

# Forage Seed Market Review

SFSDC Information Session and AGM

Terry Kowalchuk MSc., P. Ag.

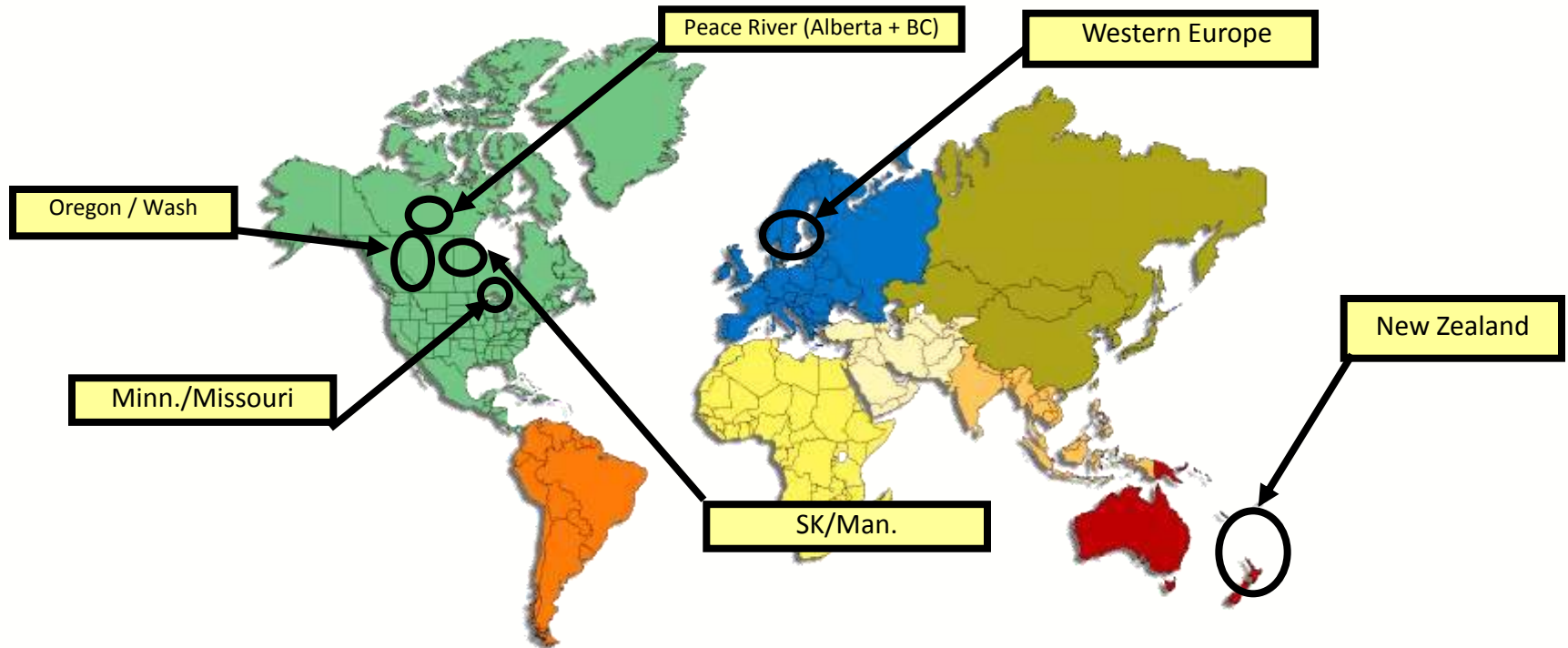
SK Ministry of Agriculture

January 2019, Saskatoon

# Acknowledgements

- **David Wong, Bed., CACE Beaverlodge AB.**
- **Calvin Yoder, Forage Seed Specialist, AAF, Spirit River**
- **Ray McVicar Executive Director SFSDC**

# Global Legume and Grass Seed Production Areas



- 1) Legumes:** alfalfa, red clover, white clover, sweet clover alsike clover, sainfoin, birds foot trefoil
- 2) Turf Grass:** perennial, annual ryegrass, Kentucky bluegrass, tall fescue (turf) and other fine fescues
- 3) Forage Grasses:** timothy, orchard grass, wheatgrasses, bromes, tall fescue (forage) and meadow fescue
- 4) Natives:** wheatgrasses, green needle, etc.

AB and BC Peace Region (40%)

- Creeping red fescue
- Timothy
- Bromegrasses
- Wheatgrasses
- Meadow fescue
- Alsike clover, red clover and alfalfa.

Manitoba (20%)

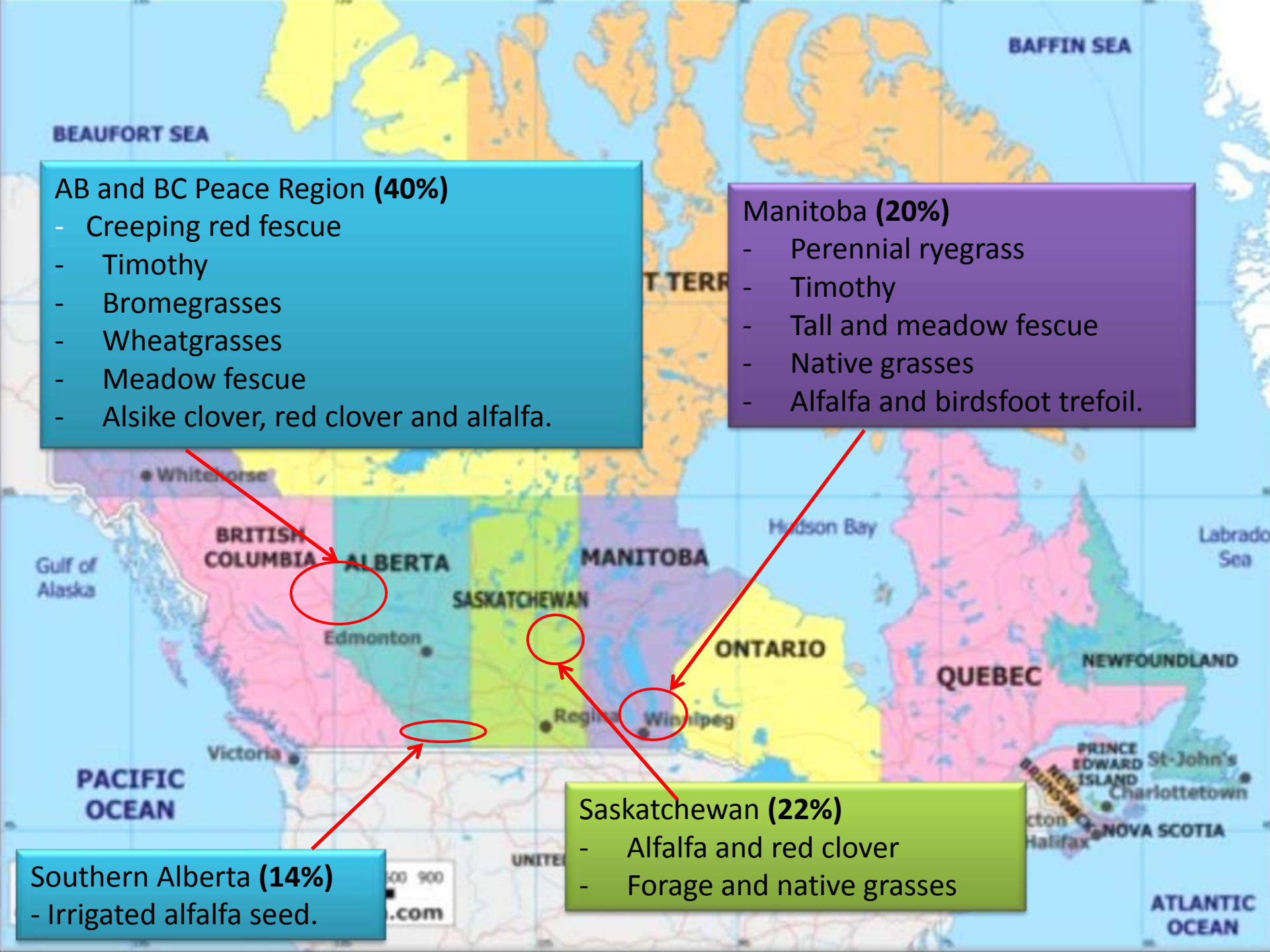
- Perennial ryegrass
- Timothy
- Tall and meadow fescue
- Native grasses
- Alfalfa and birdsfoot trefoil.

Saskatchewan (22%)

- Alfalfa and red clover
- Forage and native grasses

Southern Alberta (14%)

- Irrigated alfalfa seed.



# CANADA



**Nutrien**

**DLF Pickseed**

**Interlake Forage Seeds**

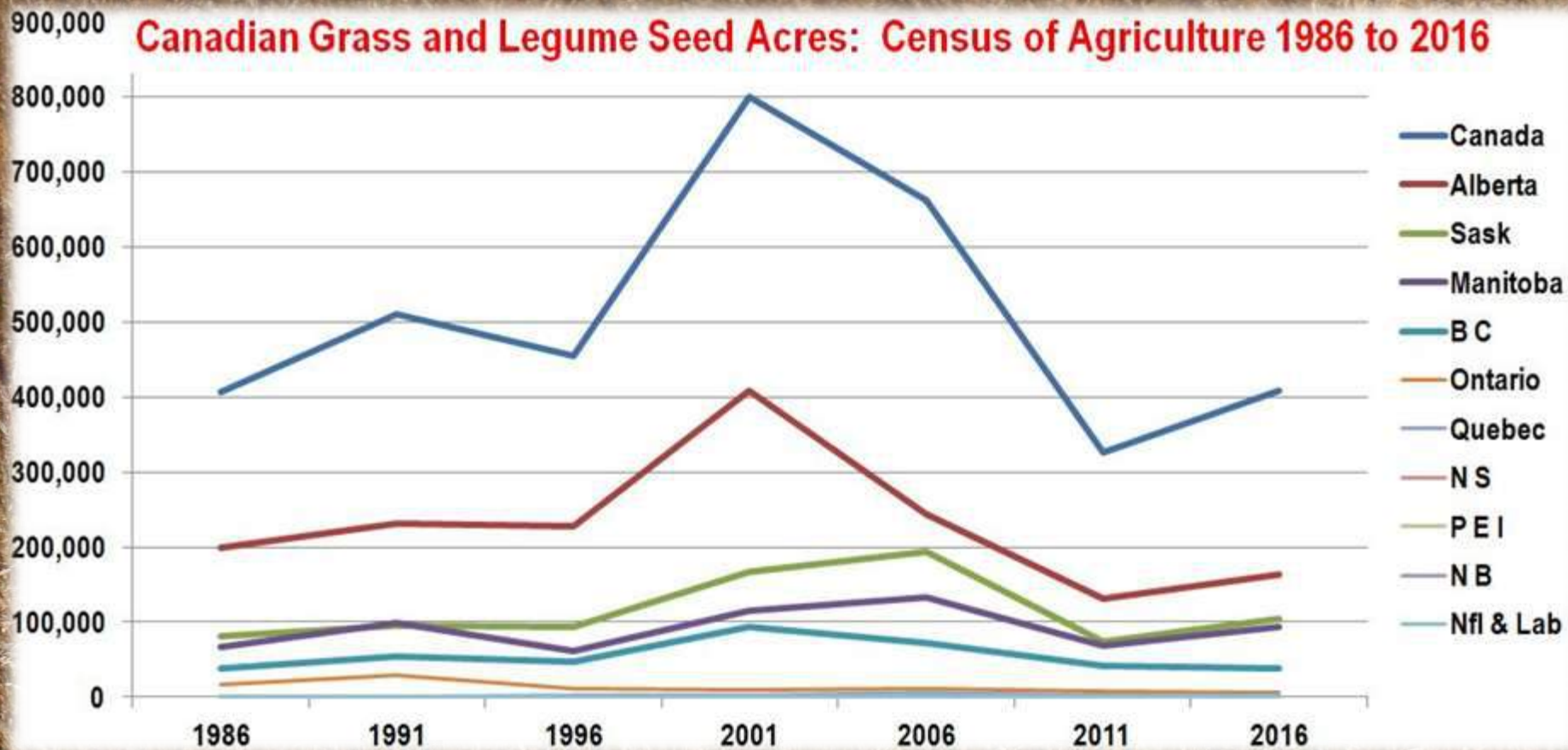
**NorthStar Seed**

**6 Seed Processors in the AB+BC Peace Region**

**BrettYoung**

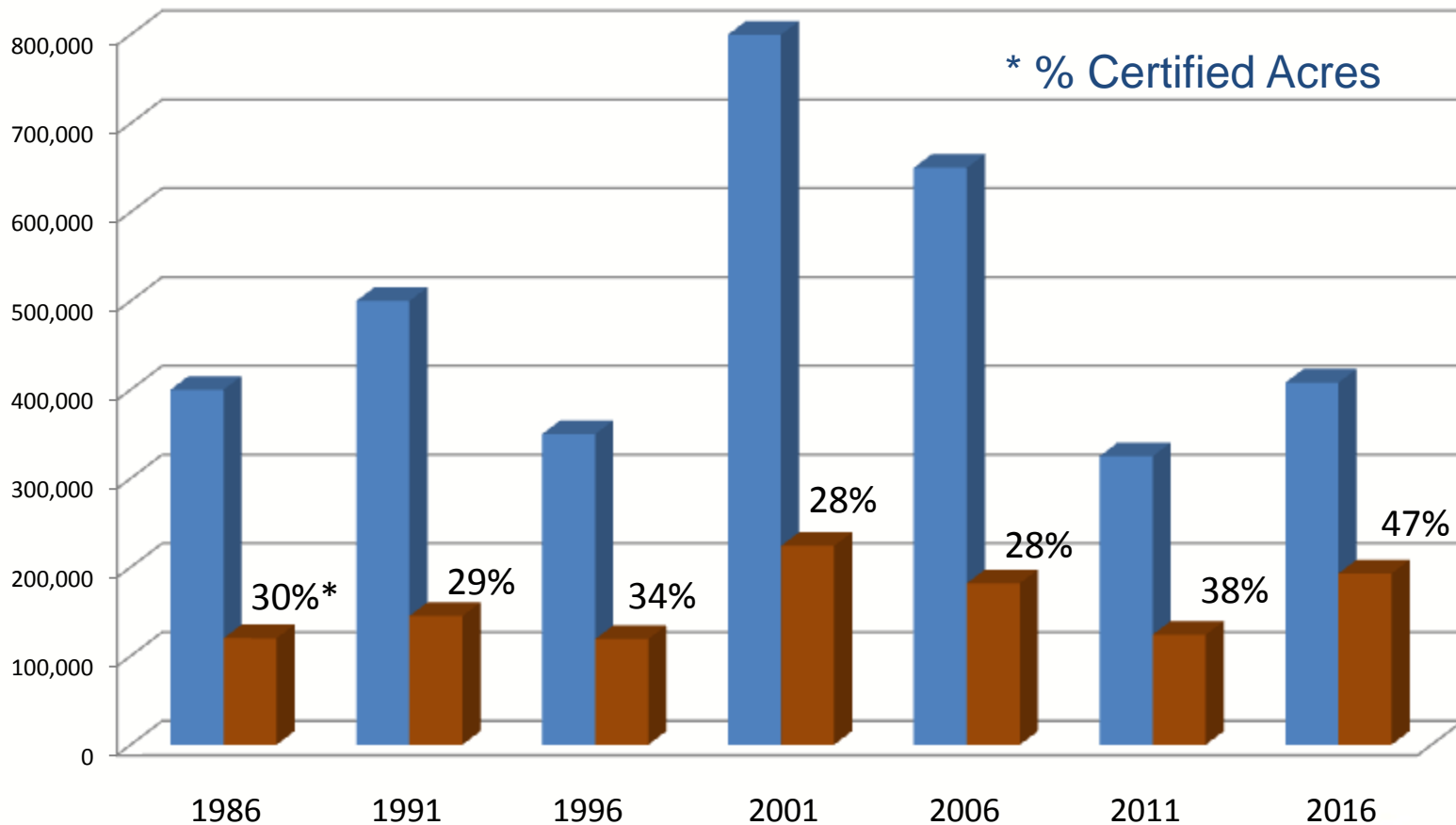
**Imperial Seeds**

## Canadian Grass and Legume Seed Acres: Census of Agriculture 1986 to 2016



# Canadian Turf/Forage Seed Acres – Total (census) vs Certified Seed

Canada Certified

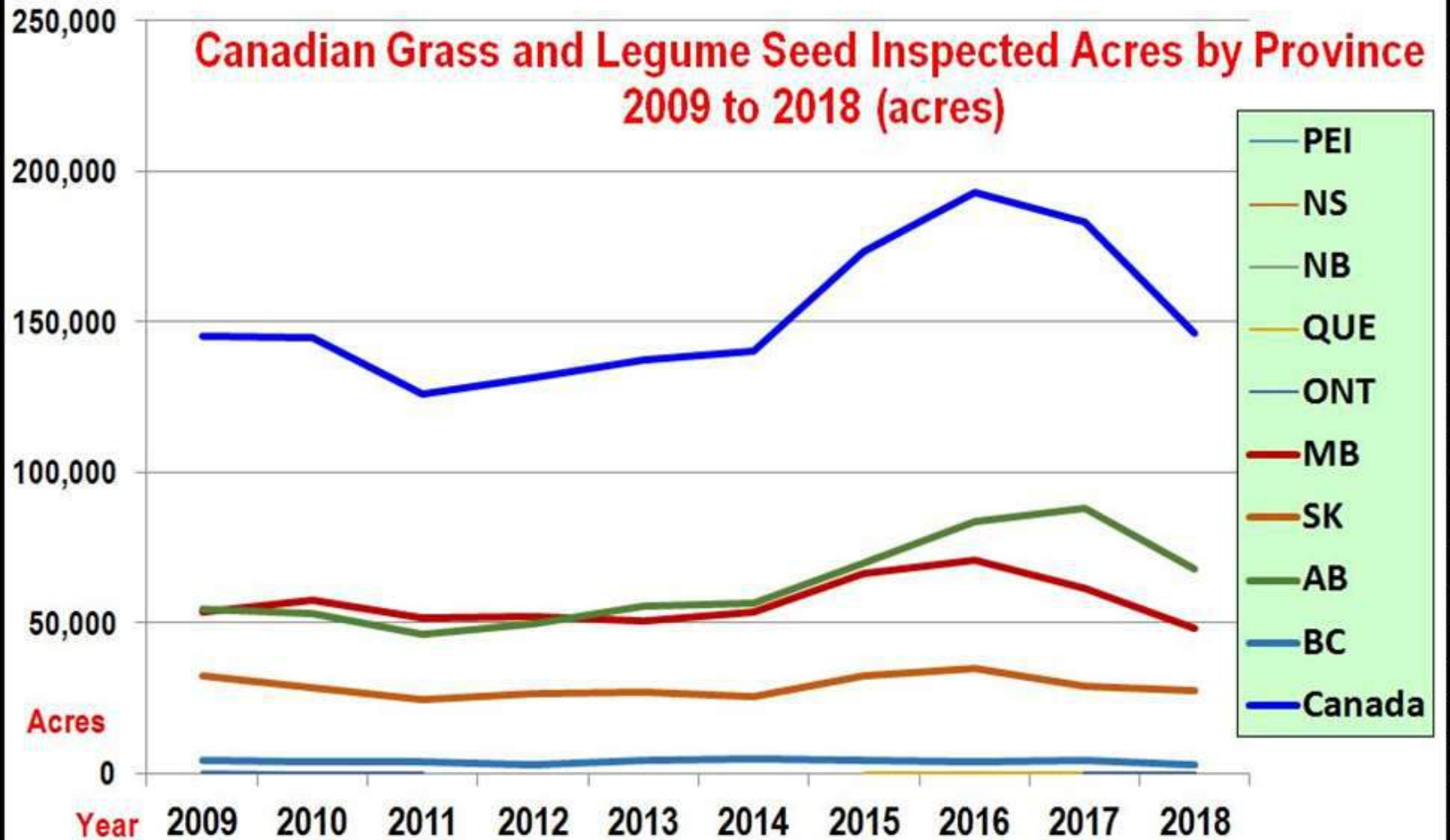


## Trend in Canadian Certified Forage Seed Acres X Species

CROP	2011	2012	2013	2014	2015	2016	2017	2018
Alfalfa	44,100	47,500	51,000	56,300	69,900	81,260	81,573	69,650
Birdsfoot Trefoil	5,000	7,300	7,400	3,900	2,600	2,107	2,872	2,337
Bromegrass	6,400	5,100	5,900	5,400	6,700	9,872	10,750	7,425
Clovers	3,600	3,900	4,200	2,500	5,900	6,106	6,243	4,596
Fescues	10,400	10,900	12,000	10,200	14,500	19,398	18,675	13,457
Ryegrass	24,000	18,500	15,500	15,800	24,900	25,386	19,204	16,104
Timothy	26,000	33,000	37,600	41,300	43,800	42,246	37,177	26,284
Wheatgrass	6,200	5,300	3,800	5,000	5,000	6,376	6,387	6,146
<b>TOTAL</b>	125,700	131,400	137,300	140,300	173,300	192,751	182,881	145,999



## Canadian Grass and Legume Seed Inspected Acres by Province 2009 to 2018 (acres)



## 2018 Canadian Certified Acres – Species x Province

CROP	MB	SK	AB	BC	All 2017	All 2018	% Change
Alfalfa	12,028	14,008	43,614	0	81,573	69,650	-15
Birdsfoot Trefoil	2,237	100	0	0	2,872	2,337	-19
Bromegrass	498	2,454	3,995	478	10,750	7,425	-31
Clover	920	2,755	921	0	6,243	4,596	-26
Fescue	5,277	1,155	6,725	300	18,675	13,457	-28
Ryegrass	13,259	1,970	875	0	19,204	16,104	-16
Timothy	13,847	3,545	7,096	1,796	37,127	26,284	-29
Wheatgrass	0	1,470	4,646	30	6,387	6,146	-4
<b>TOTAL(*)</b>	<b>48,066<sub>(33)</sub></b>	<b>27,457<sub>(19)</sub></b>	<b>67,872<sub>(46)</sub></b>	<b>2,604<sub>(2)</sub></b>	<b>182,961</b>	<b>145,999</b>	<b>-20</b>

\* % of total 2018 certified acres

## 2017/18 Saskatchewan Forage Seed Development Commission Summary Legumes

CROP	16/17 Weight (kg)	17/18 Weight (kg)	% Change	Average Price (\$/Kg)	Total Value (\$)
Alsike Clover	201,409	373,754	86	\$3.70	\$1,383,879
Red Clover	612,864	1,860,145	204	\$2.27	\$4,216,766
Sweet Clover	343,329	662,560	93	\$1.28	\$847,730
Birdsfoot Trefoil	14,562	4,989	-66	\$4.41	\$22,000
Vetch	30	991	3,203	\$4.40	\$4,758
<b>Total Forage Legumes</b>	<b>1,174,689</b>	<b>2,902,439</b>	<b>147</b>		<b>\$6,475,133</b>

- Total Forage Legume Volume up by 147%

## 2017/18 Saskatchewan Forage Seed Development Commission Summary Grasses

CROP	16/17 Weight (kg)	17/18 Weight (kg)	% Change	Avg Price (\$/Kg)	Value (\$)
Annual Ryegrass	623,663	277,270	-56	\$0.79	\$217,762
Perennial Ryegrass	1,003,332	402,736	-60	\$1.26	\$506,255
Hybrid Bromegrass	177,189	190,507	8	\$3.42	\$651,336
Meadow Bromegrass	128,939	25,938	-80	\$3.11	\$80,709
Smooth Bromegrass	22,655	9,806	-57	\$2.84	\$27,822
Crested Wheatgrass	82,291	145,894	77	\$2.70	\$393,841
Intermediate Wheatgrass	65,903	47,955	-27	\$2.86	\$137,060
Pubescent Wheatgrass	2,025	0	-100		
Slender Wheatgrass	247,096	44,732	-82	\$2.73	\$122,599
Meadow Fescue	135,429	3,455	-97	\$1.38	\$6,855
Dahurian Wild Rye	54,792	32,245	-41	\$1.76	\$62,160
Red Top	3,762	20,935	456	\$6.47	\$135,384
Timothy	901,776	833,988	-8	\$1.23	\$1,023,232
<b>Total Forage Grasses</b>	<b>3,448,852</b>	<b>2,035,460</b>	<b>-41</b>		<b>\$3,365,015</b>

- Total forage grass volume down by 41%
- Combined legume and grass volumes up by 7%

## Saskatchewan 2018/2019.....

**This year was a mixed bag.....**

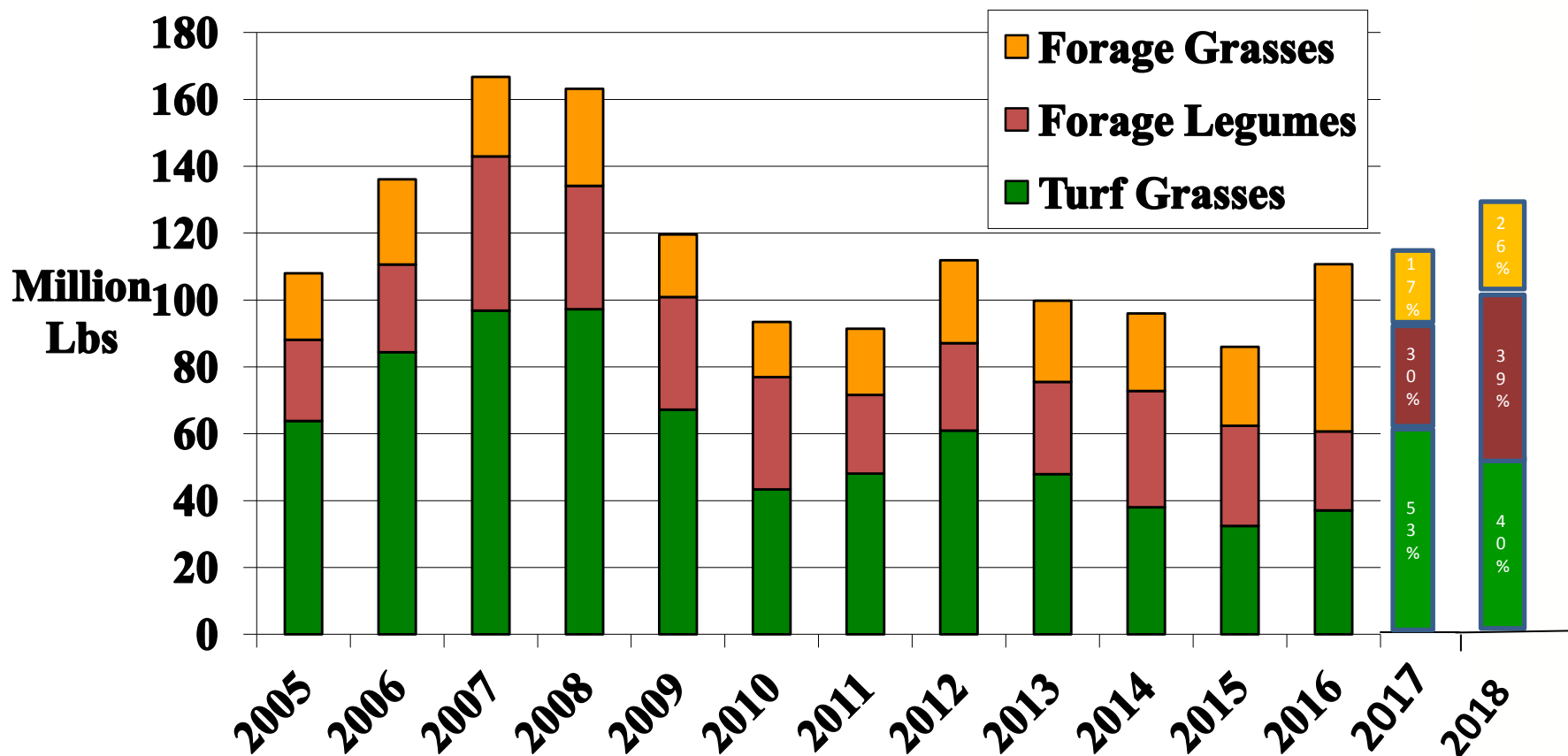
- **Dry spring and summer generally reduced yield but large variation between species depending on species growth characteristics (e.g. timothy, ryegrasses, wheatgrasses vs brome/alfalfa).**
- **Generally lower disease**
- **Typical year for insect infestations**
- **Wet, late and prolonged harvest-  
September and October.**





# Canadian Forage Seed Export Data

# Canadian Exports of FORAGE and TURF Seed (crop year – July to June)



## Canadian Exports of Forage Seeds by Species and Quantity (millions of lbs.)

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	% Change
<b>Total Canadian Exports</b>	<b>99.80</b>	<b>95.93</b>	<b>86.00</b>	<b>110.71</b>	<b>113.22</b>	<b>126.17</b>	<b>11</b>
Lucerne (Alfalfa) cert	9.73	12.82	12.90	21.58	15.06	21.60	43
Lucerne (Alfalfa) Not cert	9.24	12.04	8.43	11.13	8.32	18.15	118
<b>Total Alfalfa</b>	<b>18.98</b>	<b>24.85</b>	<b>21.33</b>	<b>32.71</b>	<b>23.38</b>	<b>39.76</b>	<b>70</b>
Creeping Red Fescue cert	6.03	2.97	2.54	2.47	6.63	1.34	-80
Creeping Red Fescue Not Cert	19.07	19.52	17.27	21.07	21.58	22.25	3
<b>Total Creeping Red Fescue</b>	<b>25.11</b>	<b>22.50</b>	<b>19.81</b>	<b>23.53</b>	<b>28.21</b>	<b>23.59</b>	<b>-16</b>
Rye Grass , Perennial	17.29	11.52	8.75	11.16	22.18	21.91	-1
Timothy Grass cert	7.57	8.12	9.52	7.85	7.48	8.14	9
Timothy Grass Not cert	0.22	0.13	0.07	0.20	0.37	0.33	-12
<b>Total Timothy</b>	<b>7.78</b>	<b>8.25</b>	<b>9.59</b>	<b>8.04</b>	<b>7.85</b>	<b>8.46</b>	<b>8</b>
<b>Seeds of Forage Plants Nes</b>	<b>8.86</b>	<b>9.38</b>	<b>8.17</b>	<b>7.87</b>	<b>7.76</b>	<b>6.80</b>	<b>-12</b>
Red Clover Double Cut	0.53	0.77	0.29	2.06	0.38	0.80	108
Red Clover , Nes	3.07	4.57	3.88	5.90	1.97	3.90	98
<b>Total Red Clover</b>	<b>3.61</b>	<b>5.33</b>	<b>4.17</b>	<b>7.95</b>	<b>2.35</b>	<b>4.69</b>	<b>100</b>
Rye Grass , Annual	2.58	1.37	1.65	2.14	2.36	4.54	92
Meadow Fescue	0.67	1.05	1.11	2.03	2.64	2.67	1
Tall Fescue	1.78	2.00	1.09	1.23	2.89	2.13	-26
Alsike Clover	2.26	1.21	1.48	2.53	1.18	2.09	77
Wild Rye	0.91	1.26	1.18	0.91	2.33	2.08	-11
Brome Grass, Nes	0.34	0.00	0.03	0.00	0.00	1.21	35560
Wheatgrass, Nes	1.07	0.71	1.49	0.85	0.77	1.03	33
Wheatgrass, Crested	2.37	0.95	0.70	0.89	1.41	1.01	-28
<b>Crops listed below had less than 1 million lbs. in Exports in 2017/18</b>							
Bird's-Foot Trefoil	1.20	0.71	0.89	1.24	1.15	0.88	-24
Sweet Clover	1.09	1.13	1.57	3.09	1.41	0.85	-40
Brome Grass, Meadow	1.35	0.66	0.58	0.61	0.67	0.71	7
Kentucky Blue Grass	1.15	0.43	0.52	0.35	0.45	0.65	45
Fescue , Nes	0.31	0.46	0.54	0.35	0.43	0.62	43
White Clover	0.09	1.13	0.37	2.11	1.96	0.38	-81
Clover , Nes	0.36	0.38	0.17	0.40	0.15	0.06	-59
Orchard Grass	0.11	0.12	0.10	0.07	0.10	0.02	-76
Bent Grass	0.02	0.13	0.56	0.00	0.22	0.01	-96
Brome Grass, Smooth	0.50	0.37	0.16	0.64	1.36	0.00	-100
<b>Total Canadian Exports</b>	<b>99.80</b>	<b>95.93</b>	<b>86.00</b>	<b>110.71</b>	<b>113.22</b>	<b>126.17</b>	<b>11</b>

- 1
- 2
- 3
- 4
- 5



## 2017/18 Export by Species, Quantity cont'd....:

- **Certified Creeping Red Fescue** down by 5.3 M lbs. (-80%)
- **Common Creeping Red Rescue** up by 920,000 lbs. (3%)
  
- **Certified alfalfa** at 15.1M lbs. up 6.5 M lbs from last year (43%)
- **Common alfalfa** at 18.2 M lbs. up 9.8 M lbs. from last year (118%)
  
- **Perennial ryegrass** unchanged from last year at 22 M lbs. but annual ryegrass nearly doubled at 4.5 M lbs.
  
- **Certified timothy** 8.1M lbs. up 8%
  
- **Red clover** 4.6M lbs. up 100 % over 2016.17
  
- **Smooth brome** down 100% to near zero 1.4 M lbs. in 2016 but NES brome grass up 1.2 M lbs.
  
- **Meadow brome exports** up 7% to 710,000 lbs.

# Exports By Value By Crop Year (June to July)

- 17/18 CDN exports \$184 M up by \$21M (11.5%)
- Top 3 Alf, CRF, PRG
- “forage seed, NES” came in at \$7.9M (primarily grass seed mixtures and some minor species not categorized elsewhere)
- Timothy @ \$7.7 M
- Red Clover at \$4.1 M

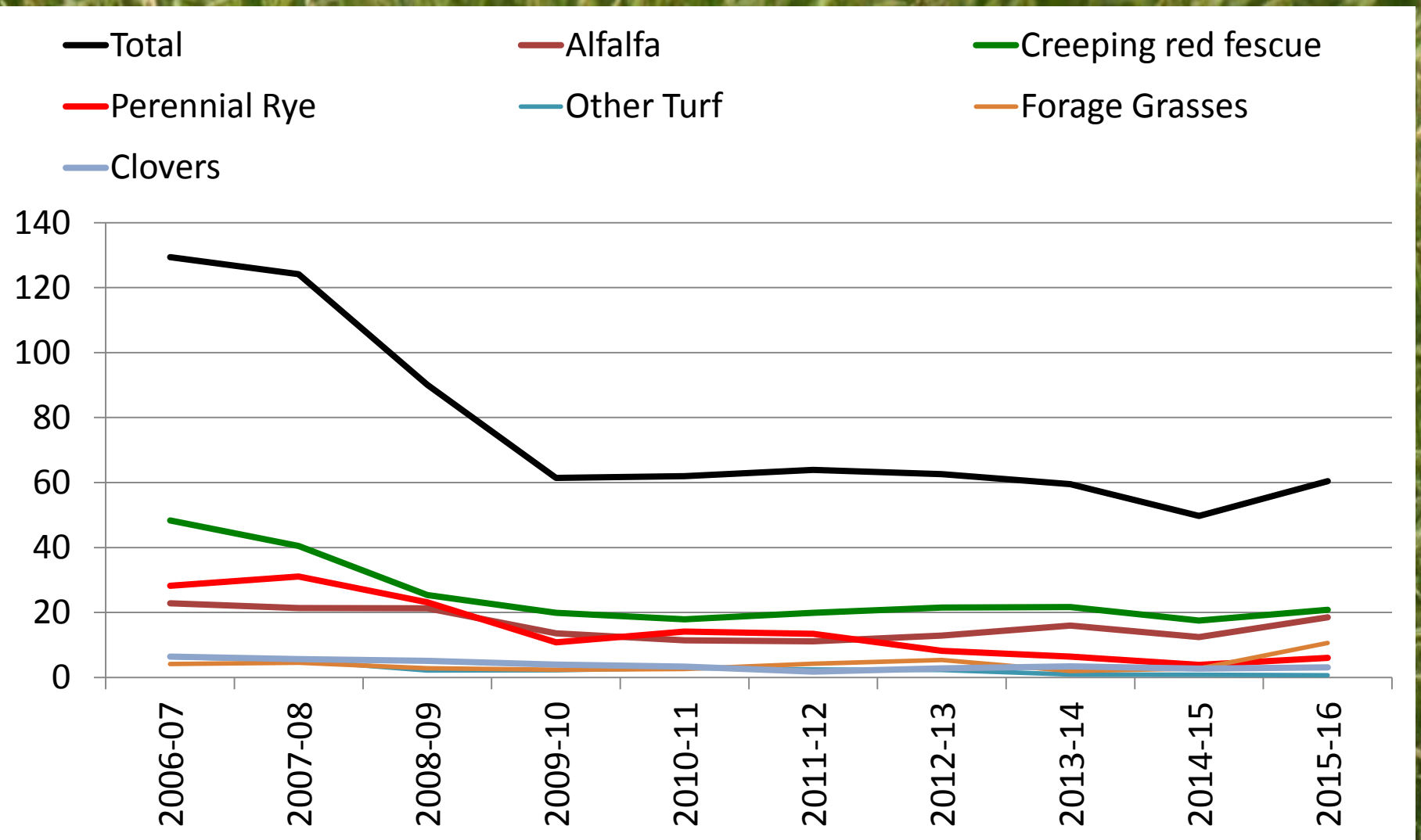
Lucerne (Alfalfa) cert	20.05	26.72	29.62	47.45	33.69	41.4	18.7%
Lucerne (Alfalfa) Not c	19.83	29.00	22.62	30.69	23.48	42.3	44.5%
<b>Total Alfalfa</b>	<b>39.89</b>	<b>55.72</b>	<b>52.24</b>	<b>78.14</b>	<b>57.17</b>	<b>83.75</b>	<b>31.7%</b>
Creeping Red Fescue	4.87	2.78	2.26	2.02	5.26	1.5	-256.3%
Creeping Red Fescue	13.83	17.70	18.32	24.16	24.17	26.9	10.3%
<b>I Creeping Red Fescue</b>	<b>18.70</b>	<b>20.48</b>	<b>20.58</b>	<b>26.19</b>	<b>29.43</b>	<b>28.41</b>	<b>-3.6%</b>
Rye Grass , Perennial	12.79	10.61	9.54	13.88	25.15	23.1	-8.7%
Timothy Grass cert	10.03	10.62	12.32	10.56	7.73	7.4	-4.4%
Timothy Grass Not cer	0.27	0.15	0.10	0.25	0.36	0.3	-34.9%
<b>Total Timothy</b>	<b>10.31</b>	<b>10.77</b>	<b>12.43</b>	<b>10.81</b>	<b>8.09</b>	<b>7.67</b>	<b>-5.5%</b>
<b>Seeds of Forage Plants</b>	<b>12.33</b>	<b>13.86</b>	<b>13.08</b>	<b>13.61</b>	<b>10.91</b>	<b>7.9</b>	<b>-37.7%</b>
Red Clover , Double Cl	0.57	0.91	0.52	2.19	0.77	1.1	31.0%
Red Clover , Nes	2.32	3.80	3.54	5.07	1.67	3.0	44.7%
<b>Total Red Clover</b>	<b>2.88</b>	<b>4.71</b>	<b>4.06</b>	<b>7.26</b>	<b>2.44</b>	<b>4.14</b>	<b>41.0%</b>
Alsike Clover	2.31	2.44	3.16	4.45	2.14	3.7	42.7%
Wild Rye	1.72	2.28	1.48	1.45	2.60	3.1	16.3%
Rye Grass , Annual	1.29	0.81	0.85	1.43	1.52	3.0	49.0%
Wheatgrass, Nes	2.52	1.59	4.66	2.29	1.73	2.7	37.2%
Bird'S-Foot Trefoil	5.06	2.67	2.67	3.87	3.19	2.6	-22.6%
Wheatgrass, Crested	4.48	2.07	1.86	2.88	3.30	2.6	-28.6%
Brome Grass, Smooth	1.21	0.71	0.48	1.74	3.44	2.2	-57.1%
Meadow Fescue	0.60	0.72	1.06	2.03	2.06	2.0	-0.8%
<b>Crops listed below had less than \$3 million in Exports in 2017/18</b>							
Tall Fescue	1.39	1.45	0.80	0.85	2.07	1.5	-35.8%
Brome Grass, Meadow	2.35	1.24	1.40	2.07	2.12	1.4	-53.5%
Fescue , Nes	0.47	0.51	0.75	0.63	0.75	1.2	39.0%
Sweet Clover	1.15	1.26	1.64	2.53	1.49	1.0	-56.2%
Kentucky Blue Grass	1.55	0.57	0.74	0.52	0.69	0.9	24.4%
White Clover	0.10	0.93	0.31	1.77	1.54	0.3	-371.6%
Orchard Grass	0.16	0.17	0.29	0.33	0.22	0.1	-83.4%
Clover , Nes	0.57	0.71	0.37	0.60	0.34	0.1	-220.0%
Bent Grass	0.05	0.02	0.13	-	0.16	0.0	-301.4%
Brome Grass, Nes	0.66	0.02	0.22	0.01	0.02	0.0	-174.2%
<b>Total Canadian Exports</b>	<b>124.53</b>	<b>136.33</b>	<b>134.79</b>	<b>179.31</b>	<b>162.59</b>	<b>183.6</b>	<b>11.5%</b>
Source: Statistics Canada, Prepared by: Alberta Agriculture and Forestry							
Crop Year = July to June, NES = Not Elsewhere Specified							

	AVERAGE EXPORT PRICES 2012 - 2018					
Description	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Lucerne (Alfalfa) cert	2.06	2.08	2.30	2.20	2.24	1.92
Lucerne (Alfalfa) Not cert	2.15	2.41	2.68	2.76	2.82	2.33
<b>Total Alfalfa</b>	<b>2.10</b>	<b>2.24</b>	<b>2.45</b>	<b>2.39</b>	<b>2.45</b>	<b>2.11</b>
Creeping Red Fescue cert	0.81	0.94	0.89	0.82	0.79	1.10
Creeping Red Fescue Not c	0.72	0.91	1.06	1.15	1.12	1.21
<b>Total Creeping Red Fescue</b>	<b>0.74</b>	<b>0.91</b>	<b>1.04</b>	<b>1.11</b>	<b>1.04</b>	<b>1.20</b>
Rye Grass , Perennial	0.74	0.92	1.09	1.24	1.13	1.06
Timothy Grass cert	1.33	1.31	1.29	1.35	1.03	0.91
Timothy Grass Not cert	1.25	1.12	1.45	1.27	0.98	0.83
<b>Total Timothy</b>	<b>1.32</b>	<b>1.30</b>	<b>1.30</b>	<b>1.34</b>	<b>1.03</b>	<b>0.91</b>
Seeds of Forage Plants Nes	1.39	1.48	1.60	1.73	1.41	1.16
Red Clover , Double Cut	1.06	1.18	1.78	1.06	2.01	1.40
Red Clover , Nes	0.75	0.83	0.91	0.86	0.85	0.78
<b>Total Red Clover</b>	<b>0.80</b>	<b>0.88</b>	<b>0.97</b>	<b>0.91</b>	<b>1.04</b>	<b>0.88</b>
Alsike Clover	0.90	1.78	1.91	2.08	0.91	0.82
Wild Rye	2.54	2.17	1.33	0.71	0.98	1.16
Rye Grass , Annual	0.72	0.40	0.78	1.16	0.53	1.40
Wheatgrass, Nes	1.11	1.32	3.15	0.91	1.46	1.31
Bird'S-Foot Trefoil	5.57	2.11	2.25	4.24	1.37	1.25
Wheatgrass, Crested	13.10	na	na	na	na	2.12
Brome Grass, Smooth	1.13	0.99	0.32	2.05	4.45	2.13
Meadow Fescue	0.25	0.76	1.51	2.28	1.47	2.02
Tall Fescue	1.16	2.05	0.90	0.68	1.79	1.73
Brome Grass, Meadow	2.14	1.10	0.89	0.67	1.50	1.62
Fescue , Nes	0.35	0.77	1.29	1.03	1.12	1.73
Sweet Clover	1.01	2.96	3.18	7.17	3.34	1.47
Kentucky Blue Grass	4.96	1.23	1.37	1.51	1.59	1.47
White Clover	1.06	0.82	0.84	0.84	0.79	0.86
Orchard Grass	0.43	0.44	1.70	0.83	1.48	1.97
Clover , Nes	5.09	5.93	3.65	8.00	3.54	4.66
Bent Grass	2.15	0.19	0.23	na	0.74	4.48
Brome Grass, Nes	1.32	0.04	1.38	0.01	0.01	11.00
<b>Total Canadian Exports</b>	<b>1.25</b>	<b>1.42</b>	<b>1.57</b>	<b>1.62</b>	<b>1.44</b>	<b>1.46</b>

## Canadian EXPORTS of Grass/Legume Seed by Crop Year (million lbs.)

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Total CDN EXPORTS	111.9	99.8	95.9	85.9	111	113	126
United States	63.9 (57%)	62.6 (63%)	59.5 (60%)	49.7 (58%)	60 (54%)	68(60%)	79(63%)
China	10.0	8.7	11.5	11.5	12	16	18
Netherlands	12.7	10.1	9.3	8.5	10	7	7
Germany	8.4	5.2	4.2	3.6	7	5	5
All Other Countries	na	na	na	14	21	17	17

# Canadian Exports (million lbs.) to The USA by Species



# Summary

- 2018 was another challenging year for seed growers.
- In Western Canada acres of inspected certified seed were down for all species.
- In Saskatchewan:
  - Total volume of forage legumes up by 147%
  - Total volume of forage grasses down by 41%
  - Overall volume up by 7%
- Exports for 2017-18 were up by 13 million lbs.
- With a few exceptions most “average” export prices were down from last year.
- Increased volume pushed total value of exports up by \$21 M (11.5%) at \$184 M.
- USA and China continue to be biggest markets primarily for alfalfa, creeping red fescue and perennial rye grass.



**saskatchewan.ca**

## Peace Region Yearly Average Prices Paid to Producers 2005 to 2017 (CDN \$/lb.)

	Creeping Red Fescue	Timothy	Smooth Brome	Meadow Brome	Alfalfa	Red Clover	Alsike Clover
2005	0.36	0.41	0.49	0.33	0.89	0.60	0.46
2006	0.39	0.39	0.69	0.72	0.96	0.61	0.35
2007	0.46	0.47	1.19	1.48	1.04	0.74	0.31
2008	0.60	0.60	0.88	1.43	1.22	0.95	0.44
2009	0.45	0.48	0.44	1.19	1.21	0.84	0.42
2010	0.35	0.46	0.40	0.76	1.27	0.62	0.51
2011	0.42	0.71	0.84	0.88	1.39	0.73	0.88
2012	0.50	0.89	1.58	1.25	1.65	0.72	1.13
2013	0.63	0.90	1.54	1.35	1.76	0.77	1.18
2014	0.74	0.82	1.56	1.58	1.82	0.85	1.26
2015	0.80	0.65	3.30	3.25	2.10	1.50+	1.40
2016	0.80	0.30	1.80	2.40	1.80	0.80	1.50
2017	0.90	0.25	1.10	1.70	1.00	0.85	1.20
2018	?	?	?	?	?	?	?