Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

# *CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS, 2026*

**November 19, 2026**

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

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This report updates Agriculture and Agri-Food Canada's (AAFC) October Outlook for the 2026-27 crop year, incorporating the latest domestic and international market developments, including trade policies in effect as of November 12, 2026. In Canada, the crop year for most field crops extends from August 1 to July 31, while the crop year for corn and soybeans runs from September 1 to August 31. Global crop markets continue to operate in an environment of elevated uncertainty driven by ongoing geopolitical tensions, evolving trade policies, and disruptions affecting global transportation and supply chains.

**For the 2026-27 crop year**, the outlook continues to rely on preliminary crop production estimates from STC's Model-Based Principal Field Crop Estimates release, based on information available as of August 31, 2026. The next update to production figures will be when STC releases final estimates on December 4, 2026. While principal field crops production is forecast 5% lower than the record 2025 harvest, it would still rank as the second-largest crop on record and surpass the five-year average by 10%. Total supplies are expected to remain nearly unchanged year-over-year (y/y) as large carry-in stocks (beginning-year inventories) are projected to mostly offset the decline in production. Exports of principal field crops are forecast to decrease by 2% y/y but remain robust at 11% above the five-year average. Carry-out stocks (year-end inventories) of principal field crops are projected to tighten modestly y/y as lower total supply and an increase in total domestic use offsets the decrease in exports. Harvest operations in Western Canada are virtually complete. In Eastern Canada, soybean harvest is virtually complete while the corn harvest continues at a steady pace; completion is expected over the next few weeks if weather allows.

The next AAFC Outlook for Principal Field Crops is scheduled for release on December 18, 2026. The next major STC release will be survey-based estimates of field crop production on December 4, 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** | | | | | | | | | |
| 2024-2025 | 27,845 | 27,017 | 3.36 | 90,650 | 2,505 | 106,368 | 52,696 | 43,437 | 10,236 |
| 2025-2026 | 27,936 | 26,923 | 3.70 | 99,542 | 2,956 | 112,734 | 52,156 | 47,856 | 12,723 |
| 2026-2027f | 28,250 | 27,134 | 3.53 | 95,873 | 2,787 | 111,383 | 50,928 | 48,935 | 11,520 |
| **Total Pulse And Special Crops** | | | | | | | | | |
| 2024-2025 | 3,749 | 3,712 | 1.77 | 6,568 | 312 | 7,696 | 4,871 | 1,300 | 1,525 |
| 2025-2026 | 3,890 | 3,818 | 2.27 | 8,661 | 189 | 10,375 | 6,018 | 1,135 | 3,221 |
| 2026-2027f | 3,452 | 3,370 | 2.03 | 6,853 | 238 | 10,312 | 6,155 | 1,212 | 2,945 |
| **All Principal Field Crops** | | | | | | | | | |
| 2024-2025 | 31,594 | 30,729 | 3.16 | 97,218 | 2,817 | 114,064 | 57,566 | 44,737 | 11,761 |
| 2025-2026 | 31,826 | 30,741 | 3.52 | 108,203 | 3,145 | 123,109 | 58,174 | 48,991 | 15,944 |
| 2026-2027f | 31,702 | 30,504 | 3.37 | 102,726 | 3,025 | 121,695 | 57,083 | 50,147 | 14,465 |

**Source:** Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
**f:** For 2026-27, all forecasts are by AAFC except for area, yield, and production, which are STC.

## All Wheat

### Durum

**For 2026-27**, Statistics Canada (STC) forecasts durum production to fall 12% to 6.4 million tonnes (Mt). With larger carry-in stocks partly offsetting the production decline, total supply is projected at 7.5 Mt, down 4% from last year.

As of November 3, 51% of Canadian Western Amber Durum (CWAD) samples collected from producers through the Canadian Grain Commission's (CGC) Harvest Sample Program were rated in the top two grades, compared to the last five-year average of 70%. Average protein content was 12.9% for CWAD No. 1 and 13.4% for CWAD No. 2.

The export forecast has been raised to 5.4 Mt this month, reflecting the strong pace of shipments to date. The CGC data reported 1.28 Mt durum exported through the licensed elevator system by early November, compared to 906 thousand tonnes (Kt) for the same period last year. STC data, which capture all exports, including those outside the licensed system, indicate that August and September exports reached 862 Kt, more than double the level seen for the same period last year. Italy (224 Kt) and Morocco (272 Kt) were the leading destinations, together accounting for over half of total exports. Domestic use in Canada is relatively stable and is forecast at 0.9 Mt, in line with the previous year. Total projected carry-out stocks are now revised further down to 1.25 Mt.

In its latest report, the International Grains Council (IGC) projects global durum production to rise 1% year-over-year (y/y) to a record 38.6 Mt, driven by larger crops in Turkey, Algeria, and Morocco. Consumption is forecast to increase 3% to 37.7 Mt, also a recent year high. Despite higher production and consumption, world durum trade is expected to fall 12% to 8.4 Mt as improved North African harvests reduce import demand. Global ending stocks are projected to rise 10% y/y to 10.3 Mt.

The 2026-27 average producer price forecast for CWAD No. 1, 13% protein, in Saskatchewan is maintained this month at $290/tonne(/t).

### Wheat (excluding durum)

**For 2026-27**, STC forecasts non-durum wheat production to fall 11% to 29.7 Mt. Total supply is projected at 35.3 Mt, down 5% from last year, though remaining 8% above the five-year average.

As of November 3, 79% of Canada Western Red Spring (CWRS) wheat samples collected through the CGC's Harvest Sample Program were graded in the top two grades, comparted to the five-year average of 92%; average protein content was 13.8% for CWRS No. 1 and 13.5% for CWRS No. 2.

The export forecast was raised slightly to 23.6 Mt, reflecting the strong pace of shipments to date. According to the CGC, 6.4 Mt of wheat was exported through the licensed elevator system by early November, up 12% from the same period in 2025-26. STC data, which capture all exports including those outside the licensed system, show August and September exports at 4.2 Mt, compared to 3.1 Mt a year earlier. Bangladesh (458 Kt), the United States (369 Kt), Japan (367 Kt), China (312 Kt), and Indonesia (290 Kt) were the top export destinations. Domestic use in Canada is also revised up slightly but remains approximately at the same level as the year before. As a result, total projected carry-out stocks are brought down to 4.1 Mt.

According to the United States Department of Agriculture, total global supply of wheat is forecast to be up slightly y/y to reach 1,110.4 Mt. Total consumption is expected to edge up to 827.9 Mt. Total trade is anticipated to decline 8% y/y to 209 Mt. As a result, global wheat ending stocks are forecast to be up slightly y/y to 281 Mt.

The average producer price forecast for CWRS 1, 13.5% protein, in Saskatchewan is lowered slightly this month to $295/t due to ample global supplies and improved crop prospects in major exporting countries. However, the forecast remains 10% above last year's level, supported by continued uncertainty in the Black Sea region.

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## Coarse Grains

### Barley

**For 2026-27**, Canadian barley production is projected by Statistics Canada (STC) at 9.7 million tonnes (Mt), essentially unchanged from the previous season, as a larger seeded area is expected to offset yields declining marginally from the record highs achieved a year earlier. Provincially, Alberta remains the largest barley-growing region, accounting for 53% of total production in 2026. Saskatchewan follows with 40%, while Manitoba contributes 5%. The remaining production is distributed among the other provinces.

Primarily due to steady production and notably lower carry-in stocks, total supply is projected to decline year-over-year (y/y) to reach 10.8 Mt. Despite the decrease, total supply would remain well above the five-year average. Total demand is expected to decline y/y, reflecting slower exports that are expected to more than offset the growth in domestic feed use. Carry-out stocks are forecast at 0.9 Mt, down from both the previous season and the five-year average.

According to Statistics Canada's (STC) monthly trade data, exports of raw barley grain during the first two months of the crop year (August – July) totaled 0.5 Mt (+71% versus the previous season; +73% versus the five-year average), with China accounting for over 75% of total shipments, followed by Japan, the US, Mexico, and other countries. Exports of barley product (in grain equivalent) during the same period totaled above 0.1 Mt (-6%; -7%), with the US representing about 60% of total shipments, followed by Japan, South Korea, Mexico, and other countries.

The 2026-27 Lethbridge average feed barley price is projected at $305/tonne (/t), up more than $20/t y/y, partly supported by stronger US corn prices.

Worldwide, the United States Department of Agriculture (USDA) projects 2026-27 global barley production at above 160 Mt, up significantly y/y. Among the major barley-exporting countries and regions, production is estimated to increase in the Black Sea region, Australia and Canada. However, these gains are expected to be more than offset by substantial output declines in Europe, the US and Argentina. Meanwhile, barley production in the rest of the world is estimated to increase sharply, resulting in an overall rise in global output. Trade is anticipated to be subdued in the year, while consumption continues to strengthen. Ending stocks are forecast to be over 24 Mt, substantially higher than the previous season and well above the five-year average.

### Corn

**For 2026-27**, Canadian corn production is projected to increase notably y/y to 16.5 Mt, driven by expanded acreage in the three major corn-growing provinces, Ontario, Quebec, and Manitoba, as well as stronger yields in Ontario and Quebec. If realized, this would mark the largest corn crop on record in Canada. Provincially, Ontario remains the dominant corn-growing region, accounting for 63% of total production in 2026. Quebec follows with 21%, while Manitoba contributes 14%. The remaining production is distributed across other provinces.

Combined with larger carry-in stocks and relatively steady imports, total supply is projected to increase by 9% y/y to 20.3 Mt, the second highest level on record. Domestic use and exports are both projected to increase. Carry-out stocks are projected at 2.1 Mt, up y/y and broadly in line with the five-year average. Imports during the first month of the crop year (September – July) totaled over 0.1 Mt (-22% versus the previous season; -25% versus the five-year average), with the US supplying almost all shipments. Exports over the same period totaled about 0.03 Mt (+52%; -56%), with 70% shipped to the US and 30% to Ireland.

The 2026-27 Chatham average corn price is projected at $245/t, up less than $15/t y/y, primarily supported by stronger US corn prices.

Worldwide, the USDA projects 2026-27 global corn production at just above 1,290 Mt, down 3% y/y but still well above the five-year average. Production in the US and the EU is estimated to decline significantly y/y. Despite the decrease, US production is expected to remain the second highest on record, while EU production is estimated to

approach a historic low. Meanwhile, production in Argentina and Brazil is forecast to decline by 14% and 1%, respectively. Even so, corn production in both countries will remain well above their respective five-year averages. In contrast, production is estimated to increase notably in Canada, China, and the Black Sea region, with Canada and

China each projected to achieve record-high output. Trade is anticipated to remain brisk and global demand is expected to stay strong and outpace production. Ending stocks are projected at 280 Mt, a notable decline from both the previous season and the five-year average. The USDA projects the US corn price for 2026-27 at just above US$180/t, an increase of nearly US$17/t y/y and the highest in four years.

**Oats**

**For 2026-27**, Canadian oat production is projected at 3.0 Mt, a notable decline from last season, primarily driven by reduced seeded area and yields declining significantly from the record highs achieved in the previous season. Provincially, Saskatchewan remains the largest oat-producing region, accounting for 45% of total production in 2026-27. Alberta follows with 23%, while Manitoba contributes 22%. The remaining production is distributed among the other provinces.

The decline in production, together with higher but tight carry-in stocks, is expected to reduce supplies sharply from both the previous crop year and the five-year average to 3.6 Mt, bringing them close to historically low levels. Total domestic use, particularly feed use, and exports are expected to decrease y/y due to smaller supplies. Carry-out stocks are projected to fall notably y/y to 0.4 Mt, among the lowest levels on record.

Exports of raw oat grain during the first two months of the crop year (August – July) totaled almost 0.3 Mt (+6% versus the previous season; -10% versus the five-year average), with the US accounting for almost 95% of total shipments, followed by Japan, Mexico, South Africa, Peru, and various other countries and regions. Exports of oat product (in grain equivalent) during the same period totaled under 0.2 Mt (+7%; -2%), with the US accounting for nearly 95% of total shipments, followed by Mexico, Japan, and South Korea.

The 2026-27 Chicago Board of Trade oat price is projected at $350/t, up more than $30/t y/y, primarily supported by tighter North American oat supplies and firm prices in other crop markets.

Worldwide, the USDA projects 2026-27 global oat production at 23 Mt, down notably y/y despite a bumper crop in Australia. Total demand is also projected to decline. Ending stocks are forecast at 3.2 Mt, down notably y/y but remain well above the five-year average.

**Rye**

**For 2026-27**, Canadian rye production is projected at 394 Kt, down sharply y/y due to reduced area and yields declining from the record highs achieved in the previous season. Regionally, Western Canada makes up almost 60% of national production, with the remainder located in Eastern Canada

Despite lower production, substantial carry-in stocks are expected to keep overall rye supplies abundant. Total supply is projected at 758 thousand tonnes (Kt), slightly above the previous season's record and setting a new all-time high. The abundant supply is expected to support both domestic feed use and exports. Carry-out stocks are projected to decrease sharply from the previous year's multi-decade high to 280 Kt; nevertheless, they would remain among the highest levels observed over the past multi decades. Exports during the first two months of the crop year (August – July) totaled 65 Kt (+11% versus the previous season; -3% versus the five-year average), with the US accounting for almost all shipments.

The 2026-27 Prairie average rye price is projected at $150/t, up y/y but remaining subdued due to ample supplies.

The 2026–27 US rye market is characterized by sharply lower domestic production, which is being partially offset by a substantial increase in imports. Even with a downward trend in total domestic consumption, ending stocks are forecast to edge lower y/y while holding above the five-year average.

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## Oilseeds

### Canola

**For 2026-27,** Canadian farmers planted a record 9.5 million hectares (Mha) this spring, marking an 8% rise year-over-year (y/y). Canadian canola harvest has wrapped for the year and results at the national level will be known once Statistics Canada (STC) releases their final estimates on December 4. For now, the agency projects canola production at 22.1 million tonnes (Mt); if realized, this would be the second largest crop on record, just below last year's peak of 22.2 Mt. With an 18% rebound in carry-in and notably strong production, total supply is projected to rise to the second highest level on record. At 24.1 Mt, this would be 15% higher than the five-year average of 20.9 Mt.

The Canadian Grain Commission's (CGC) Harvest Sample Program is underway and they are now releasing preliminary reports on 2026 canola crop quality. According to the latest iteration as of October 30, 88% of the 632 submitted samples received so far were rated No.1. Recall, last year's program yielded 95% of total samples rated No.1. Historically, the five-year average of canola rated No. 1 under CGC's program is 92% and 89.5% for the ten-year average. The average oil content of No.1 canola is on par with last year at 43.6%. The protein content averages at 21.7%, up slightly from last year, while chlorophyll content averages at 8.3 milligrams per kilogram so far. Glucosinolates, a measure of feed quality, averages at 11.2 micromoles per gram (µmol/g) so far, marking an improvement from last year's 12 (µmol/g).

On the demand side, total domestic use is projected higher this month at 14.5 Mt on raised industrial use. This would be the highest total use on record, up 11% from last year and 29% higher than the five-year average. In September, STC reported crush was virtually on par with August at 1.23 Mt, yielding 519 thousand tonnes (Kt) of canola oil and 714 Kt of meal. The volume crushed in September notably surpassed historical September crush volumes. September 2026 crush was 22% higher than last year and 48% higher than the historical September five-year average of 887 Kt. Total Canadian canola crush for the 2026-27 crop year has been raised 100 Kt to a new record of 14 Mt. If realized, this would be 9% higher than last year's peak and 30% higher than the five-year average of 10.8 Mt. For now, total exports remain forecast at 7.7 Mt, down 14% from last year but on par with average. Total carry-out is projected at 1.87 Mt, a slight contraction from the year prior and 7% tighter than average.

The simple average price forecast, No.1 Track Vancouver, has been raised $5/tonne (/t) to $805/t, marking a 13% rise from 2025-26.

Key factors to observe are: (i) the Canadian Grain Commission's harvest sample program in respect to 2026 canola crop quality, (ii) farmer deliveries and crush pace, (iii) the Canadian canola export pace, particularly to major markets such as China, Japan, and Mexico, (iv) Australian rapeseed harvest progress, (v) geopolitical conflicts and their impact on global trade flows and oilseed complex pricing, (vi) any developments related to biofuel and renewable fuel policies.

### Flaxseed

**For 2026-27,** Canadian farmers planted 269 thousand hectares (Kha) of flaxseed this spring, according to STC. This is up 7% from last year, the second consecutive yearly increase, interrupting a trend in declining flax area. While the 2026-27 flaxseed area is below the five-year average of 284 Kha, it is still up from the record low of only 204 Kha planted in 2024-25. Flaxseed harvest is complete across the major growing provinces and final production numbers will be known once STC releases final estimates in December. At this time, the agency projects flaxseed production at 386 Kt, a 15% decrease y/y as yields come down from last year's record. STC expects output in Saskatchewan to contract by 22% from last year, only partially offset by the expectation of higher production in Alberta. Sharply higher carry-in offsets the decline in national output, bringing total supply 2% higher y/y to 607 Kt.

On the demand side, total domestic use is forecast to rise 11% higher than last year to 111 Kt with feed, waste, and dockage rising 13% on the year. At this

time, exports remain forecast at 275 Kt, a slight contraction from last year's 284 Kt. Total carry-out is projected to grow to the highest level in ten years as sharp carry-in combines with above-average production. At 221 Kt, this would be 5% higher than last year and 36% higher than the five-year average.

The simple average price forecast for flax, No.1 in-store Saskatoon, is unchanged at $600/t, down 4% from last year.

**Soybeans**

**For 2026-27,** Canadian farmers planted 2.4 Mha to soybeans this spring, according to STC, an expansion of 2% from last year and 8% higher than the average. Compared historically, 2026 soybean area is the third highest on record. Across Canada, soybean harvest is largely complete and final production results will be known once STC releases final estimates in December. Currently, STC estimates production in Quebec and Ontario to rise 10% and 11%, respectively, while Manitoba production is projected to decline by 1%. National soybean production is forecast by the agency at 7.5 Mt, up 7% from last year and 8% higher than the five-year average. Despite a sharp decline in carry-in stocks, this was more than offset by the higher production, bringing total supply to 8.2 Mt.

Total domestic use is unchanged at 2.4 Mt, down 5% from last year, largely on lower feed, waste, and dockage. For now, soybean crush is forecast at 1.75 Mt, on par with last year and just ahead of the five-year average of 1.74 Mt. Total exports remain forecast at 5.4 Mt, a 3% uptick y/y and 12% above the five-year average of 4.8 Mt. Total carry-out is expected to rebound moderately to 400 Kt, but still be considered tight historically as it would be 17% lower than the five-year average.

The simple average soybean price forecast, track Chatham, is raised $5/t to $580/t, up 5% from last year but 3% below the five-year average.

In their latest World Agricultural Supply and Demand Estimates, the United States Department of Agriculture (USDA) lowered global soybean production from 442.7 Mt to 442.5 Mt for 2026-27, citing lower production prospects for Ukraine, South Africa, the EU, and Mexico. The projected decline in these regions offsets the Department's raised production outlook for the US and Colombia. Still, global soybean output for the current marketing year is forecast at a record high and would be 11% higher than the five-year average. For the US, 2026-27 production was raised to a new record of 124.5 Mt, up 7% y/y and 6% higher than the five-year average. At the time of writing, US soybean harvest is approaching its end with 92% of the 2026 soybean crop in the bin as of November 8. Strong carry-in, record global production, and record imports brings global soybean supply to a new peak of 758.9 Mt, up 2% y/y. The USDA's global crush forecast was raised marginally this month to 442.8 Mt, rising 3% y/y to a new peak. The Department maintained their domestic crush forecast this month, keeping the projection at its record 75.7 Mt (+5% y/y). Global soybean trade was raised slightly to 192.6 Mt on higher export prospects for the US and Argentina. Global carry-out was tightened 1% to 123.5 Mt, down from last year's estimated 125 Mt.

The US average soybean price estimate for 2026-27 was raised 10 cents this month to US$12.10/bushel ($US445/t).

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## Pulse and Special Crops

### Dry Peas

**For 2026-27**, production is estimated to fall by 17% to 3.26 million tonnes (Mt). This is due to lower area, especially in Saskatchewan, where 53% of the peas were grown. Yellow pea production is forecast to be lower than last year at 2.54 Mt, and green pea production is expected to fall to 0.52 Mt. Production of the other remaining dry pea types is expected to be similar at 200 thousand tonnes (Kt). Supply is forecast to be marginally above last year at 4.46 Mt as record high carry-in stocks combine with lower production. Exports are forecast to rise to 2.8 Mt. From August to September 2026, China and India were Canada's top two markets. With the similar supply, carry-out stocks are forecast to fall to just over 1.0 Mt. The average price is expected to increase by 7% from 2025-26 to $320/tonne (/t) due to stronger spot prices for yellow types.

During October, the on-farm price of yellow peas in Saskatchewan rose by $40/t while the price of green pea types rose by $25/t. Current indications of crop quality suggest a similar percentage of Canadian dry peas will grade No.1 and No.2 when compared to last year. This and the lower Canadian output will result in a smaller supply of No.1 and No. 2 dry peas for this crop year. For the crop year to-date, there has been a $200/t premium for green dry peas to yellow dry peas, versus a green pea premium of $86/t to yellow peas in 2025-26.

Area seeded to dry peas in the US for 2026-27 is forecast by the United States Department of Agriculture (USDA) to fall by 3% from last year to 1.13 million acres (0.46 million hectares (Mha). This is largely due to lower seeded area in North Dakota. US dry pea yields are estimated to be above average and dry pea production is forecast by the USDA to rise from last year by 13% to 0.95 Mt. The main export markets for US dry peas are Canada, the Philippines, and China.

### Lentils

**For 2026-27**, production is estimated to fall by 0.9 Mt (-27%) to below 2.5 Mt, due to lower yields and area in Western Canada. Production of red lentils fell from last year to about 1.5 Mt, while large green lentil production fell to 0.7 Mt. Production of the other remaining lentil types decreased to 0.23 Mt. Supply is expected to fall by only 4% to 3.8 Mt with record carry-in stocks and a fall in output.

Exports are expected to decrease marginally to 2.4 Mt. To-date, India, the EU, and the United Arab Emirates are the top export markets. Carry-out stocks are forecast to fall to 1.15 Mt. The average price is forecast to rise by 7% to $535/t, with an average grade distribution.

During the month of October, the on-farm price in Saskatchewan for large green lentils rose by $55/t and red lentil prices decreased by $20/t. This was largely due to strong export demand for green lentils. Compared to last year, a decrease in the supply of No. 1 or No. 2 grade Canadian lentils is expected for 2026-27. To-date, large green lentil prices have maintained a premium of $45/t over red lentil prices, compared to a $43/t premium in 2025-26.

For 2026-27, US area seeded to lentils is forecast by the USDA to fall by 42% from 2025-26, largely due to lower area seeded in Montana. With higher yields and lower abandonment, 2026-27 US lentil production is therefore forecast by the USDA at 0.37 Mt, down 23% from the production in 2025-26. The main US export markets for lentils to-date are the European Union (EU), Canada, and Mexico.

### Dry Beans

**For 2026-27**, production is estimated to have decreased by 19% to 354 thousand tonnes (Kt). This includes 103 Kt of white pea bean types and 251 Kt of colored bean types. Production in Ontario and Manitoba fell as lower seeded area for both provinces was offset by higher yields. In Alberta, colored dry bean production increased due to higher yields. Supply is forecast to fall by only 10% due to larger carry-in stocks.

Exports are forecast to be lower than last year based on limited supply. Based on data for August and

September, the EU and the US are the top two markets. Carry-out stocks are expected to decrease. The Canadian dry bean price is forecast to rise to $1,020/t due to the lower North American supply.

Area seeded to dry beans in the US is estimated by the USDA to decrease by 16% to 1.15 million acres (0.46 Mha), mostly due to smaller area seeded in North Dakota. US total dry bean production (excluding chickpeas) is forecast by the USDA at 0.98 Mt, down 20% from 2025-26. The largest decreases are expected for black and pinto beans. The main US export markets continue to be the EU, Mexico and Canada.

**Chickpeas**

**For 2026-27,** production is estimated at 400 Kt, 17% lower than last year's output due to smaller seeded area and yields. The production of both kabuli and desi types is estimated to be lower than the previous year. Total supply is forecast to increase by 17% due to higher carry-in stocks. Exports are forecast at 265 Kt, with the US and the EU as the top markets. Carry-out stocks are expected to rise sharply, largely due to increased supply. The average price is forecast to be similar to the previous year, at $520/t, due to expectations for similar world production, with below-average Canadian crop quality.

The USDA has estimated US chickpea area seeded at 0.43 million acres (0.17 Mha), 20% lower than in 2025-26. With above-average yields, 2026-27 US chickpea production is forecast by the USDA at 0.265 Mt, down 15% from 2025-26.

**Mustard Seed**

**For 2026-27**, production is estimated to have risen by 18 Kt to 158 Kt, due to higher area and yields. Production of yellow, brown, and oriental types of mustard seed increased. Total supply is forecast to rise to 314 Kt. Exports are expected to be unchanged at 100 Kt and, as of August and September, the US and the EU are the top two markets. Carry-out stocks are forecast to rise in Canada and the US. The average price is forecast to fall from 2025-26 to $845/t.

**Canary Seed**

**For 2026-27,** production is estimated to decrease sharply to 142 Kt as lower seeded area and yields combine. Exports are expected to be higher than the previous year, despite slightly lower supply as higher carry-in stocks partly offset reduced production. Based on data for August and September, Mexico and the EU are the top two export markets, followed by the US. Carry-out stocks are expected to fall. The average price is forecast to be unchanged from last year at $435/t.

**Sunflower Seed**

**For 2026-27,** production is estimated to have risen to 72 Kt on higher harvested area, more than offsetting lower yields. When compared to 2025-26, supply is expected to increase to 255 Kt, as higher carry-in stocks combine with increased production. Exports are forecast to be higher than the previous year, and carry-out stocks are forecast to decrease. The US is expected to remain Canada's main export market for sunflower seed. The average price is forecast to be $765/t, 10% higher than last year, mostly due to stronger oilseed-type prices than in 2025-26.

US sunflower seed production for 2026-27 is forecast by AAFC at 1.05 Mt, down marginally from 2025-26. This is largely due to lower production in North Dakota. Production of oil-type varieties is estimated to have fallen to 0.96 Mt, and the production of confectionery-type varieties is estimated to have been higher at 0.09 Mt. However, total US supply is expected to increase by 3% to 1.36 Mt. Domestic use is expected to rise. US sunflower seed carry-out stocks are expected to rise and pressure North American sunflower seed prices.

The world supply of sunflower seed for 2026-27 is estimated by the USDA at 69.7 Mt. This is 12% higher than last year, due to increased production in Russia and Ukraine. World domestic use is expected to rise to a record 61.4 Mt, and world exports are forecast to decrease to 3.9 Mt. World carry-out stocks are expected to be 45% higher than the previous year at 4.5 Mt.

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# CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

**November 19, 2026**

| 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** | | | | | | | | | | | | |
| 2024-2025 | 2,576 | 2,565 | 2.49 | 6,380 | 5 | 7,054 | 5,821 | 193 | 277 | 722 | 512 | 321 |
| 2025-2026 | 2,643 | 2,593 | 2.82 | 7,305 | 8 | 7,825 | 5,845 | 220 | 433 | 878 | 1,102 | 282 |
| 2026-2027f | 2,371 | 2,309 | 2.78 | 6,417 | 5 | 7,524 | 5,400 | 220 | 425 | 874 | 1,250 | 290 |
| **Wheat Except Durum** | | | | | | | | | | | | |
| 2024-2025 | 8,259 | 8,087 | 3.66 | 29,559 | 80 | 34,279 | 23,399 | 3,351 | 2,947 | 7,151 | 3,728 | 282 |
| 2025-2026 | 8,297 | 8,022 | 4.15 | 33,257 | 166 | 37,151 | 23,860 | 3,513 | 3,415 | 7,747 | 5,544 | 269 |
| 2026-2027f | 7,951 | 7,712 | 3.85 | 29,705 | 100 | 35,348 | 23,550 | 3,200 | 3,671 | 7,698 | 4,100 | 295 |
| **All Wheat** | | | | | | | | | | | | |
| 2024-2025 | 10,835 | 10,652 | 3.37 | 35,939 | 85 | 41,333 | 29,220 | 3,543 | 3,224 | 7,873 | 4,240 | |
| 2025-2026 | 10,940 | 10,615 | 3.82 | 40,562 | 174 | 44,976 | 29,705 | 3,733 | 3,848 | 8,625 | 6,646 | |
| 2026-2027f | 10,322 | 10,021 | 3.60 | 36,122 | 105 | 42,872 | 28,950 | 3,420 | 4,097 | 8,572 | 5,350 | |
| **Barley** | | | | | | | | | | | | |
| 2024-2025 | 2,592 | 2,394 | 3.40 | 8,144 | 169 | 9,464 | 2,842 | 93 | 5,067 | 5,373 | 1,249 | 296 |
| 2025-2026 | 2,483 | 2,277 | 4.27 | 9,725 | 153 | 11,127 | 4,181 | 305 | 5,467 | 6,006 | 940 | 283 |
| 2026-2027f | 2,743 | 2,477 | 3.92 | 9,713 | 120 | 10,773 | 3,700 | 305 | 5,628 | 6,173 | 900 | 305 |
| **Corn** | | | | | | | | | | | | |
| 2024-2025 | 1,478 | 1,449 | 10.59 | 15,345 | 1,828 | 19,169 | 2,776 | 5,848 | 8,946 | 14,810 | 1,584 | 225 |
| 2025-2026 | 1,531 | 1,460 | 10.18 | 14,867 | 2,112 | 18,563 | 1,194 | 5,847 | 9,770 | 15,634 | 1,735 | 233 |
| 2026-2027f | 1,604 | 1,559 | 10.61 | 16,549 | 2,000 | 20,284 | 2,400 | 5,900 | 9,868 | 15,784 | 2,100 | 245 |
| **Oats** | | | | | | | | | | | | |
| 2024-2025 | 1,174 | 993 | 3.38 | 3,358 | 16 | 4,044 | 2,565 | 75 | 795 | 972 | 507 | 345 |
| 2025-2026 | 1,213 | 1,049 | 3.74 | 3,920 | 14 | 4,441 | 2,407 | 83 | 1,287 | 1,457 | 577 | 307 |
| 2026-2027f | 1,030 | 840 | 3.61 | 3,031 | 20 | 3,628 | 2,300 | 90 | 740 | 928 | 400 | 350 |
| **Rye** | | | | | | | | | | | | |
| 2024-2025 | 183 | 117 | 3.60 | 421 | 1 | 513 | 154 | 39 | 153 | 216 | 143 | 165 |
| 2025-2026 | 276 | 156 | 3.94 | 613 | 1 | 757 | 168 | 45 | 161 | 227 | 362 | 142 |
| 2026-2027f | 236 | 118 | 3.33 | 394 | 2 | 758 | 203 | 45 | 212 | 275 | 280 | 150 |
| **Mixed Grains** | | | | | | | | | | | | |
| 2024-2025 | 149 | 62 | 2.46 | 152 | 0 | 152 | 0 | 0 | 152 | 152 | 0 | |
| 2025-2026 | 123 | 68 | 2.69 | 184 | 0 | 184 | 0 | 0 | 184 | 184 | 0 | |
| 2026-2027f | 144 | 65 | 2.65 | 172 | 0 | 172 | 0 | 0 | 172 | 172 | 0 | |
| **Total Coarse Grains** | | | | | | | | | | | | |
| 2024-2025 | 5,575 | 5,015 | 5.47 | 27,419 | 2,014 | 33,342 | 8,337 | 6,054 | 15,113 | 21,523 | 3,482 | |
| 2025-2026 | 5,626 | 5,010 | 5.85 | 29,309 | 2,281 | 35,071 | 7,949 | 6,280 | 16,868 | 23,507 | 3,615 | |
| 2026-2027f | 5,757 | 5,059 | 5.90 | 29,860 | 2,142 | 35,616 | 8,603 | 6,340 | 16,621 | 23,333 | 3,680 | |
| **Canola** | | | | | | | | | | | | |
| 2024-2025 | 8,908 | 8,846 | 2.17 | 19,239 | 131 | 22,595 | 9,379 | 11,412 | 143 | 11,619 | 1,597 | 677 |
| 2025-2026 | 8,757 | 8,705 | 2.55 | 22,227 | 109 | 23,934 | 8,956 | 12,891 | 130 | 13,089 | 1,889 | 711 |
| 2026-2027f | 9,490 | 9,406 | 2.34 | 22,051 | 130 | 24,069 | 7,700 | 14,000 | 450 | 14,501 | 1,868 | 805 |
| **Flaxseed** | | | | | | | | | | | | |
| 2024-2025 | 204 | 201 | 1.28 | 258 | 8 | 431 | 228 | N/A | 57 | 69 | 134 | 630 |
| 2025-2026 | 251 | 249 | 1.82 | 454 | 7 | 596 | 284 | N/A | 88 | 100 | 212 | 625 |
| 2026-2027f | 269 | 257 | 1.50 | 386 | 10 | 607 | 275 | N/A | 100 | 111 | 221 | 600 |
| **Soybeans** | | | | | | | | | | | | |
| 2024-2025 | 2,324 | 2,303 | 3.38 | 7,795 | 267 | 8,667 | 5,531 | 1,678 | 430 | 2,354 | 783 | 487 |
| 2025-2026 | 2,363 | 2,344 | 2.98 | 6,989 | 385 | 8,157 | 5,261 | 1,757 | 528 | 2,534 | 362 | 552 |
| 2026-2027f | 2,412 | 2,391 | 3.12 | 7,456 | 400 | 8,218 | 5,400 | 1,750 | 468 | 2,418 | 400 | 580 |
| **Total Oilseeds** | | | | | | | | | | | | |
| 2024-2025 | 11,435 | 11,350 | 2.40 | 27,292 | 407 | 31,693 | 15,138 | 13,090 | 630 | 14,041 | 2,514 | |
| 2025-2026 | 11,370 | 11,298 | 2.63 | 29,671 | 501 | 32,687 | 14,501 | 14,647 | 746 | 15,723 | 2,463 | |
| 2026-2027f | 12,171 | 12,054 | 2.48 | 29,892 | 540 | 32,895 | 13,375 | 15,750 | 1,018 | 17,030 | 2,490 | |
| **Total Grains And Oilseeds** | | | | | | | | | | | | |
| 2024-2025 | 27,845 | 27,017 | 3.36 | 90,650 | 2,505 | 106,368 | 52,696 | 22,688 | 18,967 | 43,437 | 10,236 | |
| 2025-2026 | 27,936 | 26,923 | 3.70 | 99,542 | 2,956 | 112,734 | 52,156 | 24,660 | 21,462 | 47,856 | 12,723 | |
| 2026-2027f | 28,250 | 27,134 | 3.53 | 95,873 | 2,787 | 111,383 | 50,928 | 25,510 | 21,735 | 48,935 | 11,520 | |

**(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:** For 2026-27, all forecasts are by AAFC except for area, yield, and production, which are STC.

# CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

Unclassified | Non classifié

**November 19, 2026**

| 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** | | | | | | | | | | | |
| 2024-2025 | 1,300 | 1,281 | 2.34 | 2,997 | 39 | 3,335 | 2,177 | 670 | 489 | 17% | 405 |
| 2025-2026 | 1,420 | 1,383 | 2.85 | 3,934 | 13 | 4,436 | 2,659 | 595 | 1,182 | 36% | 300 |
| 2026-2027f | 1,227 | 1,194 | 2.73 | 3,260 | 20 | 4,462 | 2,800 | 652 | 1,010 | 29% | 320 |
| **Lentils** | | | | | | | | | | | |
| 2024-2025 | 1,704 | 1,693 | 1.44 | 2,431 | 126 | 2,722 | 1,822 | 339 | 561 | 26% | 790 |
| 2025-2026 | 1,772 | 1,743 | 1.93 | 3,363 | 50 | 3,974 | 2,416 | 274 | 1,284 | 48% | 500 |
| 2026-2027f | 1,579 | 1,556 | 1.59 | 2,467 | 75 | 3,825 | 2,400 | 280 | 1,145 | 43% | 535 |
| **Dry Beans** | | | | | | | | | | | |
| 2024-2025 | 163 | 160 | 2.65 | 424 | 71 | 510 | 402 | 73 | 35 | 7% | 1,075 |
| 2025-2026 | 172 | 171 | 2.55 | 438 | 60 | 533 | 406 | 72 | 55 | 12% | 830 |
| 2026-2027f | 147 | 136 | 2.61 | 354 | 70 | 479 | 400 | 74 | 5 | 1% | 1,020 |
| **Chickpeas** | | | | | | | | | | | |
| 2024-2025 | 194 | 194 | 1.48 | 287 | 43 | 360 | 210 | 88 | 62 | 21% | 735 |
| 2025-2026 | 219 | 218 | 2.21 | 482 | 32 | 576 | 258 | 82 | 236 | 70% | 520 |
| 2026-2027f | 216 | 211 | 1.90 | 400 | 40 | 676 | 265 | 86 | 325 | 92% | 520 |
| **Mustard Seed** | | | | | | | | | | | |
| 2024-2025 | 245 | 243 | 0.79 | 192 | 8 | 288 | 91 | 54 | 143 | 98% | 860 |
| 2025-2026 | 146 | 145 | 0.97 | 140 | 7 | 289 | 100 | 41 | 148 | 105% | 865 |
| 2026-2027f | 153 | 149 | 1.06 | 158 | 8 | 314 | 100 | 44 | 170 | 118% | 845 |
| **Canary Seed** | | | | | | | | | | | |
| 2024-2025 | 118 | 118 | 1.57 | 185 | 0 | 230 | 133 | 13 | 84 | 58% | 685 |
| 2025-2026 | 129 | 129 | 1.82 | 235 | 0 | 319 | 148 | 12 | 159 | 99% | 435 |
| 2026-2027f | 96 | 94 | 1.52 | 142 | 0 | 301 | 155 | 11 | 135 | 81% | 435 |
| **Sunflower Seed** | | | | | | | | | | | |
| 2024-2025 | 24 | 24 | 2.13 | 51 | 25 | 251 | 36 | 64 | 151 | 151% | 720 |
| 2025-2026 | 31 | 29 | 2.40 | 69 | 28 | 248 | 31 | 59 | 158 | 176% | 695 |
| 2026-2027f | 35 | 31 | 2.30 | 72 | 25 | 255 | 35 | 65 | 155 | 155% | 765 |
| **Total Pulse And Special Crops (c)** | | | | | | | | | | | |
| 2024-2025 | 3,749 | 3,712 | 1.77 | 6,568 | 312 | 7,696 | 4,871 | 1,300 | 1,525 | | |
| 2025-2026 | 3,890 | 3,818 | 2.27 | 8,661 | 189 | 10,375 | 6,018 | 1,135 | 3,221 | | |
| 2026-2027f | 3,452 | 3,370 | 2.03 | 6,853 | 238 | 10,312 | 6,155 | 1,212 | 2,945 | | |

**(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:** For 2026-27, all forecasts are by AAFC except for area, yield, and production, which are STC.