

**CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS**

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This report is an update of Agriculture and Agri-Food Canada's (AAFC) April outlook report for the 2021-2022 and 2022-2023 crop years. 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. The economic outlook, for the world and Canadian grain markets remains particularly uncertain, due in large part to the Russian invasion of Ukraine, which has resulted in the ongoing disruption of supplies from the region for the foreseeable future.

The outlook incorporates recent information from (i) Statistics Canada's (STC) March 2022 Field Crop Area Survey and Survey of Stocks of Principal Field Crops in Canada as of March 31, 2022. (ii) the United States Department of Agriculture (USDA) - World Agriculture Supply and Demand Estimates (WASDE) (iii) International Grains Council Grain Market Report (iv) Agricultural Market Information Systems (AMIS) Market Monitor.

**For 2021-2022**, stocks of all principal field crops reported by STC in Canada as of March 31, 2022 declined by 29.1% relative to March 31, 2021, due to drought-reduced production in 2021 and sustained strong global demand. With the exception of corn and soybeans, stocks of all principal field crops decreased, and for most by a significant proportion. The largest decrease in stocks on a percentage basis was for canola (-49.3 per cent) while wheat, excluding durum, had the largest absolute decline (-5.0 MT). As a result, carry-out stocks (ending-year inventories) for all principal field crops are forecast to end the year at a record low level.

Crop prices are forecast to remain strong on support from: (i) supply disruptions caused by the Russian invasion of Ukraine (ii) tight Canadian supplies (iii) relatively tight global grain supplies (iv) expectations for a continuation of firm international demand. Price volatility is expected to remain high due to tightness in global stocks and the unknowns in regards to the situation in Ukraine.

**For 2022-2023**, STC's April 26 report on the Seeding Intentions of Principal Field Crops in Canada indicated that total seeded area is estimated to remain largely unchanged, with wheat area increasing by 7.2%, at the expense of oilseeds and pulse & special crop area, which are estimated to decrease by 5.9% and 1.0% respectively, while coarse grains area holds relatively steady. The most significant climate-related risks to agriculture to May 17 were flooding and excess moisture through the southeastern Prairies and continued drought through the southwestern Prairies. As a result, seeding progress in the southeastern Prairies has been delayed, while in the western Prairies seeding is for the most part proceeding at a historically normal pace. Seeding and field work from Ontario to Atlantic Canada have generally progressed well due to favorable conditions. Total field crop production is forecast to increase significantly, although record low carry-in stocks combined with a significant increase in exports are expected to result in carry-out stocks remaining relatively tight.

Crop prices, in general, are expected to remain relatively strong in 2022-23 but decrease from the record to near-record prices of 2021-22 as Canadian and world production is expected to increase.

The next AAFC Outlook for Principal Field Crops is scheduled to be released on June 21, 2022. STC is scheduled to publish final area estimates for principal field crops on June 29, 2022.

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

	Area Seeded -- thousand hectares --	Area Harvested	Yield t/ha	Production	Imports	Total Supply	Exports	Total Domestic Use	Carry-out Stocks
<b>Total Grains And Oilseeds</b>									
2020-2021	27,491	26,536	3.44	91,205	2,682	107,487	50,897	45,241	11,349
2021-2022f	27,693	26,507	2.45	65,039	5,102	81,489	31,360	43,239	6,890
2022-2023f	27,703	26,611	3.19	85,006	2,712	94,607	43,195	42,337	9,075
<b>Total Pulse And Special Crops</b>									
2020-2021	4,000	3,949	2.16	8,545	338	9,778	6,784	1,461	1,533
2021-2022f	3,832	3,730	1.23	4,577	230	6,340	4,360	1,145	835
2022-2023f	3,799	3,733	1.84	6,873	312	8,020	5,555	1,415	1,050
<b>All Principal Field Crops</b>									
2020-2021	31,491	30,485	3.27	99,750	3,019	117,265	57,681	46,702	12,882
2021-2022f	31,525	30,237	2.30	69,616	5,332	87,830	35,720	44,384	7,725
2022-2023f	31,502	30,343	3.03	91,879	3,024	102,627	48,750	43,752	10,125

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

**f:** forecasts by AAFC except for area, yield and production for 2021-2022 and seeded area for 2022-23 which are STC

## All Wheat

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### Durum

**For 2021-22**, production of durum is estimated at 2.65 million tonnes (Mt) by Statistics Canada (STC), 60% less than the previous year due to a reduction in yields caused by the drought across the Prairies.

Total supply is forecast at 3.43 Mt. On the demand side, exports of durum continue to lag last year's shipments by 60% according to the Canadian Grain Commission, they remain pegged at 3.2 Mt. For the period of August to March, STC reports exports of durum at 1.7 Mt, 56% less than last year's volumes with a reduction in shipments to Italy, Morocco and Algeria. Domestic use is down 28% year over year (y/y) on lower feed use; carry out stocks are forecast at 0.55 Mt, 27% less than the previous year and the lowest on record since 1984-85.

The International Grain Council (IGC) expects 2021/2022 global durum production to be 30.9 Mt, down 9% compared to the previous year and a 20-year low. Total supply was trimmed 0.1 Mt from last month's report (m/m) to 39.0 Mt due to tighter-than expected carry-in stocks world-wide. Total consumption was trimmed 1% m/m and is forecast at 32.6 Mt. World trade is forecast at 6 Mt, 33% less than the previous year, on lower deliveries to Europe, Algeria and Morocco. Closing stocks were reduced 0.2 Mt, to 6.2 Mt, the smallest since 2007/08. International pricing for durum has been mixed this past month, with US durum holding steady at \$595/tonne, Canadian durum softening from \$595/tonne in early April to \$575/tonne in early May; and French durum fluctuating between \$512/tonne and \$500/tonne for the same period.

The 2021-22 average spot price for Saskatchewan (SK) Canadian Amber Durum (CWAD) 1, 13% protein is reduced to \$640/tonne with continued downward pressure as forward spot pricing to July continues to soften.

**For 2022-23**, total supply is projected to increase to 6.25 Mt (+82% y/y) due to an increase in seeded area and a return to average yields. According to STC, seeded area for durum is projected at 2,519 thousand hectares (kha), up 13% year on year; the biggest increase is in Saskatchewan (+281.7 kha),

while the area seeded to durum in Alberta is forecast to decline by 12.5 kha to 387.5 kha. Canadian exports are forecast to sharply increase from current levels due to increased demand, especially from North Africa, where the harvest has been negatively affected by poor climatic conditions. Canadian exports are projected at 4.4 Mt, or 70% of total supply, in line with average export/supply ratio over the last five years. With domestic use expected to return to average levels (~0.85 Mt), carry out stocks are projected to increase from current levels to 1.0 Mt.

According to the IGC, preliminary forecasts for world durum production are reported at 33.9 Mt, up 10%, on better yields in North America compared to summer 2021, but with downward pressure given the current dry conditions in the region. Total consumption is forecast to increase 5% to 34.1 Mt, and outpace production by 0.2 Mt, leading to a further contraction in ending stocks, pegged at 6.2 Mt. Total trade is forecast at 8.6 Mt with an increase in shipments to the EU and Morocco.

The average SK spot price for CWAD 1, 13% for 2022-2023 forecast is raised to \$430/tonne, supported by overall strength in prices caused in part by the poor supply prospects in North Africa.

### Wheat (excluding durum)

**For 2021-22**, total supply of wheat is estimated at 24.21 Mt, 28% less than the previous year due to the poor harvest caused by the drought in Western Canada. Total supply was raised slightly on account of an increase in imports, which, as of March 31, are over 200% more than shipments this time last year according to STC. Imports are exclusively from the USA.

On the demand side, exports of wheat have been lagging last year's volumes by over 40% according to the Canadian Grain Commission, they have been reduced to 13.0 Mt. For the period of August to March, STC reports exports of wheat at 8.0 Mt, 41% less than last year's volumes over the same period with a reduction in shipments to China, Peru, Indonesia and Colombia. Domestic feed use was

raised to 4.99 Mt on account of increased feed use relative to the same period last year. Carry out stocks are forecast to drop to 3.0 Mt, 39% less than the previous year and the lowest on record since 2007-08. According to STC, total wheat stocks to March 31 are estimated at 8.64 Mt, 37% less than in March 2021.

According to the USDA-WASDE, world production in 2021-22 is estimated at 779.3 Mt, up 0.5% compared to the previous year and 11.9 Mt short of total use at 790.8 Mt. Total supply is estimated at 1,705.5 Mt and trade at 199.9 Mt, down 1.7% compared to 2020-21. Closing stocks are projected at 279.7 Mt, with about half held in China and unavailable to the global market. For the US, the supply estimate for 2021-22 is reported at 70.4 Mt, down 12.5% year on year on account of poor production caused by the drought. As a result, exports are 18.8% lower than last year, estimated at 21.9 Mt. With domestic use relatively stable, carry out stocks are estimated at 17.8 Mt, down 22% compared to the previous year.

For the 2021-22 crop year, the average Saskatchewan Canadian Western Red Spring (CWRS) 1, 13.5% protein is raised to \$445/tonne on continued strength in futures markets, rising input costs and the Russian invasion of Ukraine.

**For 2022-23**, projections have been revised up due to the results from the STC seeding report published in April 2022. Total supply is projected at 29.02 Mt, up 20% year on year due to an increase in seeded area and assumption of a gradual return to trend yields. According to STC, the area seeded to wheat (x durum) is projected to increase 6% y/y to 7,683 kha, of which 7,136 is spring wheat. The biggest gains for spring wheat are in Saskatchewan (+226.3 kha), followed by Alberta (+186.4 kha) and

Manitoba (+51.8 kha). Winter wheat remaining after over-winter losses is estimated at 474.7 thousand hectares, down 72.3 kha from seeding in the fall, with the biggest losses in Ontario (-34.9 kha) and Alberta (-17.1 kha).

Exports are forecast at 17.5 Mt, 60% of total supply, in line with the average export/supply ratio over the last five years. Domestic use is forecast at 7.52 Mt, down 8% year over year, on lower feed use, which is expected to return to average levels for a total carry out of 4.0 Mt, up 33% compared to 21-22, but still 10% below the last five-year average.

The USDA-WASDE released their first global outlook for 2022-23 on May 12; they are calling for lower overall supplies and consumption, increased trade and lower ending stocks. More specifically, total supply is projected to decline to 1054.5 Mt (-15.96 Mt) on account of lower production in Australia, Ukraine and Morocco offsetting any gains in Russia, Canada and the USA. Total global use is projected at 787.5 Mt, with a reduction in feed and industrial use offsetting any increase in human consumption. Trade is projected at 204.9 Mt, a record if realized. Ukraine's wheat exports are forecast to decline to 10 Mt. Closing stocks are projected at 267 Mt, 5% less than in 2021-22.

The average SK spot price for CWRS 1, 13.5% for the 2022-23 crop year is revised up again this month as volatility continues to shake the market. It is pegged at \$410/tonne with continued upward pressure amid speculation concerning the war and uncertain 2022 production prospects.

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## Coarse Grains

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### Barley

**For 2021-22**, the Canadian barley supply and demand situation includes sharply lower carry-in stocks, production and supply, as well as significantly reduced domestic feed consumption and exports, when compared to last year. Carry-out stocks are projected at 0.3 million tonnes (Mt), a record low level, due to sharply decreased supply.

Statistics Canada's (STC) stocks report indicates that Canadian barley stocks as of March 31st, 2021 are at their lowest level (1.7 Mt) for the same period in at least two decades (-44% year-on-year (y/y), -51% five-year average). The decline mainly reflects significantly lower on-farm stocks.

Imports for the first eight months (August 2021 – March 2022) of the current crop year are pegged at 0.16 Mt (-6% y/y, +146% five-year average). The importing pace has posted a drastic drop in March relative the pace in the previous months and this is expected to continue for the last four months (April – July 2022) of the crop year. Exports for the first eight months are pegged at 2.09 Mt (-28% y/y, 0% five-year average), of which, about 90% were shipped to China and most of the rest were destined for Lithuania, the US, Japan and Mexico. Exporting pace of barley grain for the January – March 2022 period has considerably dropped from the levels in August – December 2021 period. For the rest of the current crop year, the slow exporting pace is anticipated to continue. For malt, the exporting pace has shown a jump in March but remained relatively stable in the first eight months compared to barley grain, bringing total exports in the first eight months only slightly lower than a year ago.

Total domestic disappearance for the August 2021 – March 2022 period sits at 4.02 Mt (-32% y/y, -21% five-year average). The decline mainly reflects significantly lower feed use. Feed use, which represents more than 90% of total domestic disappearance, has dropped to its lowest level in at least two decades. In contrast, industrial use, which represents less than 5% of total domestic disappearance, has surged during the January – March 2022 period, bringing the total in the first

eight months only slightly lower than a year ago.

The Lethbridge feed barley price for 2021-22 is forecast to hit a new high of \$435/t, up sharply from the old record of \$294/t set in 2020-21 and well above the previous five-year average. The 2021-22 prices are supported by uncertain new crop production prospects, tight domestic barley supplies, the decline in the availability of other domestic feed grain substitutes, robust demand and stronger prices of other grains. Barley prices though are being tempered by the large quantities of US corn imports into Western Canada since last September, limiting the price increase.

**For 2022-23**, Canadian producers intend to reduce barley acreage by 10% (326 thousand hectares (Kha)) from 2021-22 to 3.0 million hectares (Mha), according to STC's first 2022 acreage report. This is because producers on the Canadian Prairies, where about 97% of barley in Canada is grown, intend to plant less barley. Saskatchewan, the second largest barley producing province in Canada, is expected to lead the reduction. Despite this, Canadian barley acreage in 2022-23 will still be 5% and 8%, respectively, above the previous five- and ten-year averages.

Production is projected to increase by 34% from 2021-22 to 9.3 Mt based on assumptions for average yield potentials despite smaller acreage. This, combined with expectations for historical low carry-in stocks and smaller imports, will lead supply to increase by 23% to 9.7 Mt, which, however, will be the third lowest since 2016-17.

In responding to larger supply, domestic use, including industrial use and feed use, and exports are predicted to increase from 2021-22. Carry-out stocks are projected to rise to 0.5 Mt, which is still a historically low level.

The average price is predicted to fall from the record level in 2021-22 to \$400/t, due to anticipations for a recovery in domestic supplies. But it will remain historically high, underpinned by strong corn prices.

According to the United States Department of Agriculture (USDA), global barley production in 2022-23 is predicted to increase by 3% or nearly 4.0 Mt to 149 Mt. Combined 2022-23 barley production in the world's major barley exporting countries is expected to increase only slightly due to sharp production declines in Australia and Ukraine, offsetting higher production in other major exporting countries, including Argentina, Canada, the EU countries and Russia. In addition, Turkey and the US will see a sharp increase in barley production for 2022-23. With a decline in carry-in stocks, total supply is projected to decrease by 2% or 2.5 Mt to 196 Mt. Ending stocks are forecast to increase only 0.4 Mt due to strong demand. As a result, the stocks-to-use ratio will be close to the historical low level reached in 2021-22.

### **Corn**

**For 2021-22**, the Canadian corn supply and demand situation includes larger production, imports and supply, greater industrial use, feed consumption and export demand, relative to last year. Carry-out stocks are predicted at 1.9 Mt, a decrease of 12% and 18% from a year ago and the previous five-year average.

Canadian corn stocks as of March 31st, 2021 are at their highest level (9.3 Mt) in at least two decades (+14% y/y, +12% five-year average). This reflects a significant increase of stocks in commercial positions and most of the increase located in Ontario. On-farm stocks are lower than a year ago, due to a significant decrease in Ontario.

Imports during the first seven months (September 2021 – March 2022) of the current crop year are at a record level and are expected to remain robust for the remaining months of the crop year, due to strong demand for US corn from the Canadian Prairie provinces. Exports have been following the seasonal trend and are expected to increase for the rest of the crop year. Most Canadian corn is shipped to European countries, followed by the US.

Total domestic disappearance for the September 2021 – March 2022 period sits at 9.6 Mt, a level not seen in at least two decades (+16% y/y, +17% five-year average). This is due to sharply increased feed

use for the period on the Canadian Prairies. Industrial and food use for the period are at a relatively stable pace.

The 2021-22 Chatham corn price average is forecast at a new record of \$310/t, up \$38/t and over \$100/t respectively from the old record set in 2020-21 and the previous five-year average. The surge in corn price is linked to concerns about global corn supply prospects along with strong demand.

Compared to its April projections, the USDA did not make notable revisions to the 2021-22 production numbers for the world's major corn exporting countries. However, global corn production was revised up by more than 5.0 Mt. With demand increasing only slightly, world corn carry-out stocks for 2021-22 were increased by nearly 4.0 Mt.

The USDA kept its forecasts for 2021-22 US corn supply and demand unchanged from its April numbers. The average farm price was raised by US\$0.10/bu to US\$5.90/bu, up sharply from \$4.53 last year.

**For 2022-23**, Canadian producers intend to expand corn acreage by 6% (90 Kha) from 2021-22 to 1.5 Mha. Producers in Ontario, Quebec and Manitoba, Canada's major corn growing provinces, intend to plant more corn. Ontario, Canada's largest corn producing province, is expected to lead the expansion. If realized, Canadian corn acreage in 2022-23 will be at an all-time high.

Potential yield, projected at the previous five-year average, is expected to be below the historically high level in 2021-22. Production is expected to increase by 2% from 2021-22 to 14.3 Mt, supported by increased area despite decreased yield. However, significantly smaller carry-in stocks and imports will lead supply to decrease by 10% and 1% respectively from the level in 2021-22 and the previous five-year average.

Domestic use is predicted to decrease from 2021-22 on lower feed use. Exports are forecast to remain unchanged. Carry-out stocks are projected at 2.1 Mt, up 11% from a year ago to 2.1 Mt, but down 5% from the previous five-year average.

The average price is predicted at \$330/t, up from the record level of 2021-22, supported by strong new crop corn prices in the US due largely to uncertain global corn supply prospects.

World corn production in 2022-23 is predicted to decrease by 3% or nearly 35 Mt to 1,181 Mt. Combined corn production for 2022-23 in the world's major corn exporting countries is expected to decline by 5% or more than 27 Mt. This is due to the fact that corn production in Ukraine is predicted to fall by 54% or 23 Mt, and in the US, it is expected to decrease by 4% or 17 Mt, which is expected to offset record high production in Brazil and Argentina. Total production from other countries is projected to decrease by 1% or nearly 8 Mt. Global demand is projected to decline but not as much when compared with the reduction in production. As a result, global ending stocks will decrease by 4 Mt from 2021-22. The stocks-to-use ratio will be close to the lowest level seen in recent nine years.

For the US, corn supply for 2022-23 is projected to decrease by 3% from 2021-22 due to lower production. Demand for feed use and exports are projected to decrease but remain unchanged for ethanol production. Ending stocks will be 6% and 24% lower than last year and the previous five-year average. The average farm price is projected at US\$6.75/bu, up sharply from \$5.90 for 2021-22 and approaching the record high of \$6.89 reached in 2012-13.

### **Oats**

**For 2021-22**, the Canadian oat supply and demand situation includes considerably higher carry-in stocks, sharply lower production and supply, as well as significantly reduced domestic feed consumption and exports, when compared to last year. Carry-out stocks are projected at 0.2 Mt, significantly lower than last year and a record low level.

Canadian oat stocks as of March 31st, 2021 are at the lowest level (0.95 Mt) for the same period in at least two decades (-49% y/y, -48% five-year average). The decline mainly reflects significantly lower on-farm stocks.

Exports for the first eight months are pegged at 1.6 Mt (-26% y/y, -12% five-year average), of which, about 90% were shipped to the US and most of the rest were destined for Mexico, Japan and China. The exporting pace has slowed down in recent months, and for the rest of the current crop year, exports are anticipated to continue to be sluggish.

Total domestic disappearance for the August 2021 – March 2022 period sits at 0.73 Mt (-29% y/y, -16% five-year average). The decline reflects lower feed use, which represents about 80% of total domestic disappearance.

The CBOT oat futures average price for 2021-22 is projected at CAD\$560/t, up sharply from the old record set in 2020-21, due to severe crop production problems in North America and stronger prices of other grains. For the crop year to date, oat price in the CBOT market is averaged at \$572/t (\$563/t a month ago, \$291/t a year ago).

**For 2022-23**, Canadian producers intend to expand oat acreage by 17% (230 Kha) from 2021-22 to 1.6 Mha. Producers in Prairie provinces, Canada's major oat growing provinces, as well as Quebec and Ontario, intend to significantly expand oat acreage. If realized, Canadian oat acreage in 2022-23 will be at an all-time high since 2008.

Production is projected to increase sharply by 67% from 2021-22 to 4.3 Mt based on assumptions for a return to average yield and larger area. This would be partly offset by historically low carry-in stocks, which will lead supply to increase by 39% from 2021-22 to 4.6 Mt.

In responding to larger supply, domestic use, specifically feed use and exports are predicted to increase. Carry-out stocks are projected to rise sharply to 0.5 Mt, however will still remain significantly below normal levels.

The average price is predicted to fall from the record level in 2021-22 to \$500/t, due to expectations for a recovery in supplies for North America, but it remains historically high, supported by strong prices in neighboring markets.

Global oat production for 2022-23 is projected by the USDA to increase by 11% from 2021-22 and 7% from the previous five-year average. For the US, 2022-23 oat production is projected to increase by nearly 50% from 2021-22, based on forecasts for larger area to be harvested and higher yields. Despite stronger demand, world ending stocks are predicted to increase by 9% from last year and be on par with the previous five-year average.

## **Rye**

**For 2021-22**, the Canadian rye supply and demand situation includes marginally increased supply, record high domestic feed use and considerably decreased exports, relative to last year. Carry-out stocks are projected at 60 thousand tonnes (Kt), 17% and 33% lower than last year and the previous five-year average.

Canadian rye stocks as of March 31st, 2021 are pegged at 193 Kt, down 11% from a year ago, as a result of a surge in feed use, despite rising supply and lagging exports.

The 2021-22 average price is projected at \$310/t, a new record and up sharply from 2020-21, due to robust demand and increased prices for other grains.

**For 2022-23**, Canadian rye acreage is estimated at 239 Kha, edging down from 2021-22, which reflects lower fall rye area. Fall rye accounts for over 98% of all rye area in Canada. Rye area in both Eastern and Western Canada has exhibited an upward trend in the recent decade. Despite the decline, Canadian rye area for 2022-23 is still at the high end of range in the recent decade and is 28% higher than the previous five-year average.

Production is projected to edge up from 2021-22 to 482 Mt on assumptions for a return to average yields and an increase in harvested area. Supply is projected at 544 Kt, close to 2021-22 level, due to lower carry-in stocks offsetting the slightly increased production, but 17% higher than the previous five-year average.

Total demand for rye in 2022-23 is projected to decline due to lower feed use, given expected ample feed grain supplies in Western Canada. Exports are projected to be at the previous five-year average and above the 2021-22 level. Carry-out stocks are projected to increase significantly from 2021-22 and the previous five-year average, as lower feed demand offsets higher exports while supply is stable.

The 2022-23 average price is projected at \$260/t, significantly lower than the 2021-22 price forecast, based on anticipations for larger 2022-23 feed grain supplies on the Canadian Prairies.

Global rye production for 2022-23 is projected to decrease from 2021-22 due to a lower production forecasts for the EU and Ukraine. For the US, the largest rye importing country, the 2022-23 rye production is projected to increase by more than one-third, based on forecasts for larger area to be harvested and higher yield. World demand remains stable. World ending stocks are predicted to decrease by 23% from last year and 16% from the previous five-year average.

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## Oilseeds

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### Canola

**For 2021-22**, canola supplies tightened up significantly from than last year, declining 37% to 14.5 million tonnes (Mt), due to a 49% drop in carry-in stocks and 35% lower production as a result of last summer's drought.

Demand for Canadian canola remains firm on a strong world oilseed crush and high prices for competing oilseeds, vegetable oils and protein meals. Disruption of Black Sea exports of sunflowerseed oil as a result of the Russian invasion of Ukraine is tightening world supplies and supporting world prices. Domestically, processing of canola is estimated to fall to 8.3 Mt, a drop of 20% from last year, while exports are expected to fall by 51% to 5.2 Mt, as commercial buyers outbid exporters for the tight supplies. For the crop year, the major importers of Canadian canola to-date are China, Japan, Mexico and the European Union.

Carry-out stocks are forecast to fall by 77% from last year, to a tight 0.40 Mt, for a stock-to-use ratio of 3% versus 8% in 2020-21 and the 5-year average of 13%. Price volatility for canola increased sharply during the past month due to shipping disruptions from the Black Sea Region. For the crop year to-date, Canadian canola prices are estimated at \$1,100/t vs \$730/t last year and the 5-year average of \$556/t.

**For 2022-23**, the area seeded to canola is expected to decrease by 7% to 8.5 million hectares (Mha) based on Statistics Canada's Seeding Intentions Survey, as farmers shift into lower risk crops following last summer's drought. Harvested area is forecast at 8.4 Mha while yields are forecast at 2.14 t/ha versus the 1.4 t/ha achieved last year. Western Canadian canola yields will be largely determined by moisture; current weather maps show above normal soil moisture in Manitoba, normal in Saskatchewan and below normal across a large portion of Alberta. Generally, soil conditions are moister across the key canola-growing northern half of the Prairies and drier across the southern half.

Production is forecast to rise to the 8<sup>th</sup> highest level

on record of 17.9 Mt. By province, Saskatchewan is forecast to grow 9.4 Mt of canola, Alberta 5.4 Mt and Manitoba 3.0 Mt for the upcoming crop year. Total supply is forecast to rise sharply from last year to 18.4 Mt as the increase in production is moderated by a very tight carry-in of stocks.

Following the rebound in domestic supplies, usage of Canadian canola is forecast to recover with exports up by about 71% to 8.8 Mt while domestic crush is expected to rise to 9.0 Mt from 8.3 Mt last year. Carry-out stocks are forecast to rise by 25% to a still very tight 0.5 Mt for a stocks-to-use ratio of 3%. Canola prices are forecast to decline to \$1000/t track Vancouver, a drop of about 10% from the record highs in 2021-22. If realized, this would be the second highest canola price on record.

The 2022-23 outlook remains sensitive to several key factors, including the unfolding situation in Ukraine. The second factor is the anticipated rate of growth in the renewable diesel sector as the world seeks to reduce its dependence on mineral oils in response to high crude oil prices and to combat climate change. The third factor is the expected world production of alternate oilseed crops - this outlook assumes a minimal shift in seeded area for most oilseed crops, normal temperatures and moisture across most growing regions, and normal yields for most crops. The outlook is also sensitive to the strength of food demand for oilseeds, particularly in China. China is the world's largest importer of oilseeds but remains a volatile purchaser and can affect the canola market either positively or negatively. Policy shifts in Indonesia as that country seeks to restrict palm oil exports in an effort to suppress domestic prices is adding another source of uncertainty into world oilseed markets.

### Flaxseed

**For 2021-22**, supplies are estimated to be down 38%, to 0.41 Mt, versus 0.67 Mt last year, due to lower production and slightly smaller carry-in stocks. Limited supplies of flaxseed may be imported into Canada due to high domestic prices.

Exports are forecast to decrease by about 44%, to



0.29 Mt as a result of the constrained domestic supplies. Similarly, total domestic use is forecast to fall slightly to 99,900 t, on lower feed, waste and dockage. Carry-out stocks are forecast to fall by 49% to 30,000 t, while flaxseed prices rally sharply to \$1,250/t, versus \$693/t in 2020-21 and the 5-year average of \$526/t.

**For 2022-23**, Statistics Canada estimates a slight decline in the area seeded to flaxseed, to 0.35 Mha versus the 5-year average of 0.39 Mha, based on its survey of farmer seeding intentions. Harvested area for flaxseed is forecast at 0.34 Mha, while yields are 1.3 t/ha based on the five-year average. Flaxseed production is forecast at 0.47 Mt with 70% of the output occurring in Saskatchewan. Total supply is forecast to increase by 22%, to 0.51 Mt, as the rise in output is constrained by very tight carry-in stocks.

Exports are forecast to increase to 0.39 Mt on steady to stronger Chinese, European and United States consumption. Total domestic use is forecast to fall by about 24% to 0.08 Mt, on lower feed, waste and dockage. Carry-out stocks are forecast to rise by about 50% to 45,000 tonnes. Flaxseed prices are forecast to decline by 12%, but remain historically very strong at \$1,100/t for 2022-23.

### **Soybeans**

**For 2021-22**, domestic supplies of soybeans are estimated down 6% from last year, to 7.0 Mt, versus 7.4 Mt last year, as a result of a marginal decrease in carry-in stocks and a 1% decrease in production. Soybean imports are estimated down slightly to 0.4 Mt for the current crop year compared to the 0.44 Mt imported for 2020-21.

Canadian exports of soybeans are estimated down by 14%, to 4.0 Mt for the current crop year as tight domestic supplies mute support from strong world demand. Domestic processing of soybeans is forecast to increase by 10% from last year's pace to a historically normal 1.8 Mt, on strong crush margins and robust demand for vegetable oils. Soybean prices are estimated to rise to \$670/t for the current crop year versus the simple average of \$605/t earned in 2020-21.

The factors to watch for the remainder of the crop year

are: (1) instability in world oilseed, protein meal and vegetable oil trade flows, (2) volatility in world oilseed prices, (3) US planting pace, (4) South American production and export pace, (5) the strength of Chinese buying and (6) Canadian crush and export pace.

**For 2022-23**, farmers intend to plant 2.17 Mha to soybeans in Canada, up marginally from last year, based on Statistics Canada April 26<sup>th</sup> release of its Seeding Intentions Estimates. The largest soybean growing provinces in Canada are Ontario at 1.27 Mha, Manitoba 0.53 Mha and Quebec with 0.37 Mha. Assuming 5-year average yields, production is forecast at 6.4 Mt, versus 6.3 Mt in 2021-22 and similar to the 6.4 Mt grown in 2020-21. Total supply is forecast to increase to 7.3 Mt, on the combined rise in production and carry-in along with stable imports.

On the demand side, exports are forecast to increase by 13% to 4.5 Mt, with shipments headed to a diverse group of countries. Domestic processing is forecast up slightly to 1.9 Mt compared to last year. Carry-out stocks are forecast to fall slightly to 0.35 Mt versus the 0.45 Mt estimated for 2021-22 and the 5-year average of 0.49 Mt.

Soybean prices are forecast to fall by \$20/t to \$650/t, as pressure from a large US soybean crop is offset by a drop in South American production due to drought. A stable Canada-US dollar exchange rate is assumed for the duration of the 2022-23 crop year.

In its first outlook for the 2022-23 crop year since the Agriculture Outlook Forum, the USDA is predicting US soybean area will rise slightly to 91.0 million acres (Mac) at the expense of corn area. Assuming a normal abandonment, harvested area is estimated at 90.1 Mac while yields are pegged at 51.5 bushels per acre (bu/ac) vs 51.4 bu/ac last year and 51.0 bu/ac for 2020-21. Total soybean production is predicted to increase to 4.64 billion bushels (Bbu) spurring a similar sized rise in supplies to 4.89 Bbu. On the demand side, the USDA predicts a strong crush and export pace at 2.26 Bbu and 2.20 Bbu respectively. Consumption of soyoil for biofuel is expected to rise by 12% to 12.0 billion pounds (Blbs) providing additional support to the soybean sector. Ending stocks are

predicted at 310 million bushels (Mbu) versus the 235 Mbu expected to be carried out for 2021-22 and up 12% from the 257 Mbu of ending stocks for 2020-21. The simple average farm-gate price for soybeans is US\$14.40/bu vs US\$13.25/bu for 2021-22 and US\$10.80/bu for 2020-21.

World oilseed production is projected to rise for 2022-23 as higher production of soybeans, canola-rape seed, peanuts, cottonseed and palm kernel is partly offset by lower output of sunflowerseed and stable production of copra. World supplies of oilseeds are projected to increase to 750.3 Mt as the rise in output is moderated by lower beginning stocks. On the demand side, world crush is predicted

up to 528.1 Mt, vs 510.3 Mt for 2020-21, based on a higher crush of soybeans, canola-rape seed and cottonseed. Non-crush usage of oilseeds is predicted to rise to 103.2 Mt, vs 98.4 Mt for 2020-21. Ending stocks are estimated at 119.1 Mt for 2022-23 versus 103.2 Mt the previous year and 115.0 Mt for 2020-21. World trade of oilseeds is up to 196.4 Mt on support from increased inter-country movement of soybeans and canola-rape seed.

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## Pulse and Special Crops

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### Dry Peas

**For 2021-22**, dry pea supply is much lower than the previous year at 2.8 million tonnes (Mt). Canada's exports are forecast to fall to 2.1 Mt, down 41% from the 2020-21 level. Reduced demand from China and Bangladesh has been partially offset by the record export pace to the US. Canadian exports to the US for the year-to-date (August-March) are higher than for the same period last year due to the small US dry pea crop. With smaller domestic supply inhibiting exports and domestic use, carry-out stocks in Canada are expected to be sharply lower than the previous year at 0.15 Mt.

The average price is expected to be sharply higher than 2020-21, due to record dry pea prices for all types. Yellow dry peas prices are expected to maintain a \$60/t premium to green dry peas, compared to a green pea premium of \$5/t in 2020-21. During the month of April, Saskatchewan yellow and green pea farm gate prices were unchanged.

**For 2022-23**, producers intend to decrease seeded area in Canada to 1.44 million hectares (Mha), 7% below 2021-22. By province, Saskatchewan is expected to account for 52% of the dry pea area, Alberta 40%, with the remainder seeded across Canada.

Production is forecast to rise sharply to 3.5 Mt due to a return to average yields but lower area seeded. Supply is forecast to rise by 31% to 3.7 Mt due to higher production. Exports are expected to be higher than 2021-22 at 2.7 Mt and carry-out stocks are forecast to increase. The average price is expected to fall from the record levels in 2021-22, with increased domestic supply and expectations for increased world production.

In the US, area seeded to dry peas for 2022-23 is forecast by the USDA to rise by 11% to 1.09 million acres (Mac). This is largely due to an increase in expected area in North Dakota.

### Lentils

**For 2021-22**, Canada's lentil supply is 2.1 Mt and exports are forecast to be significantly lower than 2020-21 at 1.5 Mt. The main markets continue to be Turkey, India and the United Arab Emirates. Carry-out stocks are forecast to fall to 0.25 Mt.

The average price of lentils in Canada is forecast to rise sharply to record levels, largely due to the North American drought and strong import from Turkey. Large green lentil prices are forecast to have a \$340/t premium over red lentil prices for the entire crop year, compared to a \$135/t premium to red lentils in 2020-21. During the month of April, Saskatchewan large green lentil farm gate prices fell \$65/t while red lentil farm gate prices increased \$15/t.

**For 2022-23**, producers intend to raise the area seeded to lentils in Canada by 4% to 1.82 Mha. By province, Saskatchewan is expected to account for 89% of the lentil area, with the remainder seeded in Alberta and Manitoba.

Production is forecast by AAFC to rise 59% to 2.55 Mt and supply is expected to increase to 2.9 Mt. Exports are expected to rise with increased supply to 2.1 Mt. Carry-out stocks are forecast to rise to 0.35 Mt. The average price is forecast to be lower than 2021-22, with the assumption of an average grade distribution and with lower prices for No.1 red and green lentils grades.

In the US, the area seeded to lentils for 2022-23 is forecast by the USDA at 0.79 Mac, 11% higher than in 2021-22, due to higher area seeded in North Dakota and Montana.

### Dry Beans

**For 2021-22**, dry bean exports are forecast to decrease to 0.34 Mt due to lower export demand from smaller price-sensitive markets like Angola caused by the record export prices, compared to the previous year. The US and the EU remain the main markets for Canadian dry beans. Smaller North American supply have supported Canadian dry bean prices for 2021-22. To-date (August-April), Canadian white pea bean prices have averaged 25%

higher, black and pinto beans are 50% higher, than 2020-21 levels.

**For 2022-23**, the area seeded in Canada is forecast to fall by 23% from 2021-22 to 137 Kha due to lower returns compared to other crops. By province, Ontario is expected to account for 33% of the dry bean area, Manitoba 38%, Alberta 21%, with the remainder in Saskatchewan, Quebec and the Maritimes.

Production is expected to decrease to 325 thousand tonnes (Kt). With higher carry-in stocks, supply is expected to decrease by only 2%. Exports are forecast to rise and stocks are expected to fall. The average Canadian dry bean price is forecast to be marginally lower due to expectations for similar North American supply.

In the US, area seeded to dry beans is forecast by the USDA to decrease by 6% to 1.31 Mac, with lower area across most of the US dry bean growing states.

### **Chickpeas**

**For 2021-22**, the chickpea supply is sharply lower than the previous year. Canadian chickpea exports are expected to increase marginally to 160 Kt, largely due to higher exports to the US, one of Canada's largest markets. Carry-out stocks are expected to fall significantly as the increase in export demand has chewed through a lot of the supply. The average price is forecast to be up sharply from 2020-21, largely due to lower production in North America, Turkey and Argentina.

**For 2022-23**, the area seeded is expected to fall marginally from 2021-22 due to prospects for lower returns compared to other crops. By province, Saskatchewan is expected to account for a significant portion of the chickpea area, with the remainder seeded in Alberta.

Production is forecast to rise by 44% to 110 Kt, assuming a return to average yields, higher than the previous year. Supply, however, is forecast to fall significantly compared to 2021-22, with lower carry-in stocks. Exports are forecast to decrease from the previous year. Carry-out stocks are expected to decrease for the second consecutive

year. The average price is forecast to be unchanged from 2021-22.

US chickpea area for 2022-23 is forecast by the USDA to fall to 0.3 Mac, down 18% from 2021-22. This is largely due to an expected decrease in area in Idaho.

### **Mustard Seed**

**For 2021-22**, the mustard seed supply is 105 Kt, down 36% from 2020-21. Canadian mustard exports are forecast to be limited to 85 Kt, lower than the previous year. The US and the EU remain the main export markets for Canadian mustard seed. Carry-out stocks are forecast to tighten. Prices are forecast to rise to record levels due to extremely tight carry-out stocks.

**For 2022-23**, the area seeded is expected to rise by 48% due to record prices from the previous year. Saskatchewan and Alberta account for 76% and 23% of the area seeded, respectively. Production is forecast to rise sharply to 145 Kt due to higher area, and improved yields. However, even with smaller carry-in stocks, supply is expected to increase by 50%. Exports are expected to increase and carry-out stocks are forecast to rise, but remain tighter than the five-year average. The average price is forecast to be lower than 2021-22, but remain historically high.

### **Canary Seed**

**For 2021-22**, supply is at 145 Kt, down 25% from the previous year. Exports are expected to be down sharply from last year. The EU and Mexico are the main markets, with lower exports to the South American region. The average price is forecast to rise from 2020-21 to a record \$1,125/t due to tighter carry-out stocks.

**For 2022-23**, producers intend to decrease the area seeded due to more competitive returns for other crops. Production is expected to increase to 150 Kt with expectations for higher yields than the previous year. Supply is forecast to rise slightly despite lower carry-in stocks. Exports are expected to increase and carry-out stocks are expected to remain tight. The average price is forecast to be lower than the 2021-22 level, but remain historically high at \$880/t.

## **Sunflower Seed**

**For 2021-22**, supply is marginally lower than the previous year. Sunflower seed exports are forecast to be lower than the previous year at 45 Kt due to lower import demand from the US. The US is the top export market, followed by Japan and Costa Rica, which import small volumes. Carry-out stocks are expected to remain unchanged.

The average price for sunflower seed in Canada is forecast to rise from 2020-21 due to higher oil and confectionery type sunflower seed prices.

**For 2022-23**, area seeded is expected to increase due to increased returns from the previous year. Production is forecast to be higher at 93 Kt, assuming average yields. Supply is expected to rise marginally with large carry-in stocks, to 238 Kt.

Exports are forecast to increase and carry-out stocks are forecast to remain unchanged. The average price is forecast to fall from 2021-22 due to expectations for an increase in North American sunflower seed supply.

The area seeded to sunflower in the US for 2022-23 is forecast by the USDA at 1.4 Mac, up 10% from 2021-22. Higher area seeded in North Dakota is expected to combine with a rise in area in other US states. The area seeded to oil type varieties is expected to increase sharply to nearly 1.3 Mac and the area seeded to confectionery type varieties is forecast to rise to a record 0.11 Mac.

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# CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

May 20, 2022

Grain and Crop Year (a)	Area Seeded <i>thousand ha</i>	Area Harvested <i>thousand ha</i>	Yield <i>t/ha</i>	Production	Imports (b)	Total Supply	Exports (c)	Food & Industrial Use (d)	Feed, Waste & Dockage	Total Domestic Use (e)	Carry-out Stocks	Average Price (g)
												<i>\$/t</i>
<b>Durum</b>												
2020-2021	2,302	2,295	2.86	6,571	13	7,321	5,766	198	388	802	753	302
2021-2022f	2,238	2,157	1.23	2,654	20	3,427	2,300	180	194	577	550	640
2022-2023f	2,519	2,468	2.30	5,677	25	6,252	4,400	200	439	852	1,000	430
<b>Wheat Except Durum</b>												
2020-2021	7,892	7,723	3.70	28,612	129	33,503	20,538	3,265	4,033	8,053	4,913	271
2021-2022f	7,255	7,090	2.68	18,998	300	24,211	13,000	2,500	4,986	8,211	3,000	445
2022-2023f	7,683	7,530	3.44	25,923	100	29,023	17,500	3,200	3,548	7,523	4,000	410
<b>All Wheat</b>												
2020-2021	10,194	10,018	3.51	35,183	142	40,824	26,303	3,463	4,422	8,855	5,666	
2021-2022f	9,493	9,247	2.34	21,652	320	27,638	15,300	2,680	5,180	8,788	3,550	
2022-2023f	10,202	9,998	3.16	31,601	125	35,276	21,900	3,400	3,987	8,376	5,000	
<b>Barley</b>												
2020-2021	3,060	2,809	3.82	10,741	294	11,991	4,277	299	6,417	7,003	711	294
2021-2022f	3,357	3,002	2.31	6,948	200	7,859	2,690	289	4,320	4,869	300	435
2022-2023f	3,032	2,720	3.42	9,300	60	9,660	3,050	319	5,511	6,110	500	400
<b>Corn</b>												
2020-2021	1,440	1,408	9.63	13,563	1,639	17,762	1,438	5,376	8,764	14,155	2,169	272
2021-2022f	1,413	1,391	10.06	13,984	4,000	20,153	1,750	5,400	11,087	16,503	1,900	310
2022-2023f	1,503	1,468	9.75	14,310	2,000	18,210	1,750	5,450	8,894	14,360	2,100	330
<b>Oats</b>												
2020-2021	1,554	1,314	3.48	4,576	17	5,019	2,971	105	1,170	1,391	657	301
2021-2022f	1,385	1,112	2.34	2,606	20	3,282	2,070	95	782	1,012	200	560
2022-2023f	1,615	1,316	3.30	4,342	15	4,557	2,650	120	1,161	1,407	500	500
<b>Rye</b>												
2020-2021	237	153	3.19	488	2	530	153	41	243	306	72	225
2021-2022f	246	147	3.22	473	2	546	115	29	321	371	60	310
2022-2023f	239	150	3.22	482	2	544	160	39	244	303	80	260
<b>Mixed Grains</b>												
2020-2021	168	97	2.41	233	0	233	0	0	233	233	0	
2021-2022f	133	65	2.53	164	0	164	0	0	164	164	0	
2022-2023f	137	59	2.63	155	0	155	0	0	155	155	0	
<b>Total Coarse Grains</b>												
2020-2021	6,459	5,780	5.12	29,601	1,952	35,535	8,839	5,820	16,827	23,087	3,608	
2021-2022f	6,534	5,716	4.23	24,175	4,222	32,004	6,625	5,813	16,674	22,919	2,460	
2022-2023f	6,526	5,712	5.00	28,589	2,077	33,126	7,610	5,928	15,966	22,335	3,180	
<b>Canola</b>												
2020-2021	8,410	8,325	2.34	19,485	125	23,044	10,589	10,425	243	10,734	1,722	730
2021-2022f	9,097	9,002	1.40	12,595	150	14,467	5,150	8,300	566	8,917	400	1,100
2022-2023f	8,457	8,391	2.14	17,950	100	18,450	8,800	9,000	99	9,150	500	1,000
<b>Flaxseed</b>												
2020-2021	377	371	1.56	578	26	667	505	N/A	85	103	59	693
2021-2022f	416	404	0.86	346	10	415	285	N/A	80	100	30	1,250
2022-2023f	351	344	1.35	466	10	506	385	N/A	57	76	45	1,100
<b>Soybeans</b>												
2020-2021	2,052	2,041	3.12	6,359	437	7,417	4,661	1,636	603	2,462	294	605
2021-2022f	2,153	2,139	2.93	6,272	400	6,966	4,000	1,800	516	2,516	450	670
2022-2023f	2,168	2,165	2.96	6,400	400	7,250	4,500	1,900	300	2,400	350	650
<b>Total Oilseeds</b>												
2020-2021	10,839	10,738	2.46	26,421	588	31,129	15,755	12,061	931	13,299	2,075	
2021-2022f	11,666	11,545	1.66	19,212	560	21,847	9,435	10,100	1,161	11,532	880	
2022-2023f	10,975	10,900	2.28	24,816	510	26,206	13,685	10,900	456	11,626	895	
<b>Total Grains And Oilseeds</b>												
2020-2021	27,491	26,536	3.44	91,205	2,682	107,487	50,897	21,343	22,180	45,241	11,349	
2021-2022f	27,693	26,507	2.45	65,039	5,102	81,489	31,360	18,593	23,015	43,239	6,890	
2022-2023f	27,703	26,611	3.19	85,006	2,712	94,607	43,195	20,228	20,409	42,337	9,075	

(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 2021-2022 and seeded area for 2022-23 which are STC

# CANADA: PULSES AND SPECIAL CROPS SUPPLY AND DISPOSITION

May 20, 2022

Grain and Crop Year (a)	Area		Yield t/ha	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (c)	Carry-out Stocks	Stocks-to- Use Ratio %	Average Price (d) \$/t
	Seeded thousand ha	Harvested thousand ha									
<b>Dry Peas</b>											
2020-2021	1,722	1,685	2.73	4,594	81	4,909	3,582	768	559	13%	340
2021-2022f	1,546	1,491	1.51	2,258	30	2,846	2,100	596	150	6%	600
2022-2023f	1,437	1,410	2.48	3,500	80	3,730	2,700	730	300	9%	480
<b>Lentils</b>											
2020-2021	1,713	1,705	1.68	2,868	110	3,187	2,326	454	407	15%	645
2021-2022f	1,742	1,716	0.94	1,606	50	2,063	1,500	313	250	14%	1,000
2022-2023f	1,815	1,790	1.42	2,550	75	2,875	2,100	425	350	14%	835
<b>Dry Beans</b>											
2020-2021	185	183	2.68	490	63	578	396	72	110	24%	930
2021-2022f	177	171	2.26	386	75	571	340	71	160	39%	1,200
2022-2023f	137	133	2.45	325	75	560	360	70	130	30%	1,180
<b>Chickpeas</b>											
2020-2021	121	120	1.79	214	41	506	159	71	275	119%	640
2021-2022f	75	74	1.04	76	25	376	160	66	150	66%	960
2022-2023f	71	70	1.57	110	45	305	120	65	120	65%	960
<b>Mustard Seed</b>											
2020-2021	104	101	0.98	99	6	165	111	15	40	32%	885
2021-2022f	125	113	0.44	50	15	105	85	15	5	5%	3,000
2022-2023f	185	179	0.81	145	7	157	90	42	25	19%	2,050
<b>Canary Seed</b>											
2020-2021	111	110	1.62	178	0	193	160	7	26	16%	690
2021-2022f	127	125	0.95	119	0	145	130	10	5	4%	1,125
2022-2023f	108	107	1.40	150	0	155	135	10	10	7%	880
<b>Sunflower Seed</b>											
2020-2021	45	45	2.25	101	36	241	51	74	116	93%	620
2021-2022f	41	40	2.03	82	35	233	45	73	115	98%	875
2022-2023f	45	44	2.11	93	30	238	50	73	115	93%	850
<b>Total Pulses and Special Crops (c)</b>											
2020-2021	4,000	3,949	2.16	8,545	338	9,778	6,784	1,461	1,533		
2021-2022f	3,832	3,730	1.23	4,577	230	6,340	4,360	1,145	835		
2022-2023f	3,799	3,733	1.84	6,873	312	8,020	5,555	1,415	1,050		

(a) Crop year is August-July. Grains Include pulses (dry peas, lentils, dry beans, chick peas) and special crops (mustard seed, canary seed, sunflower seed).

(b) Imports and exports exclude products.

(c) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use + Loss in Handling

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

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

f: forecasts by AAFC except for area, yield and production for 2021-2022 and seeded area for 2022-23 which are STC