Agriculture and Agri-Food Canada Agriculture et Agroalimentaire Canada

CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS, 2026 June 19, 2026

Market Analysis Group / Crops and Horticulture Division
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This report is an update to Agriculture and Agri-Food Canada's (AAFC) May Outlook report for the 2025-26 and 2026-27 crop year, based on information and international trade policies in effect up to June 12, 2026. In Canada, the crop year begins on August 1 and ends on July 31 for most crops; for corn and soybeans, the crop year begins on September 1 and ends on August 31. Market volatility persists across the grain sector, with ongoing geopolitical pressures driving production costs higher and raising the likelihood of interruptions to transportation networks and supply chains.

For 2025-26, the report incorporates Statistics Canada's (STC) March 31, 2026, stocks data, showing total stocks of principal field crops up 15.4% year-over-year and 19.3% above the 2021-25 average. Supplies of principal field crops grew 7% in 2025-26 following a record harvest. Canadian products continue to move swiftly through the licensed elevator system with total producer deliveries to date up 6% compared to the previous year, according to the Canadian Grain Commission (CGC). Meanwhile, shipments to international destinations trail last year's volumes and total Canadian exports are forecast to drop 1% in 2025-26 compared to the previous year. Closing stocks are forecast to grow 50% from 2024-25 on strong production and lower exports year-over-year. Prices for most crops are seen lower in 2025-26 as ample supplies and subdued trade weigh on prices, except for corn, canola, soybeans, and mustard seed, which are posting mild to moderate gains.

For 2026-27, the Outlook incorporates Statistics Canada's March 5, 2026, crop area estimates showing that farmers intend to seed less field crops in 2026 compared to last season, resulting in a 10% drop in production. As of the first week of June, seeding across Canada is advancing well, with some areas reaching completion as producers begin to focus on crop maintenance. According to the Canadian Drought Monitor, precipitation was highly variable across the country over the month of May. Much of British Columbia, western Alberta, and the southern Prairies remained drier than normal, while eastern Alberta and parts of Manitoba were wetter. Overall, as of May 31, 2026, 25% of the country, including 21% of agricultural land, was rated Abnormally Dry or in Drought, except for Atlantic Canada, which received well above normal precipitation.

Production of field crops is forecast 10% lower year-over-year, assuming trend yields which remain sensitive to any extreme weather. Supplies are forecast to drop only 4%, bolstered by large inventories. Domestic use is expected to grow 1% while trade remains subdued, dropping 4% on reduced demand from some key import regions. The total volume of stocks is projected to drop 19% but remain relatively comfortable. Prices are seen steady to higher in 2026-27 except for flaxseed, chickpeas, mustard seed, canary seed, and sunflower seed.

The next AAFC Outlook for Principal Field Crops is scheduled for release on July 20, 2026. STC will release its next seeded area estimates on June 30, 2026, based on survey data collected in late May and early June.

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	27,831	27,004	3.35	90,462	2,506	106,072	52,686	43,692	9,694
2025-2026f	27,907	26,894	3.66	98,321	2,825	110,839	51,272	45,725	13,842
2026-2027f	28,034	27,008	3.32	89,661	3,007	106,510	49,007	46,350	11,152
Total Pulse And Special Crops									
2024-2025	3,749	3,712	1.77	6,568	311	7,700	4,870	1,301	1,530
2025-2026f	3,890	3,818	2.27	8,661	205	10,396	5,915	1,286	3,195
2026-2027f	3,618	3,560	1.78	6,328	239	9,762	5,865	1,242	2,655
All Principal Field Crops									
2024-2025	31,580	30,716	3.16	97,029	2,817	113,772	57,555	44,993	11,224
2025-2026f	31,797	30,712	3.48	106,981	3,030	121,235	57,187	47,011	17,037
2026-2027f	31,652	30,568	3.14	95,989	3,246	116,272	54,872	47,592	13,807

Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
f: forecasts by AAFC except for area, yield and production for 2025-26 and seeded area for 2026-27, which are STC.

All Wheat

Durum

For 2025-26, the Canadian durum supply is 8% larger than the previous year due to an increase in seeded area accompanied by higher yields. According to Statistics Canada (STC), production is estimated at 7.1 million tonnes (Mt) with a national yield of 2.8 tonnes per hectare (t/ha), up from 2.5 t/ha in 2024-25.

The pace of durum exports is now relatively on par with last year's volume according to STC; the forecast has been raised 100 thousand tonnes (Kt) to 5.6 Mt. For this marketing year, to April 2026, exports of durum are reported at 4.4 Mt, with strong demand from Turkey (+167 Kt year-on-year), Nigeria (+47 Kt), China (+37 Kt), Mexico (+37 Kt), and Algeria (+34 Kt), more than outweighing reduced demand from Morocco, the US, and Japan. Exports to Italy, a prime customer of Canadian durum, is relatively stable year-on-year. The Canadian Grain Commission (CGC) reports weekly exports to the end of May outpacing last year's volume by 1%. Domestic use is forecast at 0.7 Mt, while stocks were reduced to 1.3 Mt.

Internationally, world durum production in 2025-26 rose 4% to 38.2 Mt, a nine-year high with increased harvests in North America and North Africa, according to the International Grains Council (IGC). World consumption is forecast to climb 2% to 36.5 Mt, with higher food use outweighing the decline in feed use. Trade is expected to decrease by 4% to 8.8 Mt with reduced import demand from Algeria and the EU. Stocks are expected to expand to 9.1 Mt, including 3.5 Mt of inventories in major exporting nations.

The average producer spot price for Canadian Western Amber Durum, no. 1, 13% protein (CWAD, 1, 13) in Saskatchewan for 2025-26 remains unchanged at $280/tonne.

For 2026-27, area seeded to durum is forecast to drop 2% to 2.6 million hectares (Mha), according to STC. Assuming average yields, production is forecast at 5.8 Mt and supply at 7.1 Mt, down 7% from 2025 and 1% lower than last month's report due to reduced opening stocks. The seeded area and accompanying forecasts for production and supply will be revised next month after the release of STC's update to seeded area on June 30, 2026.

Favourable weather over the past few weeks has helped farmers advance durum seeding progress in Alberta and Saskatchewan. As of June 1, Saskatchewan farmers have completed 90% of intended durum acres, according to the provincial crop report. In Alberta, durum seeding is fully complete at 100%. Recent widespread rains have also improved surface and sub-surface moisture across key durum-growing regions in both provinces.

Exports remain unchanged at 5.3 Mt, down 5% year-on-year, with reduced demand from key importers in North Africa. Domestic use is pegged at 0.5 Mt and closing stocks at 1.3 Mt, unchanged from last season.

Globally, the IGC projects 2026-27 global durum production to reach a new high of 39 Mt under improved harvest outlooks in Algeria and Morocco, where favourable weather has helped boost yields. With growing food demand, global use is projected to reach a 10-year high of 37.4 Mt with a 3% increase in food use and a bump in feed use. Trade will likely remain subdued under reduced import demand from North Africa and Turkey. Global stocks will rise again in 2026-27, with stocks in major exporters increasing 5% to 3.7 Mt.

The 2026-27 average producer spot price for CWAD, 1, 13% in Saskatchewan is forecast to remain steady at $280/tonne, under pressure from ample supplies and reduced global trade.

Wheat (excluding durum)

For 2025-26, the Canadian supply of wheat (excluding durum), is estimated at 36.6 Mt, up 7% year-on-year, and 15% above average levels. Canada produced 32.8 Mt of wheat in 2025, the largest crop on record.

Exports continue to move swiftly to international destinations, outpacing last year's volume by 3%

according to STC. For this year to-date (April 2026), exports are reported at 16.9 Mt, compared to 16.5 Mt over the same period last year, with increased demand from China (+782 Kt), Bangladesh (+235 Kt), Ecuador (+230 Kt), South Africa (+106 Kt), Vietnam (+94 Kt), Sri Lanka (+77 Kt), and Spain (+74 Kt). The CGC reports weekly exports, to the end of May, are also outpacing last year's volume by 3%. The 2025-26 forecast was increased to 23.4 Mt, relatively on par with last year's record volume. Total domestic use is pegged at average levels and closing stocks at 5.5 Mt, 52% more than opening levels.

According to the United States Department of Agriculture (USDA), global production of wheat, including durum, was 844.4 Mt in 2025, up 6% from the previous year, thanks to abundant harvests in many leading wheat producing nations. Total consumption is projected to grow 2% year-on-year while trade is forecast to grow 8% on higher demand from China, Bangladesh, North Africa, the Middle East, and Southeast Asia. With the increased supply globally, closing stocks are pegged at just over 279.9 Mt, 8% more than opening levels.

The average producer spot price for Canadian western red spring wheat, no. 1, 13.5% protein (CWRS, 1 13.5%) in Saskatchewan remains unchanged at $265/tonne.

For 2026-27, farmers intend to seed 1% less wheat; assuming average yields, production is forecast to decline 12% to 28.8 Mt. Supply is forecast at 34.4 Mt bolstered by comfortable stocks. The seeded area and accompanying forecast for production and supply will be revised next month, following the release of STC's area report on June 30. The majority of spring wheat, the most common type of wheat grown in Canada, is produced in the Prairies. At the time of writing, 85% of spring wheat has been seeded in Saskatchewan, 96% in Alberta, and is close to complete in most of Manitoba, except in the northwest where intense precipitation and storms hindered progress.

Exports in 2026-27 are forecast to drop slightly under reduced import demand from some key regions. Domestic use is forecast at 7.0 Mt, down 11% year-on-year, and stocks at 4.3 Mt, down 22% year-on-year.

Internationally, the USDA forecasts a contraction in production in 2026-27 with smaller harvests in all major wheat producing and exporting nations. The most pronounced declines are forecast for Argentina (-24%), the US (-22%), and Australia (-22%). Total consumption was raised from last month's report on increased feed and residual use, primarily in Russia. It is forecast to reach 824.6 Mt, just marginally higher than in 2025-26. Trade is expected to contract 7% to 212 Mt, with reduced import demand from North Africa, the Middle East, and Southeast Asia. Global ending stocks are pegged at 275.4 Mt, down 2% from last season.

The average producer spot price for CWRS, 1, 13.5% in Saskatchewan is forecast to rise to $295/tonne, supported by lower exportable supplies in major exporting nations, but gains will likely be limited by subdued trade.

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Coarse Grains

Barley

For 2025-26, the Canadian barley supply is estimated at approximately 11.1 million tonnes (Mt), up sharply year-over-year (y/y), supported by both larger carry-in stocks (which sit at an eight-year high) and significantly stronger production, despite a decline in imports. Supply for 2025-26 also remains significantly above the five-year average. The abundant supplies are expected to encourage both domestic feed consumption and exports. Carry-out stocks are projected at 1.1 Mt, down notably from the previous season's 1.3 Mt but well above the five-year average of 0.9 Mt.

According to Statistics Canada's (STC) monthly trade data, exports of raw barley grain during the first nine months of the crop year (August – April) reached nearly 2.9 Mt (+68% y/y; +35% versus the five-year average), with China accounting for nearly 60% of total shipments, followed by Japan, Saudi Arabia, and the US. Exports of barley product (in grain equivalent) over the same period reached almost 0.5 Mt (-9% y/y; -9% versus average), with the US representing about 60% of total shipments, followed by Japan, Mexico, and South Korea.

The 2025-26 Lethbridge average feed barley price is projected at $285/tonne (/t), down roughly $10/t from 2024-25 and approaching its lowest level in five years.

For 2026-27, Canadian farmers plan to increase barley acreage, according to STC's first area report for the upcoming growing season. Nationwide, barley area to be seeded in 2026 is projected at 2,607 thousand hectares (Kha), up 5% y/y, reflecting stronger interest in the crop across much of Western Canada, particularly in Alberta and Saskatchewan, despite a slight decline in Manitoba. Nevertheless, the planned 2026 area is 9% below the previous five-year average. By province, Alberta remains the largest barley-growing region, accounting for almost 55% of total barley acreage in 2026. Saskatchewan follows with over 35%, Manitoba with 5%, and the remainder spread across other provinces.

Production is projected at 8.3 Mt, a noticeable decrease from last season, due to a return to average yields that would be significantly lower than the record highs achieved in the previous season, despite expectations for a larger area. Total supply is projected at 9.5 Mt, down significantly y/y, primarily due to lower production and carry-in stocks, with imports expected to be unchanged. Total domestic use, specifically feed use, and exports are projected to decline, driven by reduced supplies. Carry-out stocks are projected to fall sharply to 0.7 Mt, largely as a result of the smaller anticipated crop.

The 2026-27 Lethbridge average price is projected at $295/t, up $10/t y/y.

Globally, the United States Department of Agriculture (USDA) projects 2026-27 barley production at 155 Mt, up slightly y/y, despite lower combined output among major exporters. Trade is anticipated to be subdued in the year, while total consumption strengthens. Ending stocks are forecast at over 21 Mt, slightly higher than the previous season and well above the previous five-year average.

Corn

For 2025-26, Canadian corn supply is projected at 18.6 Mt, down modestly y/y, mainly due to significantly lower carry-in stocks and reduced production, despite expected notable increase in imports. Total domestic use is expected to increase y/y on modest increases in food consumption, industrial use, and feed use. Exports are expected to decline sharply. Carry-out stocks are projected at 1.8 Mt, up noticeably from the previous season's 1.6 Mt but well below the five-year average of 2.0 Mt.

Imports during the first eight months of the crop year (September – April) totaled nearly 1.4 Mt (+18% y/y; -31% versus average), with the US supplying almost all shipments. Exports over the same period reached almost 0.8 Mt (-59% y/y; -40% versus average), with Ireland taking nearly 50% of the total volume, followed by the US and several countries in Western Europe.

The 2025-26 Chatham average corn price is projected at $230/t, up $5/t from 2024-25 and the highest in three years.

For 2026-27, Canadian farmers plan to increase corn acreage slightly. Nationwide, area seeded to corn in 2026 is projected at 1,557 Kha, up 2% y/y, driven by stronger growing interest in Ontario, even as acreage declines in Quebec and Manitoba. If realized, the 2026 area would be 4% above the five-year average and marginally surpass the record high set in 2023-24. By province, Ontario remains the dominant corn-growing region, accounting for nearly 60% of the total national area, followed by Quebec at just over 20%, Manitoba at 15%, and the remainder spread across the other provinces.

Production is expected to increase notably y/y to 15.6 Mt, reflecting expectations for larger area and improved yields. Combined with higher anticipated carry-in stocks and imports, total supply is projected to increase to 19.6 Mt. Total domestic use is expected to increase, driven mainly by higher feed use. Exports are forecast to increase, mainly supported by larger exportable supplies. Carry-out stocks are projected to increase noticeably to 2.0 Mt, largely reflecting the expanded production.

The 2026-27 Chatham average corn price is projected at $240/t, up $10/t y/y.

Globally, the USDA projects 2026-27 corn production at 1,300 Mt, down 2% y/y but still well above the five-year average. US production is forecast to decline significantly, followed by Argentina, Mexico, and Ukraine. In contrast, China and Brazil are forecast to post a y/y increase, each reaching record highs. EU production is expected to rise slightly but remain well below the five-year average. Trade is expected to remain active, while total demand is also expected to increase. Ending stocks are projected at over 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 below US$175/t, up US$10/t y/y and the highest in three years.

Oats

For 2025-26, Canadian oat supply is estimated at about 4.45 Mt, up significantly y/y, primarily due to the greater output, despite significantly lower carry-in stocks. This level is close to the five-year average. Total domestic use is expected to rise y/y on stronger feed demand, supported by abundant available supplies, while exports are expected to slow down compared with both last year and the five-year average. Carry-out stocks are projected at 0.8 Mt, up sharply y/y and notably above the five-year average.

Exports of raw oat grain during the first nine months of the crop year (August – April) were nearly 1.2 Mt (-7% y/y; -10% versus average), with the US accounting for almost 80% of total shipments, followed by Mexico, South Africa, Japan, Peru, and various other countries and regions. Exports of oat product (in grain equivalent) over the same period reached almost 0.7 Mt (-6% y/y; -5% versus average), with the US accounting for nearly 95% of total shipments, followed by Mexico, Japan, and South Korea.

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

For 2026-27, Canadian farmers plan to reduce oat acreage, according STC. Nationally, oat area to be seeded in 2026 is projected at 1,175 Kha, down 3% y/y, reflecting declining interest in the crop across much of Western Canada, particularly in Saskatchewan and Alberta, despite a slight expansion anticipated in Manitoba. Overall, Canadian oat acreage has fallen noticeably since 2023, and the planned 2026 area is 10% below the previous five-year average. By province, Saskatchewan remains the largest oat-growing region, representing over 40% of total oat acreage in 2026. Alberta follows with over 25%, Manitoba with 20%, and the remainder spread across other provinces.

Production is projected at 3.38 Mt, a noticeable decrease from last season, due to a return to average yields along with a smaller expected seeded area. Supply is projected at 4.2 Mt, down 6% y/y, due to the reduction in output only partly offset by significantly higher carry-in stocks. Total domestic use is expected to decrease y/y on lower feed use, while exports remain steady. Carry-out stocks are projected to fall notably y/y to 0.6 Mt.

The 2026-27 CBOT oat price is projected at $315/t, up $10/t y/y.

Internationally, the USDA projects 2026-27 oat production at almost 23 Mt, down notably y/y, with the vast majority of the decline concentrated among key exporters. Trade is expected to slow compared with the previous season. Total consumption is also projected to decline. Ending stocks are forecast to decline to about 3.5 Mt, marking a significant decline from the previous season but remaining well above the five-year average.

Rye

For 2025-26, Canadian rye supply is estimated at about 758 thousand tonnes (Kt), a sharp increase from both the previous season and the five-year average, also the highest in more than three decades. The abundant supply is expected to support domestic use, while exports remain steady. Carry-out stocks are forecast at 320 Kt, rising sharply y/y and also the highest in more than three decades.

Exports during the first nine months of the crop year (August – April) were nearly 130 Kt (-1% y/y; -9% versus average), with the US accounting for almost all shipments.

The 2025-26 Prairie average rye price is projected at $155/t, down $10/t from 2024-25.

For 2026-27, Canadian rye acreage is estimated at 233 Kha, down 16% y/y but still 8% above the five-year average. Of this, 229 Kha was seeded to fall rye last autumn for harvest in late summer 2026. Western Canada makes up almost 60% of the total area, with the rest in the East.

Production is projected at 475 Kt, down sharply y/y due to a return to average yields and a smaller seeded area. However, supported by heavy carry-in stocks, total supply is projected to increase from the previous year's already historically ample level, remaining the highest in more than three decades. The abundant supply is expected to support domestic feed use and exports. Carry-out stocks are projected to decrease from the previous year's multi-decade high to 300 Kt.

The 2026-27 Prairie average rye price is projected at $155/t, unchanged y/y.

The USDA projects 2026-27 US rye production at just over 280 Kt, down notably y/y. Imports are projected to increase significantly but remain relatively low compared with the past several years. Demand is expected to rise slightly, while ending stocks are projected to hold steady at 20 Kt.

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Oilseeds

Canola

For 2025-26, total supply is forecast at 23.4 million tonnes (Mt), up 4% from last year and 13% above the five-year average of 20.8 Mt, as record production offsets sharply lower carry-in. Imports remain forecast at 115 thousand tonnes (Kt), down moderately from last year.

On the demand side, total domestic use was adjusted lower this month on a lower estimation for feed, waste, and dockage (residual). Now forecast at 12.3 Mt, this would still be 5% higher than last year and 14% higher than average, largely on record crush expectations. For the crop year to the end of April, Statistics Canada (STC) reports that domestic crush slowed from March's peak, bringing total crush to 9.2 Mt; despite the lower volume processed, the crush pace is now 5% ahead of last year, up 2 points from the previous Outlook report. Canola oil and meal production for the crop year-to April stand at 3.85 Mt and 5.34 Mt, respectively. Total crush for 2025-26 remains forecast at a record 12.1 Mt, up 6% year-over-year (y/y) and 18% above the five-year average of 10.3 Mt.

According to the Canadian Grain Commission (CGC), canola exports for the crop year to Week 43 lag last year by 13%. Despite the slower pace, this is an improvement of 4 points from the May Outlook. Export volumes from January to now have been strong, given the improved market access to China and strong demand this marketing year from other destinations such as the EU, Japan, Mexico, and Pakistan. CGC exports show canola movement reached a crop-year high of 1.1 Mt in May, up 24% from April. With just two months left in the 2025-26 crop year, total exports have been adjusted 100 Kt higher to 8.4 Mt. If realized, this would be 10% lower than last year but 5% ahead of the five-year average of 8.0 Mt. Total carry-out is projected to rise sharply from last year, at 2.7 Mt, thanks to record production.

The simple average price forecast, No.1 Track Vancouver, remains unchanged at $690/tonne (/t), up 2% from last year but 15% below the average.

Key factors to observe are: (i) domestic export pace, (ii) US soybean and soy-product futures, (iii) domestic crush volumes, (iv) monetary policy and status of the Canadian dollar, (v) year-end inventories and pipeline reserves, (vi) volatility of energy and veg-oil markets as a result of heightened geopolitical tensions abroad.

For 2026-27, the area seeded to canola is projected by STC at 8.8 million hectares (Mha), up slightly from last year and virtually on par with the average. This projection is based off farmer surveys conducted from mid-December 2025 to mid-January 2026, notably pre-conflict in Iran and prior to variable seeding conditions across the Prairies. Final area will not be known until STC releases their Principal Field Crop Areas on June 30, 2026, which is based on farmer surveys.

Seeding continues across Canada, with some regions experiencing delays this spring due to poor weather conditions and excess moisture. According to provincial agriculture reports as of the first week of June, canola planting in Alberta has reached 89% complete, Saskatchewan (73%), and Manitoba (60%). It is important to note that seeding can advance rapidly if conditions allow, and seeded area may well be near completion by the time the June Outlook reaches publication. At this time, the national yield and production forecasts remain unchanged until more information from STC is released at the end of the month. Yields are assumed to return to average after last year's record high, putting production lower from 2025 by 12%. Lower production offsets the rebound in carry-in, putting total supply 6% lower y/y at 22 Mt.

The demand side remains unchanged this month, with total domestic use projected at a record high of 13.2 Mt. Crush is projected at a new peak of 13 Mt on expanded processing capacity and anticipated strong demand, particularly for canola oil as a feedstock for renewable fuel and biofuel. If realized, this would be a 7% rise y/y and 22% higher than the five-year average of 10.6 Mt. At this time, total exports for 2026-27 are projected at 7.5 Mt, a moderate decline from the previous year but relatively on par with average. Total carry-out is projected at a tight 1.3 Mt, sharply below the previous year and well below the five-year average of 2.2 Mt.

The simple average price forecast, No.1 Track Vancouver, remains unchanged at $695/t, $5/t higher y/y but still below the average of $803/t.

Key factors to observe are: (i) domestic planting progress, (ii) domestic weather and growing conditions, (iii) condition of global rapeseed crops, (iv) how fertilizer availability and pricing impacts global rapeseed production, (v) US canola oil demand, (vi) any policy updates pertaining to trade of Canadian canola and products.

Flaxseed

For 2025-26, total supply is forecast at 596 Kt, up sharply from last year and the highest level in five years thanks to higher seeded area and strong production last season.

On the demand side, the forecast for total domestic use remains unchanged at 89 Kt, up 24% y/y but below the five-year average of 106 Kt. According to STC's most recent available data of grains supply and disposition, flaxseed exports for the crop year to March 31, 2026, have reached 167 Kt, 29% higher than the same period last year. At this time, the 2025-26 export program is forecast at 270 Kt, which would be notably above last year's 228 Kt but on par with the average. Total carry-out is projected to rise sharply higher at 237 Kt.

The simple average price forecast for flaxseed, No.1 in-store Saskatoon cash, has been raised $15/t this month to $605/t, following a stronger moving average for prices in the region. The price is 4% lower than last year and 19% below the five-year average of $732/t.

For 2026-27, the area seeded to flax is projected by STC at 305 thousand hectares, rising 22% from last year. To note, this projection is based on STC's farmer surveys back in December 2025 to January 2026, and final area will not be known until STC releases new data at the end of the month.

Seeding is nearing completion in flax-growing regions. According to provincial agriculture reports as of the first week of June, flax seeding is complete in Alberta, Saskatchewan is at 71% completion, and Manitoba reports the majority of flaxseed acres have been seeded. Yields are assumed to return to average after last year's record high, putting production at 400 Kt, 12% lower y/y but up 11% from average. Carry-in stocks are projected sharply higher and, combined with the expectation for solid production, puts total supply at a six-year high of 647 Kt.

On the demand side, total domestic use is forecast to rise 18% from last year to 104 Kt on higher feed, waste, and dockage, while other domestic use remains stable. For now, 2026-27 exports are projected at 275 Kt, rising 2% y/y and would be 21% higher than the five-year average of 227 Kt. Total carry-out is projected to climb to 268 Kt, the highest level in 11 years, if realized.

The simple average price forecast for flax, No.1 in-store Saskatoon, is projected at $600/t, $5/t lower than last year as strong anticipated export demand is pressured by larger supplies.

Soybeans

For 2025-26, total supply is forecast at 7.6 Mt, down 10% from last year as suboptimal growing conditions across Eastern Canada last season brought the national yield to a six-year low. Although total soybean supply is down on the year, it is still on par with the five-year average.

On the demand side, total domestic use is forecast at 1.95 Mt, down 21% from last year and the five-year average, on lower forecasts for crush and feed, waste, and dockage (residual). According to the latest available data from STC, soybean crush for the crop year to March 31, 2026, has reached just over 1 Mt, up 6% y/y but down slightly from the average. Total crush for 2025-26 remains forecast at 1.65 Mt. The forecast for total exports remains unchanged at 5.5 Mt, just under last year's volume and the third highest on record, if realized. Given the strong export program, coupled with solid crush, total carry-out is forecast at a tight 128 Kt.

The simple average soybean price forecast, track Chatham, is unchanged at $545/t. This is up 12% from last year but still below the five-year average of $608/t.

For 2026-27, the area seeded to soybeans is projected by STC at 2.38 Mha, up moderately from last year and 7% higher than the five-year average. Final seeded area will not be known until STC releases their farmer survey results at the end of June.

Soybean seeding continues across Eastern Canada, with intended area reaching 80% complete as of the first week of June in Ontario, according to Grain Farmers of Ontario, while reports indicate soybean planting in Quebec is virtually complete. Western Canadian soybean planting is also underway, with the Manitoba provincial government reporting 64% of the intended soybean crop planted as of the first week of June. The national yield and production forecasts are unchanged at this time until more information is known once STC releases seeded area data at the end of June. Production is projected at 7.5 Mt, up 10% from last year. Total supply is projected to rebound to 8.1 Mt, up 7% and 6% from last year and the five-year average, respectively.

On the demand side, total domestic use is forecast at 2.3 Mt, an 18% rise y/y on higher anticipated crush and feed, waste, and dockage (residual). At this time, crush is forecast at 1.75 Mt, a 6% rise y/y and just above the five-year average of 1.72 Mt. Total exports are projected to decline slightly y/y to 5.4 Mt. However, this projection would still be 11% higher than the average, as an anticipated rebound in supplies supports stronger export movement relative to historical levels. Carry-out stocks for the year are projected to rebound to 378 Kt.

The simple average soybean price, track Chatham, is forecast at $550/t. This would be slightly higher than the previous year but below the five-year average of $596/t.

In their June estimates, the United States Department of Agriculture (USDA) has maintained global oilseed production for 2026-27 at 718.2 Mt, anticipating higher sunflower production in Russia offset by lower soybean output for the nation. Oilseed trade remains projected at 217 Mt, a slight increase y/y, with higher soybean exports from Argentina offsetting lower estimates for Russian soybean exports. World oilseed use as been raised slightly from last month to 606.7 Mt. Global oilseed carry-out was raised on higher Russia sunflower and Argentina soybean year-end inventories, partially offset by lower EU canola/rapeseed carry-out. Given larger anticipated oilseed supplies (+2% y/y) and strong demand, global veg-oil output is projected to rise 3% y/y to 244.1 Mt. Veg-oil trade was adjusted slightly higher this month to 91.8 Mt. For soybeans, global production was lowered slightly this month on a reduction for harvested area in Russia. Global crush was lowered slightly this month; at 383.1 Mt, this would be a 3% rise y/y. The global soybean export projection was unchanged this month as higher exports from Argentina offset lower exports from Russia. Global carry-out has been adjusted slightly higher this month to 124.9 Mt. The US average soybean price estimate for 2026-27 is unchanged at US$11.40/bushel ($US419/t).

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Pulse and Special Crops

Dry Peas

For 2025-26, Canada's exports are expected to be higher than 2024-25 at 2.7 million tonnes (Mt), with higher imports from Pakistan, Bangladesh, China, and the US. For the August to April period, Canadian exports to the US are at 133 thousand tonnes (Kt), up sharply from last year for the same period, despite a larger US dry pea crop. Carry-out stocks in Canada are expected to be a record high, despite larger domestic use and higher export demand. The average dry pea price is expected to fall from the levels in 2024-25 for all dry pea types.

The price premium for green dry pea prices above yellow dry peas has been \$100/tonne (/t) compared to the \$208/t green pea premium observed in 2024-25. During the month of May, the yellow and green pea farmgate prices were unchanged, despite expectations for a decrease in Canadian green pea supply in 2026-27.

For 2026-27, Canadian dry pea seeded area is expected to fall 12% from 2025-26 to 1.25 million hectares (Mha), due to lower returns from the previous year. By province, Saskatchewan is expected to account for 48% of the dry pea area, Alberta 47%, with the remainder spread across Canada.

Production is expected to decrease to 2.95 Mt due to lower area but trend yields. Supply is forecast to fall by 11% due to the lower production offset by a record high carry-in stock estimate. Exports are forecast to be similar at 2.7 Mt, despite the decrease in supply. Carry-out stocks are forecast to fall to 0.61 Mt, sharply lower than the previous year. The average price is expected to be higher than in 2025-26.

In the US, area seeded to dry peas is forecast by the United States Department of Agriculture (USDA) to be unchanged at 1.17 million acres (0.475 million hectares (Mha)). This is largely due to an expected fall in North Dakota and a rise in Montana areas. Assuming average yields and abandonment, US dry pea production is forecast by AAFC to rise by 6% to 0.89 Mt. The US has been successful in exporting small amounts of green dry peas to China, the Philippines, and Canada. It is expected that the US will maintain its market share in 2026-27.

Lentils

For 2025-26, lentil exports are forecast to be sharply higher than 2024-25 at 2.3 Mt. The main markets are India, Turkey, and the United Arab Emirates. Carry-out stocks are forecast to increase to record levels. The average price, for all types and grades, is forecast to fall from the levels the year before. This is due to larger carry-out stocks and lower prices, particularly for large, medium, and small green lentil types. For the crop year, large green lentil prices are expected to maintain a premium of C\$50/t over red lentil prices. During May, Saskatchewan large green lentil prices rose \$5/t and red lentil farm gate prices increased by \$10/t.

For 2026-27, area seeded to lentils in Canada is expected to be 6% lower than the previous year at 1.67 Mha, due to the sharp fall in farmgate green lentil prices in the 2025-26 crop year. Saskatchewan is expected to account for 88% of the lentil area, with the remainder in Alberta and Manitoba. Production is forecast by AAFC to fall by 30% to 2.35 Mt. Supply is expected to fall only marginally to 3.84 Mt, as a result of decreased production partly offset by record high carry-in stocks. Exports are expected to be unchanged at 2.3 Mt. Carry-out stocks are forecast to be lower at 1.24 Mt. The average price is forecast to rise from 2025-26 due to lower world supply with higher prices for the top grades and the assumption of an average grade distribution.

In the US, the area seeded to lentils for 2026-27 is forecast by the USDA at 0.83 million acres (0.34 Mha), down 22% from 2025-26 due to lower area seeded in Montana and North Dakota. Assuming average yields and abandonment, US lentil production is forecast by AAFC to fall sharply to 375 thousand tonnes (Kt). The main US export markets for lentils continue to be the EU, Canada and Mexico.

Dry Beans

For 2025-26, dry bean exports are expected to rise to 410 Kt, marginally higher than the previous year. The US and the EU remain the main markets for Canadian dry beans, with smaller volumes exported to Japan and Mexico. The larger North American supply has resulted in lower Canadian prices. This has pressured US and Canadian dry bean prices throughout the 2025-26 crop year.

For 2026-27, the area seeded in Canada is forecast to decrease by 31% from 2025-26, mainly because of lower potential returns compared to other crops. By province, Ontario is expected to account for 34% of the dry bean area, Manitoba (41%), Alberta (17%), with the remainder seeded in Saskatchewan, Quebec, and the Maritimes. Production is expected to fall to 0.31 Mt. Supply is expected to fall despite larger carry-in stocks. Exports are forecast to decrease due to the lower supply. Carry-out stocks are expected to decrease to low levels. The average Canadian dry bean price is forecast to rise due to a smaller expected supply in North America, particularly for black and pinto bean types.

In the US, area seeded to dry beans is forecast by the USDA to fall by 10% to 1.24 million acres (0.5 Mha) mostly due to a decrease in area seeded in North Dakota and Michigan. Assuming average yields and abandonment, 2026-27 US total dry bean production (excluding chickpeas) is therefore forecast to fall to 1.09 Mt, down 11% from 2025-26.

Chickpeas

For 2025-26, Canadian chickpea exports are expected to rise to a record 240 Kt due to increased export demand from Pakistan, the US, and the EU. Carry-out stocks are expected to be burdensome. The average price is forecast to fall sharply from prices in the previous year.

For 2026-27, the area seeded is expected to increase by 6% from 2025-26 due to competitive producer returns in the previous year and strong export demand. By province, Saskatchewan is expected to account for the majority of the chickpea area with the remainder in Alberta. Production is forecast to fall to 340 Kt with a return to average yields. Supply is forecast to increase as lower production will be more than offset by large carry-in stocks. Exports are forecast to be lower and carry-out stocks are expected to rise for the fourth consecutive year. The average price is forecast to be lower due to higher world supply, with the expectation of an average grade distribution in 2026-27.

US chickpea area for 2026-27 is forecast by the USDA to decrease to 0.5 million acres (0.2 Mha), down 7% from the previous year. Assuming average yields and abandonment, 2026-27 US chickpea production is forecast by AAFC at 0.29 Mt, down 6% from 2025-26. The US is expected to continue to improve its market share in the EU and Pakistan.

Mustard Seed

For 2025-26, Canadian mustard exports are forecast at 95 Kt, up marginally from the previous year. The US and the EU have been the main export markets for Canadian mustard seed. Carry-out stocks are forecast to be mostly unchanged to 145 Kt. Prices are forecast to rise marginally from their levels in 2025-26 due to similar carry-out stocks.

For 2026-27, the area seeded is expected to rise by 35%, due to good returns from the previous year. By province, Saskatchewan is expected to account for 81% of the mustard seeded area, with 19% seeded in Alberta. Production is forecast by AAFC to rise by 9% to 152 Kt with a higher area and return to more average yields. Supply is expected to increase due to higher production and similar carry-in stocks. Exports are expected to be unchanged at 95 Kt, and carry-out stocks are forecast to increase and remain burdensome. The average price is forecast to be lower than the previous year.

Canary Seed

For 2025-26, exports are expected to be higher than 2024-25 at 135 Kt. The EU and Mexico have remained the main markets. Carry-out stocks are expected to rise to the highest level since 2005-06. The average price is forecast to decrease due to rising stock levels compared to 2024-25.

For 2026-27, the area seeded is expected to decrease due to weaker returns for canary seed in 2025-26. Production is forecast to fall by 29% but supply is expected to increase to its highest level since 2005-06. Exports are expected to be unchanged from 2025-26 despite the higher supply. Carry-out stocks are expected to rise. The average price is forecast to be lower than the 2025-26 level.

Sunflower Seed

For 2025-26, sunflower seed exports are forecast to be marginally lower at 35 Kt. The US and Japan have been Canada's main export markets for sunflower seed. Carry-out stocks are expected to rise despite a decrease in supply as both exports and domestic use fall by a greater extent. The average Canadian price for sunflower seed is forecast to decrease from 2024-25, with lower prices for oil-type sunflower seed prices.

For 2026-27, the area seeded is expected to be lower than 2025-26, due to lower returns compared to other crops. Production is forecast to be lower at 58 Kt, assuming average yields, and supply is expected to decrease to 238 Kt with lower production.

Exports are expected to be unchanged and carry-out stocks are forecast to decrease. The average price is forecast to fall from 2025-26 due to expectations for North American sunflower seed supply to be higher. Weaker oil-type prices in the US and Canada are expected despite forecasts for higher US soy-oil prices.

US sunflower seed area for 2026-27 is forecast by the USDA at 1.39 million acres (0.56 Mha), up 8% from 2025-26, due to increased area in North and South Dakota. The area seeded to oil-type varieties is expected to rise to 1.29 million acres (0.52 Mha), and the area seeded to confectionery-type varieties is forecast to be lower at 0.09 million acres (0.037 Mha). Assuming average yields and abandonment, 2026-27 US sunflower seed production is forecast by AAFC to fall by 3% to 1.03 Mt.

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

June 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	292	737	496	321
2025-2026f	2,643	2,593	2.75	7,135	8	7,639	5,600	200	306	739	1,300	280
2026-2027f	2,581	2,445	2.37	5,796	5	7,101	5,300	200	72	501	1,300	280
Wheat Except Durum												
2024-2025	8,259	8,087	3.66	29,559	80	34,247	23,399	3,351	3,028	7,232	3,616	282
2025-2026f	8,297	8,022	4.09	32,820	150	36,586	23,400	3,300	3,559	7,686	5,500	265
2026-2027f	8,240	8,047	3.58	28,802	100	34,402	23,200	3,200	2,875	6,902	4,300	295
All Wheat												
2024-2025	10,835	10,652	3.37	35,939	85	41,302	29,220	3,543	3,320	7,969	4,112	
2025-2026f	10,940	10,615	3.76	39,955	158	44,225	29,000	3,500	3,864	8,425	6,800	
2026-2027f	10,821	10,492	3.30	34,598	105	41,503	28,500	3,400	2,948	7,403	5,600	
Barley												
2024-2025	2,592	2,394	3.40	8,144	169	9,464	2,842	93	5,067	5,373	1,249	296
2025-2026f	2,483	2,277	4.27	9,725	120	11,094	4,000	219	5,602	6,044	1,050	285
2026-2027f	2,607	2,381	3.50	8,339	120	9,509	2,900	219	5,466	5,909	700	295
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
2025-2026f	1,531	1,460	10.18	14,867	2,100	18,551	1,600	5,950	9,184	15,151	1,800	230
2026-2027f	1,557	1,520	10.28	15,622	2,200	19,622	1,900	5,950	9,755	15,722	2,000	240
Oats												
2024-2025	1,174	993	3.38	3,358	17	4,045	2,565	76	796	973	507	345
2025-2026f	1,213	1,049	3.74	3,920	20	4,446	2,350	90	1,109	1,296	800	305
2026-2027f	1,175	986	3.43	3,379	20	4,199	2,350	90	1,062	1,249	600	315
Rye												
2024-2025	183	117	3.60	421	1	513	154	39	153	216	143	165
2025-2026f	276	156	3.94	613	2	758	152	55	210	285	320	155
2026-2027f	233	139	3.43	475	2	797	182	55	241	314	300	155
Mixed Grains												
2024-2025	149	62	2.46	152	0	152	0	0	152	152	0	
2025-2026f	123	68	2.69	184	0	184	0	0	184	184	0	
2026-2027f	116	56	2.63	148	0	148	0	0	148	148	0	
Total Coarse Grains												
2024-2025	5,575	5,015	5.47	27,419	2,014	33,343	8,337	6,055	15,114	21,524	3,482	
2025-2026f	5,626	5,010	5.85	29,309	2,242	35,032	8,102	6,314	16,288	22,960	3,970	
2026-2027f	5,687	5,082	5.50	27,963	2,342	34,274	7,332	6,314	16,672	23,342	3,600	
Canola												
2024-2025	8,908	8,846	2.17	19,239	131	22,530	9,379	11,412	191	11,667	1,484	677
2025-2026f	8,751	8,699	2.51	21,809	115	23,408	8,400	12,100	150	12,301	2,707	690
2026-2027f	8,838	8,752	2.19	19,200	100	22,007	7,500	13,000	150	13,201	1,306	695
Flaxseed												
2024-2025	204	201	1.28	258	8	430	228	N/A	60	71	131	630
2025-2026f	251	249	1.82	454	10	596	270	N/A	70	89	237	605
2026-2027f	305	304	1.32	400	10	647	275	N/A	85	104	268	600
Soybeans												
2024-2025	2,311	2,290	3.32	7,606	267	8,467	5,521	1,678	540	2,461	484	487
2025-2026f	2,340	2,321	2.93	6,793	300	7,578	5,500	1,650	100	1,950	128	545
2026-2027f	2,383	2,380	3.15	7,500	450	8,078	5,400	1,750	350	2,300	378	550
Total Oilseeds												
2024-2025	11,422	11,337	2.39	27,104	407	31,428	15,129	13,090	791	14,199	2,100	
2025-2026f	11,341	11,269	2.58	29,057	425	31,582	14,170	13,750	320	14,340	3,072	
2026-2027f	11,526	11,435	2.37	27,100	560	30,732	13,175	14,750	585	15,605	1,952	
Total Grains And Oilseeds												
2024-2025	27,831	27,004	3.35	90,462	2,506	106,072	52,686	22,688	19,225	43,692	9,694	
2025-2026f	27,907	26,894	3.66	98,321	2,825	110,839	51,272	23,564	20,472	45,725	13,842	
2026-2027f	28,034	27,008	3.32	89,661	3,007	106,510	49,007	24,464	20,205	46,350	11,152	

(a) Crop year is August-July, except corn and soybeans, for which the crop year is September-August.
(b) Imports exclude products.
(c) Exports include grain products but exclude oilseed products.
(d) Food and Industrial use for soybeans is based on data from the Canadian Oilseed Processors Association.
(e) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use + Loss in Handling
(g) Crop year average prices: Wheat (No.1 CWRS, 13.5% protein) and Durum (No.1 CWAD, 13% protein), both are average Saskatchewan producer spot prices. Barley (No. 1 feed, cash, I/S Lethbridge), Corn (No.2 CE, cash, I/S Chatham), Oats (US No. 2 Heavy, CBOT nearby futures); Rye (Average Prairie producer price, FOB farm); Canola (No. 1 Canada, cash, Track Vancouver); Flaxseed (No. 1 CW, cash, I/S Saskatoon); Soybeans (No. 2 CE, cash, I/S Chatham)
Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
f: forecasts by AAFC except for area, yield, and production for 2025-26 and seeded area for 2026-27 which are STC.

CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

Unclassified / Non classifié

June 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	2,176	670	489	17%	405
2025-2026f	1,420	1,383	2.85	3,934	15	4,438	2,700	748	990	29%	300
2026-2027f	1,246	1,220	2.42	2,950	20	3,960	2,700	650	610	18%	310
Lentils											
2024-2025	1,704	1,693	1.44	2,431	126	2,722	1,822	339	561	26%	790
2025-2026f	1,772	1,743	1.93	3,363	45	3,969	2,300	254	1,415	55%	510
2026-2027f	1,674	1,650	1.42	2,350	75	3,840	2,300	300	1,240	48%	520
Dry Beans											
2024-2025	163	160	2.65	424	71	515	402	73	40	8%	1,075
2025-2026f	172	171	2.55	438	70	548	410	73	65	13%	770
2026-2027f	119	118	2.63	310	70	445	370	70	5	1%	850
Chickpeas											
2024-2025	194	194	1.48	287	43	360	210	88	62	21%	735
2025-2026f	219	218	2.21	482	40	584	240	89	255	78%	540
2026-2027f	233	232	1.47	340	40	635	230	90	315	98%	500
Mustard Seed											
2024-2025	245	243	0.79	192	8	288	91	54	143	98%	860
2025-2026f	146	145	0.97	140	9	292	95	52	145	99%	870
2026-2027f	198	193	0.79	152	9	306	95	51	160	110%	850
Canary Seed											
2024-2025	118	118	1.57	185	0	229	133	12	84	58%	685
2025-2026f	129	129	1.82	235	0	319	135	14	170	114%	440
2026-2027f	122	121	1.39	168	0	338	135	13	190	128%	435
Sunflower Seed											
2024-2025	24	24	2.13	51	25	251	36	64	151	151%	720
2025-2026f	31	29	2.40	69	26	246	35	56	155	170%	700
2026-2027f	27	26	2.23	58	25	238	35	68	135	131%	660
Total Pulse And Special Crops (c)											
2024-2025	3,749	3,712	1.77	6,568	311	7,700	4,870	1,301	1,530		
2025-2026f	3,890	3,818	2.27	8,661	205	10,396	5,915	1,286	3,195		
2026-2027f	3,618	3,560	1.78	6,328	239	9,762	5,865	1,242	2,655		

(a) Crop year is August-July. Grains Include pulses (dry peas, lentils, dry beans, chick peas) and special crops (mustard seed, canary seed, sunflower seed).
(b) Imports and exports exclude products.
(c) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use + Loss in Handling
(d) Producer price, FOB plant, averages over all types, grades and markets.
Source: Statistics Canada (STC) and Agriculture and Agri-Food Canada (AAFC)
f: forecasts by AAFC except for area, yield, and production for 2025-26 and seeded area for 2026-27 which are STC.