Required Report: Required - Public Distribution **Date:** May 10, 2023

Report Number: CA2023-0017

Report Name: Grain and Feed Annual

Country: Canada

Post: Ottawa

Report Category: Grain and Feed

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Report Highlights:

FAS/Ottawa forecasts total production of wheat, corn, barley, and oats to increase one percent in MY 2023/24 from the previous year, assuming yields return closer to historic averages and a six percent increase in wheat production offsets production declines in other crops. FAS/Ottawa assumes planted area to increase more than three percent on an additional 700,000 hectares of wheat. Only oat planted area is forecast to decline. Mid-April prairie cropland conditions are significantly better than in the past two years due to improved soil moisture in the western portion of the prairies. However, some regions are now reporting too much moisture.

GRAIN AND FEED ANNUAL

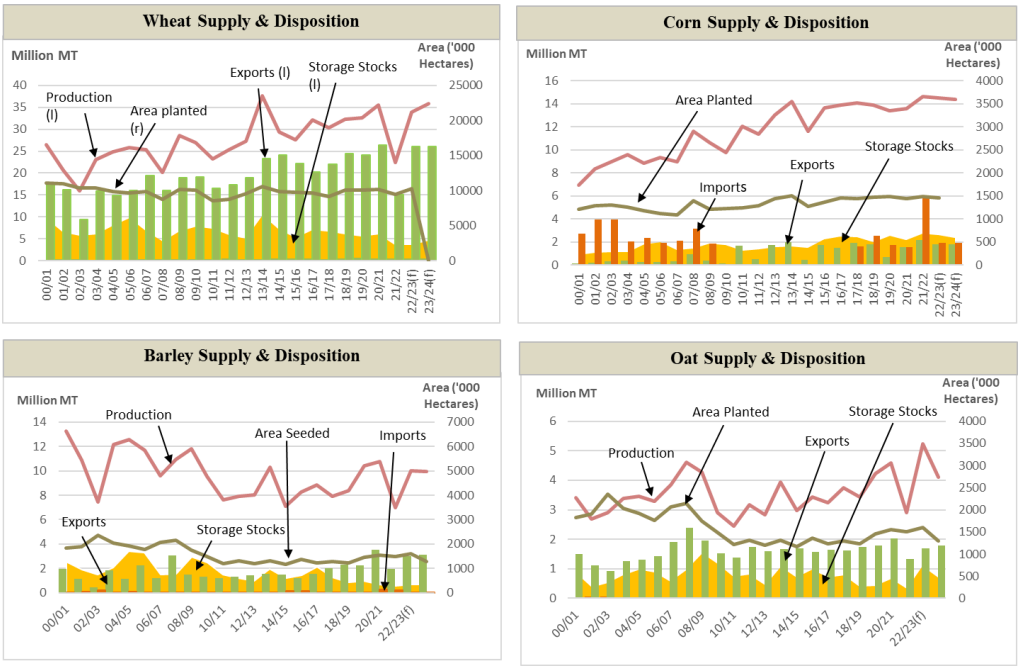
This report covers the supply and distribution of Canadian wheat, barley, oats, and corn in marketing years (MY) 2022/2023 and 2023/2024. U.S. Department of Agriculture marketing years run from August to July for wheat, oats, and barley, and from September to August for corn. Forecasts in this report do not fully reflect trade disruptions at Black Sea ports, and embargoes and export restrictions put on crops and fertilizers.

Executive Summary

Marketing Year 2023/24

Production of wheat, corn, barley, and oats is forecast to increase one percent year-over-year to 64.3 million metric tons (MT) in MY 2023/24 on an assumption that oat, corn, and wheat yields fall in line with historic averages and that a six percent increase in wheat production will more than offset production declines in other reported crops. FAS/Ottawa expects planted area to increase more than three percent on an additional 700,000 hectares of wheat. Only oat area is expected to shrink, due to large on-farm stocks remaining. This forecast is informed by Statistics Canada's planting intentions survey published on April 26.

Figure 1: Supply and Distribution of Grains in Canada



Source: Created by FAS/Ottawa using data from AAFC, Trade Data Monitor, LLC, and USDA PSD

The most significant downside risk to this outlook is the persistently dry conditions in patches of Alberta and Saskatchewan that are the primary cereal-growing areas in Canada. However, mid-April conditions in the western half of the prairies are significantly better than in the past two years due to increased soil moisture.

Sources indicate that as of mid-April, planting is expected to be on track in much of the Canadian Prairies or a week or two delayed because of precipitation and cold temperatures in late April. Planting schedules throughout wetter parts of the country will depend on how much standing water is in the field. Corn is expected to be planted on schedule or slightly delayed due to the significant precipitation received throughout the winter and spring. In Ontario and Quebec, farmers typically plant corn in late April and the first half of May each year and in Manitoba between May 1 and May 15.

Total exports are forecast to increase marginally from MY 2022/23 and remain historically high on strong global demand. Total imports are forecast to decline slightly on reduced demand for feed wheat. Domestic feed supply is expected to increase, and pastureland conditions are expected to be improved over early MY 2022/23 conditions.

Beginning stocks of wheat, oats, and barley combined are forecast to increase ten percent over MY 2022/23 as supplies continue to re-build after the severe drought of MY 2021/22. However, beginning stocks of wheat will remain at historically low levels in MY 2023/24. Oats are the exception as MY 2023/24 beginning stocks are forecast to be up more than 200 percent over the previous year due to record oat production and depressed prices that motivated farmers to store crop instead of marketing it.

Total ending stocks are forecast to remain well below historic levels as supplies continue to rebuild while global demand remains strong.

Marketing Year 2022/23

In MY 2022/23, production of wheat, corn, barley, and oats increased by more than 35 percent over MY 2021/22 on recovery of oat, barley, and wheat yields.

The ending stocks-to-use ratio for total wheat is forecast to fall from 14 percent to 10 percent, a historical low, and seven percentage points below the five-year average. Stocks-to-use ratios are also low for spring wheat, durum, and barley, while ratios are high by historic comparison for oats (25 percent, versus 10 percent in MY 2021/22) and steady for barley (at seven percent).

WHEAT

Table 1: Wheat Production, Supply, and Demand

Wheat	2021/2022		2022/2023		2023/2024	
Market Year Begins	Aug 2021		Aug 2022		Aug 2023	
Canada	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	9199	9199	10082	10082	0	10700
Beginning Stocks (1000 MT)	5953	5953	3663	3663	0	3600
Production (1000 MT)	22422	22422	33824	33824	0	35845
MY Imports (1000 MT)	552	552	600	602	0	520
TY Imports (1000 MT)	558	558	600	594	0	520
TY Imp. from U.S. (1000 MT)	392	392	0	0	0	0
Total Supply (1000 MT)	28927	28927	38087	38089	0	39965
MY Exports (1000 MT)	15116	15136	25000	26000	0	26000
TY Exports (1000 MT)	14990	15010	25000	26000	0	26000
Feed and Residual (1000 MT)	5152	5132	4500	3369	0	4300
FSI Consumption (1000 MT)	4996	4996	5050	5120	0	5120
Total Consumption (1000 MT)	10148	10128	9550	8489	0	9420
Ending Stocks (1000 MT)	3663	3663	3537	3600	0	4545
Total Distribution (1000 MT)	28927	28927	38087	38089	0	39965
Yield (MT/HA)	2.4374	2.4374	3.3549	3.3549	0	3.35

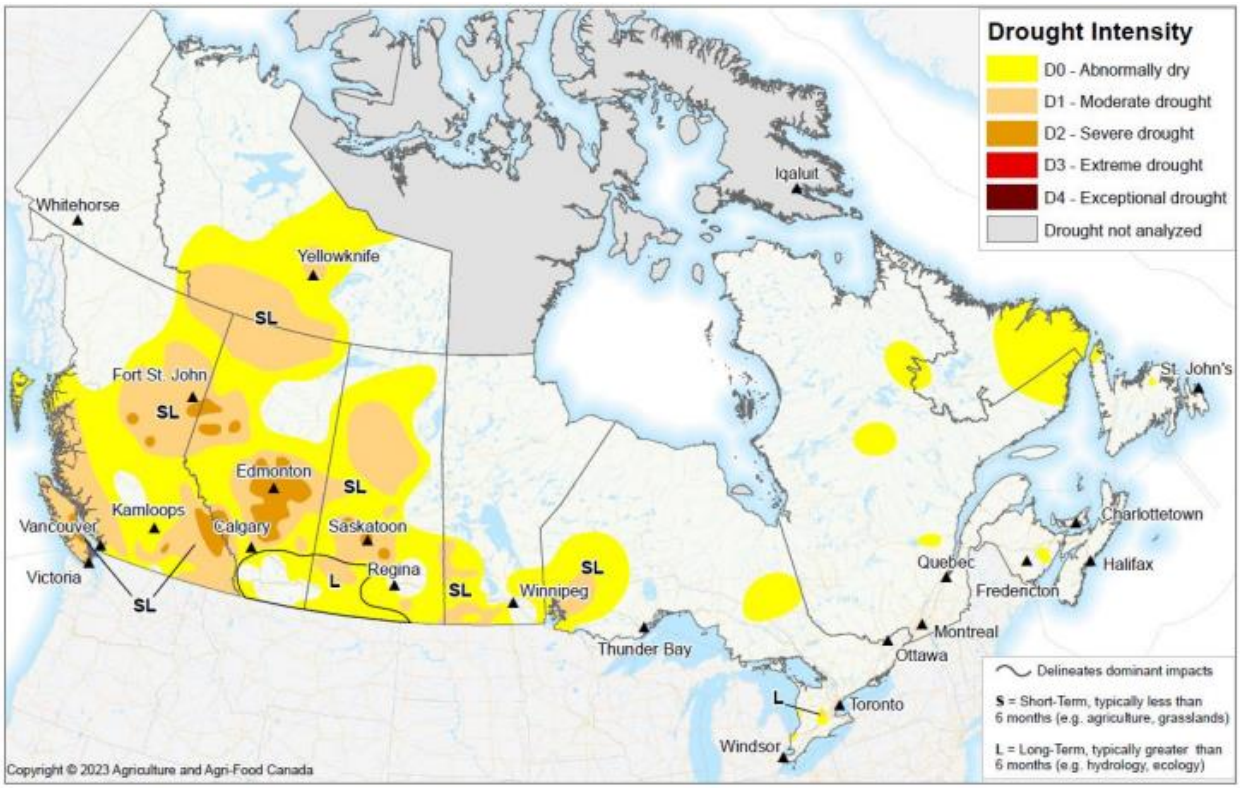
(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2023/2024 = July 2023 - June 2024

Wheat Production – MY 2023/24

FAS/Ottawa's production forecast is based on assumptions of an increase in total area planted to spring wheat and winter wheat. The wheat production forecast assumes a return to a trimmed five-year average yield. The trimmed average excludes the low annual average yield obtained in the drought year of 2021. Durum production is forecast to rebound despite an expected decrease in area planted, based on the assumption that yields will increase from 2.27 MT per hectare in MY 2022/23 to the trimmed five-year average of 2.53 MT per hectare in MY 2023/24.

Durum is expected to take up just over 20 percent of wheat area, in line with historic averages. Durum area as a share of total wheat area has been stable over the past ten years, ranging between 19 percent and 26 percent of total wheat area, depending on prices. Durum is primarily grown in southern Saskatchewan, where soil and climate are typically most suitable.

Figure 2: Drought Conditions as of March 31, 2023



Source: [Agriculture and Agri-Food Canada]

Although soil moisture in the prairies is improved compared to last year, there is a need for timely rains to maintain sufficient moisture levels in the western half of the prairie region where there are large expanses of dry area and patches of moderate to severe drought.

Vast areas of Manitoba and Northern Saskatchewan are currently experiencing excessive moisture.

Saskatchewan sources indicate that wheat planting is expected to begin no earlier than the weeks of April 24 or May 1 in the southwest/west-central regions. The rest of the province will likely plant sometime after the weeks of May 1 or May 8, depending on how much standing water is in fields. Historic wheat seeding dates in Saskatchewan are early to mid-May.

Farmers in the Alberta Peace Region told FAS/Ottawa that they are preparing to begin planting wheat the first week of May, average for the area. Further south in Alberta, farmers have reported very good moisture from snow melt and plan to seed the weeks of May 1 or May 8 when the fields are expected to be drier. Wheat planting in the southern region of the province typically begins mid-April to the first week of May.

Contacts report that winter wheat crops in Ontario, planted in the fall of 2022, had a good survival rate and the emerging quality is generally considered excellent.

Wheat Production – MY 2022/23

Wheat production increased 51 percent in MY 2022/23, year-over-year, on improved yields following the MY 2021/22 drought. Soil moisture levels were generally below average in many areas of the western half of the prairies but were significantly improved over 2021. Canadian farmers reported that they intended to plant more durum wheat in 2022, year-over-year, but planted other crops instead due to April 2022 snowstorms that delayed planting until June.

As of mid-April 2023, Saskatchewan cash prices for No. 1 Canadian Western Red Spring (13.5 protein) have fallen 23 percent from a year earlier but are up 35 percent over a two-year period. No. 1 Canadian Western Amber Durum (13.0 protein) cash prices have fallen 24 percent in 12 months but are still more than 40 percent higher than two years ago.

Wheat Exports

Total MY 2023/24 exports are forecast to remain steady on sustained strong global demand.

Year-to-date (YTD)[1] exports of non-durum wheat (excluding flour and products) are up on increased exportable supplies. Most notably, China increased its purchases by an additional 1.7 million MT YTD over the same period in MY 2021/22.

Canada remains a leading exporter of durum wheat. In MY 2021/22, 54 percent of global durum exports came from Canada. YTD MY 2022/23 exports are up on an 80 percent increase in exportable supplies and strong demand from Italy.

[1] August 2022 to February 2023

Table 2: Canadian Non-Durum Wheat Exports ('000, MT)

Partner	08/2020 - 07/2021	08/2021 - 07/2022	08/2022 to 02/2023 (YTD)
World	20,385	12,136	11,656
Japan	1,547	1,627	905
Indonesia	2,280	1,221	925
United States	1,089	1,138	677
Colombia	1,463	969	708
West Africa	1,429	893	507
Peru	1,825	807	791
China	3,324	690	2,182
Ecuador	869	678	412
Bangladesh	1,108	656	913

Source: Trade Data Monitor, LLC; FAS Ottawa

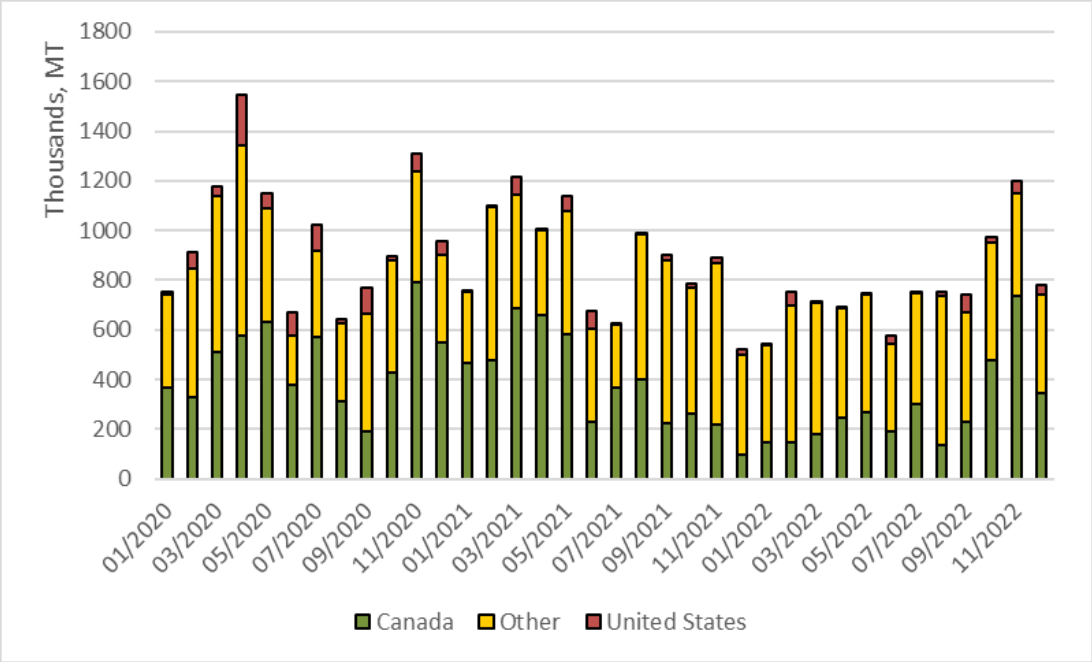
FAS Ottawa's wheat trade estimates have been revised to include bulgur wheat, pre-cooked or otherwise prepared (HS 190430). Wheat imports and exports include products.

Table 3: Canadian Durum Wheat Exports ('000, MT)

Partner	08/2020 - 07/2021	08/2021 - 07/2022	08/2022 - 02/2023 (YTD)
World	5,740	2,689	3,210
Italy	1,398	301	1,015
Morocco	1,057	679	480
Algeria	1,121	413	519
United States	328	499	449
Tunisia	287	0	272
Japan	231	202	90
Belgium	306	105	7
Nigeria	173	123	11
Peru	158	73	52

Source: Trade Data Monitor; FAS Ottawa

Figure 3: Total Monthly Global Exports of Durum Wheat



Source: Trade Data Monitor, LLC; FAS Ottawa

Wheat Imports

Total wheat imports remain low (less than two percent of supply) due to high domestic production of mostly spring wheat, but also durum and winter wheat.

YTD MY 2022/23 total wheat imports have decreased from the same time a year ago driven by reduced demand for imported feed wheat when domestic supplies recovered. Nearly 100 percent of non-durum imports are from the United States.

YTD MY 2022/23, total durum imports fell 92 percent over the same period a year ago to just 575 MT. Nearly 30 percent of Canada's durum purchases YTD in MY 2022/23 are from the United Kingdom. Typically, almost 100 percent of Canada's durum imports are from the United States.

Wheat Consumption

Wheat for feed, food, seed, and industrial use is forecast to remain steady from MY 2023/24.

Feed wheat use is forecast to fall more than 30 percent in MY 2022/23 over the previous year on improved feed wheat quality and expanded supply of alternative animal feed due to improved growing conditions.

Total wheat milled in Canada has increased to meet growing consumer demand. Industry contacts state that no new capacity was added in the last few years since the P&H mill in Hamilton came online. ADM remains the largest milling company in Canada. It operates seven mills with 4,200 tons of total daily milling capacity.

FAS/Ottawa's food, seed, and industrial (FSI) estimates have been revised to include bulgur wheat, pre-cooked or otherwise prepared (HS 190430).

The Pest Management Regulatory Agency's (PMRA) re-evaluation decision regarding lambda-cyhalothrin (e.g., Matador, Silencer, LaBamba, etc.) comes into force on April 29, 2023.

The new and updated label for lambda-cyhalothrin indicates that crops treated with lambda-cyhalothrin cannot be used as livestock feed in Canada. This includes any harvested grain, seed screenings, by-products or aftermath.

Tables 4 & 5

Total wheat milled ('000 MT), Marketing Year (Aug to July)				
	MY 2018/19	MY 2019/20	MY 2020/21	MY 2021/22
Total wheat milled	3,206	3,218	3,178	3,253
Western red spring wheat milled	2,251	2,279	2,214	2,188
Western amber durum wheat milled	215	234	212	219
Other western wheat milled	105	76	65	99
Ontario winter wheat milled	553	547	584	610
Other eastern wheat milled	81	81	101	138

Source: Statistics Canada; FAS Ottawa

Note: Figures do not add to totals because of rounding

Wheat Milled ('000 MT), Year-to-date, August to February					
	MY 2018/19	MY 2019/20	MY 2020/21	MY 2021/22	MY 2022/23
Total wheat milled	1,868	1,871	1,886	1,885	1,917
Western red spring wheat milled	1,300	1,341	1,302	1,279	1,262
Western amber durum wheat milled	123	131	131	129	128
Other western wheat milled	73	40	40	54	50
Ontario winter wheat milled	324	321	352	349	371
Other eastern wheat milled	46	39	60	72	105

Source: Statistics Canada; FAS Ottawa

Note: Figures do not add to totals because of rounding

Wheat storage stocks

FAS/Ottawa forecasts the ending stocks-to-use ratio for total wheat to fall from 14 to 10 percent, a historical low, and seven percentage points below the five-year average. A low stocks-to-use ratio is typically associated with price spikes. As of mid-April, cash prices for spring wheat have fallen 23 percent from a year earlier but are up 35 percent over a two-year period. Durum wheat cash prices have fallen 24 percent in 12 months but are still more than 40 percent higher than two years ago.

CORN

Table 6: Corn Production, Supply, and Demand

Corn	2021/2022		2022/2023		2023/2024	
Market Year Begins	Sep 2021		Sep 2022		Sep 2023	
Canada	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1462	1462	1444	1444	0	1505
Beginning Stocks (1000 MT)	2169	2169	2746	2746	0	2585
Production (1000 MT)	14611	14611	14539	14539	0	14400
MY Imports (1000 MT)	6141	6062	1100	1900	0	1900
TY Imports (1000 MT)	6108	6002	1100	1900	0	1900
TY Imp. from U.S. (1000 MT)	6025	0	0	0	0	0
Total Supply (1000 MT)	22921	22842	18385	19185	0	18885
MY Exports (1000 MT)	2191	2191	1600	1800	0	1800
TY Exports (1000 MT)	2200	2200	1600	1800	0	1800
Feed and Residual (1000 MT)	12171	12092	9000	9500	0	9200
FSI Consumption (1000 MT)	5813	5813	5300	5300	0	5500
Total Consumption (1000 MT)	17984	17905	14300	14800	0	14700
Ending Stocks (1000 MT)	2746	2746	2485	2585	0	2385
Total Distribution (1000 MT)	22921	22842	18385	19185	0	18885
Yield (MT/HA)	9.9938	9.9938	10.0686	10.0686	0	9.5681

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Corn Production – MY 2023/24

Statistics Canada farmer survey results show that corn area will remain steady in Ontario, the main corn-growing area in Canada. Corn area is forecast to increase in Quebec and Manitoba.

Corn production is forecast to fall marginally due to the assumption of a return to five-year average yields. Forecasts are based on revised 2021 corn harvest and yield estimates published by Statistics Canada, which differ from USDA official estimates.

Heavy April and early May rain showers have delayed planting in Ontario and Quebec until the week of May 8 or later. The most favorable corn crops in Ontario and Quebec usually result

from corn planted in late April and the first half of May because the crop can utilize the full growing season. In Manitoba, farmers aim to plant corn between May 1 and May 15 each year.

Corn Production – MY 2022/2023

Corn production in MY 2022/23 remained steady as a year-over-year increase in corn yields offset a reduction in corn area harvested.

Corn Trade - MY 2023/2024

MY 2023/24 imports and exports are forecast to remain steady from the previous year due to expectations of similar domestic supply levels and unchanged domestic and U.S. demand.

Corn Trade - MY 2022/2023

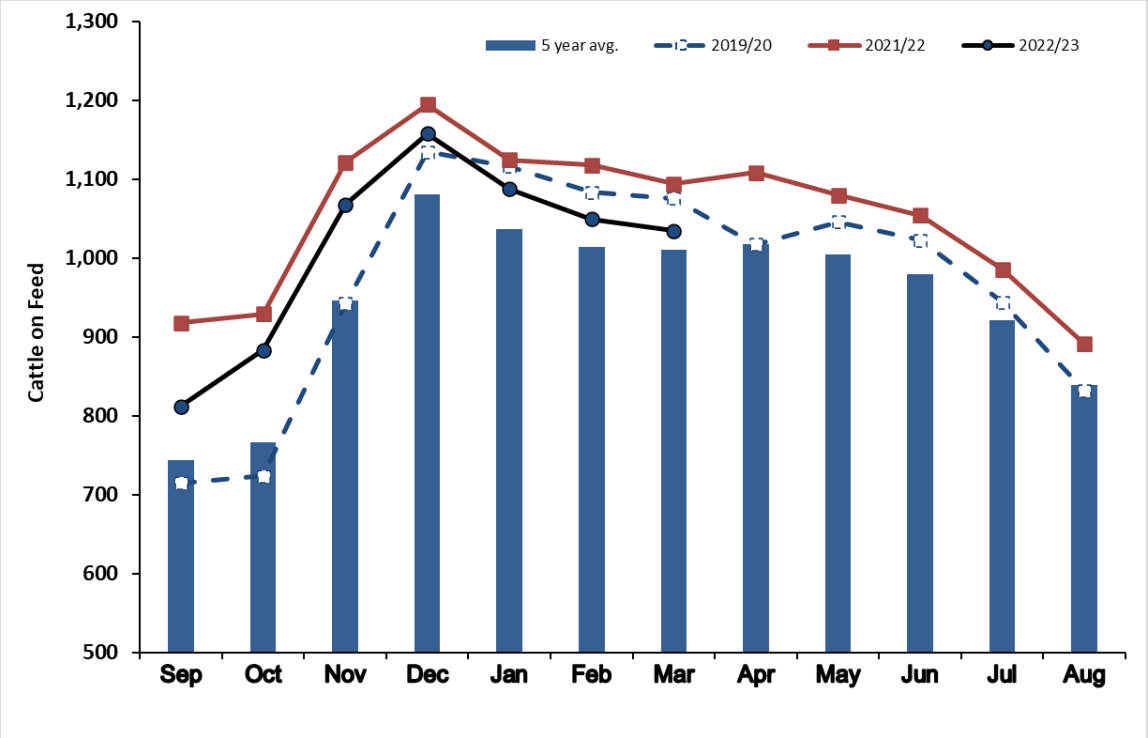
MY 2022/23 corn imports are forecast to fall 70 percent over the previous year due to increased field moisture in the Canadian prairies that improved domestic production in 2022 and reduced import demand.

FAS Ottawa forecasts corn imports will fall from 6.1 million MT in MY 2021/22 to 1.9 million MT in MY 2022/23. This forecast is higher than the official USDA forecast of 1.1 million MT. Imports YTD in February are already at 817,000 MT with six months remaining in the marketing year. The pace of imports has slowed, but average monthly imports for the next six month are forecast to reach an average of 140,000-180,000 MT per month.

Corn Consumption

Feed corn consumption is forecast to fall in MY 2022/23 and again in MY 2023/24 on the assumption of improved feed barley availability and grazing options, as well as the assumption of reduced demand from hog and cattle operations due to shrinking herd sizes.

Figure 4: Cattle on feed at Alberta and Saskatchewan feedlots with >1,000 head capacity



Source: CANFAX; FAS/Ottawa

Andriani S.P.A., an Italian pasta company known for its Biori and Felicia pasta brands, has announced plans to build a 50,000 sq ft production facility in London, Ontario designed to manufacture allergen and gluten free pastas. It will use grains (corn and oats) and is expected to be operational in the first half of 2024.

Corn Storage Stocks

Ending stocks are forecast to remain near the five-year average in MY 2022/23 and MY 2023/24 on steady overall supply and demand.

BARLEY

Table 7: Barley Production, Supply, and Distribution

Barley	2021/2022		2022/2023		2023/2024	
Market Year Begins	Aug 2021		Aug 2022		Aug 2023	
Canada	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	3011	3011	2636	2636	0	2670
Beginning Stocks (1000 MT)	711	711	543	543	0	700
Production (1000 MT)	6984	6984	9987	9987	0	9959
MY Imports (1000 MT)	228	228	30	30	0	30
TY Imports (1000 MT)	204	204	30	30	0	30
TY Imp. from U.S. (1000 MT)	47	0	0	0	0	0
Total Supply (1000 MT)	7923	7923	10560	10560	0	10689
MY Exports (1000 MT)	1981	1981	2900	3000	0	3100
TY Exports (1000 MT)	1974	1974	3100	3000	0	3000
Feed and Residual (1000 MT)	4178	4178	5900	5660	0	5600
FSI Consumption (1000 MT)	1221	1221	1100	1200	0	1300
Total Consumption (1000 MT)	5399	5399	7000	6860	0	6900
Ending Stocks (1000 MT)	543	543	660	700	0	689
Total Distribution (1000 MT)	7923	7923	10560	10560	0	10689
Yield (MT/HA)	2.3195	2.3195	3.7887	3.7887	0	3.73

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Barley Production – MY 2023/2024

Barley production is forecast down on lower yields which are expected to fall slightly to a trimmed five-year average (which excludes the 2021 drought year). This production forecast hinges on the assumption that soil moisture conditions will improve further. Most barley is planted in late April (in the southern-most regions of the prairies) to mid-May.

Barley Production – MY 2022/2023

In MY 2022/23, barley production increased 43 percent over the previous year, despite a 15 percent decrease in area planted as average yields improved significantly from the drought year of 2021. The Canadian Grain Commission reports that the favorable growing conditions in 2022 had positive effects on the quality of malting barley.

Barley Consumption

Barley is used for malting, food, and general purposes (feed and forage). According to crop insurance data, area seeded with barley in the Canadian prairies in 2022 consisted of 48.2 percent malting barley, 44. 3 percent general purpose barley, and 2.4 percent food barley. Not all malting barley makes it into the malting channel due to quality issues.

Barley Trade - MY 2023/24

Exports are forecast to grow marginally on increased domestic supplies. China has become an important buyer of Canadian barley in recent years. Although demand from China can be unpredictable, the country has consistently purchased between 1.4 and 3.3 million MT each marketing year since 2018.

Barley Trade - MY 2022/23

Table 8: Canadian Exports of Barley ('000 MT)

Partner	08/2020 - 07/2021	08/2021 - 07/2022	08/2022-02/2023 YTD
World	3,534	1,981	2,105
China	3,262	1,680	1,815
United States	139	279	260
Japan	132	21	31

Source: Trade Data Monitor, LLC; FAS/Ottawa

YTD[2] exports rose 30 percent to 2.1 million MT from the same period a year ago. Eighty-six percent of exports YTD were destined for China, where it is used to produce beer and feed livestock. This sustained elevated level of exports of barley to China comes during a time where China has a tariff placed a tariff on Australian barley, which took effect May 2020.

Canada is a net exporter of barley and, historically, almost all barley imports have come from the United States. Imports of barley YTD MY 2022/23 (August 2022 to February 2023) declined 86 percent from the same period of the previous year due to improved domestic feed supplies.

[2] August through February

Stocks

MY 2023/24 ending stocks are forecast to fall marginally over MY 2022/23 on increased domestic consumption and exports.

MY 2022/23 ending stocks are forecast to increase over the previous marketing year on increased domestic supply. This pushes stocks further in line with a trimmed five-year average stock level of 808,000 MT. The stocks-to-use ratio for barley is forecast to remain steady at seven percent, which is historically low.

OATS

Table 9: Oat Production, Supply, and Distribution

Oats	2021/2022		2022/2023		2023/2024	
Market Year Begins	Aug 2021		Aug 2022		Aug 2023	
Canada	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1214	1214	1402	1402	0	1150
Beginning Stocks (1000 MT)	657	657	333	333	0	1100
Production (1000 MT)	2899	2899	5226	5226	0	4094
MY Imports (1000 MT)	25	25	20	25	0	15
TY Imports (1000 MT)	28	28	10	25	0	15
TY Imp. from U.S. (1000 MT)	14	14	0	0	0	0
Total Supply (1000 MT)	3581	3581	5579	5584	0	5209
MY Exports (1000 MT)	1328	1328	1750	1700	0	1800
TY Exports (1000 MT)	1222	1222	1750	1700	0	1800
Feed and Residual (1000 MT)	710	710	1700	1400	0	1329
FSI Consumption (1000 MT)	1210	1210	1300	1384	0	1380
Total Consumption (1000 MT)	1920	1920	3000	2784	0	2709
Ending Stocks (1000 MT)	333	333	829	1100	0	700
Total Distribution (1000 MT)	3581	3581	5579	5584	0	5209
Yield (MT/HA)	2.388	2.388	3.7275	3.7275	0	3.56

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Oats begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Production – MY 2023/22

MY 2023/24 oat production is forecast down on reduced area planted in Saskatchewan. Poor returns relative to competing crops and high on-farm stocks are expected to incentivize farmers to grow competing crops, such as barley, instead of oats.

Oat feed prices in Saskatchewan remain competitive with wheat, at $270 CAD per MT in mid-April. As in recent years, area planted is expected to be concentrated in Saskatchewan (approximately 50 percent). Most oats are planted close to mid-May.

Domestic Consumption

Consumption in MY 2023/24 is forecast to remain historically high but fall marginally from MY 2022/23 on an expected lower production of oats.

Paterson Foods is constructing an oat mill outside Winnipeg, Manitoba that will be known as O Foods Ltd and is expected to have a capacity of 250,000 MT. O Foods plans to supply the industry by late 2023. The site of the facility is logistically advantageous due to service by Canadian National (CN), Canadian Pacific (CP) and BNSF railways.

Consumption in MY 2022/23 is forecast to increase on expanded domestic supplies.

Exports

MY 2023/24 exports are forecast to increase as high levels of storage stocks are sold off. Demand from the United States and Latin America are projected to remain strong.

MY 2022/23 exports are forecast to increase nearly 30 percent on an 80 percent increase in production. Disappointed with oat prices, farmers have been reluctant to sell their oats, which is expected to limit export levels through to the end of the marketing year in July 2023.

Table 10: **Canadian Oat Exports (‘000, MT)**

Partner	08/2020 - 07/2021	08/2021 - 07/2022	08/2021 - 02/2022 (YTD)
World	2,022	1,328	919
United States	1,497	1,233	842
Mexico	175	28	28
Japan	34	23	19
China	12	18	11
South Korea	10	11	7
Peru	46	8	8
Sri Lanka	11	5	3

Source: Trade Data Monitor; FAS/Ottawa

Ending Stocks

Oat prices have been trending downward, causing farmers to be reluctant to sell off the large share of stocks that remain on farm. Farmers are expected to sell their oats (which are bulkier than most principal field crops) in late MY 2022/23 or early MY 2023/24 to make room for new crop.

Attachments:

No Attachments