Canada is the world’s seventh largest soybean producer. This Market View Insight first examines soybean production by the United States’ northern neighbor in terms of geographic concentration and compositional quality. Then, Canadian soybean consumption and trade are compared to the United States.

Total Canadian soybean production in the 2017 crop year is estimated at 7.74 million metric tons (mmt). This is slightly less than half the size of Illinois’ (16.65 mmt) and roughly equivalent to the size of Missouri’s (7.88 mmt) 2017 soybean production. Production is concentrated in the southern portions of Ontario and Manitoba as shown in Figure 1. Production of these two provinces, along with the total amount of production from Canada’s other provinces and territories is shown in Figure 2. During the 2013 to 2017 crop years, Ontario and Manitoba accounted for nearly 80% of Canada’s production.

Prior to 2006, production was centered in Southern Ontario. However, it’s interesting to note the growth in production that took place in Manitoba over the past decade. This production growth mirrors what has occurred in the North Dakota, which borders Manitoba. North Dakota accounted for over 5% of total U.S. soybean production from 2013 to 2017 while the state produced less than 2% of total U.S. production prior to 2000.
An annual soybean quality survey from the Canadian Grain Commission shows that soybean crude protein in the country’s western growing area, which is primarily Manitoba, is generally lower than the crude protein in the rest of the Canadian crop, as shown in Figure 3. \(^1\) Results by province and region were not available prior to the 2008 survey, but Figure 3 also illustrates that the national aggregate average crude protein has been declining since the 2000 crop year. \(^2\) Samples for this annual survey are collected in cooperation with producers, grain handlers and processors at harvest and are tested by the Canadian Grain Research Laboratory.

\(^1\) More information about the 2017 survey and previous surveys can be found at the following link: https://www.grainscanada.gc.ca/soybeans-soja/hqsom-mqrso-eng.htm

\(^2\) It’s important to note that different measurement instruments and calibrations used in these annual surveys has varied over time. For example, soybean composition estimates were made using a FOSS 6500 or DS2500 near-infrared (NIR) spectrometer in the 2016 and 2017 reports when a FOSS Infratec 1241 NIR spectrometer had been used for the previous five surveys. The varying measurement instruments and calibrations could contribute to variations in soybean composition across surveys.
Figures 4 through 6 examine the balance between supply and disappearance of whole soybeans, soybean meal and soybean oil in Canada. The data used to produce these figures were accessed from the USB Market View Database. No patterns in annual beginning and ending stocks were noticed across time; therefore, they are not included in the following figures.

Figure 4 displays annual Canadian whole soybean supply (imports and production) and disappearance (crush, residual use and exports). As production has grown, crush volume has remained fairly constant while whole soybean exports have grown over time. From marketing years 2000/01 through 2002/03, Canada’s total soybean crush represented nearly 80% of its soybean production. Over the past three marketing years, however, the relative proportion of Canada’s crush to its production averaged approximately 30%, while exports over the same timespan represented over 65% of soybean production.

Like Canada’s soybean crush, the country’s consumption of soybean meal has remained fairly constant since marketing year 2000/01 as shown in Figure 5. Both soybean meal production from Canada’s domestic crush and imports supply significant proportions of the soybean meal consumed in Canada.
Figure 6 indicates that Canada consumed nearly all of the soybean oil it produced prior to marketing year 2009/10. Since then, however, Canada’s soybean oil exports have been increasing as domestic consumption has fallen. Competition from competing sources of edible oils may offer an explanation for this trend.

Figure 7 shows that total edible oil consumption in Canada has increased since marketing year 2000/01. This growth has been primarily driven by increased consumption of canola oil.