

Canadian Grass and Legume Seed Data: 2018-2019 Grass and Legume Seed Exports

Overview:

After having Canadian grass and legume seed exports rise annually for the past 3 years, 2018-19 exports fell by 17.5 million lbs. to 109.6 million lbs. Canadian exports' had risen from 86.61 million lbs. (2014-15) to 127.1 million lbs. in 2017-18. Last years' decrease in exports can be contributed to decreased alfalfa seed exports (down 6.5 million lbs.) and creeping red fescue (down 7 million lbs.). With the exception of annual ryegrass seed, smooth brome grass seed, and grass/legume seed mixtures, all other Canadian grass and legume seed showed a decrease in exports, albeit some only marginally.

The value of 2018-19 export sales fell by over \$23 million to \$160.7 million. Export sales had peaked in 2017-18, with over \$183 million worth of Canadian grass and legume seed exported. However, this 2018-19 export value is still the 3rd largest in at least the past 15 years.

Canadian Grass and Legume Seed Exports by Quantity and Species

Canadian exports were once again lead by **alfalfa** seed. Within Canada, alfalfa seed quotes had fallen due to overproduction the past few years. These lower price quotes has led to very good exports, with the past 4 years of exports being very strong. Although exports fell by 6.5 million lbs. in 2018/19, it still ranked second most in the past 10 years. Of the 33.5 million lbs. of exported alfalfa seed, 57.5% was certified. The USA imported 22.7 million lbs. of Canadian alfalfa seed (33.2% of all Canadian exports). Overall, Canada exported over \$68 million worth of alfalfa seed, down by over \$15 million from 2017/18.

For the third consecutive year, **perennial ryegrass** seed exports exceeded 20 million lbs. Exports had fallen to only 8.1 million lbs. in 2014/15, but had rebounded to 22.34 million lbs. in 2016/17, followed by exports of 22.07 and 20.99 million lbs. in the past two years. However, the value of perennial ryegrass seed exports had remained steady the previous two years. 2016/17 saw export sales reach \$29.43 million, with sales falling to \$28.41 million in 2017/18. However, 2018/19 saw sales fall to \$22.98 million. The USA (10.28 million lbs.) and China (7.94 million lbs.) were Canada's major buyers.

Canadian Exports of Perennial Ryegrass Seed by Country and Crop					
Year (millions of lbs.)					
	2014-15	2015-16	2018-19	2018-19	2018-19
Total Canadian Exports	86.61	111.50	114.02	127.07	109.59
Total Canadian PRG Exports	8.81	11.24	22.34	22.07	20.99
USA	3.87	6.03	14.61	13.29	10.28
China	3.14	2.76	4.97	6.14	7.94
Netherlands	1.26	1.96	1.68	1.79	1.33
Italy	0.04	0.12	0.39	0.25	0.32
Germany	0.13	0.07	0.00	0.22	0.30
Turkey	0.06	0.00	0.13	0.00	0.17
Denmark	0.02	0.00	0.00	0.11	0.10
France	0.00	0.00	0.00	0.00	0.00
Japan	0.00	0.00	0.09	0.09	0.00
UK	0.08	0.09	0.00	0.01	0.00



After having exports of over 20 million lbs. (certified and common) for the previous 3 years, **creeping red fescue** exports fell below the 20 million lb. annually mark, with only 16.78 million lbs. exported in 2018/19. The USA imported 16.2 million lbs. of Canadian creeper in 2018/19 (96.5% of creeper exports). The total value of exports reached \$22.98 million last year. The previous 3 years had seed exports exceed at least \$26 million. Of the 22.98 million lbs. of exported creeper, only 770,000 lbs. (3.3%) was certified.

Canadian Grass and Legume Seed Exports by Species, Crop Year (July to June) and Quantity millions of lbs, 2008/09 to 2018/19											
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Total: World	119.49	81.35	91.35	111.88	99.80	96.25	86.61	111.50	114.02	127.07	109.59
Alfalfa - certified	10.62	6.48	6.35	7.95	9.73	12.95	12.99	21.73	15.17	21.76	19.26
Alfalfa -o/t certified	13.78	8.94	8.71	8.47	9.24	12.04	8.49	11.21	8.38	18.28	14.23
Total Alfalfa	24.40	15.42	15.05	16.43	18.98	24.99	21.48	32.94	23.55	40.04	33.49
Clover, Alsike	1.92	1.70	2.72	2.62	2.26	1.25	1.49	2.55	1.19	2.11	1.64
Clover, Red - double cut	1.42	0.15	0.35	0.26	0.53	0.77	0.29	2.07	0.38	0.80	0.25
Clover, Red - nes	2.76	1.74	2.87	3.14	3.07	4.67	3.91	5.94	1.98	3.92	2.95
Clover, Sweet	1.04	1.20	1.23	1.61	1.09	1.13	1.58	3.12	1.42	0.86	0.85
Clover - white	0.18	0.04	0.34	0.12	0.09	1.13	0.37	2.13	1.98	0.38	0.05
Bird's-foot trefoil	1.72	0.87	0.81	1.70	1.20	0.71	0.90	1.25	1.16	0.89	0.90
Clover - nes	0.15	0.47	0.13	0.29	0.36	0.38	0.17	0.40	0.15	0.06	0.04
Fescue, Creeping red - cert	8.16	4.84	6.24	14.05	6.03	2.97	2.56	2.48	6.67	1.35	0.55
Fescue, Creeping red - o/t cert	24.48	16.49	13.85	13.01	19.07	19.52	17.39	21.22	21.73	22.41	16.23
Total Creeping Red Fescue	32.64	21.33	20.09	27.06	25.11	22.50	19.95	23.70	28.41	23.76	16.78
Fescue, nes	0.86	0.56	0.58	0.62	0.31	0.46	0.55	0.35	0.43	0.62	0.20
Rye grass, annual	2.50	2.22	3.05	2.44	2.58	1.37	1.66	2.16	2.38	4.57	6.38
Rye grass, perennial	28.09	15.46	21.19	27.24	17.29	11.52	8.81	11.24	22.34	22.07	20.99
Fescue, tall	2.19	3.00	2.93	3.56	1.78	2.00	1.10	1.24	2.92	2.14	1.55
Blue grass, Kentucky	0.96	0.72	0.72	0.56	1.15	0.43	0.52	0.36	0.45	0.65	0.58
Bent grass	0.04	0.07	0.08	0.01	0.02	0.13	0.57	-	0.22	0.01	-
Brome grass, meadow	0.49	0.56	0.82	0.77	1.35	0.66	0.58	0.61	0.67	0.72	0.36
Brome grass, nes	0.16	0.29	0.31	0.47	0.34	0.00	0.03	0.00	0.00	0.00	0.00
Brome grass, smooth	0.86	0.87	0.84	1.31	0.50	0.37	0.16	0.65	1.37	1.22	1.40
Fescue, meadow	0.52	0.14	0.12	0.37	0.67	1.05	1.12	2.04	2.66	2.69	1.18
Orchard grass	0.02	0.01	0.01	0.19	0.11	0.12	0.10	0.08	0.10	0.02	0.05
Timothy - certified	3.41	3.69	5.05	7.81	7.57	8.16	9.59	7.90	7.53	8.20	6.75
Timothy - o/t certified	0.22	0.10	0.20	0.22	0.22	0.13	0.07	0.20	0.37	0.33	0.53
Total Timothy	3.63	3.79	5.25	8.03	7.78	8.30	9.66	8.10	7.90	8.53	7.28
Wheatgrass, crested	1.16	0.77	1.29	1.69	2.37	0.95	0.71	0.90	1.42	1.02	0.90
Wheatgrass, nes	0.65	0.83	0.90	1.30	1.07	0.71	1.50	0.85	0.78	1.04	0.81
Wild rye	1.60	0.84	0.29	0.30	0.91	1.26	1.19	0.92	2.35	2.10	1.39
Seeds of forage plants, nes	9.53	8.28	9.39	9.80	8.86	9.38	8.23	7.92	7.81	6.85	9.56
Total: World	119.49	81.35	91.35	111.88	99.80	96.25	86.61	111.50	114.02	127.07	109.59

nes = Not elsewhere specified

Canadian **timothy** seed exports fell to its' lowest level in the past 8 years, with exports falling to 7.28 million lbs. in 2018/19. Almost all timothy seed exports out of Canada are now certified. Canada's three main customers in 2018/19 were Germany, The Netherlands, and Denmark, with each country importing over 1

million lbs. For the 4th year in a row, timothy seed sales fell. From 2014/15 to 2017/18, timothy seed sales had totaled \$12.4 million, \$10.8 million, \$8.1 million, and then \$7.7 million respectively. 2018/19 however, saw exports fall again, to \$7.31 million. Of the 2018/19 timothy seed exports, certified seed accounted for 6.91 million lbs. (94.5% of total exports)

Annual ryegrass exports continue to rise. 2018/19 saw 6.38 million lbs. exported, the 5th year in a row that exports had increased. The 6.38 million lbs. of exports was the largest amount in the past 12 years. China imported 2.38 million lbs., with the USA importing another 1.16 million lbs. Annual ryegrass exports last year accounted for \$4.6 million in sales.

No other Canadian grass or legume seed species had exports of over 5 million lbs., except for the category “**mixed grass and legume seed** (seeds of forage plants, not elsewhere specified).” These mixtures saw over 9.56 million lbs. in exports last crop year, bringing in over \$10 million in sales.

Other Canadian Export Notes (2018/19):

- **Red clover (nes)** seed exports fell by almost 1 million lbs. to 2.95 million lbs. Red clover seed exports have bounced around between 2 and 6 million lbs. over the past 5 years. Germany (1.22 million lbs.), China (860,000 lbs.) and the USA (540,000 lbs.) were the main destinations. Total red clover seed exports accounted for \$2.51 million.
- **Tall fescue** seed exports resulted in 1.55 million lbs. of exports, with China importing 720,000 lbs., and the USA importing 600,000 lbs.
- **Smooth bromegrass** seed exports volumes, (1.4 million lbs.), reached its' highest amount for at least the past 17 years. Although the export volume was high, the value this past years' exported smooth bromegrass seed did not come close to the \$3.44 million this crop brought into Canada through the 2016/17 crop. 2018/19 saw sales at \$2.64 million.
- 2018/19 saw both **meadow fescue** and **meadow bromegrass** seed exports fall by over 50%. Meadow fescue seed exports fell to 1.18 million lbs., from 2.69 million lbs. the previous year. Meadow bromegrass seed exports fell to 360,000 lbs., from 2017/18's exports of 720,000 lbs.

Canadian Grass and Legume Seed 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. 2018/19 saw grass and legume seed add \$72.6 million in value to its economy, based on exports of 54.5 million lbs. The volume exported this past year though was down by 2.4 million lbs.

Alberta follows Manitoba in volume shipped and value. 2018/19 saw Alberta export 35.3 million lbs. of seed, worth \$61.4 million. However, Alberta's exports fell by over 12 million lbs (25.5%), resulting in Alberta's grass

and legume seed revenues falling by over \$18 million from the previous year. Alberta's sales and exports are led by alfalfa seed from the Brooks region, and creeping red fescue grown in the Peace region.

2018/19 saw **Saskatchewan** exports decrease by almost 2 million lbs., with total grass and legume seed sales falling by \$3.6 million. However, the value of Saskatchewan's grass and legume seed sales remained above \$20 million.

	Canadian Grass and Legume Seed Exports by Province (Quantity, Millions of lbs.)					Canadian Grass and Legume Seed Exports by Province (Value, Millions of CDN \$)				
	2014-15	2015-16	2016-17	2017-18	2018-19	2014-15	2015-16	2016-17	2017-18	2018-19
Total Canada	86.0	110.7	113.2	126.2	108.8	134.8	179.3	162.6	183.6	160.7
Manitoba	36.7	46.3	48.0	56.9	54.5	61.4	74.6	63.0	71.8	72.6
Alberta	32.2	39.2	41.4	47.4	35.3	45.8	62.9	61.2	79.6	61.5
Sask	11.1	18.1	17.0	17.2	15.3	19.6	29.1	24.9	25.7	22.1
Ontario	3.3	3.5	3.5	1.5	1.9	5.4	8.4	9.3	2.7	2.4
BC	1.6	1.4	1.6	0.8	1.1	1.3	1.4	1.7	0.8	1.3
Quebec	1.2	2.1	1.7	2.4	0.6	1.3	3.0	2.3	3.0	0.9
NB	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.1
NS	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0

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. but cleaned in Alberta, and seed grown in Saskatchewan but cleaned in Manitoba, are shown as exported out of Alberta and Manitoba respectively.

Canadian Grass and Legume Seed Exports by Country

The **USA** remains Canada's primary grass and legume seed importer, taking in 61.2% of Canada's total exports in 2018/19. With the USA adjacent to Canada, some of the USA's imports from Canada are contracted seed production, primarily alfalfa seed and perennial ryegrass.



China ranks as Canada's No. 2 trading partner, importing 16.1 million lbs. of seed in 2018/19. **China** imported 7.94 million lbs. of perennial ryegrass, 3.55 million lbs. of alfalfa seed (certified and common combined) and 1.16 million lbs. of annual ryegrass. China also imported 9 other Canadian grass and legume seed species. Chinese imports from Canada amounted to over \$19.6 million.

4 other countries imported over 1 million lbs. of Canadian grass and legume seed, with those countries being The **Netherlands** (7.27 million lbs.), **Germany** (4.49 million lbs.), **Denmark** (1.96 million lbs.), and **Italy** (1.18 million lbs.),

Dutch imports centered on alfalfa seed (2.62 million lbs.), timothy seed (1.72 million lbs.), and perennial ryegrass seed (1.33 million lbs.). Germany's main imports from Canada was timothy seed (1.70 million lbs.), and red clover (1.22 million lbs.), Denmark imported 1.13 million lbs. of Canadian certified timothy, while data shows that Italy, although it imported 9 different species of grass or legumes seed, had no species totaling over 1 million lbs.

	Canadian Exports of Grass and Legume Seed by Quantity (Millions of lbs) and Country					Canadian Exports of Grass and Legume Seed by Value (Millions of \$ CDN) and Country				
	2014-15	2015-16	2016-17	2017-18	2018-19	2014-15	2015-16	2016-17	2017-18	2018-19
Total Canada	86.61	111.50	114.02	127.07	109.59	134.79	179.31	162.59	183.62	160.70
USA	49.74	60.34	67.60	78.86	67.48	85.30	115.12	111.20	127.92	110.28
China	11.47	12.01	16.34	17.74	16.12	15.49	14.71	17.98	21.24	19.61
Netherlands	8.55	12.68	9.17	9.72	7.27	12.82	18.00	10.76	11.38	9.00
Germany	3.63	6.99	5.09	5.00	4.48	4.33	7.69	5.07	5.14	4.59
Denmark	1.34	2.26	2.10	2.41	1.96	1.84	3.63	2.50	2.54	2.57
Italy	2.00	3.44	1.98	1.10	1.18	3.31	4.31	2.21	1.21	1.34
Argentina	0.98	1.63	1.75	1.31	0.99	1.72	2.90	3.13	2.45	2.08
Japan	0.91	1.13	0.70	0.60	0.77	0.81	0.88	0.64	0.53	0.72
Turkey	0.47	0.69	0.49	0.80	0.76	0.61	1.39	0.99	1.47	1.02
France	0.47	1.53	0.84	1.23	0.62	0.57	1.93	1.20	1.41	0.62
Poland	0.70	3.00	3.18	1.06	0.42	1.02	2.43	2.64	1.03	0.37
UK	0.84	0.45	0.32	0.48	0.40	1.07	0.58	0.35	0.44	0.41

Summary:

Despite having Canadian grass and legume seed export quantities and values fall this past year, 2018/19, grass and legume seed exports continues to contribute to Canada's agriculture sector, with exports accounting for \$160.7 million in sales, let alone domestic sales. Overproduction the past few years of certain species and more reliance on "hand to mouth" buying by end users, has affected sale volumes and price quotes. Total exports by volume decreased by over 17 million lbs. in 2018/19. However, like many agricultural sectors, supply and demand can be fickle from year to year. But with Canada's experience and reliability in producing high quality grass and legume seed, the long term outlook for all these crops should be good.

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