry-in stocks combine with the rise in output. Exports are forecast to increase to 2.1 Mt. India and Turkey are currently the top export markets. Imports are expected to be lower than the previous year with an average grade distribution. Carry-out stocks are expected to rise sharply, due to the larger exportable supply. The overall average price is forecast to fall by 35% to $510/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 fell by about $10/t when compared to last month. The quality of the Canadian lentil crop is considered to be average. There is a similar proportion in the supply of No. 1 and No. 2 grade Canadian lentils for 2025-26 when compared to last year. No. 1 large green lentil prices are forecast to maintain a premium of $100/t over No. 1 red lentil prices, compared to $465/t in 2024-25.

In the US, the area seeded to lentils for 2025-26 is forecast by the USDA at nearly 1.1 million acres (0.43 Mha), up 15% from 2024-25, due to higher area seeded in Montana. With estimates of average yields, 2025-26 US lentil production is estimated by the USDA at 0.5 Mt, up 23% from the 2024-25 level.

Dry Beans

For 2025-26, production rose 3% to 438 thousand tonnes (Kt), consisting of 91 Kt of white pea bean types and 347 Kt of colored bean types. Production in Ontario was 143 Kt, up 7% from 2024, with higher area but lower yields. In Manitoba, production rose due to higher yields for colored beans. In Alberta, colored bean production fell due to a decrease in area and yields.

Supply is expected to rise with higher carry-in stocks combining with 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 sharply higher. The average Canadian dry bean price is forecast to be lower at $760/t due to the higher North American supply.

In the US, area seeded to dry beans is estimated by the USDA to have decreased by 9% to 1.39 million acres (0.56 Mha), largely due to lower area seeded in North Dakota. US total dry bean production (excluding chickpeas) is estimated by the USDA to fall by 4%, to nearly 1.4 Mt. However, large carry-in stocks from the previous crop year are expected to weigh on US dry bean prices in 2025-26. US export markets continue to be Canada, EU, and Mexico.

Chickpeas

For 2025-26, production rose by 68% to a record 482 Kt due to higher harvested area and yields. Crop quality is below average when compared to the previous year. Supply is forecast to rise by 63% as higher carry-in stocks combines with increased production. Exports are forecast to be lower at 200 Kt, with the US, Turkey, and the EU as the main importers. Carry-out stocks are expected to rise sharply to 295 Kt. The average price for all grades of chickpeas is forecast to fall by 18%, to $600/t, due to higher world supply.

US chickpea area seeded is estimated by the USDA at 0.54 million acres (0.22 Mha), up 8% from 2024-25. With above-average yields, 2025-26 US chickpea production is forecast by USDA at 0.34 Mt, up 32% from the previous year.

Mustard Seed

For 2025-26, production fell by 27% to 140 Kt, with lower area, but higher yields. Production of yellow, brown and oriental types of mustard seed fell. Supply increased marginally to 292 Kt. Exports are expected to be higher at 95 Kt. Due to the small rise in supply, carry-out stocks are forecast to rise marginally to a burdensome 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 rise slightly to $880/t.

Canary Seed

For 2025-26, production rose by 27% to 235 Kt with higher yields and area. Exports are expected to be slightly higher than last year at 135 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 2024-25 level to $450/t due to larger supply and expectations for a sharp increase in carry-out stocks to a burdensome 170 Kt.

Sunflower Seed

For 2025-26, production was higher than the previous year at 69 Kt due to a rise in area and yields. Supply fell 3% with smaller carry-in stocks. Exports are forecast to be similar to last year at 35 Kt. Carry-out stocks are forecast to fall to 145 Kt. The US is expected to continue to be Canada's main export market for sunflower seed. The average price is forecast to be 3% lower than 2023-24, at $700/t, largely due to lower oilseed type prices.

US sunflower seed production is estimated by AAFC at 0.77 Mt, up 48% from 2024-25, largely due to increased production in North and South Dakota. It is estimated by AAFC that US production of oil-type varieties will rise to 0.68 Mt, and confectionery-type varieties are unchanged at approximately 90 Kt. US supply is forecast by the USDA to be 9% higher at 1.0 Mt. US exports are expected to fall, but domestic use is expected to increase. US sunflower seed carry-out stocks are expected to rise and pressure North American prices.

For 2025-26, the global supply of sunflower seed is estimated by the USDA at 57.2 Mt. This is marginally lower than last year, due to decreased output by Ukraine. World exports are expected to decrease by 9% to 2.6 Mt, and domestic use is expected to fall marginally to 51.8 Mt. World carry-out stocks are expected to fall by 4% to 2.8 Mt, lower than the five-year average.

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

December 17, 2025

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (c)	Food & Industrial Use (d)	Feed, Waste & Dockage	Total Domestic Use (e)	Carry-out Stocks	Average Price (g)
	thousand ha		*t/ha*	*thousand tonnes*								*$/t*
Durum												
2023-2024	2,442	2,385	1.78	4,247	5	4,830	3,549	191	174	612	669	425
2024-2025	2,576	2,565	2.49	6,380	5	7,054	5,821	208	277	737	496	321
2025-2026f	2,643	2,593	2.75	7,135	5	7,636	5,350	200	353	786	1,500	280
Wheat Except Durum												
2023-2024	8,505	8,324	3.50	29,167	88	34,382	21,771	3,272	3,885	8,002	4,609	317
2024-2025	8,259	8,087	3.66	29,559	80	34,247	23,399	3,351	3,028	7,232	3,616	282
2025-2026f	8,297	8,022	4.09	32,820	100	36,536	23,000	3,300	3,409	7,536	6,000	265
All Wheat												
2023-2024	10,947	10,709	3.12	33,414	92	39,212	25,321	3,463	4,060	8,614	5,278	
2024-2025	10,835	10,652	3.37	35,939	85	41,302	29,220	3,558	3,305	7,969	4,112	
2025-2026f	10,940	10,615	3.76	39,955	105	44,172	28,350	3,500	3,761	8,322	7,500	
Barley												
2023-2024	2,967	2,703	3.29	8,905	117	9,731	3,063	90	5,204	5,516	1,152	314
2024-2025	2,592	2,394	3.40	8,144	169	9,464	2,843	93	5,066	5,372	1,249	296
2025-2026f	2,483	2,277	4.27	9,725	50	11,024	3,240	319	5,752	6,284	1,500	270
Corn												
2023-2024	1,548	1,519	10.00	15,421	2,979	20,027	2,112	5,999	9,904	15,919	1,996	211
2024-2025	1,478	1,449	10.59	15,345	1,777	19,118	2,776	5,848	8,895	14,759	1,584	225
2025-2026f	1,531	1,460	10.18	14,867	1,600	18,051	2,200	5,850	8,384	14,251	1,600	220
Oats												
2023-2024	1,026	826	3.20	2,643	15	4,161	2,365	79	948	1,126	670	354
2024-2025	1,174	993	3.38	3,358	17	4,045	2,566	77	793	972	507	345
2025-2026f	1,213	1,049	3.74	3,920	20	4,446	2,650	90	855	1,046	750	305
Rye												
2023-2024	178	116	3.09	358	4	466	198	30	132	177	91	217
2024-2025	183	117	3.60	421	1	513	154	38	154	216	143	165
2025-2026f	286	170	4.02	683	2	827	202	55	301	375	250	155
Mixed Grains												
2023-2024	145	60	2.53	153	0	153	0	0	153	153	0	
2024-2025	149	62	2.46	152	0	152	0	0	152	152	0	
2025-2026f	123	68	2.69	184	0	184	0	0	184	184	0	
Total Coarse Grains												
2023-2024	5,863	5,223	5.26	27,480	3,115	34,539	7,738	6,198	16,342	22,891	3,909	
2024-2025	5,575	5,015	5.47	27,419	1,963	33,292	8,339	6,055	15,059	21,471	3,482	
2025-2026f	5,635	5,024	5.85	29,378	1,672	34,532	8,292	6,314	15,476	22,140	4,100	
Canola												
2023-2024	8,938	8,857	2.20	19,464	276	21,602	6,679	11,033	601	11,698	3,225	715
2024-2025	8,908	8,846	2.17	19,239	131	22,595	9,331	11,412	191	11,667	1,597	677
2025-2026f	8,748	8,697	2.51	21,804	100	23,501	8,000	12,000	500	12,551	2,950	660
Flaxseed												
2023-2024	247	239	1.14	273	10	502	211	N/A	118	127	164	581
2024-2025	204	201	1.28	258	8	431	225	N/A	60	71	134	630
2025-2026f	251	249	1.82	454	10	599	235	N/A	70	89	275	550
Soybeans												
2023-2024	2,279	2,261	3.09	6,981	322	7,674	4,915	1,652	316	2,208	552	572
2024-2025	2,311	2,290	3.31	7,568	267	8,387	5,421	1,678	540	2,461	505	487
2025-2026f	2,340	2,321	2.93	6,793	450	7,748	5,250	1,700	198	2,098	400	535
Total Oilseeds												
2023-2024	11,463	11,356	2.35	26,717	608	29,779	11,805	12,685	1,034	14,033	3,941	
2024-2025	11,422	11,337	2.39	27,065	406	31,413	14,977	13,090	791	14,199	2,236	
2025-2026f	11,339	11,267	2.58	29,052	560	31,848	13,485	13,700	768	14,738	3,625	
Total Grains And Oilseeds												
2023-2024	28,273	27,289	3.21	87,611	3,815	103,529	44,864	22,345	21,435	45,537	13,129	
2024-2025	27,831	27,004	3.35	90,424	2,454	106,006	52,537	22,703	19,156	43,639	9,830	
2025-2026f	27,914	26,906	3.66	98,385	2,337	110,552	50,127	23,514	20,005	45,200	15,225	

(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 2025-26 which are STC.

CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

December 17, 2025

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (c)	Carry-out Stocks	Stocks-to-Use Ratio	Average Price (d)
	------- thousand ha -------		t/ha	------------------------------ thousand metric tonnes ------------------------------						%	$/t
Dry Peas											
2023-2024	1,233	1,200	2.17	2,609	127	3,286	2,402	584	299	10%	460
2024-2025	1,300	1,281	2.34	2,997	38	3,335	2,175	671	489	17%	405
2025-2026f	1,420	1,383	2.85	3,934	20	4,443	2,200	678	1,565	54%	280
Lentils											
2023-2024	1,485	1,460	1.23	1,801	92	2,104	1,675	264	165	9%	1,000
2024-2025	1,704	1,693	1.44	2,431	124	2,721	1,821	350	549	25%	790
2025-2026f	1,772	1,743	1.93	3,363	75	3,987	2,100	352	1,535	63%	510
Dry Beans											
2023-2024	129	129	2.63	339	70	489	408	61	20	4%	1,215
2024-2025	163	160	2.65	424	71	515	402	73	40	8%	1,075
2025-2026f	172	171	2.55	438	70	548	380	73	95	21%	760
Chickpeas											
2023-2024	128	127	1.25	159	47	299	184	86	30	11%	1,005
2024-2025	194	194	1.48	287	43	359	209	88	62	21%	735
2025-2026f	219	218	2.21	482	40	584	200	89	295	102%	600
Mustard Seed											
2023-2024	258	251	0.68	171	16	227	96	42	88	64%	1,280
2024-2025	245	243	0.79	192	8	288	91	54	143	98%	860
2025-2026f	146	145	0.97	140	9	292	95	52	145	99%	880
Canary Seed											
2023-2024	104	103	1.09	112	0	170	113	13	44	35%	930
2024-2025	118	118	1.57	185	0	229	133	12	84	58%	685
2025-2026f	129	129	1.82	235	0	319	135	14	170	114%	450
Sunflower Seed											
2023-2024	40	40	2.32	92	27	270	30	66	175	184%	545
2024-2025	24	24	2.13	51	27	252	36	65	151	149%	720
2025-2026f	31	29	2.40	69	25	245	35	65	145	145%	700
Total Pulse And Special Crops (c)											
2023-2024	3,376	3,309	1.60	5,284	379	6,845	4,907	1,116	821		
2024-2025	3,749	3,712	1.77	6,568	311	7,700	4,868	1,314	1,518		
2025-2026f	3,890	3,818	2.27	8,661	239	10,418	5,145	1,323	3,950		

(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 2025-26 which are STC.