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Monthly Lentil Market Update – Jun 2025 Overview

Canada's lentil market continues to perform strongly in the current crop year. According to the latest official data (as of March 31, 2025), farmer deliveries to the Canadian Grain Commission are 12% higher than the same time last year. Exports through licensed terminals have also risen by 20%. With this trend, total carry-out stocks for all major crops, including lentils, are expected to decline by year-end.

In May, lentil exports from Canada jumped by 69% compared to April. The United Arab Emirates was the top destination, followed by Turkey and India—three markets that continue to play a key role in supporting Canadian lentil trade.

Crop development

2025 has brought challenges. Drought conditions spread across many farming regions in May due to limited rainfall and above-average temperatures. Over 50% of agricultural zones in Canada are now rated as abnormally dry or under moderate to severe drought. However, regions such as coastal British Columbia, southern Saskatchewan, and parts of Eastern Canada received good moisture, helping balance the national outlook to some extent.

Crop 2025

Despite the dry conditions, planting was completed ahead of the usual schedule across the Prairie provinces. While overall crop production in Canada is expected to dip slightly compared to last year, carry-out stocks for most crops may rise—mainly due to slower exports in grains, oilseeds, and pulses. As a result, prices for most field crops are projected to be lower this year, although some crops like wheat (excluding durum), canola, flaxseed, dry beans, mustard, and select pulses may see more stable or even improved prices.

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Lentils

Lentil exports for 2024-25 are currently trending higher than last season. India, Turkey, and the UAE remain Canada's top buyers. So far, ending stocks have increased, while average prices—especially for green lentils—are below last year's peak. This is mainly due to larger carry-in stocks and more competitive pricing across all grades.

Large green lentils continue to trade at a premium over red lentils, and this price gap is expected to continue throughout the crop year.

The total area seeded to lentils in Canada is slightly lower than last year. Saskatchewan remains the leading producing region, accounting for around 86% of total acreage, followed by Alberta and Manitoba. Production is projected to drop by 4%, reaching about 2.33 million tonnes. This will reduce overall supply, although higher carry-in stocks will help offset some of the decline.

Export volumes are expected to remain steady, and carry-out stocks should be similar to last year. The average price for the season is forecast to be slightly softer, with limited price fluctuation.

Chickpeas

Chickpea exports have declined, mostly due to reduced demand from international markets such as Turkey and the U.S. This slowdown has led to a buildup in carry-out stocks, which are expected to be heavy by the end of the crop year. Prices are also forecast to drop below last year's record levels. For 2025-26, chickpea acreage is projected to fall by 6% from the previous season. Saskatchewan continues to lead chickpea production in Canada, followed by Alberta. Despite the drop in the planted area, overall supply is forecast to increase. This is because high carry-in stocks will more than make up for the smaller harvest. As a result, exports are expected to grow, but ending stocks could rise sharply.

Dry Beans

Dry bean exports have slipped slightly compared to last year. The United States and the European Union remain Canada's main markets, with smaller shipments going to Japan and Mexico.

For the 2025-26 season, the total area planted to dry beans in Canada is expected to fall by 11% from last year. This drop is mainly due to weaker profit expectations compared to other crops. By region, Manitoba is forecast to account for 49% of the planted area, Ontario for 30%, Alberta for 10%, and the rest spread across Saskatchewan, Quebec, and the Maritimes.

Despite starting the season with larger carry-in stocks, overall supply is expected to decrease. Exports are also forecast to decline, in line with the lower available supply.

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