

Agriculture and
Agri-Food CanadaAgriculture et
Agroalimentaire Canada**CANADA: OUTLOOK FOR PRINCIPAL FIELD CROPS, 2025****October 17, 2025**

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

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This report is an update of Agriculture and Agri-Food Canada's (AAFC) September outlook report for the 2024-25 and 2025-26 crop years, based on available data and information up to October 10, 2025. For most crops in Canada, the crop year starts on August 1 and ends on July 31, although for corn and soybeans, the crop year starts on September 1 and ends on August 31. Uncertainty in the world's grain markets remains elevated due to ongoing geopolitical risks.

For the 2024-25 crop year, the report provides the final estimates for all crops, incorporating information from Statistics Canada's (STC) October 8, 2025, release of the supply and disposition for soybeans and corn in Canada. Total production for all principal field crops increased by 4% year-over-year (y/y), leading total supply to increase by 3% as carry-in stocks (beginning-year inventories) were up notably y/y by 7%, helping offset the 34% decrease in imports. Carry-out stocks (ending-year inventories) for all principal field crops declined by 19% y/y, primarily due to a 15% rise in exports largely offsetting a 3% drop in total domestic use. Prices for most principal field crops declined significantly, reflecting downward pressure from weaker global crop prices.

For the 2025-26 crop year, the outlook incorporates production estimates from Statistics Canada's September 17, 2025, release of the *Model-Based Principal Field Crop Estimates*, based on data as of August 31, 2025. Total production of principal field crops is projected to reach near record levels, up 3% y/y and 8% above the previous five-year average. In Western Canada, overall production is estimated to have increased by 4% y/y and is expected to exceed the five-year average by 10%. Harvest is nearing completion across the Canadian Prairies, while soybean harvesting is well underway, and corn harvest operations are just beginning in Eastern Canada. Prices for most principal field crops are forecast to decline y/y, reflecting expected abundant world supplies leading to lower global market values.

The next AAFC Outlook for Principal Field Crops is scheduled to be released on November 19, 2025. STC is scheduled to publish its final principal field crop production estimates for the year on December 4, 2025, based on a survey in November of approximately 27,200 farmers across Canada.

Canada: Principal Field Crops Supply and Disposition

	Area Seeded	Area Harvested	Yield	Production	Imports	Total Supply	Exports	Total Domestic Use	Carry- out Stocks
	----- thousand hectares	-----	t/ha	-----	-----	thousand tonnes	-----	-----	-----
Total Grains And Oilseeds									
2023-2024	28,273	27,289	3.21	87,610	3,815	103,301	44,863	45,310	13,129
2024-2025	27,831	27,004	3.35	90,424	2,454	106,006	52,537	43,639	9,830
2025-2026f	27,925	26,825	3.43	91,930	2,837	104,597	47,817	44,795	11,985
Total Pulse And Special Crops									
2023-2024	3,376	3,309	1.60	5,284	379	6,845	4,907	1,116	821
2024-2025	3,749	3,712	1.77	6,568	311	7,700	4,868	1,314	1,518
2025-2026f	3,879	3,785	2.01	7,606	239	9,363	5,145	1,308	2,910
All Principal Field Crops									
2023-2024	31,649	30,598	3.04	92,894	4,195	110,146	49,770	46,426	13,950
2024-2025	31,580	30,716	3.16	96,991	2,765	113,706	57,405	44,953	11,349
2025-2026f	31,804	30,610	3.25	99,536	3,076	113,960	52,962	46,103	14,895

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

f: Forecasts are by AAFC except for area, yield, and production, which are STC.

All Wheat

Durum

For 2024-25, total supply of durum is estimated at 7.1 million tonnes (Mt) according to Statistics Canada, with 6.4 Mt in production and 0.7 Mt of carry-in stocks. Canada exported over 5.8 Mt of durum, the largest volume since 2020-21. The top five destinations were Algeria (27%), Morocco (22%), Italy (16%), the United States (11%), and Japan (4%).

Globally, the International Grains Council (IGC) reported that the world saw an 11% increase in production, total use rose 4% to 35.9 Mt, while exports dropped 4% to 9.2 Mt. The IGC estimates year-end stocks at 6.7 Mt, up 9% compared to the previous year.

In 2024-25, the producer price for Canadian Western Amber Durum, No. 1, 13% protein (CWAD, 1, 13) in Saskatchewan averaged \$321/tonne.

For 2025-26, Statistics Canada reports that 2.6 million hectares (Mha) of durum were harvested for a total production of 6.5 Mt. Total supply is forecast to remain stable around 7.0 Mt, 20% above average. At the time of writing, the durum harvest is 90% complete in Saskatchewan and 92% in Alberta. As of October 6, quality of durum samples by the Canadian Grain Commission (CGC) is below average with 33% rated in the top grade, 39% as No. 2 and 56% as No. 3.

Domestic use in Canada is pegged at 0.7 Mt, unchanged from 2024-25, while exports are forecast at 5.1 Mt, down 12% from last year's record high, but still 11% above average. Exports were increased by 100 thousand tonnes from last month's report, given a slight increase in pace seen from CGC shipments. Statistics Canada reports that Canadian exports for the month of August were 136 thousand tonnes, down 44% compared to August 2024. It is still too early to discern any notable pattern to the pace, therefore, shipments through the rest of the fall will be monitored closely. There could be export opportunities into Mexico and Turkey who experienced lower than average production volumes this year.

For 2025-26, the IGC projects global durum production to rise 2% to 37.2 Mt with increased production across many major producing nations, including Canada, the EU, and parts of North Africa. Consumption is also expected to expand this year, growing to 36.4 Mt, 1% more compared to the previous year and 5% above average with sustained and expanding food use. Trade is forecast to drop, however, with slowed import demand from Europe and North Africa, where local supplies are more plentiful. At 8.6 Mt, durum exports are 6% below last year's volume yet remain relatively in line with average levels. Closing stocks are pegged at 7.5 Mt, up 12% year-on-year, with greater inventories in Europe, the US, and Canada.

The 2025-26 average producer price forecast for CWAD, 1, 13% in Saskatchewan remains unchanged at \$280/tonne.

Wheat (excluding durum)

For 2024-25, Canadian wheat supply was just shy of 34.3 Mt, according to Statistics Canada, with production at 29.6 Mt, the second highest on record, and carry-in stocks at 4.6 Mt. Canadian exports reached a record 23.4 Mt, 7% more than the previous year and 25% above the five-year average. The top destinations for Canadian wheat were China (14%), Indonesia (12%), Japan (8%), Bangladesh (8%), the United States (7%), Peru (6%), Colombia (5%), Ecuador (3%), Nigeria (3%), and Mexico (3%).

The 2024-25 crop year saw global supply of wheat drop 0.5% to 1,074.33 Mt, according to the IGC. Total use was down 0.1% to 804 Mt, trade was down 8% to 197 Mt, and stocks dropped 2% to 269.7 Mt.

The average producer price for Canadian Western Red Spring Wheat, No. 1, 13.5% protein (CWRS, 1 13.5%) in Saskatchewan was \$282/tonne in 2024-25.

For 2025-26, farmers harvested 8.1 Mha of wheat, according to Statistics Canada. Production is estimated at 30.1 Mt, the second largest on record, if

realized. Total supply is forecast at 33.8 Mt, up 1% y/y, and 11% above average. At the time of writing, the spring wheat harvest is 92% complete in Saskatchewan, 96% complete in Alberta, and 99% complete in Manitoba. Quality of CWRS, the most common wheat grown on the Prairies, is above average, with 80% of samples collected by the CGC, as of October 6, rated as No. 1 CWRS, 17% are rated No. 2, and only 1% as No. 3.

Compared to the previous year, domestic use is forecast up 4% at 7.5 Mt, but remains in line with average levels. The export forecast was revised up from last month's report by 300 thousand tonnes on account of an improved CGC shipment pace, with further revisions possible if the pace seen from CGC movement is sustained. At 22.3 Mt, they are down 5% from last year's levels, but remain 13% above average. Closing stocks are currently pegged at 4.0 Mt, under current production estimates. Global supply of wheat is abundant, especially in major exporting nations, thus increasing global competition and pressuring prices.

The IGC expected the 2025 wheat crop to reach a new record with strong yields compensating for decreased area. Total supply of wheat is forecast at 1,088 Mt, +1% year-on-year. Total demand is seen growing 2% to 819 Mt with an increase in both food and feed use. For food, the uptake is linked to growing population and increased food demand in India and parts of Africa. Feed use is seen expanding in the EU and parts of the Commonwealth of Independent States (CIS). With increased demand from Asia and Africa, trade is forecast to grow 5% to 206.9 Mt. Stocks are pegged at 270 Mt, in line with opening levels.

The average producer price forecast for CWRS, 1, 13.5% in Saskatchewan is lowered to \$265/tonne under pressure from ample global supply and increased export competition.

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Coarse Grains

Barley

For 2024-25, supply amounted to 9.5 million tonnes (Mt), down 3% year-over-year (y/y) and 8% below the five-year average. Total exports reached 2.8 Mt (2.1 Mt for grain exports and 0.74 Mt for product exports), down significantly y/y and well below the average. Top export markets for barley grain include China (representing about 70% of the grain exports), Japan (20%), and the US (10%). Top export markets for barley products include the US (60%), Japan (20%), and Mexico (15%). Total domestic use hit 5.4 Mt (5.1 Mt for feed use and 0.3 Mt for other uses), down noticeably from the previous year and the average. As a result, carry-out stocks climbed to an eight-year high of 1.2 Mt, despite lower supplies. The Lethbridge feed barley price for the crop year averaged \$296/tonne (/t), down nearly \$20/t y/y and the lowest in four years.

For 2025-26, Statistics Canada (STC) estimates 2.5 million hectares (Mha) were seeded to barley in its June seeded acreage report; this represents a decrease of 4% y/y and 16% compared to the five-year average. By province, Alberta accounts for 54% of the national area, followed by Saskatchewan (37%) and Manitoba (5%).

STC's September model-based estimates put 2025 barley production at 8.2 Mt, slightly higher than last year, thanks to an expected improvement in the average yield, despite a smaller sown area and a higher abandonment rate. As of September 23, 87% of Alberta's barley crop had been combined. 61% of the harvested barley crop in the province was rated as No.1 C.W. (Canada Western), 7 points above the five-year average, according to the Alberta's Crop Report. The report also indicates that the province's average yield is above last year's level, the five-year average, and STC's modeled estimate.

Supply is projected at 9.5 Mt, little changed y/y, thanks to carry-in stocks at an eight-year high and higher-than-expected production, which offset the decline in imports. However, supply for 2025 remains 4% below the five-year average. Total domestic use is forecast to increase on higher feed demand. Total exports are forecast to be little changed y/y, but well below average. Carry-out

stocks are projected at 1.0 Mt, down y/y, but still well above average.

The 2025-26 Lethbridge average feed barley price is projected at \$270/t, down over \$25/t from 2024-25, partly due to pressure from expected lower US corn prices.

Worldwide, Australia's barley production for 2025-26 is forecast at 14.6 Mt by the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES). This is up 10% y/y and well above the five-year average. The EU's barley production for 2025-26 is forecast by the European Commission at 55.7 Mt. This is up 14% y/y and well above the five-year average.

Corn

For 2024-25, supply amounted to 19.1 Mt, down 5% y/y and slightly below the five-year average. Imports came in at 1.8 Mt, down sharply from the previous year and the five-year average, with over 99% coming from the US. Exports ended up at 2.8 Mt, up sharply y/y and well above the average. The top export markets included Ireland (representing about 40% of the exports), Spain (20%), the United Kingdom (20%), and Portugal (10%). Total domestic use hit 14.8 Mt (8.9 Mt for feed use and over 5.8 Mt for food and industrial use), down noticeably from the previous year mainly due to a significant decline in feed use, as well as a small decline in food and industrial use. Carry-out stocks finished the year at 1.6 Mt, down sharply y/y, also a ten-year low. The Chatham corn price for the crop year averaged at \$225/t, up nearly \$15/t from the previous year but down almost \$35/t from the five-year average.

For 2025-26, more than 1.5 Mha was seeded to corn, up 4% from the previous season and the five-year average, and only slightly below the all-time high set in 2023-24. By province, Ontario accounts for 58% of the national area, followed by Québec (22%), and Manitoba (16%).

Production is projected at 15.5 Mt, up slightly y/y due to the average yield being lower than the record

high in the previous season, despite a larger seeded area. However, the national average yield in 2025 is forecast to remain well above the five-year average, supported by strong yields expected for Ontario.

Supply is projected to change little y/y, at 19.2 Mt, as an increase in imports and production are expected to offset a sharp decline in carry-in stocks. Total domestic use, including food seed and industrial use and feed use, is predicted to remain stable y/y. Exports are forecast to decline significantly on expected large corn production worldwide. Carry-out stocks are projected at 1.9 Mt, up sharply y/y, but still well below the five-year average.

The 2025-26 Chatham average corn price is projected at \$215/t, down \$10/t from 2024-25, mainly due to pressure from expected lower U.S. corn prices.

For the world's major corn exporters, the International Grains Council (IGC) predicts a noticeable y/y increase in corn production for 2025-26. Production details are as follows: the US will increase by 12% (+46 Mt) to a record 424 Mt; Argentina will increase by 14% (+7 Mt) to a near-record 59 Mt; Ukraine will increase by 17% (+5 Mt) to 32 Mt, while Brazil is predicted to decrease by 6% (-9 Mt) to 131 Mt, which is still a bumper crop. For other countries, China will increase by 2% (+5 Mt) to 300 Mt, a record high, and the EU will decrease by 5% (-3 Mt) to 57 Mt, nearing the lowest level in decades.

Oats

For 2024-25, supply amounted to 4.0 Mt, down 3% y/y and 12% below the five-year average. Total exports reached 2.6 Mt (1.6 Mt for grain exports and 0.92 Mt for product exports), up significantly y/y and in line with the average. Top export markets for oat grain include the US (representing over 75% of grain exports), Mexico (10%), and Peru (<5%). Top export markets for oat products include the US (93%), Mexico (4%), and South Korea and Japan (2%). Total domestic use hit 0.97 Mt (0.79 Mt for feed use and 0.18 Mt for other uses), up noticeably from the previous year and the average. Carry-out stocks finished the year at 0.51 Mt, down sharply from last year and the five-year average. The

Chicago Board of Trade (CBOT) oat price for the crop year averaged at \$345/t, down nearly \$10/t y/y and the lowest in four years.

For 2025-26, about 1.2 Mha was seeded to oats, up 3% y/y but 11% below the five-year average. By province, Saskatchewan sowed 43% of the Canadian oat crop, followed by Alberta (28%), Manitoba (19%), with the remaining 11% seeded in the other provinces.

Production is projected at 3.4 Mt, up slightly y/y, mainly due to the expected improvement in average yield, despite a noticeable increase in the abandonment rate leading to a y/y decline in harvested area. As of September 23, with 82% of Alberta's oat crop combined, 50% of the harvested oat crop in the province is rated as No.1 C.W. and No.2 C.W., 17 points below the five-year average, according to Alberta's Crop Report. The report also indicates that the province's average yield is above last year's level, but below the five-year average and the STC modeled estimate. Manitoba's Crop Report, released on October 1, shows that 95% of the province's oat crop has been harvested and strong overall yields are expected, with the provincial average yield to be above last year's level, the five-year average, and STC's modeled estimate.

Supply is projected at 3.9 Mt, down 4% y/y primarily due to lower carry-in stocks; it is also sharply below the five-year average. Total demand is forecast to decline y/y, primarily reflecting lower exports. Carry-out stocks are forecast at 0.5 Mt, little changed y/y but well below the five-year average.

The 2025-26 CBOT oat price is projected at \$310/t, down \$35/t y/y and the lowest in five years.

Worldwide, the EU's oat production for 2025-26 is forecast by the European Commission at 8.8 Mt, up 14% y/y and well above the five-year average.

Rye

For 2024-25, supply amounted to 513 thousand tonnes (Kt), up significantly from the previous crop year and the five-year average. Exports totaled 154 Kt, down sharply y/y and well below the average. The US remained the top export market, accounting for over 95% of the exports. Total domestic use hit

216 Kt (154 Kt for feed use, and 63 Kt for other uses), up sharply y/y but down from the average. Carry-out stocks finished the year at 143 Kt, up sharply y/y and well above the average, also an eight-year high. The farm-gate price of rye on the Canadian Prairies for the crop year averaged at \$165/t, down sharply y/y.

For 2025-26, Canadian farmers seeded 286 thousand hectares of rye, with fall rye at 282 Kha and the remaining being spring rye. The estimated total area is up 56% y/y and 39% above the five-year average, also the highest since 1990. Western Canada makes up over 60% of the national area, with the rest grown in the East.

Production is projected at 542 Kt, up sharply y/y and from the five-year average, also the highest since 1990, supported by expansion in area seeded, despite a significant decline in average yield. This, along with large carry-in stocks, will push supply to over 680 Kt, the highest in over three decades. As a result, domestic industrial and feed use, along with exports, are predicted to increase noticeably, with carry-out stocks rising to 190 Kt, the highest in over three decades.

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

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Oilseeds

Canola

For 2024-25, total supply rose by 5% year-over-year (y/y) to 22.6 million tonnes (Mt), which is an increase of 0.99 Mt from last year and is 7% above the previous five-year average. About 41% (9.3 Mt) of this supply was exported, resulting in a 40% (2.65 Mt) increase y/y. Another 52% of the supply, consisting of around 11.7 Mt, was consumed domestically, with 11.4 Mt crushed for oil and meal, and the other 0.3 Mt consumed in other domestic usage. As of July 31, total carry-out declined by 50% (-1.63 Mt) from last year to 1.6 Mt, which is 32% below the five-year average and the lowest in three years.

The top export markets for Canadian canola in 2024-25 were China (4.6 Mt) and Japan (1.7 Mt), followed by the European Union (1.1 Mt), Mexico (0.8 Mt), and the United Arab Emirates (0.57 Mt). The top markets for Canadian canola oil were the United States (2.7 Mt) and Mexico (0.17 Mt), followed by South Korea (0.14 Mt) and China (0.12 Mt). The United States and China were the top markets for Canada's canola meal at 3.9 Mt and 1.6 Mt, respectively.

The simple average price, No.1 Track Vancouver, was finalized at \$677/tonne (/t), versus \$715/t in 2023-24 and the five-year average of \$772/t.

For 2025-26, farmers decreased the area seeded to canola by about 2%, to 8.7 million hectares, which is about 1% above the five-year average, although still remaining the lowest in three years. Across western Canada, the crop experienced hot temperatures during July, followed by more moderate temperatures in August and a warmer September. Moisture conditions were normal to slightly better than normal across the southern half of the Prairies and drier than normal across the northern half of the canola growing region.

Above-normal yields, based on satellite imaging and model-based estimates, are incorporated into this release, resulting in a production forecast of 20.0 Mt, above last year and the five-year average.

With carry-in forecast at 1.6 Mt and assuming an average import program, supplies are projected at 21.7 Mt, down 4% from 2024-25.

Demand for Canadian canola is switching to being domestically driven with a forecasted record crush of 11.8 Mt, up 3% from last year and 15% above the five-year average. The forecast contains some upside depending on the completion of processing plants under construction and their becoming fully operational. By contrast, Canadian exports are forecast to fall to a two-year low of 7.0 Mt, assuming China's preliminary anti-dumping duty remains in place and there is no immediate resolution of the trade issue. Carry-out is projected at 2.5 Mt, which is up 57% (0.90 Mt) from last year and is 23% above the five-year average, although this falls well short of the record 4.4 Mt carried out in 2018-19.

The simple average forecast price, No.1 Track Vancouver, is \$645/t, which is down 5% from last year and is 17% below the five-year average. Over the past decade, the highest price of \$1,075/t was set in the drought year of 2021-22, while the lowest was \$484/t set in 2019-20.

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

Flaxseed

For 2024-25, total supply declined by 14% to 0.43 Mt as a slight drop in production was accompanied by a 25% decline in carry-in. Supplies were the lowest in three years and 20% below the five-year average of 0.54 Mt. Slightly over one-half (0.23 Mt) of the flaxseed supply was exported, while total domestic use fell to a modern-day record low of 0.07 Mt, consisting mostly of feed, waste, and dockage. Ending stocks as of July 31, 2025, were 0.13 Mt, a decline of 18% or 30,000 t from the previous year but 14% above the five-year average of 0.12 Mt.

The top export markets for Canadian flaxseed were the United States (0.084 Mt), Belgium (0.073 Mt), and China (0.027 Mt). The simple average price, No.1 in-store Saskatoon, was finalized at \$630/tonne (/t), versus \$581/t in 2023-24 and the five-year average of \$727/t.

For 2025-26, seeded area is estimated at 250.8 thousand hectares, according to Statistics Canada's Seeded Area survey. This is up 23% from last year but remains below the five-year average. Yields are projected higher from last year, following a warm to hot summer and improved moisture conditions compared to last year. Production is forecast at 0.37 Mt a rise of 42% (0.11 Mt) from last year but 3% below the five-year average of 0.38 Mt.

Total domestic use is forecast at 90 Kt, up from last year, while exports are projected at 0.23 Kt, unchanged from the previous year. Carry-out is anticipated to rise to 195 Kt. The flaxseed simple average price forecast for No.1, in-store Saskatoon cash, is projected up \$5/t year-over-year, to \$635/tonne (/t).

Soybeans

For 2024-25, soybean supplies are estimated at 8.4 Mt, a rise of 9% or 0.71 Mt from last year and 15% above the five-year average. Production was up 8% compared to the previous year, on a slight rise in planted area combined with a 0.2 tonnes per hectare (t/ha) bump in yields to 3.3 t/ha. Imports were slightly lower than last year at 0.27 Mt.

Total domestic use is estimated at 2.45 Mt, up 11%, an increase of 0.24 Mt from last year but 4% below the five-year average, on an estimated domestic crush of 1.68 Mt. Exports are estimated at 5.4 Mt, a

10% rise from last year and the second highest on record, while carry-out is at a five year high at 0.51 Mt. The export markets for soybeans are dispersed with eleven countries accounting for 80% of the shipments out of Canada. China was the largest importer of Canadian soybeans at 1.04 Mt, followed by Iran at 0.77 Mt and Algeria at 0.55 Mt.

The simple average price forecast for soybeans, track Chatham, declined to \$487/t compared to \$572/t for 2023-24 and the five-year average of \$595/t.

For 2025-26, the area planted to soybeans is estimated at 2.3 million hectares, up marginally from last year and 6% above the five-year average. Production is forecast at 7.1 Mt, making this the fourth largest crop on record, but 6% lower than 2024-25. Total supplies are projected down from last year to 8.1 Mt, however this is still 7% above the five-year average.

Total domestic use is forecast at 2.3 Mt, a drop of 8% from last year, largely due to a decrease in feed, waste, and dockage. Exports are forecast to decrease marginally from last year to 5.4 Mt, but are expected to remain 14% above the five-year average. Carry-out stocks are projected down slightly year-over-year to 0.50 Mt.

The simple average price forecast for soybeans, track Chatham, is projected down slightly from last year to \$485/t as abundant global supplies overhang markets and pressure world prices.

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Pulse and Special Crops

Dry Peas

For 2024-25, exports were lower than the 2023-24 level at 2.2 million tonnes (Mt) on lower shipments to China and the US, but this was partly offset by higher exports to Bangladesh. Domestic use was larger compared to the previous year. Marginally higher supply led to a rise in carry-out stocks in 2024-25. The average dry pea price was 12% lower than in 2023-24 at \$405/tonne (/t) due to decreased demand and increased carry-out stocks. The average crop year prices for all dry pea types were lower than for the previous year.

For 2025-26, production in Canada is estimated to increase by 0.6 Mt to 3.56 Mt, mostly due to higher yields in Western Canada. Alberta and Saskatchewan are expected to account for 3.3 Mt of the dry pea production, with the remainder of the production in Manitoba, British Columbia, and Eastern Canada. Supply is expected to be 22% higher over last year, at 4.1 Mt. Exports are forecast to be higher at 2.2 Mt, with China, the US, and India expected to be Canada's top three markets. Domestic use is expected to be unchanged and carry-out stocks are forecast to rise sharply due to higher supply. The average price is expected to decrease by over 30% from 2024-25 to \$280/t.

During the month of September, Saskatchewan yellow and green pea farm gate prices both fell \$45/t and \$85/t, respectively. Green dry pea prices are currently at a \$140/t premium to yellow dry peas compared to last year when green pea prices were at a \$208/t premium to yellow peas. In the US, area seeded to dry peas for 2025-26 is forecast by the United States Department of Agriculture (USDA) to increase by 21% from last year to 1.18 million acres (0.48 million hectares (Mha)). This is largely due to an expected rise in area seeded in North Dakota and Montana. With higher yields and abandonment, the USDA forecasts US dry pea production to increase by 23% to 0.93 Mt. The US exported about 220 thousand tonnes (Kt) of dry peas in 2024-25, mostly to Canada, the Philippines, and China. The US is expected to try and maintain its market share in 2025-26 with production higher than last year.

Lentils

For 2024-25, lentil exports rose to 1.82 Mt, up 9% from the previous year. Of this, 1.1 Mt were red lentil types, with 0.72 Mt consisting of green lentil types. The leading export markets were Turkey, India, the United Arab Emirates, and the EU. Total domestic use was higher than the previous year at 0.35 Mt. Carry-out stocks rose sharply to 0.55 Mt. The average Canadian lentil price was 21% lower than 2023-24 due to larger supplies, falling to \$790/t. No.1 large green lentil prices maintained a crop year premium of \$464/t over No.1 red lentil prices.

For 2025-26, due to higher yields and area in Western Canada, production is estimated to increase by 0.54 Mt to nearly 3.0 Mt. The production of large green lentils is forecast to increase sharply from last year to nearly 0.9 Mt and the production of red lentils is expected to be lower than last year at nearly 1.6 Mt. Production of the other remaining lentil types is also expected to be higher than last year at 0.5 Mt.

Supply is expected to be 0.9 Mt higher than last year as larger carry-in stocks combine with increased production. Exports are expected to be higher than last year at 2.1 Mt, with India, the United Arab Emirates, the EU, and Turkey expected to remain the top export markets. Domestic use is forecast to be unchanged from last year at 351 Kt. Carry-out stocks are forecast to be sharply higher than the previous year at over 1.1 Mt. The overall average price is forecast to be 33% lower than 2024-25 at \$530/t. Large green lentil prices are forecast to have a much smaller premium over red lentil prices when compared to last year.

In the US, the area seeded to lentils for 2025-26 is forecast by the USDA at 1.07 million acres (0.43 Mha), up 15% from 2024-25 due to higher area seeded in Montana and North Dakota. With lower abandonment and higher yields, the USDA has forecast 2025-26 US lentil production to rise to 0.50 Mt, 23% higher than in 2024-25. US lentil exports are just over 0.25 Mt annually, with the main markets continuing to be the EU, Canada, Colombia, India, and Mexico.

Dry Beans

For 2024-25, dry bean exports were marginally lower than the previous year at 402 Kt. The EU and the US were the top two markets for Canadian dry beans, with smaller volumes exported to Mexico and Japan. Carry-out stocks rose due to increased supply, with smaller carry-in stocks offset by larger production, and weaker export demand despite higher domestic use. The weaker Canadian dollar was more than offset by a larger North American dry bean crop, which accounted for most of the pressure on the lower Canadian dry bean prices in 2024-25, which fell 12% from the previous year to \$1,075/t.

For 2025-26, production is estimated to fall by 17% to 352 Kt, consisting of 66 Kt of white pea bean types and 286 Kt of coloured bean types. Production fell in Ontario, Manitoba, and Alberta. Supply is forecast to decrease by 10% to 0.46 Mt as the smaller production is partly offset by higher carry-in stocks. Exports are forecast to be lower than last year at 380 Kt. The US and the EU are forecast to remain the main markets for Canadian dry beans. Carry-out stocks are also expected to fall to 20 Kt. The average Canadian dry bean price is forecast to be lower at \$945/t due an increase in North American supply from higher carry-in stocks.

In the US, area seeded to dry beans is forecast by the USDA to fall to 1.39 million acres (0.56 Mha) due to a smaller area seeded in all the dry bean growing states, except Minnesota. As a result, US total dry bean production (excluding chickpeas) is forecast by the USDA at 1.36 Mt, down 4% from 2024-25, despite higher yields and lower abandonment. US export markets are expected to continue to be the EU, Mexico, and Canada. US dry bean export quantities to Canada are about 0.03-0.04 Mt annually.

Chickpeas

For 2024-25, Canadian chickpea exports rose by 14% from the previous year to 209 Kt, mainly the result of higher exports to Pakistan and the EU. As a result of the larger supply and only slightly higher exports, carry-out stocks rose sharply from the previous year to 62 Kt. The average price decreased sharply to \$735/t due to larger world chickpea supply.

For 2025-26, production is estimated to rise to 331 Kt due to higher area and yields. Supply is forecast to increase by 21% to 433 Kt as higher carry-in stocks combine with the larger production. Exports are forecast to be marginally lower, with the EU, the US, and Pakistan expected to remain the main markets for Canadian chickpeas. Carry-out stocks are expected to increase sharply, which would be negative for prices. The average price is forecast to be lower at \$600/t on the expectation of higher world supply.

US chickpea seeded area is estimated by the USDA at 0.54 million acres (0.22 Mha), up 8% from 2024-25. With higher yields and abandonment, 2025-26 US chickpea production is forecast by the USDA at 337 Kt, 33% higher than in 2024-25.

Mustard Seed

For 2024-25, Canadian mustard exports were lower at 91 Kt, due to weak demand from the EU. Carry-out stocks rose sharply due to the larger supply. Prices for all types fell by 33% to \$860/t due to ample carry-out stocks.

For 2025-26, production is estimated to decrease by 27% to 141 Kt with lower harvested area partly offset by higher yields. The production of yellow, oriental, and brown types all decreased. However, supply is forecast to rise year-on-year by 2%, helped by higher carry-in stocks. Exports are expected to rise to 95 Kt. Carry-out stocks are forecast to increase marginally to 145 Kt. The US and the EU are expected to remain the main export markets for Canadian mustard seed. The average price is forecast to increase by 8% due to expectations for stronger export demand, to \$925/t.

Canary Seed

For 2024-25, exports were higher than the previous year at 133 Kt, largely driven by higher exports to Mexico. The average price fell to \$685/t, pressured by larger Canadian carry-out stocks.

For 2025-26, production is estimated to be unchanged from last year at 185 Kt due to higher harvested area offset by lower yields. Exports are expected to increase with the rise in supply, but not enough to reduce carry-out stocks, which are expected to be higher. The EU and Mexico are forecast to remain the main export markets, followed by South America and the US. The average price is forecast to fall from 2024-25 to \$530/t due to increased Canadian carry-out stocks.

Sunflower Seed

For 2024-25, sunflower seed exports were higher at 36 Kt due to increased demand from the US. This, combined with lower domestic supply, caused carry-out stocks to fall sharply to 151 Kt. The average Canadian price for sunflower seed increased sharply from the previous year due to higher oilseed prices but lower confectionery-type prices.

For 2025-26, production is estimated at 61 Kt, 10 Kt higher than last year, due to larger harvested area and yields. However, supply is expected to decrease by 6% to 237 Kt, as the increase in production is more than offset by lower carry-in stocks. Exports are forecast to be lower, but carry-out stocks are expected to fall by 11% to 135 Kt. The US is expected to remain Canada's main export market for sunflower seed. The average price is forecast to fall marginally due to lower prices for both oilseed and confectionery types of sunflower seed.

Area seeded to sunflower seed in the US is estimated by the USDA to have risen to 1.0 million acres (0.4 Mha), 38% higher than last year, due to the increase in area seeded in North and South Dakota. The area seeded to oil-type varieties increased to 0.9 million acres (0.36 Mha) and the area seeded to confectionery-type varieties fell to 0.12 million acres (47 thousand hectares). For 2025-26, US sunflower seed production is forecast by AAFC at 735 Kt, 41% above last year.

For 2025-26, the global supply of sunflower seed is estimated by the USDA at 61 Mt. This is 5% higher than last year due to increased expected production in Russia and Ukraine. World domestic use is expected to rise by 5% to 55 Mt and world exports are forecast to decrease by 9% to 2.6 Mt. World carry-out stocks are expected to rise by 6% to 3.5 Mt, but still well below the five-year average.

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

October 17, 2025

Grain and Crop Year (a)	Area Seeded ----- thousand ha -----	Area Harvested	Yield t/ha	Production	Imports (b)	Total Supply	Exports (c)	Food & Industrial Use (d)	Feed, Waste & Dockage	Total Domestic Use (e)	Carry-out Stocks	Average Price (g) \$/t
----- thousand tonnes -----												
Durum												
2023-2024	2,442	2,385	1.78	4,247	5	4,830	3,549	191	174	612	669	425
2024-2025	2,576	2,565	2.49	6,380	5	7,054	5,821	208	277	737	496	321
2025-2026f	2,643	2,574	2.54	6,535	5	7,036	5,100	200	302	736	1,200	280
Wheat Except Durum												
2023-2024	8,505	8,324	3.50	29,167	88	34,382	21,771	3,272	3,885	8,002	4,609	317
2024-2025	8,259	8,087	3.66	29,559	80	34,247	23,399	3,351	3,028	7,232	3,616	282
2025-2026f	8,297	8,084	3.72	30,089	100	33,805	22,300	3,300	3,378	7,505	4,000	265
All Wheat												
2023-2024	10,947	10,709	3.12	33,414	92	39,212	25,321	3,463	4,060	8,614	5,278	
2024-2025	10,835	10,652	3.37	35,939	85	41,302	29,220	3,558	3,305	7,969	4,112	
2025-2026f	10,940	10,659	3.44	36,624	105	40,841	27,400	3,500	3,681	8,241	5,200	
Barley												
2023-2024	2,967	2,703	3.29	8,905	117	9,731	3,063	90	5,204	5,516	1,152	314
2024-2025	2,592	2,394	3.40	8,144	169	9,464	2,843	93	5,066	5,372	1,249	296
2025-2026f	2,483	2,233	3.69	8,228	50	9,527	2,840	319	5,155	5,687	1,000	270
Corn												
2023-2024	1,548	1,519	10.00	15,421	2,979	20,027	2,112	5,999	9,905	15,919	1,996	211
2024-2025	1,478	1,449	10.59	15,345	1,777	19,118	2,776	5,848	8,895	14,759	1,584	225
2025-2026f	1,541	1,494	10.38	15,500	2,100	19,184	2,400	5,848	9,020	14,884	1,900	215
Oats												
2023-2024	1,026	826	3.20	2,643	15	3,933	2,365	80	720	898	670	354
2024-2025	1,174	993	3.38	3,358	17	4,045	2,566	77	793	972	507	345
2025-2026f	1,213	981	3.43	3,370	20	3,897	2,420	90	785	977	500	310
Rye												
2023-2024	178	116	3.09	358	4	466	198	30	132	177	91	217
2024-2025	183	117	3.60	421	1	513	154	38	154	216	143	165
2025-2026f	286	175	3.10	542	2	686	182	55	243	314	190	155
Mixed Grains												
2023-2024	145	60	2.53	153	0	153	0	0	153	153	0	
2024-2025	149	62	2.46	152	0	152	0	0	152	152	0	
2025-2026f	123	52	2.68	138	0	138	0	0	138	138	0	
Total Coarse Grains												
2023-2024	5,863	5,223	5.26	27,480	3,115	34,311	7,738	6,198	16,114	22,663	3,909	
2024-2025	5,575	5,015	5.47	27,419	1,963	33,292	8,339	6,055	15,059	21,471	3,482	
2025-2026f	5,646	4,934	5.63	27,779	2,172	33,432	7,842	6,311	15,341	22,000	3,590	
Canola												
2023-2024	8,938	8,857	2.20	19,464	276	21,602	6,679	11,033	601	11,698	3,225	715
2024-2025	8,908	8,846	2.17	19,239	131	22,595	9,331	11,412	191	11,667	1,597	677
2025-2026f	8,748	8,670	2.31	20,028	100	21,726	7,000	11,800	375	12,226	2,500	645
Flaxseed												
2023-2024	247	239	1.14	273	10	502	211	N/A	118	127	164	581
2024-2025	204	201	1.28	258	8	431	225	N/A	60	71	134	630
2025-2026f	251	242	1.51	365	10	509	225	N/A	71	90	195	635
Soybeans												
2023-2024	2,279	2,261	3.09	6,981	322	7,674	4,915	1,652	316	2,208	552	572
2024-2025	2,311	2,290	3.31	7,568	267	8,387	5,421	1,678	540	2,461	505	487
2025-2026f	2,340	2,320	3.07	7,134	450	8,089	5,350	1,700	339	2,239	500	485
Total Oilseeds												
2023-2024	11,463	11,356	2.35	26,717	608	29,779	11,805	12,685	1,034	14,033	3,941	
2024-2025	11,422	11,337	2.39	27,065	406	31,413	14,977	13,090	791	14,199	2,236	
2025-2026f	11,339	11,231	2.45	27,527	560	30,324	12,575	13,500	784	14,554	3,195	
Total Grains And Oilseeds												
2023-2024	28,273	27,289	3.21	87,610	3,815	103,301	44,863	22,345	21,207	45,310	13,129	
2024-2025	27,831	27,004	3.35	90,424	2,454	106,006	52,537	22,703	19,156	43,639	9,830	
2025-2026f	27,925	26,825	3.43	91,930	2,837	104,597	47,817	23,311	19,805	44,795	11,985	

(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 are by AAFC except for area, yield, and production, which are STC.

CANADA: PULSE AND SPECIAL CROPS SUPPLY AND DISPOSITION

2025-10-17

Unclassified / Non classifié

October 17, 2025

Grain and Crop Year (a)	Area Seeded	Area Harvested	Yield	Production	Imports (b)	Total Supply	Exports (b)	Total Domestic Use (c)	Carry-out Stocks	Stocks-to- Use Ratio	Average Price (d)
	----- thousand ha -----		t/ha		----- thousand metric tonnes -----					%	\$/t
Dry Peas											
2023-2024	1,233	1,200	2.17	2,609	127	3,286	2,402	584	299	10%	460
2024-2025	1,300	1,281	2.34	2,997	38	3,335	2,175	671	489	17%	405
2025-2026f	1,420	1,385	2.57	3,563	20	4,072	2,200	672	1,200	42%	280
Lentils											
2023-2024	1,485	1,460	1.23	1,801	92	2,104	1,675	264	165	9%	1,000
2024-2025	1,704	1,693	1.44	2,431	124	2,721	1,821	350	549	25%	790
2025-2026f	1,772	1,748	1.70	2,972	75	3,596	2,100	351	1,145	47%	530
Dry Beans											
2023-2024	129	129	2.63	339	70	489	408	61	20	4%	1,215
2024-2025	163	160	2.65	424	71	515	402	73	40	8%	1,075
2025-2026f	162	146	2.42	352	70	462	380	62	20	5%	945
Chickpeas											
2023-2024	128	127	1.25	159	47	299	184	86	30	11%	1,005
2024-2025	194	194	1.48	287	43	359	209	88	62	21%	735
2025-2026f	219	214	1.55	331	40	433	200	88	145	50%	600
Mustard Seed											
2023-2024	258	251	0.68	171	16	227	96	42	88	64%	1,280
2024-2025	245	243	0.79	192	8	288	91	54	143	98%	860
2025-2026f	146	141	1.00	141	9	293	95	53	145	98%	925
Canary Seed											
2023-2024	104	103	1.09	112	0	170	113	13	44	35%	930
2024-2025	118	118	1.57	185	0	229	133	12	84	58%	685
2025-2026f	129	126	1.47	185	0	269	135	14	120	80%	530
Sunflower Seed											
2023-2024	40	40	2.32	92	27	270	30	66	175	184%	545
2024-2025	24	24	2.13	51	27	252	36	65	151	149%	720
2025-2026f	31	27	2.30	61	25	237	35	67	135	132%	680
Total Pulse And Special Crops (c)											
2023-2024	3,376	3,309	1.60	5,284	379	6,845	4,907	1,116	821		
2024-2025	3,749	3,712	1.77	6,568	311	7,700	4,868	1,314	1,518		
2025-2026f	3,879	3,785	2.01	7,606	239	9,363	5,145	1,308	2,910		

(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 are by AAFC except for area, yield, and production, which are STC.