

## Canadian Grass and Legume Seed Data: Grass and Legume Seed Exports, July 2016 to June 2017

### Overview:

Canadian grass and legume seed exports increased by 3 million lbs. for the crop year ending June, 2017. Creeping red fescue led all exports with 28.2 million lbs. of seed exported. This was followed by alfalfa seed, with 23.2 million lbs. of exports. Perennial ryegrass seed saw its exports rebound significantly from the previous year, with over 22 million lbs. of seed exported.

Creeping red fescue regained its number one Canadian export position as exports increased by 4.7 million lbs., while alfalfa seed saw its exports fall by almost 27%, down 21 million lbs. from 2015-16. Perennial ryegrass seed exports increased by over 80%, with exports increasing by over 11 million lbs.

After these 3 crops, no other crop had exports of over 10 million lbs. Timothy seed, primarily certified, came in at #4 with 7.8 million lbs. of exports.

Canadian Grass and Legume Seed Exports by Crop Year (July to June) by Quantity (millions of lbs) and Value (millions of CDN \$)										
Description	2012-13		2013-14		2014-15		2015-16		2016-17	
<b>Total Canadian Exports</b>	<b>99.8</b>	<b>124.5</b>	<b>95.9</b>	<b>136.3</b>	<b>86.0</b>	<b>134.8</b>	<b>110.7</b>	<b>179.3</b>	<b>113.2</b>	<b>162.6</b>
Fescue, Creeping red - cert	19.1	4.9	19.5	2.8	17.3	2.3	21.1	2.0	21.6	5.3
Fescue, Creeping red - o/t cert	6.0	13.8	3.0	17.7	2.5	18.3	2.5	24.2	6.6	24.2
<b>Total Creeping Red Fescue</b>	<b>25.1</b>	<b>18.7</b>	<b>22.5</b>	<b>20.5</b>	<b>19.8</b>	<b>20.6</b>	<b>23.5</b>	<b>26.2</b>	<b>28.2</b>	<b>29.4</b>
Alfalfa, Cert	9.7	20.1	12.8	26.7	12.9	29.6	21.6	47.5	15.1	33.7
Alfalfa, Not cert	9.2	19.8	12.0	29.0	8.4	22.6	11.1	30.7	8.3	23.5
<b>Total Alfalfa</b>	<b>19.0</b>	<b>39.9</b>	<b>24.9</b>	<b>55.7</b>	<b>21.3</b>	<b>52.2</b>	<b>32.7</b>	<b>78.1</b>	<b>23.4</b>	<b>57.2</b>
Rye Grass Seeds, Perennial	17.3	12.8	11.5	10.6	8.7	9.5	11.2	13.9	22.2	25.2
Timothy, Cert	7.6	10.0	8.1	10.6	9.5	12.3	7.8	10.6	7.5	7.7
Timothy, Not cert	0.2	0.3	0.1	0.1	0.1	0.1	0.2	0.2	0.4	0.4
<b>Total Timothy</b>	<b>7.8</b>	<b>10.3</b>	<b>8.3</b>	<b>10.8</b>	<b>9.6</b>	<b>12.4</b>	<b>8.0</b>	<b>10.8</b>	<b>7.8</b>	<b>8.1</b>
Clover, Red - double cut	0.5	0.6	0.8	0.9	0.3	0.5	2.1	2.2	0.4	0.8
Clover, Red - nes	3.1	2.3	4.6	3.8	3.9	3.5	5.9	5.1	2.0	1.7
<b>Total Red Clover</b>	<b>3.6</b>	<b>2.9</b>	<b>5.3</b>	<b>4.7</b>	<b>4.2</b>	<b>4.1</b>	<b>8.0</b>	<b>7.3</b>	<b>2.3</b>	<b>2.4</b>
Rye Grass, Annual	2.6	1.3	1.4	0.8	1.7	0.8	2.1	1.4	2.4	1.5
Wheatgrass, Crested	2.4	4.5	0.9	2.1	0.7	1.9	0.9	2.9	1.4	3.3
Alsike Clover	2.3	2.3	1.2	2.4	1.5	3.2	2.5	4.5	1.2	2.1
Tall Fescue	1.8	1.4	2.0	1.5	1.1	0.8	1.2	0.8	2.9	2.1
Brome Grass, Meadow	1.4	2.3	0.7	1.2	0.6	1.4	0.6	2.1	0.7	2.1
Bird's-Foot Trefoil	1.2	5.1	0.7	2.7	0.9	2.7	1.2	3.9	1.2	3.2
Blue grass, Kentucky	1.1	1.6	0.4	0.6	0.5	0.7	0.4	0.5	0.4	0.7
Clover, Sweet	1.1	1.2	1.1	1.3	1.6	1.6	3.1	2.5	1.4	1.5
Wheatgrass, NES	1.1	2.5	0.7	1.6	1.5	4.7	0.8	2.3	0.8	1.7
Wild Rye	0.9	1.7	1.3	2.3	1.2	1.5	0.9	1.4	2.3	2.6
Fescue, Meadow	0.7	0.6	1.1	0.7	1.1	1.1	2.0	2.0	2.6	2.1
Brome Grass, Smooth	0.4	1.2	0.4	0.7	0.2	0.5	0.4	1.7	0.2	3.4
Clover, NES	0.5	0.6	0.4	0.7	0.2	0.4	0.6	0.6	1.4	0.3
Brome Grass, NES	0.3	0.7	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Fescue, NES	0.3	0.5	0.5	0.5	0.5	0.7	0.3	0.6	0.4	0.7
Orchard Grass	0.1	0.2	0.1	0.2	0.1	0.3	0.1	0.3	0.1	0.2
Clover - White	0.1	0.1	1.1	0.9	0.4	0.3	2.1	1.8	2.0	1.5
Bent Grass	0.0	0.1	0.1	0.0	0.6	0.1	0.0	0.0	0.2	0.2
Forage Seed, NES	8.9	12.3	9.4	13.9	8.2	13.1	7.9	13.6	7.8	10.9
<b>Total Canadian Exports</b>	<b>99.8</b>	<b>124.5</b>	<b>95.9</b>	<b>136.3</b>	<b>86.0</b>	<b>134.8</b>	<b>110.7</b>	<b>179.3</b>	<b>113.2</b>	<b>162.6</b>

Source: Statistics Canada NES = Not Elsewhere Specified

Prepared by: Alberta Agriculture and Forestry, Economics and Competitiveness Branch, Statistics and Data Development Section

The value of CDN exports in 2016-17 fell by \$16.7 million (down 9.3%), although still significantly higher than the past 5 year average. The most valuable export crop was once again Alfalfa, (\$57.2 million), followed by creeping red fescue at \$29.43 Million. Perennial ryegrass was Canada's 3rd most valuable export crop @ \$25.15 million. No other Canadian crop species sold over \$10 million worth of product, although "forage seed, NES" came in at \$10.9 million (NES = "not elsewhere specified and would primarily include grass seed mixtures and some minor species not categorized elsewhere). Canadian timothy seed exports brought in \$8.1 million.

## Canadian Exports by Species:

### Creeping Red Fescue ("creeper")

With 28,1 million lbs. of exports, 2016/17 Canadian grass and legume seed exports saw creeping red fescue reclaim the position as Canada's number one export species (by volume), reclaiming the title from alfalfa. Alfalfa seed exports had held the number one position the past 3 years. Although creeping red fescue exports increased for the past two years, it is still a far cry from the average export number experienced from during the 2000's (38 million lbs. avg. exports).



Exports were up by 4.7 million lbs., led by a 4.2 million lb. increase in certified creeper. Common creeper exports have been in the 17.2 to 21.6 million lb. range now for the past 5 years, with an exporting low of 19.81 million lbs. (total common and certified) experienced just two years ago.

2016/17 exports brought \$29.4 into the Canadian economy, \$3.2 million higher than 2015/16 exports.

### Alfalfa

Canadian alfalfa seed exports fell dramatically last year (down 28.5%), with certified exports down by 6.5 million lbs., and common seed down 2.8 million lbs. Total alfalfa seed exports came in at: certified exports at 15.1 mil. lbs, while common seed exports were at 8.3 mil. lbs. Alfalfa seed continues to be Canada's most valued grass/legume seed crop, with last year's sales totalling \$57.2 million. However, with 9.4 million lbs. less being exported, the export value last year fell by \$20.9 Million (down 27%).



## Perennial Ryegrass

2016/17 saw a big turnaround in perennial ryegrass seed exports, as exports almost doubled. After hitting a ten year low of only 8.75 million lbs. 2 years ago (2015/16 at 11.2 million lbs.), perennial ryegrass exports were at 22.18 million lbs. This past year, 22.18 million lbs. of seed left Canada. Prior to this past year, the 10 year average for perennial ryegrass seed exports was at 21.3 million lbs. With perennial ryegrass seed exports (quantity) up by over 98% last year, the value of its exports also

increased substantially, going from \$13.9 million (2015/16) to \$25.2 million.



## Timothy

Timothy seed exports fell slightly (down 4.75) this past year, with a total of 7.85 million lbs. exported. The 10 average for Canadian timothy exports was at 7.35 million lbs. annually. Almost all exports are of certified seed, with 95% of all exports being certified varieties. Almost all Canadian production is now under contract production. \$7.8 million worth of Canadian timothy seed was exported in 2016/17.

## Red Clover

Red clover seed exports fell an astounding 70% this past year, with only 2.35 million lbs. exported. 2015/16 saw almost 8 million lbs. or red clover exports, with the 10 yr. Average at 4.52 million lbs.

As a result of the decrease in exports, Canadian red clover seed exports only totaled \$2.4 million, down from 2015/16 value of 7.3 million. A good Canadian crop this past year should replenish stock, and with red clover seed widely accepted worldwide, expect exports to increase again.

## Other Crop Notes:

With a good 2016 Canadian **smooth bromegrass** seed crop, exports of this crop were up 111%, from 640,000 lbs (2015/16) to 1,360,000 lbs. With drought conditions affecting recent crops, only 160,000 lbs. of seed was exported 2 years ago. This past years' smooth brome grass brought \$3.4 million in value.



After reaching 1.35 million lbs. of exports in 2012/13, **meadow bromegrass** has not been able to maintain any export momentum. The year's following have only seen .66 million lbs., .58 million lbs., .61 million lbs. of exports. This past year saw exports of .67 million lbs. of meadow bromegrass seed. (export value of \$2.1 million)

**Meadow fescue** seed exports have now risen for the past 6 years, with 2016/17 showing 2.64 million lbs. of exports. (Canada's 6th most widely exported crop), up 600,000 lbs. from last year, and up from 2010/11's exports of only 120,000 lbs.

**Alsike clover** seed fell 53% from the previous year, with only 1.18 million lbs (\$2.1 million) exported. This was down by 1.38 million lbs. The 10 year average for Canadian alsike clover seed exports is 2.18 million lbs. annually.

## Canadian Grass and Legume seed exports by Country (our export destinations)

The **USA** and **China** remain by far our best customers, with the USA taking 67.6 million lbs. of seed (59.7% of total CDN exports), with China taking 16.34 million lbs of our total (14.4% of total CDN exports). No other country purchased over 10 million lbs. of seed,

Only 6 other countries bought over 1 million lbs of seed, with the **Netherlands** (9.17 million lbs.) at 3<sup>rd</sup>, while our 4<sup>th</sup> largest buyer, **Germany**, buying 5.1 million lbs. of seed.

**Poland** (3.18 million lbs), **Denmark** (2.1 million lbs), **Italy** (1.98 million lbs.) and **Argentina** (1.75million lbs) were the remaining countries to buy over 1 million lbs. of seed from Canada. In total, excluding the above, 27 other countries purchased Canadian grass/legume seed in 2016/17.

Canadian Exports of Forage Seeds by Country, Crop Year (July - June), millions of Lbs.							
Rank	Country	2012-13	2013-14	2014-15	2015-16	2016-17	% of total (2016-17)
	<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>	
1	<b>United States</b>	62.57	59.52	49.74	60.33	67.59	59.70%
2	<b>China</b>	8.74	11.53	11.47	12.01	16.34	14.43%
3	<b>Netherlands</b>	10.14	9.34	8.55	12.68	9.17	8.10%
4	<b>Germany</b>	5.20	4.24	3.63	6.99	5.09	4.49%
5	<b>Poland</b>	1.65	0.51	0.70	3.00	3.18	2.81%
6	<b>Denmark</b>	1.91	2.16	1.34	2.26	2.10	1.86%
7	<b>Italy</b>	1.47	2.43	2.00	3.44	1.98	1.75%
8	<b>Argentina</b>	0.36	0.54	0.98	1.63	1.75	1.55%
9	<b>France</b>	0.66	0.80	0.47	1.53	0.84	0.74%
10	<b>Japan</b>	0.64	0.85	0.91	1.13	0.70	0.62%
11	<b>Finland</b>	0.27	0.25	1.52	1.20	0.56	0.49%
12	<b>Spain</b>	0.25	0.11	0.17	0.13	0.53	0.47%
13	<b>Belgium</b>	0.14	0.11	0.38	0.32	0.52	0.46%
14	<b>Turkey</b>	0.93	0.65	0.47	0.69	0.49	0.44%
15	<b>Colombia</b>	0.66	0.38	0.58	0.82	0.39	0.34%
	<b>All Other Countries (24)</b>	<b>4.22</b>	<b>2.51</b>	<b>3.09</b>	<b>2.55</b>	<b>2.00</b>	<b>1.77%</b>

## Average Export Price

The adjacent chart shows the average price received for all our grass/legume seed species for each crop year (12 month period). Be aware, that these are AVERAGE numbers (total value divided by total lbs. exported), and may not be reflective of trends, actual average prices etc. (eg: a very high priced sale at the beginning of the crop year, involving a small amount of crop, may affect the average if sales at lower prices are encountered later in the crop year)

Average Canadian Export Price/Lb. by Species (2012-13 to 2016-17), \$/lb. CDN					
	2012-13	2013-14	2014-15	2015-16	2016-17
<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>
Fescue, Creeping red-cert	0.81	0.94	0.89	0.82	0.79
Fescue, Creeping red-o/t cert	0.72	0.91	1.06	1.15	1.12
Alfalfa, Cert	2.06	2.08	2.30	2.20	2.24
Alfalfa, Not cert	2.15	2.41	2.68	2.76	2.82
Rye Grass Seeds, Perennial	0.74	0.92	1.09	1.24	1.13
Timothy, Cert	1.33	1.31	1.29	1.35	1.03
Timothy, Not cert	1.25	1.12	1.45	1.27	0.98
Clover, Red - double cut	1.06	1.18	1.78	1.06	2.01
Clover, Red - nes	0.75	0.83	0.91	0.86	0.85
Rye Grass, Annual	0.50	0.59	0.51	0.67	0.64
Wheatgrass, Crested	1.89	2.19	2.66	3.24	2.35
Alsike Clover	1.02	2.02	2.14	1.76	1.81
Tall Fescue	0.78	0.73	0.74	0.69	0.71
Brome Grass, Meadow	1.73	1.88	2.41	3.42	3.18
Bird's-Foot Trefoil	4.21	3.77	3.00	3.13	2.77
Blue grass, Kentucky	1.36	1.34	1.43	1.48	1.54
Clover, Sweet	1.05	1.12	1.04	0.82	1.06
Wheatgrass, NES	2.36	2.24	3.12	2.70	2.23
Wild Rye	1.89	1.80	1.25	1.58	1.11
Fescue, Meadow	0.89	0.68	0.95	1.00	0.78
Brome Grass, Smooth	2.41	1.93	3.04	2.69	2.53
Clover, NES	1.59	1.85	2.16	1.49	2.29
Brome Grass, NES	1.93	3.26	6.67	9.92	4.44
Fescue, NES	1.51	1.10	1.38	1.81	1.73
Orchard Grass	1.39	1.41	2.87	4.46	2.30
Clover - White	1.06	0.82	0.84	0.84	0.79
Bent Grass	2.15	0.19	0.23	n/a	0.74
Forage Seed, NES	1.39	1.48	1.60	1.73	1.41

## Summary

Canadian grass and legume seed exports continue to contribute to Canada's agriculture sector, with 2016/17 exports accounting for \$162.6 million in export sales, let alone domestic sales. 2016 saw production of most species rebounding from previous dry years' lower production levels. Prices to growers have fallen but were still profitable. Growers continue to use grass and legume seed production in their management systems throughout western Canada, where the majority of production is located. With export volumes averaging 112 million lbs. annually, and with good prices for most products, grass and legume seed exports should continue to have a positive effect on our farming community.

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Dec 4, 2016  
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## Canadian Grass and Legume Seed Exports by Crop Year (July to June) by Quantity-millions of lbs

Description	2006-07	2007-08	2008-09'	2009-10'	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	10 Yr Avg.
<b>Total Canadian Exports</b>	166.77	163.16	119.49	81.35	91.35	111.88	99.80	95.93	86.00	110.71	113.22	112.64
Fescue, Creeping red - o/t cert	45.13	39.42	24.48	16.49	13.85	13.01	19.07	19.52	17.27	21.07	21.58	22.93
Fescue, Creeping red - cert	4.49	10.17	8.16	4.84	6.24	14.05	6.03	2.97	2.54	2.47	6.63	6.20
<b>Total Creeping Red Fescue</b>	49.62	49.59	32.64	21.33	20.09	27.06	25.11	22.50	19.81	23.53	28.21	29.13
Alfalfa, Cert	13.88	11.12	10.62	6.48	6.35	7.95	9.73	12.82	12.90	21.58	15.06	11.34
Alfalfa, Not cert	20.61	14.57	13.78	8.94	8.71	8.47	9.24	12.04	8.43	11.13	8.32	11.59
<b>Total Alfalfa</b>	34.48	25.69	24.40	15.42	15.05	16.43	18.98	24.85	21.33	32.71	23.38	22.93
Rye Grass Seeds, Perennial	33.97	38.63	28.09	15.46	21.19	27.24	17.29	11.52	8.75	11.16	22.18	21.33
Timothy, Cert	7.56	7.30	3.41	3.69	5.05	7.81	7.57	8.12	9.52	7.85	7.48	6.79
Timothy, Not cert	3.44	0.79	0.22	0.10	0.20	0.22	0.22	0.13	0.07	0.20	0.37	0.56
<b>Total Timothy</b>	11.00	8.09	3.63	3.79	5.25	8.03	7.78	8.25	9.59	8.04	7.85	7.35
Forage Seed, NES	6.98	14.78	9.53	8.28	9.39	9.80	8.86	9.38	8.17	7.87	7.76	9.30
Tall Fescue	3.19	3.70	2.19	3.00	2.93	3.56	1.78	2.00	1.09	1.23	2.89	2.47
Fescue, Meadow	0.44	0.68	0.52	0.14	0.12	0.37	0.67	1.05	1.11	2.03	2.64	0.71
Rye Grass, Annual	7.95	3.13	2.50	2.22	3.05	2.44	2.58	1.37	1.65	2.14	2.36	2.91
Clover, Red - nes	4.52	3.93	2.76	1.74	2.87	3.14	3.07	4.57	3.88	5.90	1.97	3.64
Clover, Red - double cut	1.59	1.39	1.42	0.15	0.35	0.26	0.53	0.77	0.29	2.06	0.38	0.88
<b>Total Red Clover</b>	6.10	5.32	4.18	1.90	3.22	3.40	3.61	5.33	4.17	7.95	2.35	4.52
Wild Rye	0.32	0.52	1.60	0.84	0.29	0.30	0.91	1.26	1.18	0.91	2.33	0.81
Clover - White	0.27	0.20	0.18	0.04	0.34	0.12	0.09	1.13	0.37	2.11	1.96	0.49
Clover, Sweet	1.33	1.06	1.04	1.20	1.23	1.61	1.09	1.13	1.57	3.09	1.41	1.44
Wheatgrass, Crested	1.20	1.67	1.16	0.77	1.29	1.69	2.37	0.95	0.70	0.89	1.41	1.27
Brome Grass, Smooth	0.49	0.79	0.86	0.87	0.84	1.31	0.50	0.37	0.16	0.64	1.36	0.68
Alsike Clover	2.41	2.94	1.92	1.70	2.72	2.62	2.26	1.21	1.48	2.53	1.18	2.18
Bird'S-Foot Trefoil	1.20	1.43	1.72	0.87	0.81	1.70	1.20	0.71	0.89	1.24	1.15	1.18
Wheatgrass, NES	2.36	1.80	0.65	0.83	0.90	1.30	1.07	0.71	1.49	0.85	0.77	1.20
Brome Grass, Meadow	0.80	0.60	0.49	0.56	0.82	0.77	1.35	0.66	0.58	0.61	0.67	0.72
Blue grass, Kentucky	1.07	1.41	0.96	0.72	0.72	0.56	1.15	0.43	0.52	0.35	0.45	0.79
Fescue, NES	1.00	0.71	0.86	0.56	0.58	0.62	0.31	0.46	0.54	0.35	0.43	0.60
Bent Grass	0.12	0.01	0.04	0.07	0.08	0.01	0.02	0.13	0.56	-	0.22	0.10
Clover, NES	0.31	0.21	0.15	0.47	0.13	0.29	0.36	0.38	0.17	0.40	0.15	0.29
Orchard Grass	0.05	0.01	0.02	0.01	0.01	0.19	0.11	0.12	0.10	0.07	0.10	0.07
Brome Grass, NES	0.11	0.18	0.16	0.29	0.31	0.47	0.34	0.00	0.03	0.00	0.00	0.19
<b>Total Canadian Exports</b>	166.77	163.16	119.49	81.35	91.35	111.88	99.80	95.93	86.00	110.71	113.22	112.64

Source: Statistics Canada

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