

## USA Grass and Legume Seed Data: 2017/2018 Exports

### Overview:

With over \$335 million in exports, 2017/18 USA grass and legume seed exports (quantity) rose by 12.5% this past year, resulting in over 355 million lbs. of seed exported. Exports were once again led by annual ryegrass, which saw exports at 108 million lbs. This was followed by tall fescue (51.8 mil. lbs.) and perennial ryegrass (46 mil. lbs.), while certified alfalfa seed exports of 25.4 million lbs. led legume seed exports. Overall, exports of all grass and legume seed rose by over 44 million lbs., while the value of these crops rose by \$10 million.

USA Grass and Legume Seed Trade by Crop: 2012/13 to 2017/18 (Value (\$) and Quantity (mil. lbs))														
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Qty chg from 16/17 (Mil lbs)	Qty chg from 16/17 (%)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
	Qty	Qty	Qty	Qty	Qty	Qty			Value	Value	Value	Value	Value	Value
<b>World Total</b>	<b>388.5</b>	<b>374.8</b>	<b>352.0</b>	<b>345.0</b>	<b>311.2</b>	<b>355.8</b>	<b>44.6</b>	<b>12.5%</b>	<b>342,181</b>	<b>362,685</b>	<b>345,413</b>	<b>356,382</b>	<b>325,988</b>	<b>335,048</b>
RYEGRASS ANN	94.4	117.1	115.4	112.3	102.6	108.6	6.0	5.5%	35,121	45,509	45,984	45,100	41,858	45,423
FESCUE TALL	47.9	37.7	45.5	35.8	33.4	51.8	18.4	35.6%	30,689	28,993	35,530	28,343	26,464	41,888
RYEGRASS PER	47.4	41.1	36.9	32.2	34.0	46.0	12.0	26.2%	34,584	32,869	32,866	28,561	27,319	34,036
FORAGE SEEDS	21.3	21.7	22.9	21.3	21.4	30.7	9.4	30.5%	10,455	11,544	11,328	11,010	12,494	15,558
ALFALFA CRT	42.1	26.4	22.3	30.9	32.6	25.4	-7.2	-28.4%	87,771	93,645	73,680	102,678	105,094	77,305
BLUEGRASS KY	24.9	21.7	21.5	18.6	15.4	24.8	9.4	38.0%	30,545	27,662	30,531	27,303	23,551	41,583
CLOVER OTHRED	8.3	10.5	4.1	8.7	9.0	16.2	7.3	44.7%		1,369	1,899	623	1,381	1,444
GRASS OTHER	51.6	44.6	36.6	40.1	26.1	16.0	-10.0	-62.7%	51,680	49,014	43,845	43,270	31,973	16,440
ALFALFA UNCRT	10.9	13.6	12.7	11.7	5.4	7.7	2.3	30.2%	16,163	20,374	20,861	18,874	13,607	19,788
FESCUE OTHER	5.7	4.2	3.0	3.8	5.8	4.8	-1.0	-21.4%	4,849	4,096	2,969	3,512	5,357	4,278
BENTGRASS	1.7	2.2	2.4	1.6	1.8	3.9	2.1	53.8%	6,019	7,904	8,557	6,138	7,040	13,224
ORCHARDGRASS	4.0	4.9	2.2	3.5	3.9	3.7	-0.1	-3.1%	3,165	4,087	2,292	3,343	3,333	3,268
BERMUDAGRS OTH	4.4	5.9	5.4	5.4	4.9	3.5	-1.4	-40.5%	6,276	7,481	7,100	6,883	6,850	4,708
LEGUME OTHER	2.5	3.3	2.8	1.1	1.6	3.4	1.8	52.4%	1,543	1,531	1,333	519	814	1,642
FESCUE CRP RD	11.2	12.5	10.8	8.1	4.9	2.7	-2.1	-77.9%	9,494	10,160	9,478	6,639	4,180	2,290
CLOVER WHT/LD	1.8	1.2	1.0	1.3	1.0	2.0	1.0	49.3%	3,199	2,346	1,979	2,788	1,580	3,309
BERMUDAGRS HSK	4.2	3.0	3.6	5.1	2.4	1.9	-0.4	-21.1%	7,217	9,743	11,233	16,889	7,388	5,510
CLOVER CRIM	1.3	1.8	1.5	1.8	3.5	1.2	-2.3	-193.9%	1,243	1,740	1,986	1,849	3,342	1,289
CLOVER OTHER	1.0	0.8	0.5	0.4	0.8	0.9	0.1	9.3%	1,606	1,268	705	585	1,333	1,380
WHEATGRASS	0.6	0.5	0.6	0.2	0.2	0.2	0.0	1.2%	277	945	894	373	279	378
CLOVR DBLCTRD	0.1	0.2	0.1	0.7	0.7	0.1	-0.5	-350.9%	143	202	83	762	584	168
FESCUE MEADOW	0.0	0.0	0.1	0.3	0.1	0.1	0.0	2.7%	11	8	75	226	50	82
BIRDSFT TREFOILS	0.1	0.1	0.1	0.0	0.1	0.0	-0.1	-539.0%	131	195	205	114	117	57
<b>World Total</b>	<b>388.5</b>	<b>374.8</b>	<b>352.0</b>	<b>345.0</b>	<b>311.2</b>	<b>355.8</b>	<b>44.6</b>	<b>12.5%</b>	<b>342,181</b>	<b>362,685</b>	<b>345,413</b>	<b>356,382</b>	<b>325,988</b>	<b>335,048</b>

### Notes:

- 8 grass and legume seed categories showed over 10 million lbs. in exports in 2017/18, with the “big 3” (annual ryegrass, tall fescue and perennial ryegrass) exports increasing by 69 million lbs.
- 3 other seed crops showing increases in exports in 2017/18 included Kentucky bluegrass, up 9 million lbs.(38%) to 24.8 million lbs, red clover, up 7 million lbs.(44%) to 16.2 million lbs., and uncertified alfalfa, up 2.3 million lbs (30%) to 7.7 million lbs.
- At the other end of the spectrum, “other grass” seed exports fell by 10 million lbs., while certified alfalfa seed exports fell by over 7 million lbs.
- Certified alfalfa seed had the most value, resulting in \$77 million in export sales. This value was \$30 million above the next highest export valued crop.
- After certified alfalfa seed exports, 3 additional crops showed total export sales of over \$40 million, with those crops being annual ryegrass, tall fescue and Kentucky bluegrass. Perennial ryegrass exports had \$34 million in sales.
- The lack of exports to most European Union countries shows the self sufficiency the EU now has for both grass and legume seed.

## Exports by Species:

### Annual Ryegrass

- Exports, which have exceeded 100 million lbs. annually since 2012/13. 2017/18, saw exports rise by 6 million lbs.
- Total 2017/18 exports of 108 million lbs is right on the 5 year average.
- 2017/18 exports saw sales come in at over \$45 million.
- Both China (27.6 mil. lbs.) and South Korea (20.7 mil. lbs.) imported over 20 million lbs. of American annual ryegrass seed.
- Australia (17.1 mil. lbs.) was the only other country importing over 10 million lbs.
- 11 other countries imported more than 1 million lbs. of USA annual ryegrass seed.

### Tall Fescue

- Exports recovered significantly from 2016/17, up by over 35% to 51.8 million lbs.
- China more than doubled her tall fescue imports last year, importing 30.6 million lbs. compared to 14.8 million lbs. in 2016/17.
- No other country imported more than 10 million lbs.
- 7 other countries imported over 1 million lbs. of tall fescue, with South Korea's 4.77 million lbs. leading these countries.

### Perennial Ryegrass

- 2017/18 saw perennial ryegrass exports increase by over 12 million lbs (to 46 mil. lbs.).
- Value of exports was \$34 million.
- 8 countries imported more than 1 million lbs. of perennial ryegrass, led by Canada, who imported 13.1 million lbs.
- China (9.8 mil.lbs.) and South Korea (9.0 mil. lbs.) ranked 2<sup>nd</sup> and 3<sup>rd</sup> in USA perennial ryegrass imports.

### Kentucky Bluegrass

- Exports increased by over 9.4 million lbs. (38%), with China accounting for most of this increase. Total exports in 2017/18 reached 24.8 million lbs.
- China imported 10.1 million lbs. in 2017/18, up almost 7 million lbs. from the previous year
- Canada imported 9.1 million lbs. last year, while the Netherlands (1.0 mil.lbs.) was the only other nation showing imports of over 1 million lbs.

### Alfalfa (certified and uncertified)

- 2017/18 certified alfalfa seed exports fell by over 7 million lbs. to 25.4 million lbs., below the previous 5 year average of 30.9 million lbs.
- Mexico (22 mil. lbs. certified) remains the USA's number one customer for both certified and common alfalfa seed.
- Mexico also purchased 2.8 million lbs. of common seed.
- Saudi Arabia was 2<sup>nd</sup> in alfalfa seed imports from the USA, in both certified (8 mil.lbs.) and common (1.1 mil. lbs.). However, the sales value certified alfalfa seed going to Saudi Arabia (\$31 million) far exceeded the value of certified seed entering Mexico (\$22 million)
- Canada purchased 2.6 million lbs. of certified American alfalfa seed to rank 3<sup>rd</sup> in that import category.



## Grass and Legume Seed Mixtures

For trade and data gathering purposes, the FAS (Foreign Agricultural Service) has 3 categories for mixtures of grass and legume seed, those being “Grass Seed, other”, “Forage Seeds”, and “Legume Seeds”. The categories represent grass and legume seed processed into mixtures, and are exported as such, and therefore include various percentage mixtures of different grass and legume seed crops grown throughout the USA.

- “**Grass Seed Other**” exports fell by over 62% in 2017/18, falling by over 10 million lbs. to 16 million lbs.
- “**Forage Seeds**” exports grew by 30.5 % to 30.7 million lbs. in 2017/18, ranking it as the 4<sup>th</sup> largest grass and legume seed product being exported.
- Although “**Legume Seeds, other**” saw its’ exports increase by over 52%, total exports were only 3.4 million lbs.

## Exports by Country:

2017/18 trade saw 7 countries importing over 10 million lbs. of American grass and legume seed, with another 12 countries importing over 2 million lbs. of seed. Overall, total world trade resulted in 339.5 million lbs. of grass and legume seed exports, with over \$334 million in sales.

USA Grass and Legume Seed Trade by Country (Value and Quantity), 2012/13 to 2017/18															
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Qty chg from 16/17 (Mil lbs)	Qty chg from 16/17 (%)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	
	Qty	Qty	Qty	Qty	Qty	Qty			Value	Value	Value	Value	Value	Value	
<b>World Total</b>	<b>355.2</b>	<b>351.7</b>	<b>338.7</b>	<b>328.8</b>	<b>299.8</b>	<b>339.5</b>	<b>39.6</b>	<b>11.7%</b>	<b>345,960.0</b>	<b>348,767.0</b>	<b>333,192.0</b>	<b>350,383.0</b>	<b>320,858.0</b>	<b>334,540.0</b>	
China	66.9	61.6	86.4	80.6	63.6	89.3	25.7	28.8%	56,712.0	57,832.0	82,046.0	75,915.0	56,295.0	81,501.0	
Canada	52.7	63.4	62.8	61.0	65.5	66.2	0.7	1.1%	46,239.0	56,306.0	55,737.0	55,487.0	60,077.0	56,409.0	
Korea, South	28.4	32.9	29.2	31.7	28.8	42.1	13.3	31.6%	16,641.0	17,641.0	16,542.0	16,936.0	16,517.0	22,781.0	
Mexico	24.9	26.5	22.3	22.1	21.2	22.7	1.4	6.4%	26,852.0	32,544.0	28,435.0	29,459.0	33,142.0	33,396.0	
Australia	7.9	8.9	10.7	16.5	19.0	19.9	1.0	4.9%	5,484.0	6,330.0	7,301.0	9,624.0	9,642.0	10,676.0	
Japan	33.3	34.0	23.2	15.6	13.8	16.6	2.8	16.9%	17,815.0	17,818.0	13,151.0	14,109.0	14,403.0	14,376.0	
Italy	29.2	24.7	18.9	11.5	16.4	12.3	- 4.1	-33.8%	19,176.0	16,876.0	14,548.0	9,692.0	12,441.0	10,801.0	
Saudi Arabia	23.9	14.5	8.7	18.3	14.6	9.4	- 5.3	-56.1%	51,837.0	57,601.0	31,489.0	63,621.0	57,609.0	34,923.0	
Spain	13.9	13.1	11.1	11.3	7.5	9.2	1.7	19.0%	9,814.0	10,258.0	9,060.0	8,267.0	4,915.0	6,846.0	
Argentina	7.9	7.1	6.8	6.3	5.6	5.8	0.2	4.1%	10,751.0	10,093.0	9,345.0	8,920.0	7,044.0	8,661.0	
Ecuador	3.5	3.9	5.5	3.6	3.5	4.0	0.5	13.1%	2,548.0	3,102.0	3,898.0	3,006.0	2,888.0	3,625.0	
Chile	3.7	4.9	3.9	5.6	3.8	3.6	- 0.2	-4.7%	3,463.0	5,084.0	3,950.0	4,849.0	3,636.0	4,025.0	
France	6.4	5.5	2.9	3.1	3.1	3.3	0.3	7.7%	5,811.0	4,639.0	2,976.0	3,034.0	3,015.0	3,554.0	
South Africa	3.3	5.1	3.5	2.9	2.7	3.0	0.4	12.8%	2,422.0	3,351.0	2,800.0	2,874.0	2,079.0	2,562.0	
United Kingdom	4.0	3.7	1.8	2.1	1.7	3.0	1.3	42.8%	3,561.0	3,533.0	1,795.0	2,207.0	1,371.0	1,882.0	
Turkey	4.1	4.9	4.8	3.8	3.1	3.0	- 0.1	-3.3%	3,768.0	4,949.0	4,764.0	4,172.0	2,867.0	2,678.0	
Colombia	3.8	2.8	3.0	2.2	3.7	3.0	- 0.7	-24.7%	2,154.0	2,161.0	2,002.0	1,449.0	2,209.0	1,477.0	
Portugal	0.9	1.4	2.7	3.0	1.8	2.8	0.9	33.7%	627.0	911.0	3,145.0	1,671.0	1,015.0	1,592.0	
Peru	2.3	1.9	2.0	2.7	2.1	2.7	0.6	21.7%	2,370.0	2,876.0	3,034.0	2,512.0	4,283.0	4,357.0	
<b>Top 19 Countries</b>	<b>321.0</b>	<b>320.7</b>	<b>310.3</b>	<b>303.7</b>	<b>281.5</b>	<b>322.0</b>	<b>40.5</b>	<b>12.6%</b>	<b>288,045.0</b>	<b>313,905.0</b>	<b>296,018.0</b>	<b>317,804.0</b>	<b>295,448.0</b>	<b>306,122.0</b>	
<b>Bottom 106 Countries</b>	<b>34.2</b>	<b>31.1</b>	<b>28.5</b>	<b>25.1</b>	<b>18.3</b>	<b>17.5</b>	<b>- 0.9</b>	<b>- 0.0</b>	<b>57,915.0</b>	<b>34,862.0</b>	<b>37,174.0</b>	<b>32,579.0</b>	<b>25,410.0</b>	<b>28,418.0</b>	
<b>World Total</b>	<b>355.2</b>	<b>351.7</b>	<b>338.7</b>	<b>328.8</b>	<b>299.8</b>	<b>339.5</b>	<b>39.6</b>	<b>0.1</b>	<b>345,960.0</b>	<b>348,767.0</b>	<b>333,192.0</b>	<b>350,383.0</b>	<b>320,858.0</b>	<b>334,540.0</b>	

Value = '000, Quantity = Mil lbs.

## China

- America’s number one buyer of grass and legume seed, purchasing over \$81 million in products.
- Imports led by tall fescue (30.6 mil. lbs.) and annual ryegrass (27.7 mil. lbs.)
- 6 other species showed over 1 million lbs. in imports, those being Kentucky bluegrass (10.1 mil. lbs.), perennial ryegrass (9.8 mil. lbs.), “Other Grasses” (3.5 mil. lbs.), Bentgrass (2.5 mil. lbs.) and husked bermudagrass (1.4 mil. lbs.)
- China’s bentgrass seed imports represented 63% of total USA bentgrass seed exports

- The value of Chinese grass and legume seed imports from the USA in 2017/18 totaled \$81.5 million.

## Canada

- Canada's 66 million lbs. of grass and legume seed imports from the USA in 2017/18 was led by the mixture category "Forage Seeds", which accounted for 21.3 million lbs. This represented 69% of total "Forage Seeds" exported by the USA last year.
- 2017/18 saw 13.1 million lbs. of perennial ryegrass exported to Canada.
- Kentucky Bluegrass imports by Canada came in at 9.1 million lbs.
- Of note, Canada imported 1.7 million lbs. of creeping red fescue, which more than likely was re-imported by Canada after entering the USA. Canada is self sufficient in creeping red fescue production and is one of the world's largest producers of this crop.
- The value of Canadian grass and legume seed imports from the USA in 2017/18 totaled \$56.4 million.

## South Korea

- South Korean trade is dominated by the turf grasses, with imports in 2017/18 of 21.7 million lbs of annual ryegrass, 9 million lbs. of perennial ryegrass, and 4.8 million lbs. of tall fescue. These 3 turf grasses represented 85% of total grass and legume seed imports from the USA.
- Only 2 other crops had imports of over 1 million lbs., both of those being mixture types, "Other Grass" (3.8 mil. lbs.) and "Forage Seed" (1.2 mil. lbs.).
- The value of South Korean grass and legume seed imports from the USA in 2017/18 totaled \$22.8 million.

## Mexico

- Mexican grass and legume seed imports revolve around her cattle industry, with alfalfa seed ranking #1 (certified alfalfa, 9 mil. lbs.) and #3 (uncertified alfalfa, 2.8 mil. lbs.).
- "Forage Seed" (3.6 mil. lbs.) ranked as Mexico's 2nd most imported grass/legume crop from the USA.
- Annual ryegrass (4.0 mil.lbs.) ranked as the second largest imported grass/legume seed from the USA.
- The value of Mexican grass and legume seed imports from the USA in 2017/18 totaled \$33.4 million.



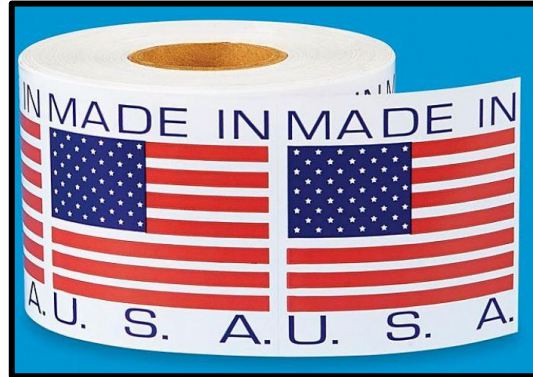
## Other Countries

- **Australia:** imports the 5<sup>th</sup> most grass and legume seed from the USA, the vast majority (86%) of the seed imported is annual ryegrass
- **Japan:** Japanese imports increased by 2.8 million lbs. in 2017/18, with 2.5 million lbs. of this increase due to annual ryegrass imports. 4 imported species were over 1 million lbs., those being annual ryegrass (7.2 mil. lbs.), "Other Grass" (2.5 mil. lbs.), "Forage Seed" (1.7 mil. lbs.) and perennial ryegrass (1.6 mil. lbs.). Japan purchased \$4.37 million of USA grass and legume seed last year.
- **Italy:** 9.4 million lbs. of Italy's 12.3 million lbs. of grass and legume seed imports from the USA was attributed to the 3 turf grasses (annual ryegrass, 6.1 mil. lbs., tall fescue 2.0 mil. lbs., and perennial ryegrass 1 mil. lbs.). Italy purchased \$10.8 million worth of American grass and legume seed in 2017/18.

- **Saudi Arabia:** Although Saudi Arabia is the USA's 8<sup>th</sup> ranked grass and legume seed importer, its high volume of alfalfa seed imports ranks it 3<sup>rd</sup> in terms of value. The Saudi's imported 9.4 million lbs. of grass and legume seed last year, with 9.2 million lbs. of this seed being alfalfa (certified = 8.1 mil. lbs., uncertified = 1.1 mil. lbs.). Her total imports resulted in the purchasing of \$34.9 of American seed.

### Summary

The USA continues to be the world's leader in grass and legume seed production, and as such, what happens in the USA affects all other grass and legume seed crop markets throughout the world. What other countries buy (and don't buy) from the USA will influence prices and subsequent future production. Despite the EU production now becoming more self-sufficient for her member countries, American export trade in the grass/legume seed sector to the rest of the world will continue to dominate this sector's marketplace.



**Note:** due to conversions, some numbers may be slightly off. Trade data does not account for secondary processing and possible re-exporting to other countries after original seed amounts have been imported into a particular country, nor does the data account for possible incorrect entries by exporting companies. Trade data obtained from Foreign Agriculture Service (FAS), USDA. FAS website as of December, 2018: <https://apps.fas.usda.gov/gats/default.aspx>

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