

Canadian Grass and Legume Seed Data: 2015-2016 Grass and Legume Seed Exports

Overview:

Canadian grass and legume seed exports showed a dramatic increase in sales for the 2015/16 crop year. Exports increased by over 33% over the previous year, with total exports hitting 100 million lbs., an export volume not seen since the 2011-12 crop year. However, 2011-12's exports (112 million lbs.) resulted in \$119.8 million worth of sales. 2015-16 saw 110 million lbs. of exports generating an incredible \$175.5 million in sales! With little on farm supplies available the past few years, end users have had to "pay" for shortage of available supplies.



Canadian Grass and Legume Seed Exports by Quantity and Species

With export volumes up almost 29% from the previous year, a total of over 110 million lbs. of grass and legume seed was exported by Canadian companies in 2015-16. This increase of over 24 million lbs. in exports was led by alfalfa seed (up 11.4 million), creeping red fescue (up 3.7 million lbs.), perennial ryegrass (up 2.4 million lbs.) and red clover seed (up 3.8 million lbs.). Timothy seed exports though, fell by 1.5 million lbs.

Alfalfa seed continues to be the #1 exported species, with certified alfalfa seed exports almost double that of common seed. Total exports for 2015-14 were at 32.7 million lbs. This volume of exported alfalfa seed was over 11 million lbs. more than the previous year.

Creeping red fescue exports increased by 3.7 million lbs. from the previous year, resulting in 23.5 million lbs. exported. Common seed dominated exports. This is the highest export total in the past 3 years.

Exports of perennial ryegrass jumped back over the 10 million lb. mark (11.1 million lbs.) after falling below 10 million lbs. the previous year. This increase in exports of 2.4 million lbs. resulted in perennial ryegrass exports increasing over 27% from the previous year.

Red clover seed exports, with a 5 year average export volume of 4.9 million lbs., saw export volumes reach almost 8 million lbs. in 2015-16.

One crop that saw exports decrease was timothy seed, which saw export numbers fall to 8.04 million lbs. from 9.6 million lbs. in 2014-15. Certified timothy seed still dominates Canadian timothy seed exports, as certified seed accounted for 97.6% of exports.

Canadian Exports of Grass/Legume Seed (by Volume, Crop Year)							
	2011-12	2012-13	2013-14	2014-15	2015-16	14/15 vs 15/16	5 yr avg
Canadian Total Exports	111.88	99.80	95.93	86.00	110.74	28.8%	100.87
Alfalfa, Cert	7.95	9.73	12.82	12.90	21.58	67.3%	13.00
Alfalfa, O/T Cert	8.47	9.24	12.04	8.43	11.13	32.1%	9.86
Alfalfa: Total	16.43	18.98	24.85	21.33	32.71	53.4%	22.86
Red Fescue O/T Cert	13.01	19.07	19.52	17.26	21.07	22.0%	17.99
Red Fescue Cert	14.05	6.03	2.97	2.54	2.47	-2.9%	5.61
Red Fescue: Total	27.06	25.11	22.50	19.80	23.53	18.8%	23.60
Rye Grass Perennial	27.24	17.29	11.52	8.75	11.16	27.6%	15.19
Seeds Of Forage Plants, Nes	9.80	8.86	9.38	8.17	7.89	-3.4%	8.82
Timothy Grass, Cert	7.81	7.57	8.12	9.52	7.85	-17.6%	8.17
Timothy Grass, O/T Cert	0.22	0.22	0.13	0.07	0.20	173.8%	0.17
Timothy Seeds: Total	8.03	7.78	8.25	9.59	8.04	-16.2%	8.34
Red Clover Nes	3.14	3.07	4.57	3.88	5.90	51.9%	4.11
Red Clover Double Cut	0.26	0.53	0.77	0.29	2.06	610.5%	0.78
Red Clover: Total	3.40	3.61	5.33	4.17	7.95	90.6%	4.89
Sweet Clover	1.61	1.09	1.13	1.57	3.09	97.2%	1.70
Alsike Clover	2.62	2.26	1.21	1.48	2.53	71.4%	2.02
Rye Grass Annual,	2.44	2.58	1.37	1.65	2.14	29.8%	2.04

Canadian production of other grass/legume seed continues to add to the Canadian economy, as 2015-16 saw exports of over 2 million lbs. for 7 other grass/legume species. Low stocks and low production saw exports of other species remain below 1 million lbs. (smooth brome grass, wild rye, and wheatgrasses).



White Clover	0.12	0.09	1.13	0.37	2.11	476.4%	0.76
Meadow Fescue	0.37	0.67	1.05	1.11	2.03	82.3%	1.05
Bird'S-Foot Trefoil,	1.70	1.20	0.71	0.89	1.24	39.1%	1.15
Tall Fescue	3.56	1.78	2.00	1.09	1.23	13.3%	1.93
Wild Rye	0.30	0.91	1.26	1.18	0.91	-22.9%	0.91
Wheatgrass, Crested	1.69	2.37	0.95	0.70	0.89	26.6%	1.32
Wheatgrass, Nes,	1.30	1.07	0.71	1.49	0.85	-43.2%	1.08
Brome Grass, Smooth	1.31	0.50	0.37	0.16	0.64	306.2%	0.60
Brome Grass, Meadow	0.77	1.35	0.66	0.58	0.61	4.4%	0.79
Clover Nes,	0.29	0.36	0.38	0.17	0.40	134.8%	0.32
Kentucky Blue Grass	0.56	1.15	0.43	0.52	0.35	-31.7%	0.60
Fescue Nes	0.62	0.31	0.46	0.54	0.35	-36.2%	0.46
Orchard Grass,	0.19	0.11	0.12	0.10	0.07	-26.1%	0.12
Brome Grass, Nes,	0.47	0.34	0.00	0.03	0.00	-98.1%	0.17
Bent Grass	0.01	0.02	0.13	0.56	0.00	-100.0%	0.14
Canadian Total Exports	111.88	99.80	95.93	86.00	110.74	28.8%	100.87
millions of lbs, crop year = July to June, NES = not elsewhere specified, OT = other than							
Source: Statistics Canada, International Merchandise Trade, Prepared by: Alberta Agriculture and Forestry							

Value of Canadian Grass/Legume Seed Exports:

2015-16 saw Canadian exports increase by a whopping \$44.5 million over the previous year, an increase of 33%, although the volume of seed increased only 29%. Not surprising, as shortages in seed stocks have resulted in increased prices for most species.

- Of the total \$179.5 million Canada had in exports, alfalfa seed accounted for over 43% of this total (\$47.4 million for certified alfalfa, \$30.7 million for common alfalfa), based on 32.7 million lbs. of exports.
- The lower valued creeping red fescue exports (23.5 million lbs.) accounted for \$26.2 million in sales. The other turfgrass, perennial ryegrass seed, accounted for 11.2 million lbs. in exports and \$13.9 million in value.
- Grass seed mixtures (unspecified as to whether it is forage mixtures or turf seed mixtures) saw the export value increase to \$13.76 million from \$13.1 million last crop year. Export volumes of these mixtures (Seeds of forage plants, NES) fell by 280,000 lbs. in 2015-16.
- Red clover exports increased by \$3.2 million (up to \$7.26 million).
- With timothy seed exports falling last year, the value of this export crop also fell, resulting in exports of \$10.8 million in sales, down \$1.6 million from the previous year.



Canadian Exports of Grass/Legume Seeds (by Value, Crop Year)							Canadian Exports of Grass/Legume Seeds (by Value, Crop Year)						
	2011-12	2012-13	2013-14	2014-15	2015-16	Avg. Export \$ 2015/16		2011-12	2012-13	2013-14	2014-15	2015-16	Avg. Export \$ 2015/16
Total Canadian Exports	119.79	124.53	136.32	134.78	179.47		Total Canadian Exports	119.79	124.53	136.32	134.78	179.47	
Alfalfa, Cert	16.69	20.05	26.72	29.62	47.45	2.20	Wheatgrass, Nes	2.54	2.52	1.59	4.66	2.29	1.13
Alfalfa, O/T Cert	17.00	19.83	29.00	22.62	30.69	2.76	Brome Grass, Meadow	1.19	2.35	1.24	1.40	2.07	1.67
Alfalfa: Total	33.68	39.89	55.72	52.24	78.14	2.39	Meadow Fescue	0.32	0.60	0.72	1.06	2.03	1.64
Red Fescue O/T Cert	8.40	13.83	17.70	18.32	24.16	1.15	White Clover	0.14	0.10	0.93	0.31	1.77	1.93
Red Fescue Cert	9.95	4.87	2.78	2.26	2.02	0.82	Brome Grass, Smooth	2.01	1.21	0.71	0.48	1.74	1.95
Red Fescue: Total	18.34	18.70	20.48	20.58	26.19	1.11	Wild Rye	0.55	1.72	2.28	1.48	1.45	1.71
Rye Grass Perennial	18.66	12.79	10.61	9.54	13.88	1.24	Rye Grass Annual	1.80	1.29	0.81	0.85	1.43	2.22
Seeds Of Forage Plants, Nes	12.24	12.33	13.86	13.08	13.76	1.74	Tall Fescue	2.26	1.39	1.45	0.80	0.85	1.40
Timothy Grass, Cert	9.25	10.03	10.62	12.32	10.56	1.35	Fescue Nes	0.52	0.47	0.51	0.75	0.63	1.56
Timothy Grass, O/T Cert	0.24	0.27	0.15	0.10	0.25	1.27	Clover Nes	0.49	0.57	0.71	0.37	0.60	1.70
Timothy Seeds: Total	9.49	10.31	10.77	12.43	10.81	1.34	Kentucky Blue Grass	0.58	1.55	0.57	0.74	0.52	1.51
Red Clover Nes	2.68	2.32	3.80	3.54	5.07	0.86	Orchard Grass	0.24	0.16	0.17	0.29	0.33	4.46
Red Clover Double Cut	0.35	0.57	0.91	0.52	2.19	1.06	Brome Grass, Nes	0.63	0.66	0.02	0.22	0.01	9.92
Red Clover: Total	3.03	2.88	4.71	4.06	7.26	0.91	Bent Grass	0.02	0.05	0.02	0.13	0.00	0.00
Alsike Clover	2.20	2.31	2.44	3.16	4.45	1.44	Total Canadian Exports	119.79	124.53	136.32	134.78	179.47	
Bird'S-Foot Trefoil	5.14	5.06	2.67	2.67	3.87	1.53	Millions of \$ CDN, Crop Year = July to June, NES = not elsewhere specified, OT = other than						
Wheatgrass, Crested	2.22	4.48	2.07	1.86	2.88	1.34	Source: StatsCan, International Merchandise Trade, Prepared by: AA&F						
Sweet Clover	1.51	1.15	1.26	1.64	2.53	1.20							

Canadian Exports by Province:

Manitoba, with diverse grass and legume seed production, and with major processing infrastructure in place, continues to lead all Canadian provinces in both export volume and value. 2015-16 saw grass/legume seed add \$74.7 million in value to its economy, based on exports of 46.3 million lbs. The volume exported in 2015-16 is up by almost 10 million lbs. from 2015-16.

Alberta follows Manitoba in volume shipped and value for crop year 2015-16. Alberta's exports increased by 9 million lbs. for 2015-16. Alberta reached 39 million lbs. in exports, resulting in \$62.9 million in sales. Alberta sales and exports is led by alfalfa seed from the Brooks region, and creeping red fescue grown in the Peace region. Saskatchewan exports increased by over 7 million lbs., an increase of over 63% compared to the previous year. This increase in exports has allowed Saskatchewan's grass/legume seed sales to reach over \$29 million.

Please note: Customs Canada records which province the various seed species are exported out of (location of processors), therefore, a lot of seed grown in B.C. (cleaned in Alberta) and Saskatchewan (cleaned in Manitoba) are shown as exports out of Alberta and Manitoba respectively.

Canadian Exports of Grass/Legume Seed (by Province, Volume/Value, Crop Year)												
	2011-12		2012-13		2013-14		2014-15		2015-16		5 Year Avg	
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
Canada	111.88	119.8	99.80	124.5	95.93	136.3	86.00	134.8	110.74	179.5	78.72	103.08
Manitoba	53.68	56.9	44.84	57.8	40.17	63.2	36.73	61.4	46.32	74.7	35.08	47.88
Alberta	37.23	33.6	39.16	42.3	35.44	43.7	32.17	45.8	39.23	62.9	28.80	33.07
Sask	11.36	16.4	8.55	13.9	13.32	20.2	11.08	19.6	18.11	29.1	8.86	14.02
Ontario	4.56	8.0	4.99	8.5	3.42	5.4	3.26	5.4	3.52	8.4	3.25	5.47
Quebec	3.13	3.3	0.57	0.8	1.93	2.5	1.18	1.3	2.14	3.0	1.36	1.57
B.C.	1.81	1.3	1.60	1.1	1.60	1.3	1.55	1.3	1.39	1.4	1.31	1.00
NS	0.00	0.0	0.01	0.0	0.04	0.0	0.03	0.1	0.01	0.0	0.02	0.02
NB	0.11	0.2	0.02	0.0	0.01	0.0	0.01	0.0	0.01	0.0	0.03	0.04
NFLD	0.00	0.0	0.06	0.1	0.00	0.0	0.00	0.0	0.00	0.0	0.01	0.01
PEI	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.00
Canada	111.88	119.8	99.80	124.5	95.93	136.3	86.00	134.8	110.74	179.5	78.72	103.08
Millions of lbs, Millions of \$, Crop Year = July to June												
Source: StatsCan, International Merchandise Trade, Prepared by: AA&F												

Destinations:

2015-16 data shows Canadian grass/legume seed exports landing in 34 different countries, with 11 countries importing at least 1 million lbs. of Canadian seed. Once again, the USA was Canada's primary destination for grass and legume seed, accounting for 54.5% of Canadian exports. The % of Canadian product going to the USA dropped by 5% from the previous year, and by 7% compared to 2 years ago. China, which was Canada's number 2 trade partner for grass/legume seed the past 2 years, dropped to number 3 this past year, giving up the number 2 position to the Netherlands. The Netherlands imported 12.7 million lbs. of Canadian grass/legume seed compared to China's imports of 12.0 million lbs. Canadian export volumes increasing by 24 million lbs. compared to 2014-15. This increase in exports is thanks to the USA (up 10.6 million lbs.), the Netherlands (up 4.1 million lbs.), Germany (up 3.4 million lbs.), and Poland (up 2.3 million lbs.). Chinese imports basically remained neutral (up 540,000 lbs.).

Canadian Exports of Grass/Legume Seed (By Country, Volume, Crop Year)					
	2011-12	2012-13	2013-14	2014-15	2015-16
Canada: Total Exports	111.88	99.80	95.93	86.00	110.74
United States	63.93	62.57	59.52	49.74	60.36
Netherlands	12.67	10.14	9.34	8.55	12.68
China	10.03	8.74	11.53	11.47	12.01
Germany	8.40	5.20	4.24	3.63	6.99
Italy	3.10	1.47	2.43	2.00	3.44
Poland	1.86	1.65	0.51	0.70	3.00
Denmark	1.53	1.91	2.16	1.34	2.26
Argentina	1.00	0.36	0.54	0.98	1.63
France	1.26	0.66	0.80	0.47	1.53
Finland	0.19	0.27	0.25	1.52	1.20
Japan	0.35	0.64	0.85	0.91	1.13
Total (11 countries)	104.34	93.60	92.17	81.31	106.23
Other Countries (2015-16 = 23)	7.53	6.20	3.75	4.69	4.50
Canada: Total Exports	111.88	99.80	95.93	86.00	110.74

Millions of lbs, Crop Year = July to June
Source: StatsCan, International Merchandise Trade, Prepared by: AA&F

USA: Grass/Legume Seed Imports from Canada

Creeping red fescue continues to lead as the species most in demand by USA companies, with 20.8 million lbs. exported to the USA in 2014-15. This was up by 3.3 million lbs., with almost all exports of creeping red fescue classified as common seed.

Alfalfa seed imports by USA companies increased dramatically (up over 49% from 2014-15), with seed class split evenly between certified and common seed.

Canadian perennial ryegrass seed exports to the USA rebounded nicely in 2015-16, as over 6 million lbs. of seed was exported, an increase of 55% (2.16 million lbs.). Perennial ryegrass seed exports to the USA had hit a low of only 3.87 million lbs. in 2014-15, and had been over 13 million lbs. as recently as 2011-12.

American imports of Canadian red clover was the only other grass/legume seed species to amount to over 1 million lbs., with 1.4 million lbs. imported in 2015-16.

Canadian Exports of Grass/Legume Seed to USA (by Volume, Crop Year)											
	2011-12	2012-13	2013-14	2014-15	2015-16		2011-12	2012-13	2013-14	2014-15	2015-16
Total Canada	111.88	99.80	95.93	86.00	110.74	Meadow Fescue	0.13	0.16	0.07	0.30	0.50
United States	63.93	62.57	59.52	49.74	60.36	Bird's-Foot Trefoil	0.58	0.58	0.25	0.49	0.47
Red Fescue Cert	7.33	3.06	2.02	0.89	0.68	Brome Grass, Meadow	0.56	0.94	0.37	0.40	0.46
Red Fescue O/T Cert	12.56	18.44	19.16	16.64	20.13	Brome Grass, Smooth	1.08	0.41	0.08	0.07	0.37
Red Fescue: Total	19.89	21.50	21.17	17.52	20.81	Fescue Nes	0.35	0.30	0.31	0.50	0.35
Alfalfa, Cert	4.93	4.91	5.85	5.94	9.24	Clover Nes	0.25	0.36	0.38	0.17	0.22
Alfalfa, O/T Cert	6.17	7.99	10.18	6.42	9.25	Tall Fescue	1.72	0.99	0.44	0.29	0.21
Alfalfa: Total	11.10	12.90	16.03	12.36	18.49	Rye Grass Annual	0.48	1.23	0.41	0.41	0.21
Seeds of Forage Plants, Nes	8.37	8.56	8.97	7.84	7.69	Kentucky Blue Grass	0.28	0.05	0.02	0.14	0.12
Rye Grass Perennial	13.85	8.20	6.41	3.87	6.03	White Clover	0.04	0.05	0.01	0.00	0.11
Red Clover Double Cut	0.21	0.22	0.40	0.29	0.53	Orchard Grass	0.02	0.04	0.08	0.09	0.07
Red Clover Nes	1.13	0.80	1.21	0.82	0.89	Wild Rye	0.30	0.38	0.12	0.10	0.05
Red Clover: Total	1.33	1.02	1.61	1.11	1.41	Brome Grass, Nes	0.34	0.14	0.00	0.03	0.00
Wheatgrass, Crested	0.65	2.32	0.75	0.61	0.89	Bent Grass	0.01	0.02	0.13	0.56	0.00
Sweet Clover	0.84	0.76	0.74	0.85	0.78	Value of Canadian Imports	69.9	80.0	87.8	85.3	115.3
Wheatgrass, Nes	1.14	1.04	0.53	1.41	0.60	Millions of lbs, value = millions of CDN \$, CropYear = July to June, NES = not elsewhere specified, O/T = other than. Source: StatsCan, International Merchandise Trade, Prepared by: AA&F					
Alsike Clover	0.64	0.62	0.65	0.60	0.53						

The Netherlands: Grass/Legume Seed Imports from Canada

2015-16 saw Dutch grass and legume seed imports increase by over 4 million lbs., making her the # 2 importer of Canadian grass and legume seed (12.68 million lbs. of seed, totaling \$12.8 million) 2015-16 Dutch imports saw alfalfa seed imports at 4.78 million lbs., up 2.96 million lbs. 2015-16 also saw increased imports of meadow fescue (840,000 lbs.), perennial ryegrass (700,000 lbs.), red clover (600,000 lbs.), and alsike clover (320,000 lbs.).

Dutch imports of timothy seed and creeping red fescue fell by 1 million lbs. and 630,000 lbs. respectively.



Canadian Exports of Grass/Legume Seed to Netherlands (by Volume, Crop Year)					
	2011-12	2012-13	2013-14	2014-15	2015-16
Total Canadian Exports	111.88	99.80	95.93	86.00	110.74
Netherlands: Total	12.67	10.14	9.34	8.55	12.68
Alfalfa, Cert	0.89	1.12	1.55	1.73	4.03
Alfalfa, O/T Cert	0.34	0.04	0.09	0.09	0.75
Red Clover Double Cut	0.00	0.06	0.19	0.00	0.33
Red Clover Nes	0.95	0.33	0.00	0.02	0.32
Sweet Clover	0.69	0.16	0.09	0.03	0.02
Alsike Clover	0.53	0.39	0.04	0.16	0.48
White Clover	0.00	0.00	0.08	0.13	0.16
Red Fescue, Cert	2.18	0.43	0.40	0.89	0.36
Tall Fescue	0.16	0.32	0.39	0.04	0.09
Meadow Fescue	0.22	0.46	0.86	0.56	1.40
Kentucky Blue Grass			0.05	0.00	0.14
Rye Grass Annual	0.34	0.25	0.04	0.04	0.00
Rye Grass Perennial	2.95	2.27	1.46	1.26	1.96
Wheatgrass, Nes	0.01	0.00		0.00	0.00
Bird'S-Foot Trefoil	0.40	0.22	0.16	0.19	0.12
Orchard Grass		0.00	0.02		0.00
Timothy Grass, Cert	2.93	3.93	3.73	3.40	2.30
Timothy Grass, O/T Cert	0.03	0.00		0.00	0.04
Wild Rye	0.00	0.14	0.01		0.18
Seeds Of Forage Plants, Nes	0.01	0.00		0.01	0.00
Value of Canadian Imports	12.39	12.60	12.22	12.82	18.00
Millions of lbs, value = millions of CDN \$, CropYear = July to June, NES = not elsewhere specified, O/T = other than					
Source: Stats Canada, IMT, Prepared by: AA&F					

China: Grass/Legume Seed Imports from Canada

Despite increasing her grass/legume seed imports from Canada by 540,000 lbs. (up 5.4%) in 2015-16, China became Canada's 3rd largest trade partner, dropping from her #2 position the previous two years. However, China has consistently imported between 8.7 million lbs. to 12 million lbs. the previous 5 years, and in 2015-16, accounted for 10.8% of Canadian grass/legume seed exports. In total, China imported 12 million lbs. of Canadian grass/legume seed for 2015-16.

Chinese imports is led by alfalfa seed's 4.2 million lbs. However, this is the same import volume as the previous year, but imports of certified alfalfa seed increased by 1 million lbs., while imports of common alfalfa seed fell by 1 million lbs.

Red clover seed, with 2.98 lbs. imported from Canada, held down the #2 position, while perennial ryegrass (2.76 million lbs.) was the 3rd most imported Canadian grass/legume species. Other grass/legume seed imports from Canada included 280,000 lbs. of smooth brome grass seed (up 200,000 lbs. from the previous year) and wheatgrasses (excluding crested) which saw 250,000 lbs. imported, an increase of 300% from 2014-15. China accounted for \$14.71 million of Canada's grass/legume seed value due to exports.

Canadian Exports of Grass/Legume Seed to China (by Volume, Crop Year)					
	2011-12	2012-13	2013-14	2014-15	2015-16
Total Canada	111.88	99.80	95.93	86.00	110.74
China: Total	10.03	8.74	11.53	11.47	12.01
Alfalfa, Cert	0.89	1.48	2.52	3.03	4.03
Rye Grass Perennial	4.87	3.90	2.82	3.14	2.76
Red Clover Nes	0.64	0.73	1.13	1.53	1.21
Red Clover Double Cut		0.05	0.15	-	0.77
White Clover	0.08	-	0.72	0.23	0.65
Sweet Clover			0.09	0.59	0.62
Wild Rye	-	0.26	0.99	0.85	0.42
Tall Fescue	0.96	0.30	0.98	0.33	0.41
Brome Grass, Smooth	0.18	0.08	0.22	0.08	0.28
Wheatgrass, Nes	-	0.02	0.14	0.08	0.25
Red Fescue , O/T Cert	0.22	0.16	0.13	0.22	0.23
Alfalfa, O/T Cert	0.85	0.95	1.22	1.19	0.17
Rye Grass Annual	0.04	0.05	-		0.12
Timothy Grass, Cert	0.01	-			0.04
Brome Grass, Meadow	0.04	0.11	0.13		0.04
Timothy Grass, O/T Cert	0.00	0.04	0.05	0.03	0.02
Bird'S-Foot Trefoil	0.05	0.02	0.05	0.04	0.01
Wheatgrass, Crested	0.95	0.05	0.05	0.09	0.00
Value of Canadian Imports	10.03	10.82	15.25	15.49	14.71
Millions of lbs, CropYear = July to June, NES = not elsewhere specified, O/T = other than					
Source: StatsCan, International Merchandise Trade, Prepared by: AA&F					

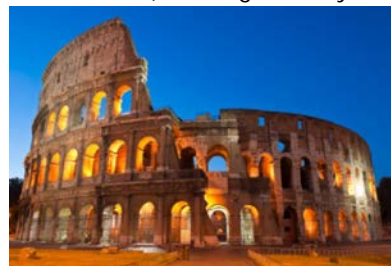
Germany: Grass/Legume Seed Imports from Canada

German imports of Canadian grass/legume seed in 2014-15 increased by 92%, with total volume of imports at 6.99 million lbs. (up 3.36 million lbs.) This increase was helped by red clover imports (up 1.49 million lbs. to 2.32 million lbs.), and creeping red fescue (up 670,000 lbs., zero imports the previous year). Alsike clover, alfalfa, timothy and birds-foot trefoil showed increased imports of 240,000 to 390,000 lbs. The value of Canadian imports into Germany reached \$7.7 million, up from \$4.3 million in 2014-15.

Canadian Exports of Grass/Legume Seed to Germany (by Volume, Crop Year)					
	2011-12	2012-13	2013-14	2014-15	2015-16
Canadian Total Exports	111.88	99.80	95.93	86.00	110.74
Germany	8.40	5.20	4.24	3.63	6.99
Alfalfa, Cert	0.28	0.34	0.58	0.16	0.50
Alfalfa, O/T Cert	0.14	-			0.04
Red Clover, D/C	0.02	-			
Red Clover, Nes	0.09	0.62	1.48	0.82	2.32
Sweet Clover	-	0.05	0.15	0.06	0.10
Alsike Clover	0.42	0.41	0.21	0.35	0.74
Red Fescue, Cert	2.15	0.79	-	-	0.67
Tall Fescue	0.21	0.07	-	0.17	0.15
Meadow Fescue				-	0.10
Rye Grass, Annual	0.32	-	0.03	0.27	0.24
Rye Grass, Perennial	2.05	0.85	0.25	0.13	0.07
Bird'S-Foot Trefoil,	0.03	0.10	0.10	0.05	0.22
Timothy, Cert	2.39	1.53	1.39	1.61	1.85
Bent Grass	0.03	0.10	0.10	0.05	0.22
Bird's-Foot Trefoil	2.39	1.53	1.39	1.61	1.85
Wild Rye,	0.01	0.03	0.00	0.01	
Canadian Total Exports	111.88	99.80	95.93	86.00	110.74

Italy: Grass/Legume Seed Imports from Canada

Italian imports from Canada rose 72% last year resulting in 3.44 million lbs. of Canadian seed landing in Italy (\$4.3 million in value, up \$1 million from 2014-15). This increase in Canadian seed imports (1.44 million lbs.) was led by the legumes, with sweet clover seed (up 620,000 lbs.), red clover (up 320,000 lbs.) and bird's-foot trefoil (up 220,000 lbs.) leading the way.



Canadian Exports of Grass/Legume Seed to Italy (by Volume, Crop Year)					
	2011-12	2012-13	2013-14	2014-15	2015-16
Canadian Total Exports	111.88	99.80	95.93	86.00	110.74
Italy	3.10	1.47	2.43	2.00	3.44
Alfalfa, Cert			0.54	0.54	0.63
Alfalfa, O/T Cert			0.47	0.28	0.05
Red Clover D/C				-	0.32
Red Clover, Nes	0.28	0.24	0.64	0.40	0.62
Sweet Clover	0.03	0.03	0.03	0.04	0.65
Alsike Clover	0.37	0.21	0.05	0.04	0.09
Clover Nes	-				0.14
Red Fescue, Cert	0.19	-	-	0.05	
Tall Fescue	0.39	0.11	0.18	0.16	0.18
Rye Grass, Annual	0.22	0.10	0.33	0.22	0.22
Rye Grass, Perennial	1.00	0.35	0.06	0.04	0.12
Bird's-Foot Trefoil,	0.29	0.16	-	0.09	0.31
Timothy Grass, Cert	0.17	0.22	0.02	0.14	0.11
Value of Canadian Imports	2.6	2.0	3.1	3.3	4.3
Millions of lbs, value = millions of CDN \$, CropYear = July to June, NES = not elsewhere specified, O/T = other than					
Source: Stats Canada, IMT, Prepared by: AA&F					

Summary:

Canadian grass and legume seed exports continue to contribute to Canada's agriculture sector, with exports accounting for \$179 million in sales, let alone domestic sales. Although production of most species is down, increased price offers have justified grower's belief in continuing to grow grass and legume seed throughout

Canada. With export volumes increasing again, and good prices for most products, grass and legume seed exports have recovered from previous years lows in volume. However, like many agricultural sectors, supply and demand can be fickle, especially resulting prices. It is hoped current prices and demand hold, but only the future knows for sure.

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