USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Global Market Analysis
International Production Assessment Division
Web: https://ipad.fas.usda.gov

August 22, 2022

Commodity Intelligence Report

Canada Mid-Season Update from the Prairies for MY 2022/23

Analysts from the USDA Foreign Agricultural Service (FAS) and FAS Ottawa conducted crop assessment travel in Saskatchewan and Alberta during the last week of July 2022. The trip included visits with several farmers throughout the region and attendance at the 2022 Saskatchewan Crop Diagnostic School in Swift Current, Saskatchewan. Both farmers and government officials reported a positive outlook for marketing year (MY) 2022/23 field crops.

Crops were observed in several agro-climatic zones where conditions have improved substantially from more challenging situations early in the season and the lingering effects of last year's historic drought. Excessive dryness had persisted throughout much of the travel region during the early part of the season. In recent weeks, however, the southern Prairies had received much needed rainfall (see Figure 1); enough that standing water was left in many fields near Brooks, in southern Alberta (Figure 2), though damage was reportedly minimal. Crops in the more arid region around Brooks are heavily irrigated.

Conversely, farmers in eastern Saskatchewan struggled with excessive moisture and cooler temperatures early on, which delayed planting and crop progress. More recently, warmer and drier conditions have prevailed there, rapidly boosting crop conditions. Recent provincial crop reporting suggests above-average yields are expected for wheat, rapeseed, barley, and oats, the predominant Prairie field crops.

Rapeseed

Canada is the world's largest producer of rapeseed, accounting for almost 25 percent of world production (see Figure 3); it is the largest exporter of rapeseed, too. Farmers report the MY 2022/23 rapeseed crop about one to two weeks behind schedule. Typically, by the end of July, rapeseed flowering is done and is well into the pod-filling stage. This season, however, flowering was observed in many fields in the last week of July (see Figure 4). Farmers and government analysts remain very optimistic about the crop, and recent reporting suggests that most rapeseed in the Prairies is rated as good to excellent, which was confirmed by observations during crop travel (see Figures 5 and 6). The primary remaining threat to the crop, according to interviews, is an early frost, particularly for rapeseed grown in eastern Saskatchewan and Manitoba, where planting had been delayed, setting the crop behind for the season. USDA forecasts Canada rapeseed production at an above-average, 20.0 million metric tons (mmt), on an above-average yield at 2.33 tons per hectare (t/ha).

Wheat

Canada is the sixth largest wheat producer, accounting for over 4 percent of global production (see Figure 3). It is the third largest exporter, though, with over 12 percent of world wheat exports. Canadian farmers planted 5 percent more area to wheat than average and nearly 9 percent more than last year, driven largely by favorable prices. Spring and durum wheat fields were observed by FAS analysts throughout the travel region (see Figures 7, 8, 9, and 10). Farmers noted that, as with rapeseed, the crop is slightly behind schedule, though generally in good to excellent condition. Provincial reporting indicates above-average yields are expected for winter (primarily grown in Ontario), spring, and durum wheat varieties. USDA estimates MY 2022/23 total wheat production at 35.0 mmt, a 62 percent year-over-year increase, and 15 percent above the 5-year average.

Barley

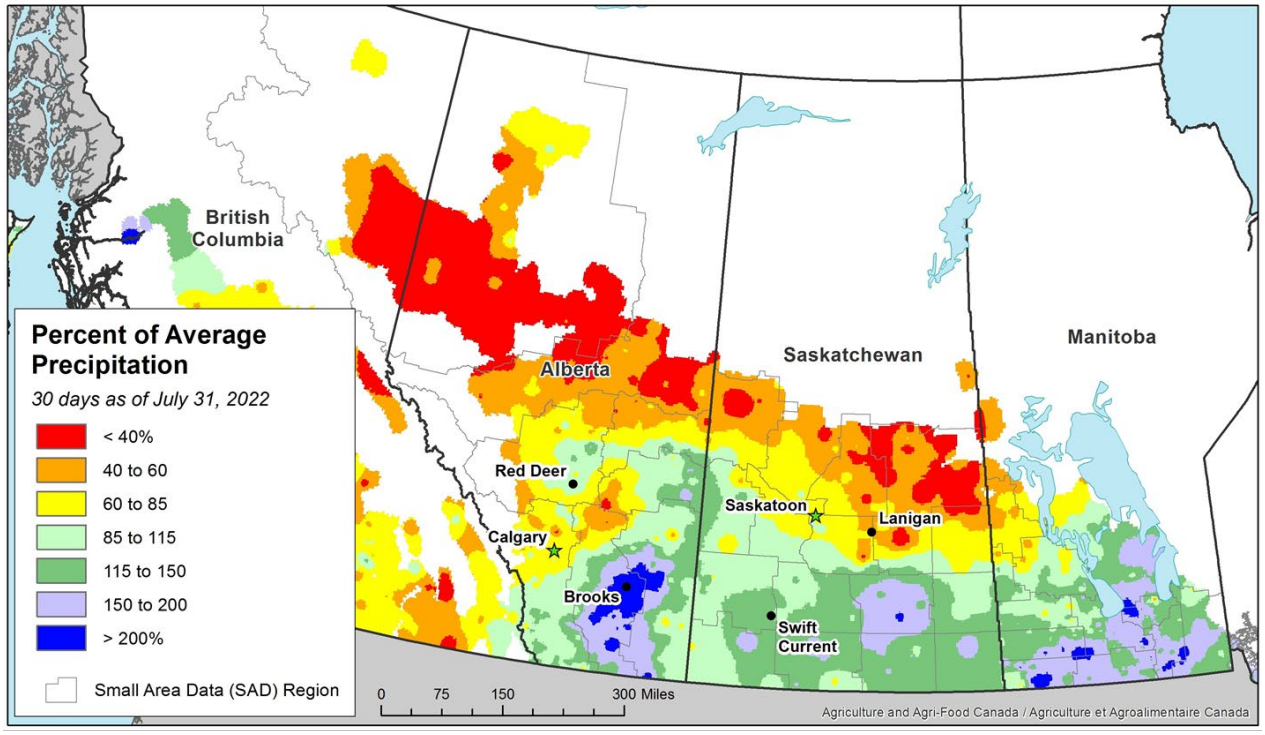
Canada is the fourth largest barley producer with almost 7 percent of global production (see Figure 11); Canada's barley exports rank fifth with 10 percent of global trade. Barley is primarily grown in Alberta and Saskatchewan, at 48 and 41 percent of the total Canadian crop, respectively (see Figure 12). FAS analysts observed several barley fields in the travel region and were hosted by barley farmers in three key locations along the trip, all reporting excellent crops. Malting barley observed in Lanigan, Saskatchewan was expected to be harvested in the second or third week of August (see Figure 13). Farmers near Brooks and Bentley, Alberta (northwest of Red Deer) noted barley crops that were taller than normal, due to the favorable conditions in June and July (see Figure 14). This also meant lodging in many fields (see Figure 15), with taller crops subject to recent heavy rains, wind, and hail. Extensive hail damage was reported in the last days of July and early August in Saskatchewan, which may increase abandonment and limit overall yield and production potential in what is otherwise expected to be an excellent crop. USDA estimates MY 2022/23 barley production at 9.9 mmt, a 42 percent increase over last year and 12 percent above the 5-year average.

Oats

Canada is the world's second largest oats producer with over 18 percent of world production (see Figure 11). Canada is the world's largest exporter of oats with over 71 percent. Oats are grown throughout the Prairie provinces, but particularly in Saskatchewan, where 52 percent of the total Canadian crop is produced. This year, 16 percent more area was planted to oats than last year, and USDA estimates harvested area to be 1.3 mha. Cereals, in general, have fared well over the summer months, and oats observed in Lanigan (see Figure 16) and near Swift Current, Saskatchewan were in good to excellent condition. USDA forecasts MY 2022/23 oat yield to be above-average at 3.62 t/ha and production to be 4.7 mmt, an 80 percent increase over last year.

The contributions of Erin Danielson at the USDA Office of Agricultural Affairs in Ottawa are gratefully acknowledged.

Improved Rainfall in July in the Southern Prairies



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Source: Agriculture and Agri-Food Canada (AAFC) Climate Services

Figure 1. Following last year's historic drought and a dry start to the 2022 season, beneficial rainfall arrived in June and July to the southern Prairies. City locations labeled on the map indicate areas visited by FAS analysts during crop travel from July 25-29, 2022. Sources: Agriculture and Agri-Food Canada (AAFC) Climate Services and the USDA Foreign Agricultural Service (FAS)

Standing Water in a Winter Wheat Field near Brooks, Alberta

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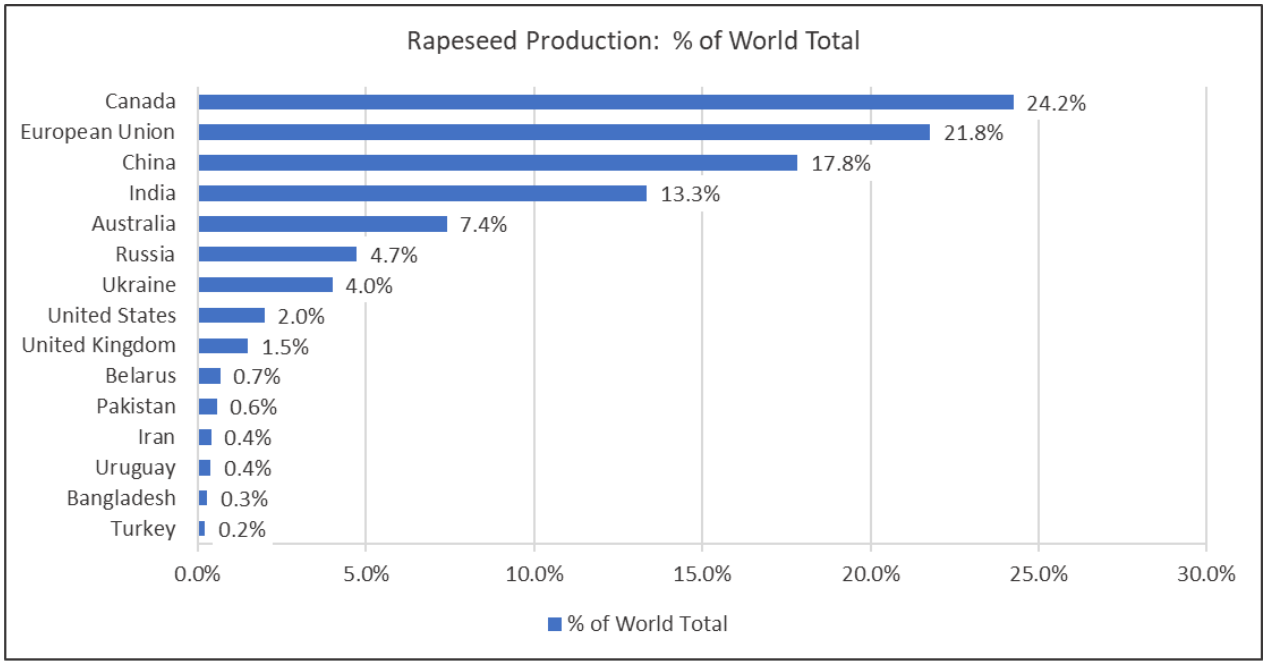
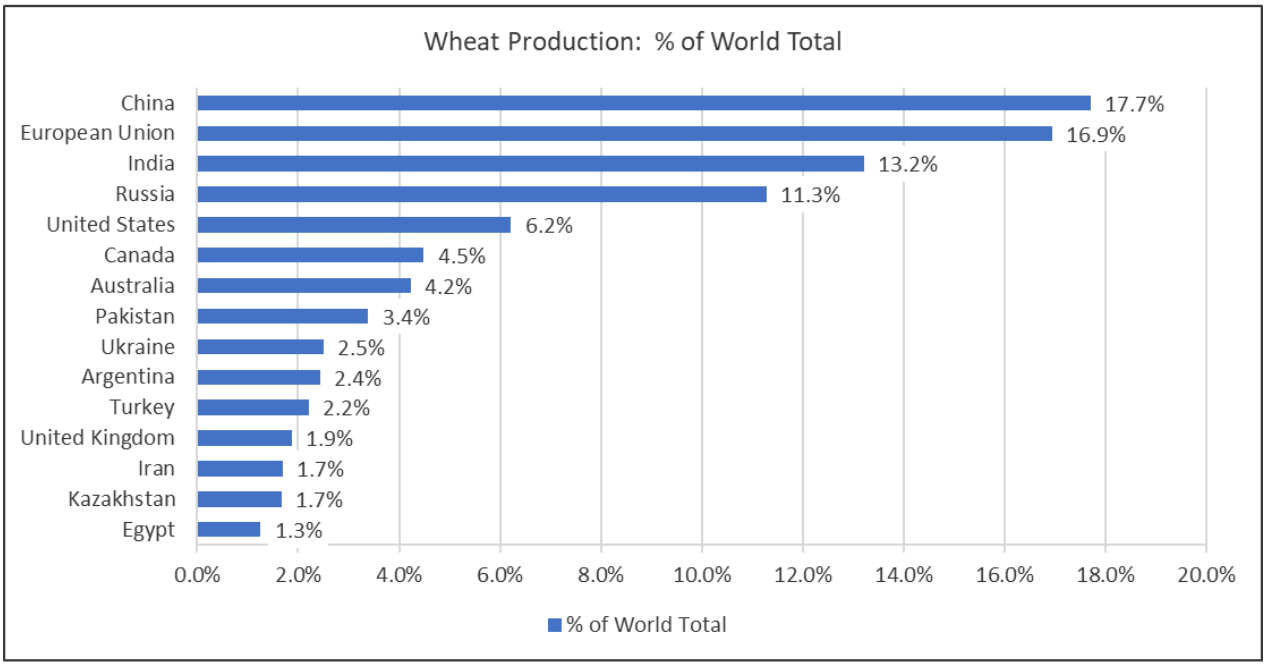
Photos: USDA FAS, Aaron Mulhollen

Figure 2. Recent rainfall in southern Alberta left standing water in many fields, though no notable damage has been reported. Crops in this region were observed to be in good to excellent condition. Source: USDA Foreign Agricultural Service (FAS)

Top 15 Rapeseed and Wheat Producers: Percent of World Total





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Source: USDA PSD Online

Figure 3. Canada is the world's leading producer of rapeseed and the sixth-largest producer of wheat. Source: USDA PSD Online

Flowering Rapeseed Fields near Lanigan, Saskatchewan (left) and Bentley, Alberta (right)

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Photos: USDA FAS, Aaron Mulhollen

Figure 4. The majority of the rapeseed crop in the travel area was 1 to 2 weeks behind but progressing rapidly. Typically, rapeseed is done flowering by the end of July, however, most fields observed remained in the flowering stage in the last week of July. Bentley, Alberta is northwest of Red Deer. Source: USDA Foreign Agricultural Service (FAS)

Rapeseed near Lanigan, Saskatchewan (left) and Bentley, Alberta (right)

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Photos: USDA FAS, Aaron Mulhollen

Figure 5. Rapeseed crops were in good to excellent condition throughout the travel area, despite the early season delays. Source: USDA Foreign Agricultural Service (FAS)

Irrigated Rapeseed near Brooks, Alberta

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Photo: USDA FAS, Aaron Mulhollen

Figure 6. Irrigated rapeseed in southern Alberta was observed at varying stages, with many fields advanced to the pod-filling stage, which is normal for late July and early August. Source: USDA Foreign Agricultural Service (FAS)

Spring Wheat near Lanigan, Saskatchewan

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Photo: USDA FAS, Aaron Mulhollen

Figure 7. The dwarf variety of spring wheat observed near Lanigan, Saskatchewan was in excellent condition. USDA Foreign Agricultural Service (FAS)

Irrigated and Dryland Spring Wheat near Brooks, Alberta

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Photos: USDA FAS, Aaron Mulhollen

Figure 8. Crops grown near Brooks, Alberta are mostly irrigated. The irrigated spring wheat in the image above on the left was notably taller and fuller than the dryland spring wheat in the image on the right. USDA Foreign Agricultural Service (FAS)

Spring Wheat near Bentley, Alberta

Figure 9. Spring wheat observed near Bentley, Alberta, northwest of Red Deer, was in excellent condition. Source: USDA Foreign Agricultural Service (FAS)

Durum Wheat near Lanigan, Saskatchewan

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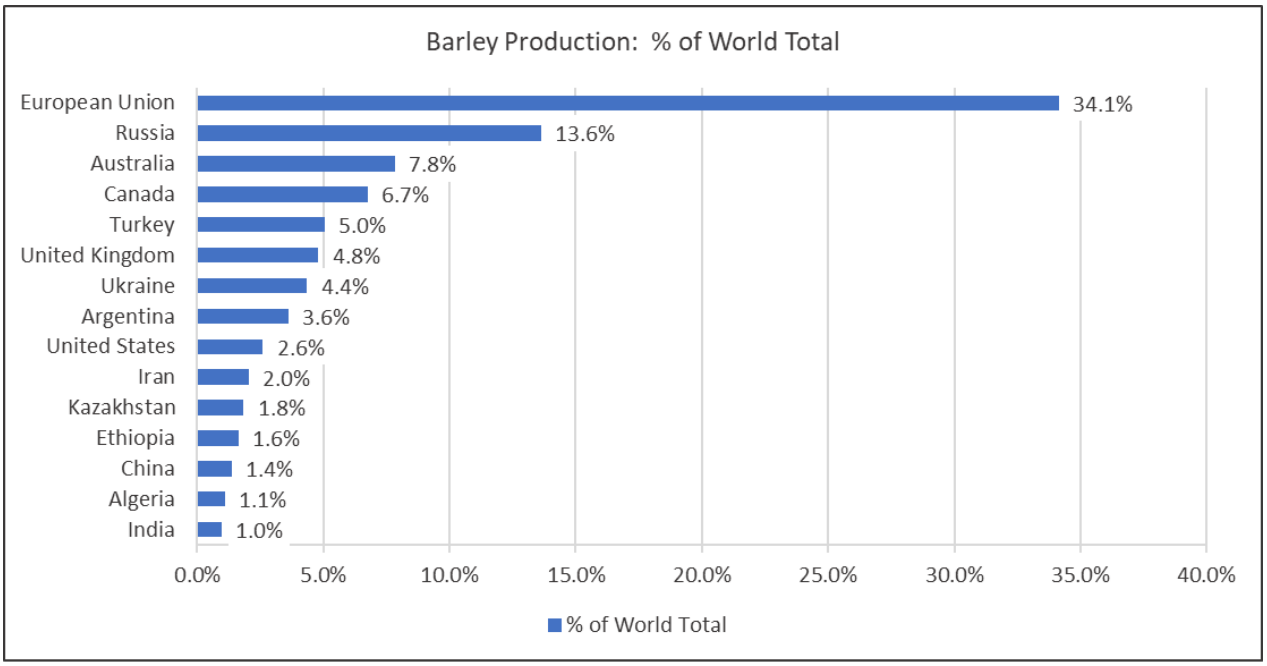
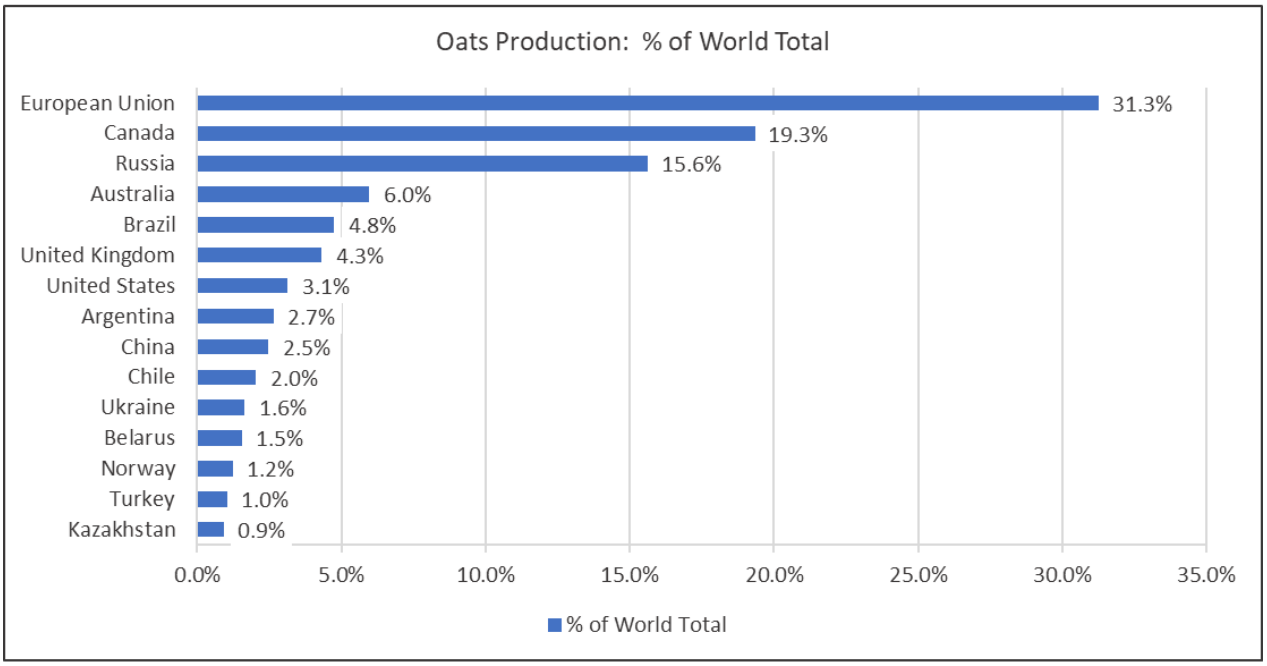
Photo: USDA FAS, Aaron Mulhollen

Figure 10. Durum wheat observed near Lanigan, Saskatchewan was in good to excellent condition. Durum is predominantly grown in southwestern Saskatchewan, and recent provincial crop reports indicate above-average yields are expected for durum this year. Source: USDA Foreign Agricultural Service (FAS)

Top 15 Barley and Oats Producers: Percent of World Total





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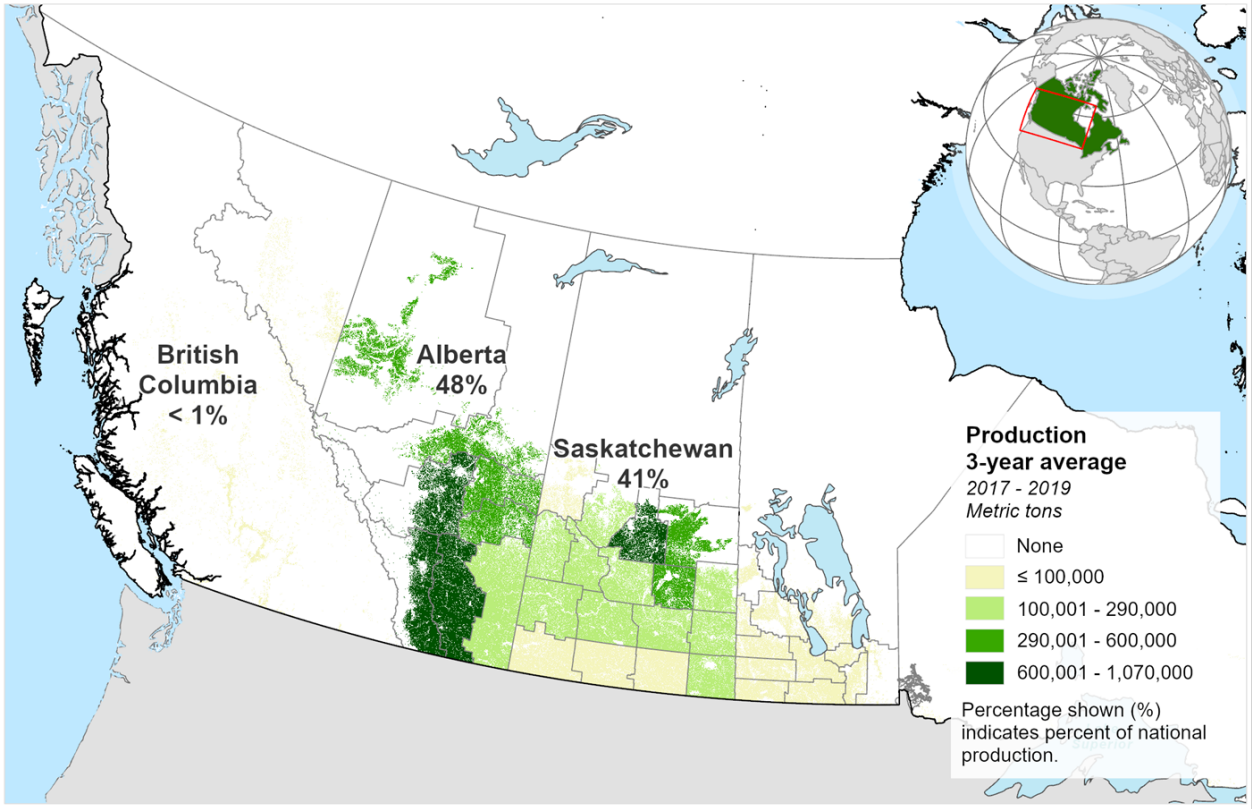
Source: USDA PSD Online

Figure 11. Canada is the world's fourth-leading producer of barley and the second-largest producer of oats. Source: USDA PSD Online

Canadian Barley Production



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Sources: Statistics Canada, Estimated production by Small Area Data (SAD) Region; Agriculture and Agri-Food Canada, Annual Crop Inventory 2018

Figure 12. The majority of Canada's barely crop is grown in Alberta and Saskatchewan. Source: Statistics Canada and Agriculture and Agri-Foods Canada (AAFC)

Two-Row Barley near Lanigan, Saskatchewan

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Photo: USDA FAS, Aaron Mulhollen

Figure 13. Two-row malting barley was observed in excellent condition near Lanigan, Saskatchewan.
Source: USDA Foreign Agricultural Service (FAS)

Two-Row Barley for Malting, near Bentley, Alberta

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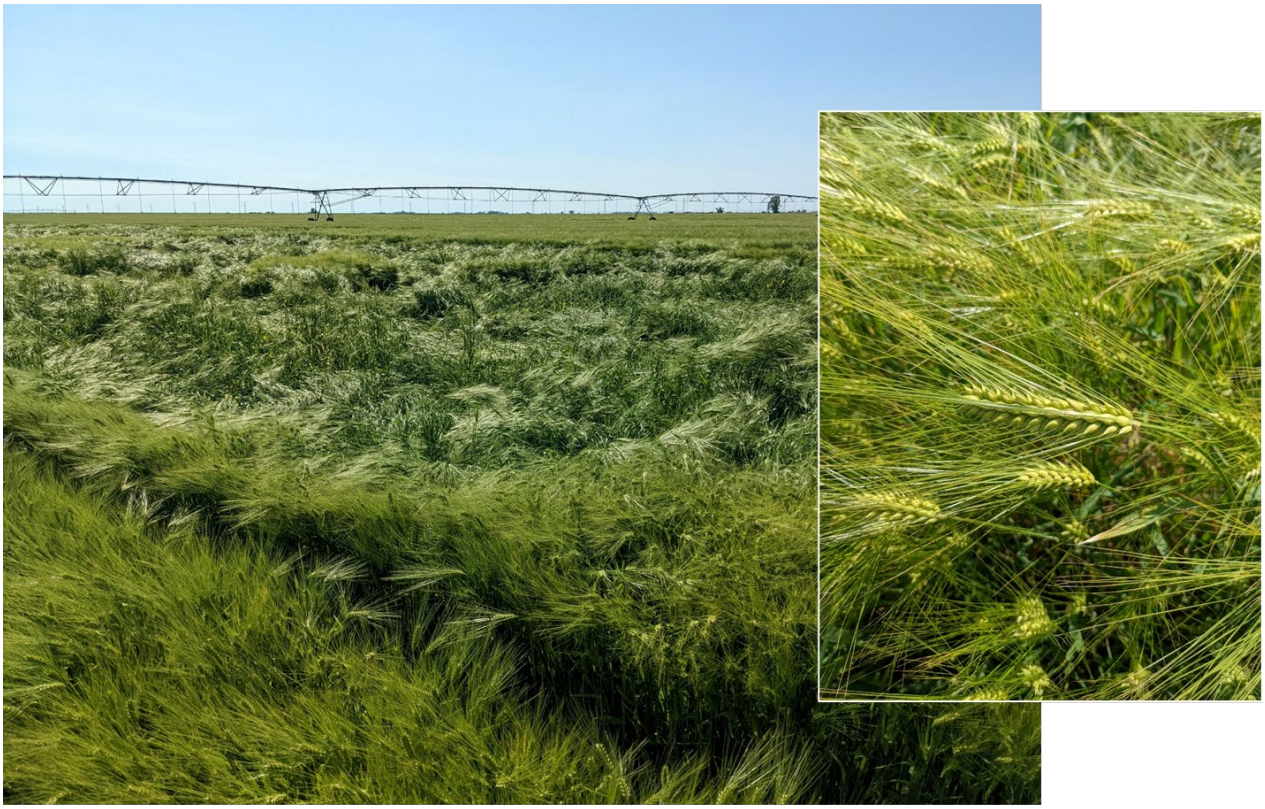
Photo: USDA FAS, Aaron Mulhollen

Figure 14. Two-row malting barley was observed in excellent condition near Bentley, Alberta. Farmers noted the thickness and stature of the crop is above-average this year, and the expectation is for above-average yields. Source: USDA Foreign Agricultural Service (FAS)

Irrigated Six-Row Barley with Lodging, near Brooks, Alberta



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Photos: USDA FAS, Aaron Mulhollen

Figure 15. Barley near Brooks, Alberta is irrigated, and was observed to be in excellent condition, despite lodging in some fields. Six-row barley, as shown in the images here, is used for animal feed, and is not malted. Source: USDA Foreign Agricultural Service (FAS)

Oats near Lanigan, Saskatchewan

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Photos: USDA FAS, Aaron Mulhollen

Figure 16. Oats were observed to be in excellent condition at a farm near Lanigan, Saskatchewan. Source: USDA Foreign Agricultural Service (FAS)

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Current World Agricultural Production Reports
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Production, Supply and Distribution Database (PSD Online)
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Global Agricultural Information Network (Agricultural Attaché Reports)
https://www.fas.usda.gov/databases/global-agricultural-information-network-gain

Crop Explorer
https://ipad.fas.usda.gov/cropexplorer/

Global Agricultural and Disaster Assessment System (GADAS)
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