CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS

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

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

For 2019-20, the outlook incorporates the results of Statistics Canada's November Farm Survey of crop production which was released on December 6, 2019 and covered 26,800 Canadian farms. Farmers from every province were asked to report on their estimated seeded and harvested areas, yield and production of grains and oilseeds (G&O) and pulses and special crops (P&SC). These are the final survey-based production estimates for 2019 and replace the model-based estimates, which were reported by Statistics Canada in September and by AAFC in the October and November Field Crop reports.

The 2019 crop year was difficult for many farmers as overly dry conditions in parts of Western Canada persisted well into the growing season and, in Eastern Canada, heavy rain, coupled with colder than normal temperatures, made planting conditions difficult early in the crop year. At the time of harvest, higher than average precipitation across Canada, including excessive early snow in the Prairies, slowed harvest for many farmers and will likely result in unharvested crops remaining in the fields over the winter. Averaged over all crops, average yields are slightly higher than the average for 2018-19 but the general quality of the crop is notably lower due to wet conditions during harvest. The production of all field crops is estimated at 93.3 million tonnes (Mt), unchanged from last year, as higher production of P&SC offset lower production of G&O. Imports of G&O are expected to decrease due to lower imports of corn into Western Canada attributable to higher domestic barley production. Exports of G&O are also forecast to decrease due to lower exports of wheat ex-durum and soybeans. In total, for all field crops, carry-out stocks are expected to decrease to 15.4 Mt, similar to last year, as significantly lower inventories of durum, corn, oilseeds and lentils are offset by higher inventories of wheat ex-durum, barley, oats and peas. As was the case with the previous crop year, average prices for field crops in Canada are expected to be supported by the low value of the Canadian dollar.

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									
2017-2018	27,149	26,336	3.27	86,187	2,504	103,046	45,370	43,356	14,320
2018-2019	27,820	26,861	3.22	86,584	4,261	105,165	46,841	44,191	14,133
2019-2020f	27,568	26,094	3.30	85,997	2,682	102,811	44,710	43,961	14,140
Total Pulse And Special Crops									
2017-2018	3,927	3,897	1.90	7,419	211	8,407	5,365	1,315	1,727
2018-2019	3,652	3,576	1.88	6,714	294	8,734	6,077	1,342	1,316
2019-2020f	3,892	3,783	1.93	7,294	313	8,923	6,265	1,428	1,230
All Principal Field Crops									
2017-2018	31,076	30,233	3.10	93,606	2,715	111,453	50,735	44,672	16,047
2018-2019	31,472	30,437	3.07	93,298	4,554	113,899	52,918	45,533	15,448
2019-2020f	31,460	29,877	3.12	93,291	2,995	111,734	50,975	45,389	15,370

Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
f: forecast by AAFC except for area, yield and production which are from STC

Durum

For 2019-20, Canadian durum production decreased by 13% from 2018-19 to 4.98 million tonnes (Mt), as the 21% lower seeded area was partly offset by higher average yields. Statistics Canada's (STC) final production estimate was slightly lower from its September estimate. Saskatchewan accounted for 86.5% of the production, Alberta for 13% and Manitoba for 0.5%. About 3% of the durum area remained to be harvested at the start of winter.

Total supply decreased by 7%, as the lower production was partly offset by higher carry-in stocks. Exports are forecast to increase by 6% to 4.8 Mt due to stronger demand resulting from a decrease in world production. Carry-out stocks are forecast to fall by 49% from 2018-19 to 0.85 Mt, 39% lower than the past five year average of 1.4 Mt. The export forecast is 0.1 Mt higher than in the November report because of higher than expected shipments for the first four months of the crop year, and the carry-out stocks forecast is 0.15 Mt lower.

The average quality in terms of grades is lower than for 2018-19, which was exceptionally good quality crop, but near the past five year average. According to Canadian Grain Commission's sample survey analysis to November 27, 2019, 50% of the durum graded No. 1 and 2 and another 40% graded No. 3 and 4. The protein content averaged 13.7%, lower than for 2018-19, but better than the past five year average.

World durum production fell by 3 Mt from 2018-19 to 35.1 Mt, while supply decreased by 2.3 Mt to 45.5 Mt, according to the International Grains Council. Use is expected to rise by 0.4 Mt to 37.8 Mt. Carry out stocks are forecast to fall by 2.8 Mt to 7.6 Mt, the lowest since 2012-13. US durum production fell by 0.64 Mt from 2018-19 to 1.48 Mt, according to the United States Department of Agriculture (USDA).

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

Wheat (excluding durum)

For 2019-20, Canadian wheat production rose by 3.5% from 2018-19 to 27.4 Mt, as the 7.5% higher seeded area was partly offset by higher abandonment and lower average yields. STC's final production estimate was 0.12 Mt lower from its September estimate. Saskatchewan accounted for 39.5% of the wheat production, Alberta 35%, Manitoba 18%, Ontario 5.5%, Quebec 1%, with the remaining 1% in the Maritimes and British Columbia. About 7% of the spring wheat area in Western Canada remained to be harvested at the start of winter.

Production by class of wheat, with 2018-19 production in brackets, is estimated at: winter (hard red, soft red and soft white) 1.7 Mt (2.51 Mt); Canada Western Red Spring (CWRS), premium quality hard wheat, 22.17 Mt (20.03 Mt); Canada Prairie Spring (CPS) 1.49 Mt (1.59 Mt), Canada Northern Hard Red Spring (CNHR) 0.74 Mt (1.06 Mt); soft white spring (CWSWS) 0.54 Mt (0.48 Mt), other western spring wheat 0.27 Mt (0.39 Mt), eastern spring wheat, mainly hard red spring (CERS), 0.46 Mt (0.39 Mt).

The average quality for CWRS wheat in terms of grades is similar to 2018-19, but better than the past five year average. According to Canadian Grain Commission's sample survey analysis to November 27, 2019, 74% of the CWRS wheat graded No. 1 and 2 and another 16% graded No. 3. The protein content averaged 13.3%, lower than for 2018-19 and the past five year average.

Total supply increased only slightly, as lower carry-in stocks partly offset the increase in production. Exports are forecast to fall by 5% to 18.8 Mt, due to more competition from other exporters because of higher world production. Carry-out stocks are forecast to increase by 18% to 5 Mt, but only 2% higher than the past five year average of 4.92 Mt. The exports forecast is 0.2 Mt lower than in the November report due to lower than expected exports for the first four months of the crop year.

World all wheat (including durum) production increased by 34 Mt to 765 Mt, while the supply increased by 29 Mt to 1,043 Mt, according to USDA. Total use is expected to increase by 17 Mt to 754 Mt. World all wheat carry out stocks are forecast to rise by 12 Mt to 289 Mt or, if stocks in China are not included, stocks would increase by 4 Mt to 142 Mt.

US all wheat production rose by 1 Mt from 2018-19 to 52.3 Mt, according to USDA. Supply is 0.4 Mt lower at 84.5 Mt. Domestic use is forecast to increase by 1.5 Mt, while exports increase by 1 Mt. Carry out stocks are forecast to decrease by 2.9 Mt to 26.5 Mt.

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

For 2020-21, the Canadian winter wheat area, seeded in the fall of 2019, increased by 17% from 2019-20 to 636,500 hectares. Ontario accounted for 74% of the winter wheat area, Western Canada for 21%, and Quebec and the Maritimes for 5%.

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Barley

For 2019-20, barley production in Canada increased by 24% or slightly more than 2.0 million tonnes (Mt) from 2018-19 to 10.4 Mt, largely due to higher harvested area and improved yields. Canada's two leading barley producing provinces, Alberta (AB) and Saskatchewan (SK), accounted for 98% of the increase in production, with 48% from AB and 50% from SK. Production reached the highest level since 2009 and compares to 10 Mt forecast by STC in September. Malting barley area and production for 2019 should be the highest in recent five years with good quality, according to the Canadian Grain Commission's report on the Quality of Western Canadian Malting Barley 2019.

Total supply of barley increased by 17% from 2018-19 as the increase in production is partly offset by the historically low carry-in stocks. Domestic use of barley is expected to increase from 2018-19, reflecting stronger feed use. Exports are expected to decrease slightly due to the increased supply of barley in competing countries, including countries in the EU and Black Sea region. Carry-out stocks are anticipated to increase sharply.

The average price of feed barley for 2019-20 is expected to be lower than that of 2018-19 due to higher world and Canadian supply.

World barley production and supply for 2019-20 increased to the highest level since 1994-95, according to the United States Department of Agriculture (USDA). Barley production increased in the major exporting countries, including the EU, Australia, Russia and Ukraine. World trade is projected to rise due to higher supply and increased imports by Saudi Arabia, China and Morocco. World carry-out stocks are expected to increase to 22 Mt from 18 Mt in 2018.

Corn

For 2019-20, corn production in Canada decreased by 3% from 2018-19 to13.4 Mt largely due to lower average yields, despite an increase in harvested area. Production in Canada's two leading corn producing provinces, Ontario (ON) and Quebec, decreased by 1% and 7%, respectively. Total production in Western Canada declined by 5% compared to last year and dropped by 23% for Atlantic Canada. The harvest rate in Eastern Canada was slightly higher than last year, while it was much lower in Western Canada. The average provincial yield fell for each province compared to last year.

The total supply of corn decreased by 9% from 2018-19, as a result of lower carry-in stocks, production and imports. Corn imports for 2019-20 into Western Canada are expected to fall sharply, because of the significant increase in barley production in Western Canada where barley is the major feed grain. However, in Eastern Canada, where corn is the major feed grain, corn imports are expected to increase due to lower corn production. Domestic use is expected to decrease from 2018-19 due to reduced food and industrial use, as well as lower feed use. Exports are expected to decrease due to lower supply and the reduced export pace to-date. Carry-out stocks are forecast to decline mainly due to smaller supplies.

The average price of corn for 2019-20 is expected to be higher than last year due the expected increase in the US corn price and a significant decline in domestic corn supply.

US corn production for 2019-20 decreased by 5% from 2018-19 largely due to a decline in yields. The average farmgate price for corn in the US is forecast to increase to US$3.85/bu from US$3.61/bu last year. Corn production in the other major world exporters, including Brazil, Argentina, Russia and Ukraine, remained ample, which will put pressure on corn prices.

Oats

For 2019-20, oat production in Canada increased by 21% from 2018-19 to 4.2 Mt largely due to higher harvested area and record yields, despite a higher abandonment rate. SK accounted for 73% of the increase, with AB contributing 19%. Oat production increased in all provinces, except for British Columbia and Nova Scotia.

The total supply of oats in Canada increased by 8% from 2018-19, as the increase in production exceeded the decrease in carry-in stocks. Domestic use is expected to remain flat. Exports of oats, grain and products, are anticipated to rise due to increased supply and a solid export pace to-date. Carry-out stocks are expected to increase significantly due to higher supply.

The average provincial price of oats in the Prairie Provinces is currently strong. The 2019-20 cumulative average prices to-date in AB, SK and Manitoba (MB) are 4 to 14% higher than those for the same period in 2018-19 and 8% higher than the average oat futures price on the Chicago Board of Trade (CBOT). However, the national average price of oats for the crop year is anticipated to be slightly lower than for last year, as a result of increased supply in domestic and competitive countries, and recent price trends have declined.

US oat production for 2019-20 dropped by 5% from 2018-19, and imports are projected to rise. Oat production in the EU and Australia increased.

Rye

For 2019-20, rye production in Canada increased by 41% from 2018-19 to 333 thousand tonnes (Kt) due to higher harvested area and improved yields. SK and MB accounted for most of the increase. Rye production increased in all provinces, except for AB and ON where lower harvested area is the main factor for lower production as a result of higher abandonment rate.

The total supply increased by 13% as higher production more-than offset the significant decline in carry-in stocks. Domestic use is expected to remain flat. Exports are anticipated to rise due to improved supply and solid demand. Carry-out stocks are expected to increase due to higher supply.

Current rye prices in SK and MB elevators are down from a year ago but remain strong. For 2019-20, the rye price is anticipated to decrease by 13% from 2018-19 to an average of $205/t.

The 2019-20 production of rye in the US, the leading importing country of Canadian rye, increased by 56 thousand tonnes (Kt). However, with a projected drop in imports, total supply increased only slightly by 7 Kt. Total consumption is projected to increase by 46 Kt, which should result in tight ending stocks of rye in the US.

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Canola

For 2019-20, canola production is estimated at 18.6 million tonnes (Mt), 8% below last year and 3% below the five year average, as the 8% shift in crop area out of canola was only marginally offset by a 0.01 t/ha increase in yields. Yields were estimated at 2.24 t/ha despite the abnormal growing conditions which affected different parts of the growing region during the crop year.

Compared to the November Outlook, which incorporated the results of Statistic Canada's mid-harvest survey, canola production declined by 0.7 Mt due to a 0.09 million hectares (ha) decline in harvested area and marginally lower yields. This drop in output reflects the challenging growing conditions experienced during the crop year including delayed seeding, dry growing conditions and a late, wet, harvest. That production only fell by 4% from the mid-harvest survey can be considered a credit to the hardiness of the crop resulting from advances made through breeding and agronomy over the past 10 to 20 years.

By province, Saskatchewan accounted for almost 55% of the canola grown in Canada at 10.1 Mt. Alberta was the second largest canola producing province with 29% or 5.3 Mt of Canada's canola. Manitoba at 3.1 Mt accounted for 16% of the canola grown in the Country. Minor quantities of canola were also grown in British Columbia, Ontario and Quebec. At time of publication approximately 1.0 Mt to 2.0 Mt of canola remains unharvested based on anecdotal reports and the proportion that will be harvested next spring is dependent on winter weather conditions.

The total supply of canola is estimated at 22.8 Mt, down slightly. The decline in production was only partly offset by a sharp increase in carry-in stocks which increased to 4.1 Mt from 2.5 Mt for 2018-19 and the 5 year average of 2.5 Mt. Imports are expected to fall slightly to 0.1 Mt.

Domestic processing of canola is forecast at a record 9.8 Mt, up from 9.3 Mt in 2018-19, on strong world demand for canola oil and canola meal combined with more-than-adequate supplies of domestic seed. Canola exports are forecast at 9.1 Mt, down slightly from last year and down from last month's estimate, based on the pace to-date for the crop year. Exports to the European Union are forecast to increase following last summer's drought across key growing areas in the EU-28 while shipments to China decrease sharply on unresolved trade issues and the ongoing African Swine Fever outbreak.

Carry-out stocks are forecast to fall to 3.5 Mt, with about 2.5 Mt remaining on farm. The stocks-to-use ratio is estimated at 18% versus 22% in 2018-19 and the 5 year average of 13%. The average canola price is forecast to fall to $460-490/t from $497/t in 2018-19, as pressure from lower world vegetable oil and protein meals prices is partly offset by the low value of the Canadian dollar.

Flaxseed

For 2019-20, flaxseed production is estimated at 486 Kt down from 492 Kt in 2018-19 and down from 2017-18. The decline in output is due to the significantly larger than normal loss of area as the area harvested ended up being 11% smaller than the area seeded. Normally, the typical area loss or abandonment is about 1%. This increase in abandonment was enough to offset the rise in seeded area and yields for flaxseed, leading to the marginal decline in output.

By province, Saskatchewan seeded 294,000 ha to flaxseed and harvested 265,000 ha to produce 359,000 tonnes (t). Manitoba grew 42,000 t of flaxseed on a harvested area of, 28,900 ha while Alberta produced 81,500 t off a harvested area of 43,100 ha.

Supplies are estimated down by 11% from last year to 556,900 tonnes. Exports are forecast to remain relatively stable at 0.50 Mt while total domestic use decreases due to lower feed, waste and dockage. Carry-out stocks are forecast to fall to 30,000 tonnes, supporting a flaxseed price of $475 to $505/t versus $496/t for 2018-19 and the five year average of $476/t.

Soybeans

For 2019-20, production is estimated at 6.05 Mt, a 7% drop from the 6.49 Mt estimated from STC's mid-harvest report and an 18% drop from the 7.42 Mt grown last year. This is due to a significant drop in planted area and sharply lower yields with about one-half of the losses from the expected levels occurring in Western Canada due to difficult growing and harvesting conditions. Total Canadian soybean supplies are estimated at 7.1 Mt, a 22% drop from last year, as sharply lower imports supplements the drop in output.

Domestic processing of soybeans is forecast to decline marginally to 1.8 Mt as some processors shift to crushing canola. Exports are forecast to fall sharply to 4.4 Mt due to lower supply compared to the record of 5.6 Mt in 2018-19. Feed, waste and dockage is also forecast to fall sharply to 0.29 Mt while carry-out stocks are estimated at 0.40 Mt. The average soybean price is forecast at $395 to $425/t versus $406/t in 2018-19 and $434/t in 2017-18.

The USDA estimates that the world supply of soybeans will decrease to 447 Mt as a decrease in North American production more-than offsets a slight rise in production for the rest-of-world. By country, Brazil re-emerges as the world's largest grower of soybeans for 2019-20 with an output of 123 Mt, up from last year. US soybean production declined sharply from 2018-19 to 97 Mt due to a sharp drop in planted area and significantly below normal yields due to adverse growing conditions. Argentina is the world's number three soybean grower with an expected output of 53 Mt supported by early season reports of favourable growing conditions. China is the world's fourth largest soybean planter with an output of 18 Mt, up slightly from the 16 Mt grown in 2018-19. Paraguay is expected to grow 10 Mt of soybeans while India produces 9 Mt. Canada rounds up the list of largest soybean growers with an expected output of 6 Mt. Other countries are expected to produce an additional 21 Mt of soybeans.

Factors to watch are: (1) South American soybean planting and growing conditions, (2) quantity and quality impacts from the difficult Canadian and US soybean harvest, (3) Canadian and US export pace, (4) crush pace, (5) ongoing impacts of the African Swine Flu, and (5) direction of price movement.

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Dry Peas

For 2019-20, production increased by 18% to 4.2 million tonnes (Mt) due to higher harvested area, particularly in Saskatchewan and Alberta. Yields were lower than the previous year. Yellow and green pea types are expected to account for about 3.5 Mt and nearly 0.6 Mt, respectively, with the remainder spread across other varieties. Supply has increased to only 4.6 Mt, due to lower carry-in stocks. Exports are forecast at 3.4 Mt, largely due to higher imports by China. Carry-out stocks are forecast to increase due to the increased supply. The average price is expected to be lower than in 2018-19, with lower yellow pea, green pea and feed pea prices.

During November, the on-farm price of yellow peas and green peas in Saskatchewan rose by $5/t and $20/t, respectively. This was largely due to expectations for a smaller Indian winter pulse crop. For the crop year to-date, green dry pea's prices have been maintaining a premium of $80/t above yellow dry peas. Last year, green peas were at a $130/t premium to yellow peas.

In the US, area seeded to dry peas for 2019-20 is estimated by the USDA to have risen to 1.1 million acres. This is largely due to an increase in area in Montana. With estimates of below average yields, US dry pea production is estimated by USDA to rise sharply to just over 1.0 Mt. US dry peas are expected to compete, on a smaller scale, in Canadian export markets such as China and the Philippines.

Lentils

For 2019-20, production increased by 4% to 2.2 Mt due to higher yields. Large green lentil production is estimated to have fallen from last year to 0.5 Mt while red lentil production rose to about 1.4 Mt. Production of the other remaining lentil types is estimated to have fallen below 0.3 Mt.

Supply, however, decreased marginally due to smaller carry-in stocks. Exports are forecast to increase to 2.1 Mt. India, Bangladesh and Turkey are currently the top export markets. Imports are expected to be higher than the previous year due to the below average grade distribution. Carry-out stocks are expected to fall due to the increase in exports combined with the smaller supply. The overall average price is forecast to rise above the levels achieved in 2018-19 with stronger prices for the No.1 grade but with a below average proportion of grade distribution at the No.1 or 2 grades.

During the month of November, the on-farm price in Saskatchewan for No. 1 grade large green lentils rose by about C$15/t when compared to last month and the price of No. 1 red lentils increased by over C$5/t. This was largely due to expectations for a smaller Indian winter pulse crop. The quality of the Canadian lentil crop is considered to be below average. There is a smaller proportion in the supply of No.1 or No.2 grade Canadian lentils for 2019-20 when compared to last year. No.1 large green lentil prices are forecast to maintain a premium of $135/t over No. 1 red lentil prices, versus $85/t in 2018-19.

In the US, the area seeded to lentils for 2019-20 was forecast by the USDA at less than 0.5 million acres, down nearly 40% from 2018-19 due to lower area seeded in Montana. With estimates of average yields, 2019-20 US lentil production is estimated by the USDA to fall to 0.3 Mt, down 22% from the 2018-19 level.

Dry Beans

For 2019-20, production fell 7% to 317 thousand tonnes (Kt), consisting of 86 Kt of white pea bean types and 231 Kt of colored bean types. Production in Ontario fell, mostly due to lower yields. In Manitoba, production rose due to higher area for colored bean and white pea bean types. In Alberta, colored bean production rose with an increase in yields.

Supply is expected to rise by 5% as higher carry-in stocks more than offset the lower production and imports. Exports are forecast to be marginally lower than the previous year. The US and the EU are forecast to remain the main markets for Canadian dry beans, with smaller volumes exported to Mexico and Japan. Carry-out stocks are expected to increase sharply. The average Canadian dry bean price is forecast to increase due to the late harvest and concerns over abandonment and crop quality by North American dry bean producers.

In the US, area seeded to dry beans is estimated by the USDA to have increased by 7% to over 1.3 million acres, largely due to higher area seeded in Minnesota. US total dry bean production (excluding chickpeas) is estimated by the USDA to fall to 1.1 Mt, down only marginally from 2018-19 as a result of lower yields. The largest yield decrease came from Nebraska. US export markets continue to be Canada, EU and Mexico.

Chickpeas

For 2019-20, production fell by 19% to 252 Kt due to lower harvested area and yields. Crop quality is expected to be below average when compared to the previous year. Supply is forecast to rise as higher carry-in stocks more than offset the lower production. Exports are forecast to decrease, with the US and Pakistan as the main importers. Carry-out stocks are expected to rise. The average price for all grades of chickpeas is forecast to fall, due to higher world and Canadian stocks.

US chickpea area seeded is estimated by the USDA at below 0.5 million acres, down 48% from 2018-19. With above average yields and lower abandonment, 2019-20 US chickpea production is forecast by USDA at over 0.3 Mt, down 44% from the previous year.

Mustard Seed

For 2019-20, production fell by 22% to 135 Kt, due to lower area. Production of all types of mustard decreased. Supply, however, decreased by only marginally due to higher carry-in stocks. Exports are expected to be similar to last year at 120 Kt. Due to lower supply, carry-out stocks are forecast to decrease. The US and the EU are expected to remain the main export markets for Canadian mustard seed. The average price is forecast to rise due to lower Canadian and world carry-out stocks.

Canary Seed

For 2019-20, production fell sharply to 125 Kt due to lower area and yields. Exports are expected to be lower than last year. The EU and Mexico are forecast to remain the main export markets, followed by Brazil and the US. The average price is forecast to be sharply higher than the 2018-19 level due to very tight carry-out stocks.

Sunflower Seed

For 2019-20, production was higher than the previous year at 63 Kt due to a rise in area and yields. Supply rose marginally with smaller carry-in stocks. Exports are forecast to be similar to last year. Carry-out stocks are forecast to fall and be similar to the previous year. The US is expected to continue to be Canada's main export market for sunflower seed. The average price is forecast to be higher than 2018-19 due to stronger oilseed type prices.

US sunflower seed production is estimated by the USDA at over 1.0 Mt, up 7% from 2018-19 and largely due to higher production in North Dakota. It is estimated by AAFC that US production of oil type varieties and confectionery type varieties rose to 0.9 Mt and about 0.1 Mt, respectively. US supply is forecast by the USDA to be unchanged at 1.25 Mt. US exports are expected to fall and domestic use is expected to rise. US sunflower seed carry-out stocks are expected to fall and provide some support for North American prices.

For 2019-20, the global supply of sunflower seed is estimated by the USDA at a near record of 56 Mt. This is only slightly lower than the record supply of last year. World exports are expected to decrease marginally to 2.6 Mt and domestic use is expected to rise to a record 51 Mt. World carry-out stocks are expected to fall sharply to 2.3 Mt.

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

December 19, 2019

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												
2017-2018	2,106	2,088	2.38	4,962	8	6,798	4,342	201	587	1,030	1,426	265
2018-2019	2,503	2,456	2.34	5,745	24	7,194	4,526	206	596	993	1,676	235
2019-2020f	1,980	1,902	2.62	4,977	25	6,678	4,800	210	599	1,028	850	245-275
Wheat Except Durum												
2017-2018	7,020	6,895	3.69	25,415	75	30,593	17,570	3,212	3,977	7,969	5,053	240
2018-2019	7,570	7,425	3.56	26,456	95	31,605	19,764	3,309	3,457	7,601	4,240	245
2019-2020f	8,145	7,754	3.53	27,371	95	31,706	18,800	3,310	3,764	7,906	5,000	210-240
All Wheat												
2017-2018	9,126	8,983	3.38	30,377	82	37,391	21,913	3,413	4,564	8,999	6,479	
2018-2019	10,073	9,881	3.26	32,201	119	38,799	24,289	3,515	4,053	8,593	5,916	
2019-2020f	10,125	9,656	3.35	32,348	120	38,384	23,600	3,520	4,363	8,934	5,850	
Barley												
2017-2018	2,334	2,114	3.73	7,891	59	10,072	2,823	62	5,716	6,005	1,244	227
2018-2019	2,628	2,395	3.50	8,380	43	9,667	3,068	104	5,345	5,707	893	260
2019-2020f	2,996	2,728	3.81	10,383	40	11,315	3,000	116	6,158	6,515	1,800	210-240
Corn												
2017-2018	1,447	1,406	10.02	14,096	1,699	18,291	1,845	5,173	8,841	14,030	2,417	174
2018-2019	1,468	1,431	9.70	13,885	2,800	19,102	1,617	5,786	9,699	15,502	1,983	194
2019-2020f	1,496	1,451	9.24	13,404	2,000	17,387	1,400	5,200	8,971	14,187	1,800	190-220
Oats												
2017-2018	1,295	1,052	3.55	3,733	14	4,450	2,368	112	1,088	1,304	778	218
2018-2019	1,235	1,005	3.42	3,436	10	4,225	2,475	186	1,031	1,338	412	254
2019-2020f	1,459	1,160	3.58	4,157	10	4,580	2,600	185	1,022	1,330	650	235-265
Rye												
2017-2018	144	101	3.39	341	1	507	194	57	119	188	124	162
2018-2019	136	79	2.99	236	2	363	146	19	108	142	74	236
2019-2020f	175	103	3.25	333	2	409	160	19	105	139	110	190-220
Mixed Grains												
2017-2018	123	54	2.77	149	0	149	0	0	149	149	0	
2018-2019	144	69	2.82	195	0	195	0	0	195	195	0	
2019-2020f	145	68	2.84	192	0	192	0	0	192	192	0	
Total Coarse Grains												
2017-2018	5,342	4,726	5.55	26,210	1,773	33,469	7,230	5,404	15,913	21,676	4,564	
2018-2019	5,610	4,979	5.25	26,132	2,855	33,551	7,305	6,095	16,378	22,883	3,362	
2019-2020f	6,270	5,509	5.17	28,469	2,052	33,883	7,160	5,520	16,447	22,363	4,360	
Canola												
2017-2018	9,313	9,273	2.30	21,328	108	22,778	10,783	9,269	160	9,496	2,499	539
2018-2019	9,232	9,120	2.23	20,343	146	22,988	9,141	9,295	397	9,754	4,094	497
2019-2020f	8,481	8,319	2.24	18,649	100	22,842	9,100	9,750	441	10,242	3,500	460-490
Flaxseed												
2017-2018	421	419	1.33	555	7	802	516	0	145	160	127	463
2018-2019	347	342	1.44	492	9	628	466	0	85	102	61	496
2019-2020f	379	339	1.43	486	10	557	450	0	57	77	30	475-505
Soybeans												
2017-2018	2,947	2,935	2.63	7,717	534	8,606	4,929	1,969	795	3,026	651	434
2018-2019	2,558	2,540	2.92	7,417	1,131	9,199	5,640	2,058	563	2,859	700	406
2019-2020f	2,313	2,271	2.66	6,045	400	7,145	4,400	1,800	295	2,345	400	395-425
Total Oilseeds												
2017-2018	12,681	12,627	2.34	29,600	649	32,186	16,227	11,238	1,100	12,682	3,277	
2018-2019	12,137	12,001	2.35	28,252	1,286	32,815	15,246	11,354	1,045	12,715	4,854	
2019-2020f	11,172	10,929	2.30	25,180	510	30,544	13,950	11,550	793	12,664	3,930	
Total Grains And Oilseeds												
2017-2018	27,149	26,336	3.27	86,187	2,504	103,046	45,370	20,056	21,576	43,356	14,320	
2018-2019	27,820	26,861	3.22	86,584	4,261	105,165	46,841	20,963	21,475	44,191	14,133	
2019-2020f	27,568	26,094	3.30	85,997	2,682	102,811	44,710	20,590	21,603	43,961	14,140	

(a) Crop year is August-July, except corn and soybeans, for which the crop year is September-August.
(b) Imports exclude products.
(c) Exports include grain products but exclude oilseed products.
(d) Food and Industrial use for soybeans is based on data from the Canadian Oilseed Processors Association.
(e) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use + Loss in Handling
(g) Crop year average prices: Wheat (No.1 CWRS, 13.5% protein) and Durum (No.1 CWAD, 13% protein), both are average Saskatchewan producer spot prices. Barley (No. 1 feed, cash, I/S Lethbridge), Corn (No.2 CE, cash, I/S Chatham), Oats (US No. 2 Heavy, CBOT nearby futures); Rye (No. 1 CW, cash, I/S Saskatoon); Canola (No. 1 Canada, cash, Track Vancouver); Flaxseed (No. 1 CW, cash, I/S Saskatoon); Soybeans (No. 2 CE, cash, I/S Chatham)
Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
f: forecast by AAFC except for area, yield and production which are from STC

CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

December 19, 2019

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 tonnes* ----------						*%*	*$//t*
Dry Peas											
2017-2018	1,656	1,642	2.50	4,112	12	4,424	3,085	691	648	17	265
2018-2019	1,463	1,431	2.50	3,581	62	4,291	3,247	718	326	8	270
2019-2020f	1,753	1,711	2.48	4,237	65	4,628	3,400	828	400	9	230-260
Lentils											
2017-2018	1,783	1,774	1.44	2,559	35	2,908	1,538	497	873	43	475
2018-2019	1,525	1,499	1.40	2,092	51	3,016	2,032	350	634	27	390
2019-2020f	1,530	1,489	1.46	2,167	75	2,876	2,100	326	450	19	385-415
Dry Beans											
2017-2018	135	132	2.45	322	86	409	350	34	25	7	760
2018-2019	143	137	2.49	341	98	464	348	37	80	21	815
2019-2020f	160	150	2.11	317	90	486	345	41	100	26	830-860
Chickpeas											
2017-2018	68	68	1.49	102	48	151	116	21	13	10	950
2018-2019	179	176	1.77	311	51	376	147	129	100	36	480
2019-2020f	159	156	1.61	252	50	402	145	127	130	48	445-475
Mustard Seed											
2017-2018	156	153	0.80	122	9	211	112	45	53	34	770
2018-2019	204	197	0.88	174	9	236	121	42	73	45	690
2019-2020f	161	155	0.87	135	8	215	120	40	55	34	700-730
Canary Seed											
2017-2018	103	103	1.41	145	0	165	147	2	16	11	465
2018-2019	109	109	1.45	158	0	174	156	7	11	7	505
2019-2020f	99	94	1.32	125	0	135	130	5	0	0	620-650
Sunflower Seed											
2017-2018	26	26	2.26	58	22	139	17	25	98	234	590
2018-2019	29	27	2.13	57	24	179	26	59	93	109	585
2019-2020f	31	29	2.18	63	25	181	25	61	95	111	585-615
Total Pulses and Special Crops (c)											
2017-2018	3,927	3,897	1.90	7,419	211	8,407	5,365	1,315	1,727	26	
2018-2019	3,652	3,576	1.88	6,714	294	8,734	6,077	1,342	1,316	18	
2019-2020f	3,892	3,783	1.93	7,294	313	8,923	6,265	1,428	1,230	16	

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