

Agriculture and Agriculture et Agri-Food Canada Agroalimentaire Canada

CANADA: GRAINS AND OILSEEDS OUTLOOK: 2008-09

Statistics Canada's (STC) seeding intentions survey for 2008-09 indicated that the total area seeded to grains and oilseeds (G&O) is expected to increase marginally from 2007-08. Summer fallow area is expected to fall to a record low level. The area seeded to wheat and oilseeds are forecast to increase while the area for coarse grains is expected to decrease. The actual seeded area may differ from the intentions because of changes in the market outlook and expected prices, producer reaction to the STC report and soil moisture conditions at the time of seeding. It is assumed that precipitation will be normal for the growing and harvest periods, and that the abandonment rate and quality will be normal. Trend yields are assumed for eastern and western Canada. Except for corn, average yields are expected to be higher than last year.

Due to higher area and yields, production of G&O in Canada is forecast to increase to 63.5 million tonnes (Mt) from 60 Mt for 2007-08. Exports are projected to increase due to higher supply and strong world demand. Total domestic use is forecast to decrease as sharply higher food and industrial use, due to strong demand for biofuel, is more-than offset by lower feed use. Carry-out stocks are forecast to decrease and remain historically very low. World and Canadian prices for G&O are expected to remain historically high due to strong demand and low carry-in stocks. The main factors to watch are: the condition of the US winter wheat crop, weather conditions in the major importing and exporting countries, petroleum and fertilizer prices, exchange rates, fund activity, and export policies in competing countries.

DURUM

Seeded area is expected to increase by 22% from 2007-08. Production is forecast to rise by 40%, but the low carry-in stocks will limit the increase in supply to 21%. Exports are forecast to recover by 30% because of the larger supply and strong demand. Carry-out stocks are forecast to increase from the very low 2007-08 level. The CWB PRO is lower than for 2007-08 due to higher Canadian and world supply.

WHEAT (ex durum)

Seeded area is expected to increase by 14%, with a 65% increase for winter wheat and a 9% increase for spring wheat. Production is forecast to increase by 26% but lower carry-in stocks will limit the increase in supply to 10%. Domestic use and exports are forecast to increase due to the higher supply and strong demand. Carry-out stocks are forecast to increase from the very low 2007-08 level. The CWB PRO is lower than for 2007-08 and the discounts for lower quality wheat are projected to increase.

BARLEY

Seeded area is expected to decrease by 14%. Production is forecast to decrease by only 5%. Total supply is expected to fall by 6% due to lower carry-in stocks. Total domestic use is forecast to fall by 2%, to the lowest level since 2002-03, due to a forecasted drop in feed, waste and dockage. Feed barley exports are forecast to fall due to increased competition from Australia and the EU. Carry-out stocks are forecast to decline and set a modern day record low. The off-Board price of feed barley is forecast to increase slightly compared to 2007-08. The CWB April PRO for Feed Barley Pool A is \$235/t vs. \$269/t for 2007/08 and the PRO for Special Select two-row designated barley is \$354/t vs. \$290/t for 2007-08.

OATS

Seeded area is expected to decrease by 17%. Production is forecast to decline by 22%. Total supply is forecast to fall by only 12% due to higher carry-in stocks. Total domestic use is expected to decline as a result of lower feed, waste and dockage. Exports are forecast to decrease significantly. Carry-out stocks are expected to decrease. The average nearby CBoT oats futures price is forecast to increase by about \$20/t from the 2007-08 average.

CORN

Seeded area is expected to decrease by 13%. Production is forecast to fall by 15% but supply is expected to decrease by only 9% due to higher carry-in stocks and imports. Total domestic use is forecast to fall by 4%, as higher food and industrial use partly offsets a decline in feed, waste and dockage. Carry-out stocks are forecast to drop sharply. The average Chatham elevator price is forecast to rise by \$25/t from the 2007-08 average, reaching a 13 year high.

CANOLA

Area seeded is expected to increase marginally, while production is forecast to rise by 9% due to higher yields. Total supply is expected to decrease marginally due to lower carry-in stocks. Exports and domestic crush are forecast to remain high on support from strong world food and biofuel demand. Carry-out stocks are forecast to fall significantly. Average canola prices in Canada are expected to increase from 2007-08.

FLAXSEED (excluding solin)

Seeded area is forecast to rise by 13% and production is expected to increase significantly. Exports are forecast to decline by 14% and carry-out stocks are expected to decline by 37%. Prices are forecast to remain strong, similar to 2007-08.

SOYBEANS

Area seeded is forecast to rise by 2%, while production increases by 12% as yields return to normal. Total supply is forecast to rise marginally as higher production more than offsets lower carry-in stocks. Exports are forecast to fall while domestic crush rises. Carry-out stocks are forecast to be the same as 2007-08. The average Chatham price is expected to increase by \$10/t to \$420/t.

FURTHER INFORMATION:

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Fred Oleson, Chi	ef	.983-0807
E-mail	olesonf@	agr.gc.ca

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CANADA: GRAINS AND OILSEEDS SUPPLY AND DISPOSITION

April 25, 2008

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Canola 2006-2007 5,283 5,238 1.72 9,000 203 11,211 5,477 3,579 290 3,913 1,820 370 2007-2008f 5,960 5,911 1.48 8,751 225 10,796 5,500 3,850 351 4,246 1,050 530-570 2008-2009f 5,991 5,900 1.61 9,500 150 10,700 5,500 3,900 355 4,300 900 550-590 Flaxseed 2006-2007 805 785 1.26 989 8 1,333 681 n/a n/a 279 373 302 2007-2008f 528 524 1.21 634 10 1,017 700 n/a n/a 182 135 560-600 Soybeans 2007-2008f 1,214 1,201 2.89 3,466 241 4,201 1,741 1,513 355 1,991 470 263 2007-2008f 1,180 1,172 <td< td=""><td>2007-2008f</td><td>8,320</td><td>7,388</td><td>3.77</td><td>27,825</td><td>2,164</td><td>33,525</td><td>5,900</td><td>3,788</td><td>19,154</td><td>23,565</td><td>4,060</td><td></td></td<>	2007-2008f	8,320	7,388	3.77	27,825	2,164	33,525	5,900	3,788	19,154	23,565	4,060	
2006-2007 5,283 5,238 1.72 9,000 203 11,211 5,477 3,579 290 3,913 1,820 370 2007-2008f 5,960 5,911 1.48 8,751 225 10,796 5,500 3,850 351 4,246 1,050 530-570 2008-2009f 5,991 5,900 1.61 9,500 150 10,700 5,500 3,900 355 4,300 900 550-590 Flaxseed 3,717 700 3,850 355 4,300 900 550-590 Flaxseed 11,717 700 n/a n/a 182 135 560-600 2007-2008f 595 565 1.25 705 15 855 600 n/a n/a 170 85 560-600 Soybeans 3,030 450 3,616 1,700 1,400 266 1,766<	2008-2009f	7,101	6,174	3.96	24,420	2,246	30,726	4,875	4,288	17,916	22,811	3,040	
2006-2007 5,283 5,238 1.72 9,000 203 11,211 5,477 3,579 290 3,913 1,820 370 2007-2008f 5,960 5,911 1.48 8,751 225 10,796 5,500 3,850 351 4,246 1,050 530-570 2008-2009f 5,991 5,900 1.61 9,500 150 10,700 5,500 3,900 355 4,300 900 550-590 Flaxseed 3,717 700 3,850 355 4,300 900 550-590 Flaxseed 11,717 700 n/a n/a 182 135 560-600 2007-2008f 595 565 1.25 705 15 855 600 n/a n/a 170 85 560-600 Soybeans 3,030 450 3,616 1,700 1,400 266 1,766<	Canola												
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Total Oilseeds 2006-2007 7,302 7,225 1.86 13,455 452 16,745 7,899 5,092 645 6,183 2,663 2007-2008f 7,668 7,606 1.59 12,080 685 15,428 7,900 5,250 617 6,194 1,335 2008-2009f 7,794 7,660 1.73 13,235 615 15,185 7,700 5,400 635 6,350 1,135 Total Grains And Oilseeds 2006-2007 24,612 23,021 2.69 61,865 2,633 83,279 32,192 11,676 24,461 38,060 13,027	2007-2008f	1,180	1,172	2.30	2,696	450	3,616	1,700	1,400	266	1,766	150	390-430
2006-2007 7,302 7,225 1.86 13,455 452 16,745 7,899 5,092 645 6,183 2,663 2007-2008f 7,668 7,606 1.59 12,080 685 15,428 7,900 5,250 617 6,194 1,335 2008-2009f 7,794 7,660 1.73 13,235 615 15,185 7,700 5,400 635 6,350 1,135 Total Grains And Oilseeds 2006-2007 24,612 23,021 2.69 61,865 2,633 83,279 32,192 11,676 24,461 38,060 13,027	2008-2009f	1,208	1,195	2.54	3,030	450	3,630	1,600	1,500	280	1,880	150	400-440
2007-2008f 7,668 7,606 1.59 12,080 685 15,428 7,900 5,250 617 6,194 1,335 2008-2009f 7,794 7,660 1.73 13,235 615 15,185 7,700 5,400 635 6,350 1,135 Total Grains And Oilseeds 2006-2007 24,612 23,021 2.69 61,865 2,633 83,279 32,192 11,676 24,461 38,060 13,027	Total Oilseeds												
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Total Grains And Oilseeds 2006-2007 24,612 23,021 2.69 61,865 2,633 83,279 32,192 11,676 24,461 38,060 13,027													
2006-2007 24,612 23,021 2.69 61,865 2,633 83,279 32,192 11,676 24,461 38,060 13,027	2008-2009f	7,794	7,660	1.73	13,235	615	15,185	7,700	5,400	635	6,350	1,135	
2006-2007 24,612 23,021 2.69 61,865 2,633 83,279 32,192 11,676 24,461 38,060 13,027	Total Grains A	nd Oilseed	ls										
				2.69	61,865	2,633	83,279	32,192	11,676	24,461	38,060	13,027	
2007-2008f 24,735 23,630 2.54 59,958 2,874 75,859 29,000 12,798 22,397 37,165 9,695	2007-2008f	24,735	23,630	2.54	59,958	2,874	75,859		12,798	22,397	37,165	9,695	
2008-2009f 25,057 23,883 2.66 63,505 2,886 76,086 29,725 13,653 21,422 36,986 9,375	2008-2009f	25,057	23,883	2.66	63,505	2,886	76,086	29,725	13,653	21,422	36,986	9,375	

(a) Crop year is August-July except corn and soybeans which are September-August.

(b) Excludes imports of products. (c) Includes exports of products for wheat, oats, barley, and rye. Excludes exports of oilseed products.

(d) Total Domestic Use = Food and Industrial Use + Feed Waste & Dockage + Seed Use

(e) Soybean food and industrial use is based on data from the Canadian Oilseed Processors Association. Totals excludes flaxseed due to data confidentiality.

(f) Crop year average prices: No.1 CWRS 12.5% protein and No.1 CWAD 12.5% (CWB final price I/S St. Lawrence/Vancouver), Barley (No. 1 feed, WCE, cash, I/S Lethbridge), Corn (No.2 CE, cash, I/S Chatham), Oats (US No. 2 Heavy, CBoT nearby futures); Rye (No.1 CW, I/S Saskatoon); Canola (No. 1 Canada, WCE, cash, I/S Vancouver); Flaxseed (No. 1 CW, WCE, cash, I/S Thunder Bay); Soybeans (No. 2, I/S Chatham).

* Canadian Wheat Board April Pool Return Outlook (PRO)

f: forecast; Agriculture and Agri-Food Canada: April 25, 2008

Source: Statistics Canada, Cereals and Oilseeds Review Series, Cat. No. $\,22\text{-}007$