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Canada

Grain and Feed Update

Grain and Feed - July Lock-Up Report

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Report Highlights:
Extremely wet conditions in Canada, particularly during May and June, have had a significant impact on forecasted production for 2010/11. Seeding in Western Canada - Manitoba, Alberta, and especially Saskatchewan have been affected by these conditions, reducing the forecast particularly for wheat and barley. Seeding for wheat is below the five-year average of 87 percent in Saskatchewan alone. Durum production is forecast to drop by more than 40 percent from 2009/10 production due to several factors, including the excess moisture. Total wheat exports are forecast to drop to 15.5 MMT in 2010/11, down 3 MMT from the year before. Due to reduced area and excessive moister Canada is forecast to be headed for the smallest barley crop in nearly 50 years, 7.8 MMT and exports are forecast down to 1.0 MMT. Corn production should not be affected by the wet conditions since it is principally grown in the eastern provinces which were not affected by the wet conditions. Yields are expected to be up approximately 7 percent with production forecast at 10.2 MMT with imports forecast at 2.5 MMT. While seeding for oats was not influenced by the conditions, yields are expected to be down nearly 15 percent with exports forecast at 1.5 MMT.

Executive Summary:
For 2010/11, Canadian producers increased the areas seeded to oats and corn and decreased the areas seeded to wheat and barley from 2009/10, according to Statistics Canada's May seeding intentions survey, released on June 23, 2010. However, the actual areas seeded may differ significantly from the survey results because of the extreme wet conditions in Manitoba, Alberta and especially Saskatchewan in May and June. Seeding is well below the five-year average of 87 percent in Saskatchewan alone. Excess moisture has prevented many producers from completing their seeding and, as well, fields which had already been seeded have been damaged. Abandonment is expected to be significantly above normal and average yields are forecast to be below normal due to extreme wet conditions and cool temperatures across western Canada. In Eastern Canada, abandonment and yields are forecast to be near normal.

- Due to flooding conditions during seeding, Post forecast a drop in 2010/11 wheat production of over 20 percent compared to last season to 20.9 million metric tons (MMT) and 15 percent down from Post's previous estimate. Wheat exports are forecast to decrease to 15.5 MMT from 18.5 MMT in 2010/11 because of the lower supply availability this year.

- For 2010/11Post forecasts barley production to fall by 18 percent to 7.8 MMT compared to the 2009/10 estimate and 15 percent compared to Post's last forecast as yields decline, based on July numbers from Agriculture Canada. This could be the smallest barley crop in nearly 50 years. Exports are forecast to fall to 1.0 MMT.

- Corn area harvested in 2010/11 is forecast at a level similar to last year at 1.2 million hectares since the main growing regions are Quebec and Ontario, where conditions have not been as wet as in the prairie provinces. Although production is forecast up by about 700,000 tons to 10.2 MMT, imports are also forecast to increase from 2.3 to 2.5 MMT due to increased demand for ethanol.

- Oat area harvested is forecast to be similar to last year at about 1 million hectares, but yields are expected to decrease due to the early season wetness. Production is forecast to decrease significantly to 2.47 MMT which is expected to result in a 15 percent decrease in exports to a forecast level of 1.5 MMT.

Wheat

Highlights for 2010/11

Due to flooding conditions during seeding, Post forecast a drop in production of over 20 percent compared to last season to 20.9 million tons (MMT) and 15 percent down from Post's previous estimate. The forecast of harvested area is decreased more than 17 percent compared to last season and 12 percent compared to Post's previous forecast, based on Agriculture Canada's July 8, 2010, "Grain and Oilseeds Outlook: 2010-11." In the same report, Agriculture Canada forecast that 2010/2011 seeding would be down over 8 percent from seeding in 2009/10. However, they state that "the actual areas seeded may differ significantly from the survey results because of the extreme wet conditions in Manitoba, Alberta and especially Saskatchewan in May and June." As the seeding window closed, parts of Western Canada had seen more than double the annual average rainfall. The government is

concerned that unseeded acreage could be as high as 12 million acres (4.9 million hectares). The Canadian Wheat Board (CWB) says Western Canada will have the lowest wheat acreage since 1971. Abandonment is expected to be higher than normal in western Canada, especially in the main wheat producing province of Saskatchewan. Hard red spring wheat is forecast to account for more than 75 percent of the total wheat (ex-durum) production, the same as in 2009/10. Supply is forecast to drop by 16 percent compared to last season and by over 5 percent compared to Post's previous forecast. Domestic food and industrial use is forecast to remain stable, while the domestic feed use is forecast to decline nearly 30 percent. Carry-out stocks are expected to decrease to a historically low level of 5.6 MMT, compared to 6.9 MMT last year and 6.1 MMT, Post's previous forecast.

Wheat exports are forecast to decrease to 15.5 MMT from 18.5 MMT in 2010/11 because of the lower supply availability this year. However, European and Russian crops are also expected to be smaller. Canada is trying to promote its product's higher protein content within the competitive world trading forum. Another factor affecting Canadian wheat exports is new serious competitors in Russia, Ukraine and Kazakhstan, who are expanding their markets, particularly in North Africa and the Middle East. Industry specialists are calling on the Canadian wheat industry to build on Canada's reputation as a reliable supplier of quality wheat and to differentiate Canadian wheat from the competition. There is also a drive to increase investment in research and breeding in wheat to improve productivity, disease resistance and nutritional value.

Despite the reduced outlook for the export market, the grain-trade relationship between Canada and China just recognized their shared grain export history which goes back 49 years to when the CWB first started selling wheat and barley to China. In those 49 years the Chinese market has changed. The country's grain production has expanded and imports have decreased. However, Canada expects that China will remain an important market for Canadian wheat. Despite competition from other grain exporters, Canada continues to account for as much as 40 percent of imports in some years. The export focus is high protein red spring wheat, which often is mixed with lower grade wheat from other countries. The CWB is operating a pilot project with a Chinese retailer to distribute bags of Canadian premium flour milled in Canada but packaged in China to give consumers a taste of a 100 percent Canadian product.

There have been continuing challenges to the CWB from the political front as the ruling Conservative Party has introduced a variety of measures to try and limit the board's powers and to give farmers more marketing choices. The Board contends that on the wheat side, the majority of farmers still prefer to sell their product on the single-desk marketing system. The CWB says there are more differing opinions for selling barley. A new bill, introduced by the Liberals as a counter to recent Conservative initiatives, would make four changes to the CWB Act: reduce the number of directors appointed by the government to two from four; limit the government's ability to give orders to the CWB; strengthen rules for voting procedures before any legislative changes are made to the single-desk system; and require the government to consult and collaborate with the Board.

It is worth noting that Health Canada is considering implementing a new standard for ochratoxin A (OTA). One proposal under consideration would impose a 3 percent level as a cut-off for hard spring wheat, 9 percent for infant cereals and 1.5 percent for breakfast cereals. The new standard could cause some wheat to be rejected from the food system and impose increased costs on farmers. The industry has argued that even though evidence may indicate toxicity problems at high levels, there is scant evidence of problems at naturally occurring levels and that most new proposed standards are too high.

OTA has been around for decades, but has only recently become a worrisome issue in the world grain trade. Canada's recent initiatives have followed on the heels of European lawmakers and regulators who have recently begun treating OTA as dangerous, and shipments of many types of wheat and wheat products, such as pasta, have been affected. Canadian researchers have advised the industry that the best way for the Canadian industry to deal with the new standards is to embrace new practices rather than fighting the rules. They have encouraged the Canadian government and the industry to first study the types of fungus that are present in Canadian grain. Certain types pose greater risk than others. Additionally, they encourage the study and implementation of optimal storage and handling methods. Researchers note that European farmers have already moved to reduce OTA in their stored grain, while British producers have proven levels can be reduced. Finally, sampling tools that can correctly identify OTA levels need to be developed.

Specifically for durum, production is forecast to drop by more than 40 percent from 2009/10 production because of sharply lower prices, burdensome carry-in stocks and excess moisture in some areas during seeding. Abandonment is expected to be higher than normal because of excess moisture in the durum production areas which are mostly in southern Saskatchewan and southern Alberta. Due to higher carry-in stocks, supply is expected to decrease by 19 percent. Durum exports are forecast to increase by 6 percent, mainly because of increased imports from northern Africa. The projection is based on the volatility of production in North Africa and while it achieved high levels in 2009/2010, it is expected to fall in the out-year, requiring more imports. Carry-out stocks are forecast to decrease by 52 percent to a historically low level. The market outlook this spring was so dismal that the CWB allowed durum growers to opt out of their contracts without penalty.
A significant impact on Canadian durum exports in 2009/2010 is a drop in shipments to Algeria. Algeria is one of the world's biggest grain importers and is often the leading importer of Canadian durum. A strong domestic harvest in Algeria last season allowed it to reduce wheat imports in 2009. Currently Algeria has enough domestic stocks to satisfy needs and they are on track for a good grain harvest this year. Furthermore, there is two percent more land under cereals production compared to last season. The state grain import agency in Algeria has stated that they will not import more durum for the moment, but rather will allow stocks to run down. However, Algeria's harvests fluctuate significantly according to rainfall.

Highlights for 2009/10

The wheat 2009/10 production estimate remained at 26.5 million metric tons, (MMT) off 9.5 million hectares based on the most recent reporting by Statistics Canada. The production level for 2009/10 is high due to good weather conditions in the fall which permitted a successful harvest. Nevertheless, estimated production levels in 2009/10 represent a drop in production from the previous year. This drop in production is due to a combination of factors including lower seeding rates due to the large carry-in stocks resulting from bumper wheat crop the previous crop year and strong world wheat supplies, combined with lower yields and higher abandonment rates due to weather-related poor growing conditions. The drop in production is partially off-set by the large carry-in stocks, resulting in total supplies of 33.6 MMT, or about the same level as the previous crop year.

The exports estimate is increased slightly to 18.5 MMT in 2009/2010. The reduction from the previous year is due in part to lower supplies and slightly lower world demand. Meanwhile the CWB set a target

of 18.7 MMT based on expected demand for high quality/high protein Canadian wheat. Strong competition affected Canadian exports as world supplies were high due to large carry-over stocks from the previous crop year. Ending stocks in 2009/10 are expected to total close to 7.0 MMT, on par with the 5-year average.

Highlights for 2008/09

Wheat exports in 2008/09 totaled 18.8 MMT, 11 percent higher than the previous crop year. Low 2008/2009 carry-in stocks, due to a small 2007 crop and high exports in 2007/08, were off-set by a large, good quality 2008 crop and made ambitious exports of 18.8 MMT possible. This higher pace of exports in 2008/09 of the large wheat crop was aided by the fact that the recession led to grain facing less competition in rail transportation. Post revised the domestic consumption figures based on the May seeding intentions survey, released on June 23, 2010. Wheat for use in feed consumption increased to 3.5 MMT, a substantial increase from the previous crop year at 3.1 MMT. The main reason for the increased feed consumption of wheat was due to poor forage conditions spurring demand for other feed sources. Post's current figure for FSI consumption was revised from 4.7 MMT to 4.3 MMT. Reflecting the large crop increase carry-out stocks are estimated at almost 6.7 MMT, up significantly from the previous year level of 4.4 MMT.

Barley

Highlights for 2010/11

For 2010/11Post forecasts production to fall by 18 percent to 7.8 MMT compared to the 2009/10 estimate and 15 percent compared to Post's last forecast as yields decline, based on July numbers from Agriculture Canada. This could be the smallest barley crop in nearly 50 years. Total supply is forecast to fall by nearly 20 percent due to lower carry-in stocks and production. Domestic feed use is projected to decline due to lower livestock numbers. Total exports are forecast to decrease to 1.0 MMT, due to lower supply while carry-out stocks fall significantly.

International barley prices are expected to be supported by lower world production and by the removal of the intervention subsidies in the European Union (EU). A recent record heat wave has reduced crop prospects in western Europe and Russia, improving conditions for barley exports. The United States and China are expected to continue to be the major export markets for Canadian malting barley exports. Canada’s exports of feed barley are expected to be minimal due to strong returns from the domestic market relative to the foreign markets. Exports to the EU are likely to drop as stocks in the EU have grown significantly following the change to the EU subsidy policy and cheap feed barley from the Black Sea region. On the positive side for Canadian exports is the Chinese market. As noted earlier in this report and in previous GAIN reports, Canadian barley exports to China have found a growing market. Canadian malting barley sales to China now average 386,000 tons each year. Canadian barley growers' claim that each of the top Chinese beer producers use Canadian barley. Moreover, they note that China is a huge market for beer.

Barley growers have historically had a number of conflicts with the CWB, however, over the last quarter, the Western Barley Growers Association has vowed to make more of an effort to work with the

Board in furthering the interests of their members. In particular, barley growers hope to work with the CWB on marketing programs, research and the promotion of the sector as a vocational choice. In the last annual report, Post noted initiatives by the Government of Canada to promote Canadian malting barley to international customers. The Barley Growers hope to utilize their relationship with the Board to encourage even greater government support for research. The industry faces a crisis in the decline of the breeding and agronomy research sector as more and more scientists are retiring. Finding young scientists interested in plant breeding is a challenge and various commodity groups are looking for ways to promote the field. On the research front, the barley industry is hopeful that a sugar found in barley straw could have future potential in ethanol production.

Highlights for 2009/10

Barley production is estimated to have fallen to 9.5 MMT, a 19 percent drop from the previous crop year's level, and 23 percent below the 10-year average, but 3 percent above Post's previous estimate. This drop is due to reduced area, lower yields and higher abandonment rates resulting from poor weather conditions. Close to average carry-in stocks will help off-set the drop in production so that supplies will only decrease to 12.4 MMT, 7 percent lower than the previous crop year. Barley exports for marketing year 2009/10 are estimated at 1.35 MMT. Post anticipated a decrease due to lower domestic supplies and the demand for feed barley from the United States remaining low due to higher U.S. supplies of corn. However, an increase in demand from China is likely to drive Canadian barley exports higher than originally anticipated. Domestic consumption of feed barley is expected to decrease to 7.3 MMT in 2009/10 due to lower supplies, higher prices, and an anticipated decrease in livestock numbers as the Canadian industry continues to downsize and restructure. Anticipated lower supplies will pull stocks down to well below the five-year average.

Highlights for 2008/09

Barley exports in 2008/09 marketing year fell short of initial expectations. Barley exports totaled 1.48 MMT, significantly short of the previous year's level of 3 MMT. Canadian feed use jumped 17 percent as poor weather conditions hurt forage production, leaving livestock producers in western Canada to seek out additional feed grains. Feed consumption of barley is estimated to have reached almost 7.7 MMT in 2008/09. Carry-out stocks are estimated at 2.8 MMT, a little higher than the 5-year average of 2.4 MMT.

Corn

Highlights for 2010/11

Area harvested is forecast at a level similar to last year at 1.2 MMT since the main growing regions are Quebec and Ontario, where conditions have not been as wet as in the prairie provinces. Statistics Canada reports that about 65 percent of Canada's corn will be seeded to genetically modified (GM) varieties, this compares to 62 percent in 2009/10. Although domestic supply is expected to increase, imports are also forecast to increase due to increased demand for ethanol. Carry-out stocks are expected to decrease by 6 percent due to the higher total domestic use.

Highlights for 2009/10

Based on Stats Canada data the estimate for corn production at 9.5 MMT is about 1 MMT below the 2008/09 crop and the same as Post's previous estimate. The reduction is due primarily to lower yields due to poor weather. Imports of corn are expected to increase to 2.3 MMT, based on year-to-date data from The Global Trade Atlas. Corn imports totaled 1.96 MMT in the first 10 months of the marketing year, compared to 1.54 MMT in the same period the year before. Feed consumption of corn is expected to drop slightly to 7.3 MMT, reflecting the downsizing and restructuring that is on-going in the Canadian hog industry. Corn for industrial usage is expected to increase as several corn ethanol plants in Ontario come on-line in 2010. Carry-out stocks, at 1.7 MMT, are forecast lower than the previous year's level of almost 1.9 MMT.

Highlights for 2008/09

Corn imports in 2008/09 are estimated at 1.86 MMT, higher than originally estimated, but still significantly lower than the 10-year average of 2.4 MMT due to the availability of domestic corn and barley for feed purposes, and ample supplies of Canadian corn for industrial usage. In 2008/09 corn for feed purposes is estimated to have fallen to 7.6 MMT from 10.2 MMT in 2007/08, representing a return to more average consumption levels. Due to a stable demand from ethanol plants located in the province of Ontario, the domestic consumption of corn for industrial purposes remains significantly above the 5-year average of 2.7 MMT at 4.1 MMT. Carry-out stocks are forecast at 1.84 MMT.

Oats

Highlights for 2010/11

Area harvested is forecast to be similar to last year, but yields are expected to decrease due to the early season wetness. Agriculture Canada is reporting area seeded to be 1.5 million hectares, the same as last year, but a drop from 1.7 million hectares seeded in 2008/09. Production and supply are forecast to decrease significantly which is expected to result in a 15 percent decrease in exports to a forecast level of 1.5 MMT. Canadian exports may also be negatively impacted by the weak value of the Euro. Carry-out stocks are expected to remain relatively flat.

Earlier in the quarter, Canadian oats watchers noted that more farmers began 2010 looking at positive returns for 2010/11 for oats. Many crop calculators placed oats second to canola in returns. But, since those early estimates, the situation took a downturn, particularly with a slump in demand. Projections indicate that the demand for shipments to the United States is likely to decrease given a drop in the food and horse feed markets. Acreage surveys indicated that farmers in the core oat-growing areas planned for an average crop. The real change in seeding came from farmers who don't normally grow the crop. It is expected that these farmers will probably harvest poorer yields than top oat producers. In addition, oat production will likely be affected by the wet conditions prevalent in May and June.

Oat producers still are positive about the potential growth in the demand for oats, oat bran and oat flour for the production of gluten-free foods. Some projections indicate increases as high as 15 to 30 percent per year. The drive behind this increasing demand is a greater awareness of celiac disease and gluten intolerance and the use of pure oats in the diet for those diagnosed with the condition. To qualify as pure oats, crops must contain less than 20 parts per million of gluten. One Canadian prairie producer, Avena Foods, began producing and processing pure oats in 2008 and now operates the largest dedicated pure oat facility in North America. About 80 percent of the company's production is shipped to the

United States. Pure oats cannot be grown on land that has produced wheat, barley or rye for the previous three years. Production must follow strict protocols and must be harvested with dedicated equipment to protect against contamination from other cereal crops. Another Canadian company that sells pure oats to manufacturers of gluten free foods, Cream Hill Estates, has had sales increases between 50 and 100 percent each year since it began selling pure oat products in 2006. Last year the company sold 75,000 tons of the product and in 2010 they expect to contract more than 100,000 tons. Producers of pure oats can expect a premium of roughly 50 percent over conventional oat markets.

Highlights for 2009/10

Oats production is estimated to have fallen to 2.8 MMT, compared to 4.3 MMT for the previous year and identical to Post's previous estimate, due to lower area planted and higher rates of abandonment caused by poor growing conditions. This drop in production is expected to reduce supplies to 4.3 MMT compared to the availability of over 5 MMT in the last several seasons. Despite this reduction in supplies, the oats market remains flush and exports are expected to decrease further to 1.9 MMT, down from 2008/09 export figure of 2.4 MMT. Post revised the export estimate from 1.7 MMT based on figures from Global Trade Atlas. Expected lower supplies will draw down stocks, resulting in carry-out stocks for 2009/10 being forecast at 1.1 MMT.

Transportation Note:

Many factors influence grain movement and transportation factors are significant when considering the outlook for Canadian grain farmers. For prairie farmers, transportation is their single largest cost in marketing their grain. Therefore, having access to reasonable transportation is a necessity. A recent study funded by a group of farm organizations, including the Canadian Federation of Agriculture, found that western farmers are now paying millions more than they would have under previous transportation schemes. Western farmers paid C$6.87 more per ton to move grain than what would have been considered fair under the former Western Grain Transportation Act. Over the last 20 years dramatic changes have taken place in railway transportation in western Canada. Today the number of elevators has dropped from 1,500 to 240 and the railways have moved to multi-car blocks of at least 50 cars. Those two things have dramatically improved their cost structure. At the same time, thousands of miles of railway track have been abandoned, further reducing overall costs for railways. Despite these improvements in efficiencies, a recent study found that prairie farmers are still paying too much to move their grain, leading some to the conclusion that the railways are not passing on all the benefits of the lower cost structure to their farmer clients.

In addition shipments through the St. Lawrence Seaway appear to be down from last year. Last year, the shipping season got off to a roaring start in April with more than twice the typical tonnage in that month alone. Shipments this year are expected to return to more normal levels. Grain shipments out of Thunder Bay Ontario have remained in the range of 5.5 to 6.5 million tons annually over the past decade. However, the CWB's share of those shipments is the majority at around 4.2 million tons, but it has been going down. A number of reasons have been cited for the expected downturn in eastern shipments in 2010. Demand for durum wheat in foreign markets, in particular North Africa, has slowed, exchange rates have increased the costs of using the seaway relative to alternatives like the west coast and the availability of shipping has been limited by a reduction in inbound vessels due to problems with the steel industry. The press is reporting that there are indications that strong grain shipments could continue into the spring if rail rates are competitive with lake freight costs. Authorities from the Thunder Bay Port Authority have noted that regardless of whether there is a good or bad harvest in western Canada, the amount of grain that gets shipped through the eastern export system remains fairly

constant.

Wheat , Canada	2008/2009			2009/2010			2010/2011		
1,000 hectares, 1,000 metric tons	Market Year Begin: Aug 2008			Market Year Begin: Aug 2009			Market Year Begin: Aug 2010		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Area Harvested	10,032	10,032	10,032	9,500	9,539	9,540	7,700	9,000	7,890
Beginning Stocks	4,406	4,406	4,406	6,556	6,915	6,693	6,356	7,250	6,953
Production	28,611	29,005	28,611	26,500	26,512	26,520	20,500	24,380	20,900
MY Imports	378	385	378	400	382	400	400	380	400
TY Imports	387	394	387	400	387	400	400	380	400
TY Imp. from U.S.	301	306	301	0	208	208	0	380	380
Total Supply	33,395	33,796	33,395	33,456	33,809	33,613	27,256	32,010	28,253
MY Exports	18,812	18,606	18,812	18,500	18,000	18,500	15,500	17,300	15,500
TY Exports	18,583	18,450	18,583	18,500	17,500	18,500	15,500	17,200	15,500
Feed and Residual	3,295	3,536	3,544	3,700	3,652	3,700	2,000	3,536	2,650
FSI Consumption	4,732	4,739	4,346	4,900	4,907	4,460	5,100	5,060	4,500
Total Consumption	8,027	8,275	7,890	8,600	8,559	8,160	7,100	8,596	7,150
Ending Stocks	6,556	6,915	6,693	6,356	7,250	6,953	4,656	6,114	5,603
Total Distribution	33,395	33,796	33,395	33,456	33,809	33,613	27,256	32,010	28,253

Statistical notes: HS codes for all wheat trade include 1001, 1101, 190219, 190230, 190240.

Barley, Canada	2008/2009			2009/2010			2010/2011		
1,000 hectares, 1,000 metric tons	Market Year Begin: Aug 2008			Market Year Begin: Aug 2009			Market Year Begin: Aug 2010		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Area Harvested	3,502	3,502	3,502	2,920	2,918	2,918	2,650	3,000	2,600
Beginning Stocks	1,568	1,568	1,568	2,843	2,883	2,843	2,363	2,545	2,550
Production	11,781	11,823	11,781	9,520	9,212	9,517	8,400	9,200	7,800
MY Imports	42	40	42	50	50	40	50	60	45
TY Imports	42	40	42	50	50	40	50	60	45
TY Imp. from U.S.	42	40	42	0	50	40	0	60	45
Total Supply	13,391	13,431	13,391	12,413	12,145	12,400	10,813	11,805	10,395
MY Exports	1,483	1,483	1,483	1,300	1,500	1,350	1,000	1,700	1,000
TY Exports	1,618	1,700	1,618	1,200	1,500	1,350	1,000	1,700	1,000

Feed and Residual	7,690	7,715	7,687	7,400	6,950	7,300	6,900	6,250	6,900
FSI Consumption	1,375	1,350	1,378	1,350	1,150	1,200	1,350	1,405	1,000
Total Consumption	9,065	9,065	9,065	8,750	8,100	8,500	8,250	7,655	7,900
Ending Stocks	2,843	2,883	2,843	2,363	2,545	2,550	1,563	2,450	1,495
Total Distribution	13,391	13,431	13,391	12,413	12,145	12,400	10,813	11,805	10,395

Statistical note: Barley trade numbers do not include products.

Corn, Canada	2008/2009			2009/2010			2010/2011		
1,000 hectares, 1,000 metric tons	Market Year Begin: Sep 2008			Market Year Begin: Sep 2009			Market Year Begin: Sep 2010		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Area Harvested	1,169	1,169	1,169	1,150	1,181	1,181	1,200	1,260	1,170
Beginning Stocks	1,457	1,457	1,457	1,857	1,842	1,871	1,467	1,400	1,727
Production	10,592	10,563	10,592	9,560	9,561	9,561	10,500	11,000	10,200
MY Imports	1,843	1,863	1,863	2,000	2,000	2,300	2,500	2,000	2,500
TY Imports	1,844	1,863	1,863	2,000	2,000	2,300	2,500	2,000	2,500
TY Imp. from U.S.	1,844	1,863	1,863	0	2,000	2,300	0	2,000	2,500
Total Supply	13,892	13,883	13,912	13,417	13,403	13,732	14,467	14,400	14,427
MY Exports	372	327	327	150	200	150	300	300	200
TY Exports	366	327	327	150	200	150	300	300	200
Feed and Residual	7,533	7,594	7,594	7,500	7,503	7,355	8,000	7,685	7,886
FSI Consumption	4,130	4,120	4,120	4,300	4,300	4,500	4,500	4,500	4,700
Total Consumption	11,663	11,714	11,714	11,800	11,803	11,855	12,500	12,185	12,586
Ending Stocks	1,857	1,842	1,871	1,467	1,400	1,727	1,667	1,915	1,641
Total Distribution	13,892	13,883	13,912	13,417	13,403	13,732	14,467	14,400	14,427

Statistical note: Corn exports and imports do not include products.

Oats, Canada	2008/2009			2009/2010			2010/2011		
1,000 hectares, 1,000 metric tons	Market Year Begin: Aug 2008			Market Year Begin: Aug 2009			Market Year Begin: Aug 2010		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Area Harvested	1,448	1,448	1,448	950	950	948	1,000	1,325	1,025
Beginning Stocks	950	950	950	1,527	1,527	1,578	1,142	1,090	1,286
Production	4,273	4,272	4,273	2,800	2,798	2,798	2,800	3,535	2,470
MY Imports	16	17	17	15	15	15	15	15	15
TY Imports	14	14	14	15	15	15	15	15	15
TY Imp. from U.S.	14	14	14	0	15	15	0	15	15
Total Supply	5,239	5,239	5,240	4,342	4,340	4,391	3,957	4,640	3,771

MY Exports	1,942	1,942	2,380	1,450	1,700	1,940	1,500	2,200	1,550
TY Exports	1,789	1,789	2,270	1,550	1,700	1,890	1,500	2,200	1,500
Feed and Residual	1,090	1,110	1,086	1,100	900	980	1,100	1,150	770
FSI Consumption	680	660	196	650	650	185	675	90	190
Total Consumption	1,770	1,770	1,282	1,750	1,550	1,165	1,775	1,240	960
Ending Stocks	1,527	1,527	1,578	1,142	1,090	1,286	682	1,200	1,261
Total Distribution	5,239	5,239	5,240	4,342	4,340	4,391	3,957	4,640	3,771

Statistical note: Oat exports and imports do not include products.

Useful Resources:

Field Crop Reporting Series:
http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=22-002-XFB&lang=eng

Agriculture and Agri-Food Canada, Market Analysis Division:
http://www.agr.gc.ca/pol/mad-dam/index_e.php