

EU Grass and Legume Seed Update to 2012

(Overview of top 10 Grass/Legume Seed producing countries in Europe)

Please note: **2012 = acres only**, production data not posted yet (except for Germany)

- Data only taken from top 10 EU countries, converted to acres (area) and lbs. (production).
- Data from European Seed Certification Agency Associations (ESCAA).
- Although Italy is listed as the 2nd most in acres/production, the ESCAA Disclaimer on Italian data states: "**Notification** Hungary and Italy include imports in the certified seed quantities".
- Most notes, if not referring to 4 or 5 year averages, will be based on 2012 data.



EU 28 countries, July 2013

Overview Notes: EU 10

- 4 year average production of all certified grass/legume seed @ 520.8+ million lbs.
- 5 year average acres @ 624,000. 2012 = 623,000 acres.
- Poland does not publish production numbers.
- Area dedicated to grass and legume seed production varies greatly, going from a low of 583,000 acres to a high of 690,000 within the past 5 years.
- All 10 countries reported producing white clover, tall fescue, red clover, Italian ryegrass, and orchard grass (cocksfoot) within the past 5 years.

EU Grass & Legume Seed Production												5 yr avg	4 yr avg
	2008		2009		2010		2011		2012		2013		
Totals for	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Acres	(lbs)
Denmark	178,208	219,757,708	209,230	135,673,537	152,608	263,137,588	148,139	213,887,648	169,776	-	-	171,592	208,114,120
Italy	64,429	47,750,787	78,839	31,983,799	72,240	60,346,236	79,345	64,167,838	83,728	-	-	75,716	51,062,165
France	85,327	58,520,287	89,680	63,266,207	72,104	62,610,411	67,793	46,648,541	78,084	-	-	78,598	57,761,361
Germany	74,130	44,779,488	78,111	79,491,859	71,400	67,823,396	66,602	55,480,992	73,040	63,158,811	74,757	73,007	62,146,909
Spain	46,980	36,106,466	55,119	47,303,984	65,544	64,612,987	73,103	62,837,682	54,516	-	-	59,052	52,715,280
Czech Republic	65,317	25,093,270	59,594	18,702,567	46,841	15,865,807	43,044	17,393,072	49,367	-	-	52,832	19,263,679
Netherlands	39,681	44,909,571	43,934	41,779,814	31,275	48,386,541	26,467	32,373,078	36,238	-	-	35,519	41,862,251
Sweden	29,607	15,218,412	29,310	14,836,761	32,407	16,889,650	32,396	14,567,775	31,668	-	-	31,078	15,378,149
Poland	34,485	-	33,231	-	33,124	-	32,848	-	31,104	-	-	32,958	-
UK	13,127	11,610,477	13,417	-	12,988	12,159,472	13,853	13,810,867	15,894	-	-	13,856	12,526,939
Total: Top 10 EU	631,290	503,746,464	690,465	433,038,526	590,531	611,832,088	583,589	521,167,493	623,413	63,158,811	74,757	624,208	520,830,853

By crop, majority of:

- Alsike clover being grown in Sweden and Germany. Acres minimal. Italy ranks #3, but data indicates it may be imported.

- Birdsfoot trefoil production dominated by France, although average acres for all 10 countries only 200 (5 yr. average).
 - Orchard grass production dominated by Denmark (7,200 ac.) and France (5,600 ac.).
 - Common vetch production dominated by Spain, (30,000 ac.).
 - Alfalfa seed production dominated by France (28,000 ac) and Spain (16,000). Italy ranks #1 but data indicates it may be imported.
 - 5 countries show over 10,000 acres of perennial ryegrass production, led by Denmark (73,000 ac.), followed by Netherlands, Germany, Poland and the U.K.
 - 4 countries average over 5,000 acres annually for red clover production (Czech Republic, France, Sweden, and Germany).
 - Denmark (42,000 ac.) dominates red fescue production. Of the other 9 countries, only Poland averaged over 5,000 acres.
 - Both Germany and Denmark average over 2,500 acres of Sheep's/Hard Fescue annually.
- Tall fescue grown in all 10 countries, with France (7,500 ac.) more than double # 2's average acres (Netherlands @ 3,300 ac.).
 - Timothy seed grown primarily in Sweden, Germany and Czech Republic. Total timothy acres for all 10 countries averages over 17,000.
 - White clover production dominated by Denmark (9,000 ac.), with Sweden a distant 2nd with annual acres of 1,500.

Denmark

- Continues to be the number one producing grass/legume seed country in the EU, has more than double the acres as the next closest country (France).
- Majority of production based on perennial ryegrass (64,000 ac.), creeping red fescue (38,000 ac.) and smooth stalked meadow grass (18,000 ac.).
- Averaging 64 million lbs. of creeping red fescue annually.
- 2012 creeping red fescue acres (42,250 ac.) below 5 year average at 37,500 acres.
- Averaging almost 81 million lbs. of perennial ryegrass production annually.
- White clover = main legume grown for seed (under 10,000 ac. annual average).
- Timothy seed acres average less than 800 annually.
- Alsike clover seed acres appear to be growing (not specified) as production increasing, but may still be less than 1000.



Grass Seed Harvest in Denmark

- Tall fescue acres only 50% of 2008 acres, but has almost doubled in 2012 from 2011.
- Total Danish acres up 14% in 2012, with perennial ryegrass acres up 34% from 2011 (up 22,000 ac.) making up almost all the acreage increase.
- Annual production at 208 million lbs., supplying much of Europe's grass and legume seed needs.

Denmark	2008		2009		2010		2011		2012	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Alsike clover	-	4,189	17	-	-	1,323	-	56,222	-	3	15,434
Bentgrass	353	163,376	339	484,593	545	194,022	403	170,211	347	397	253,050
Birdsfoot trefoil	-	5,953	26	29,324	33	27,340	52	2,425	63	35	16,260
Cocksfoot	11,336	11,002,393	13,175	5,832,137	6,560	11,714,764	2,994	7,901,121	2,363	7,285	9,112,604
Common vetch	-	17,638	-	65,042	73	-	46	41,230	64	37	30,977
Festulolium	2,156	2,057,299	1,822	836,501	941	1,764,722	1,743	2,395,736	1,573	1,647	1,763,564
Hybrid ryegrass	2,498	3,362,540	2,053	966,584	1,087	3,547,082	984	1,732,752	1,728	1,670	2,402,240
Italian/Westerwold ryegrass	3,711	5,519,937	3,617	2,897,813	3,260	5,195,391	3,443	5,119,546	3,579	3,522	4,683,172
Lucerne/Alfalfa	-	87,090	14	7,695	9	470,504	44	52,915	35	20	154,551
Meadow fescue	2,852	3,466,607	2,322	760,061	855	3,048,136	577	1,889,955	636	1,448	2,291,190
Others meadowgrass	296	338,216	166	265,237	298	276,702	280	199,093	216	251	269,812
Perennial ryegrass	72,071	86,955,769	85,634	51,828,035	58,297	100,773,030	64,349	84,092,174	86,415	73,353	80,912,252
Red clover	1,158	810,264	945	1,357,606	1,527	769,696	793	309,113	769	1,038	811,670
Red fescue	40,794	69,193,459	52,399	37,165,520	41,804	81,985,929	38,802	68,870,015	37,476	42,255	64,303,731
Sheep's / hard fescue	2,578	2,253,306	3,228	2,675,811	3,010	4,330,007	2,480	3,722,805	1,943	2,648	3,245,482
Small timothy	39	29,985	14	7,717	9	21,607	37	7,055	9	21	16,591
Smooth-stalked meadowgrass	14,777	15,784,825	17,235	15,191,315	17,087	21,988,250	18,447	20,679,040	17,449	16,999	18,410,857
Tall fescue	12,899	12,763,146	15,293	6,317,480	7,106	20,683,449	3,364	11,066,994	6,186	8,970	12,707,767
Timothy	797	466,536	612	457,650	515	328,295	812	413,841	928	733	416,580
Trefoil	215	219,598	209	195,081	219	207,031	60	29,765	238	188	162,869
White clover	9,680	5,255,582	10,110	8,332,336	9,372	5,810,309	8,428	5,135,641	7,761	9,070	6,133,467
Denmark - Total	178,208	219,757,708	209,230	135,673,537	152,608	263,137,588	148,139	213,887,648	169,776	171,592	208,114,120

France

- #2 grass and legume seed producing country in Europe.
- Majority of their production based on alfalfa seed production, with many other crops in the 3000 acres + range (orchard grass, common vetch, Italian ryegrass, perennial ryegrass, red clover, red fescue, and tall fescue).
- Creeping red fescue acres average less than 3,500 acres, with 2012 at 2,900.
- Total French acres up 15% in 2012, with Orchard grass, common vetch and red clover making up most of this 10,000 acre increase.
- Annual French production at 57.7 million lbs.

France	2008		2009		2010		2011		2012	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Alsike clover	9.9	4,850.6	9.4	7,275.8	5.0	1,102.4	16.6	7,055.4	20.8	12	5,071
Bentgrass	-	-	0.1	-	0.2	44.1	-	-	6.2	1	11
Bermseem/Egyptian clover	-	-	3.7	1,543.4	27.8	3,968.6	23.8	50,269.4	66.5	24	13,945
Birdsfoot trefoil	61.8	17,638.4	43.6	16,536.0	163.2	28,001.0	176.1	49,828.5	200.4	129	28,001
Brome	413.7	154,115.5	252.0	127,437.4	48.1	182,116.5	80.6	280,450.6	162.9	191	186,030
Cocksfoot	9,524.9	5,983,827.2	8,810.2	5,893,430.4	3,101.5	3,409,723.2	2,481.7	2,311,732.8	4,127.0	5,609	4,399,678
Common vetch	2,714.9	5,818,687.7	6,196.8	8,993,820.2	2,704.4	4,874,592.3	1,333.0	2,249,998.4	5,132.4	3,616	5,484,275
Crested hairgrass	-	-	-	-	-	-	-	-	16.6	3	-
Crimson clover	580.1	374,375.0	1,639.8	924,472.6	1,377.9	1,084,982.1	1,809.2	1,160,827.2	1,578.3	1,397	886,164
Festulolium	5.7	71,656.0	7.4	46,521.3	-	135,154.2	-	-	125.5	28	63,333
Hairy vetch	147.6	109,799.0	217.5	146,178.2	254.7	366,658.2	387.4	190,715.2	371.0	276	203,338
Hungarian vetch	-	-	-	-	-	-	-	-	1.0	0	-
Hybrid ryegrass	3,333.6	2,088,386.6	2,522.9	2,570,576.3	1,154.7	2,598,356.8	1,749.6	2,031,723.2	3,251.5	2,402	2,322,261
Italian/Westerwold ryegrass	5,058.5	6,043,356.8	7,240.9	6,448,599.0	6,693.8	9,255,529.9	6,423.2	8,224,785.9	7,705.6	6,624	7,493,068
Lopsided oat	-	-	-	-	-	-	1,040.6	1,341,841.3	2,485.7	705	335,460
Lucerne/Alfalfa	32,282.9	10,346,024.0	28,393.3	11,186,052.8	26,434.3	13,346,536.3	26,793.7	8,962,732.5	26,881.0	28,157	10,960,336
Meadow fescue	235.8	139,784.3	175.1	27,339.5	-	101,420.8	83.1	58,206.7	85.3	116	81,688
Others meadowgrass	-	-	-	-	-	1,102.4	-	-	-	-	276
Perennial ryegrass	10,834.1	13,723,777.6	10,672.9	13,431,862.1	8,794.6	13,175,884.8	8,683.7	8,244,188.2	7,753.5	9,348	12,143,928
Persian clover	-	-	-	-	2.5	-	-	-	-	0	-
Red clover	6,759.2	3,300,806.1	10,671.2	4,189,340.5	10,242.4	5,164,303.0	6,574.0	2,890,713.3	9,019.5	8,653	3,886,291
Red fescue	3,754.7	3,295,073.6	3,048.4	3,131,697.9	3,516.6	2,918,714.2	3,851.9	3,623,147.8	2,907.3	3,416	3,242,158
Sainfoin/Sulla	84.6	209,676.5	149.5	123,909.8	212.0	121,705.0	212.0	61,954.9	236.3	179	129,312
Sheep's / hard fescue	274.3	202,621.1	129.7	120,602.6	80.4	44,977.9	160.2	182,337.0	119.8	153	137,635
Smooth-stalked meadowgrass	-	-	-	-	45.4	37,702.1	41.9	35,056.3	-	17	18,190
Small timothy	0.7	44.1	0.1	-	-	-	-	-	-	0	11
Tall fescue	9,219.4	6,635,786.6	9,462.2	5,878,878.7	7,209.4	5,543,528.6	5,735.2	4,406,733.8	5,665.6	7,458	5,616,232
Timothy	-	-	-	-	2.0	-	3.2	264.6	5.0	2	66
Trefoil	6.7	-	4.2	132.3	7.4	-	30.8	4,409.6	44.1	19	1,135
White clover	24.3	-	29.0	-	25.8	214,306.6	101.4	279,568.6	115.1	59	123,469
France - Total	85,327.4	58,520,286.7	89,679.9	63,266,206.8	72,104.0	62,610,411.1	67,793.0	46,648,541.1	78,083.8	78,597.6	57,761,361.4

Germany

- # 3 in European production (ignore Italy as per the disclaimer).
- Acres and production on the upswing.
- Data includes 2012 production and 2013 acres
- Acres still less than 50% of Denmark's' acreage.
- Grass seed production dominated by Italian ryegrass (2012 = 33,000 ac.) and perennial ryegrass (2012 = 16,800 ac.).
- Meadow fescue only other crop to average over 5,000 ac. annually
- German acres in 2013 only up by 1,700 from 2012.
- Annual German production @ 62 million lbs.



Italian Ryegrass at flower

Germany	2008		2009		2010		2011		2012		2013	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Alsike clover	-	-	-	-	-	19,843.2	-	51,592.3	-	-	-	-	14,287
Bentgrass	7.4	2,204.8	7.4	-	-	42,552.6	-	133,169.9	-	28,441.9	-	2	41,274
Bermseem/Egyptian clover	-	-	-	-	-	-	-	14,110.7	-	176,825.0	-	-	38,187
Birdsfoot trefoil	48.9	-	30.5	-	-	89,514.9	-	-	-	-	-	13	17,903
Cocksfoot	1,351.1	273,395.2	853.9	359,382.4	817.4	589,343.0	429.8	233,267.8	322.6	155,438.4	421.4	699	322,165
Common vetch	436.7	-	569.2	-	1,014.6	546,790.4	788.4	824,595.2	797.3	976,505.9	855.4	744	469,578
Crimson clover	171.9	17,638.4	450.1	268,985.6	366.0	349,681.3	360.1	298,089.0	224.7	171,974.4	173.8	291	221,274
Fenugreek	-	-	-	-	-	-	-	-	-	31,087.7	-	-	6,218
Festulolium	329.1	167,564.8	329.8	123,468.8	170.4	83,121.0	93.0	65,041.6	174.8	45,859.8	227.9	221	97,011
Golden oatgrass	197.7	-	90.8	-	73.4	24,693.8	59.3	2,866.2	60.8	19,402.2	85.6	95	9,392
Hairy vetch	175.6	-	327.4	-	752.9	234,811.2	541.6	245,173.8	511.1	20,063.7	463.8	462	100,010
Hybrid ryegrass	1,410.9	822,390.4	1,397.2	890,739.2	724.2	717,882.9	917.1	677,314.6	1,066.9	783,145.0	1,127.2	1,107	778,294
Italian/Westerwold ryegrass	26,289.5	17,488,473.6	32,758.8	30,452,697.6	27,351.2	26,052,798.7	28,936.9	25,635,871.0	33,182.6	31,188,439.4	30,770.8	29,882	26,163,656
Lopsided oat	-	-	-	-	-	394,659.2	86.1	494,977.6	440.2	1,217,270.1	1,646.2	362	421,381
Lucerne/Alfalfa	369.8	22,048.0	176.6	26,457.6	209.6	5,005,777.9	181.5	822,831.4	245.3	1,034,933.1	448.1	272	1,382,410
Meadow fescue	8,433.0	7,800,582.4	5,944.1	4,059,036.8	4,629.2	5,453,352.3	3,132.7	3,344,240.6	3,642.9	3,177,116.8	4,493.0	5,046	4,766,866
Meadow foxtail	94.2	-	105.2	-	73.9	41,891.2	18.6	1,830.0	39.9	2,204.8	51.8	64	9,185
Others meadowgrass	-	-	-	-	-	-	-	-	-	330.7	-	-	66
Perennial ryegrass	16,356.6	10,446,342.4	17,100.8	35,036,476.8	16,164.1	15,722,869.8	14,039.8	12,446,757.4	16,491.3	15,329,974.4	16,768.3	16,153	17,796,484
Persian clover	-	-	-	-	-	198,652.5	-	10,142.1	-	19,622.7	-	-	45,683
Red clover	3,509.7	729,788.8	4,740.8	1,166,339.2	5,733.5	1,756,123.2	4,985.0	1,225,868.8	4,792.4	1,545,123.8	5,528.2	4,882	1,284,649
Red fescue	5,381.4	3,327,043.2	3,882.4	2,471,580.8	3,845.0	2,964,133.1	3,607.4	2,561,316.2	3,145.6	1,819,841.9	3,665.4	3,921	2,628,783
Sainfoin/Sulla	-	-	2.5	-	-	-	-	-	-	-	-	0	-
Sheep's / hard fescue	4,136.1	1,351,542.4	3,941.7	2,125,427.2	3,911.2	2,751,810.9	3,887.2	1,194,340.2	3,316.0	1,451,640.3	3,642.6	3,806	1,774,952
Smooth-stalked meadowgrass	508.9	167,564.8	438.7	123,468.8	463.3	603,453.8	522.3	965,481.9	447.9	349,019.8	370.5	459	441,798
Tall fescue	1,147.0	912,787.2	1,801.2	1,186,182.4	2,173.0	2,017,392.0	1,602.1	1,831,086.4	1,515.8	1,538,509.4	1,055.0	1,549	1,497,191
Tall oatgrass	341.5	147,721.6	360.3	165,360.0	489.3	231,724.5	337.0	87,089.6	317.4	114,870.1	179.3	337	149,353
Timothy	3,313.0	1,095,785.6	2,779.3	1,031,846.4	2,408.1	1,859,528.3	2,046.0	2,074,275.8	2,241.2	1,939,342.1	2,725.3	2,585	1,600,156
Trefoil	-	-	-	-	4.0	-	-	-	-	-	-	1	-
White clover	119.8	6,514.4	21.8	4,409.6	26.3	70,994.6	30.3	239,661.8	63.0	52,915.2	57.3	53	74,919
Germany - Total	74,129.7	44,779,488.0	78,110.6	79,491,859.2	71,400.4	67,823,396.2	66,602.1	55,480,991.9	73,039.7	63,189,898.7	74,756.9	73,006.6	62,153,126.8

Netherlands

- Acres inconsistent, up and down every year, 5 yr. average at 35,000 acres.
- Annual Dutch production at 41 million lbs.
- 65% of total Dutch production dedicated to perennial ryegrass (23,000 ac.).
- Besides perennial ryegrass, only Italian ryegrass, red fescue, sheep's/hard fescue and tall fescue average over 1,000 acres.
- 2012 overall acres increased 36%, with perennial ryegrass acres increasing 46% (up 8,500 ac.).
- Annual average Dutch production at 41.8 million lbs.

Netherlands	2008		2009		2010		2011		2012	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Bentgrass	339.5	61,734.4	366.0	54,081.5	300.1	90,396.8	243.0	68,348.8	193.4	288	68,640
Bermuda grass	-	15,433.6	-	-	-	-	-	-	-	-	3,858
California Bluebell	-	-	11.9	698.9	9.9	-	-	-	5.0	5	175
Cocksfoot	15.4	255,756.8	36.2	142,463.2	14.9	11,024.0	37.2	15,433.6	24.8	26	106,169
Crested hairgrass	-	-	10.7	-	-	8,819.2	49.6	2,204.8	67.0	25	2,756
Festulolium	262.6	370,406.4	171.1	10,935.8	42.2	255,756.8	-	-	171.1	129	159,275
Hybrid ryegrass	656.7	687,897.6	550.3	607,488.5	238.1	251,347.2	280.2	330,720.0	629.9	471	469,363
Italian/Westerwold ryegrass	3,606.4	3,635,715.2	4,235.8	5,219,824.3	1,993.9	6,951,734.4	3,152.1	6,892,204.8	4,121.8	3,422	5,674,870
Lopsided oat	-	-	126.5	-	277.8	291,033.6	-	-	563.0	193	72,758
Lucerne/Alfalfa	-	-	-	17,365.0	2.5	-	2.5	-	2.5	1	4,341
Meadow fescue	26.3	2,204.8	31.0	53,578.8	7.4	4,409.6	7.4	8,819.2	2.5	15	17,253
Others meadowgrass	-	-	-	9,205.0	52.1	37,481.6	76.9	63,939.2	52.1	36	27,656
Perennial ryegrass	25,743.1	29,495,814.4	27,905.0	29,601,622.8	21,072.6	27,718,745.6	17,751.8	20,154,076.8	26,054.9	23,705	26,742,565
Red clover	8.2	-	8.2	6,614.4	9.9	-	2.5	2,204.8	2.5	6	2,205
Red fescue	2,345.8	2,650,169.6	2,648.6	1,253,111.3	1,852.6	2,751,590.4	1,230.1	1,192,796.8	932.5	1,802	1,961,917
Sheep's / hard fescue	295.4	299,852.8	131.9	131,578.1	218.2	189,612.8	156.2	110,240.0	86.8	178	182,821
Smooth-stalked meadowgrass	1,984.2	2,015,187.2	1,859.3	1,369,033.1	2,095.6	2,786,867.2	1,837.7	1,607,299.2	1,393.8	1,834	1,944,597
Tall fescue	4,351.7	5,419,398.4	5,716.4	3,254,591.3	3,092.6	7,000,240.0	1,572.3	1,911,561.6	1,904.6	3,328	4,396,448
Timothy	14.4	-	15.9	9,571.0	5.0	-	5.0	2,204.8	19.8	12	2,944
Tufted hairgrass	31.0	-	121.0	4,409.6	-	30,867.2	62.0	-	14.9	46	8,819
White clover	-	-	-	34,339.8	-	6,614.4	-	11,024.0	-	-	12,995
Netherlands - Total	39,680.7	44,909,571.2	43,945.8	41,780,512.4	31,285.2	48,386,540.8	26,466.6	32,373,078.4	36,242.7	35,524.2	41,862,425.7

Spain

- Spanish seed production in 2012 focused on common vetch (33,500 ac.), alfalfa (10,200 ac.), and Italian ryegrass (7,200 ac.).
- Total Spanish acres in 2012 were 54,500, with these 3 crops occupying 93% of Spain's grass and legume seed acres.
- Total Spanish acres in 2012 down 21,000, led by alfalfa down 13,000 from 2011. Common vetch acres down 6000 from 2011.



Common vetch

Spain	2008		2009		2010		2011		2012	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Bentgrass	-	-	-	-	-	-	-	661.4	-	-	165
Bitter vetch	188.2	125,894.1	-	254,874.9	-	-	-	-	-	38	95,192
Cocksfoot	-	-	-	-	-	17,417.9	-	16,536.0	-	-	8,488
Common vetch	19,372.2	24,753,730.6	26,519.7	35,013,546.9	40,594.6	47,051,313.9	39,869.1	45,685,881.3	33,516.0	31,974	38,126,118
Hairy vetch	240.6	433,022.7	240.6	1,027,657.3	418.0	442,944.3	1,821.6	1,316,706.6	1,604.1	865	805,083
Hybrid ryegrass	50.1	33,072.0	50.0	36,158.7	33.5	204,825.9	35.6	198,211.5	2.0	34	118,067
Italian/Westerwold ryegrass	7,196.6	6,266,923.5	8,370.3	7,675,349.8	6,746.7	11,922,456.0	6,425.2	8,868,808.0	7,265.7	7,201	8,683,384
Lopsided oat	-	-	-	-	-	-	-	308,892.5	-	-	77,223
Lucerne/Alfalfa	15,946.6	2,636,499.8	16,347.9	1,827,558.7	16,454.0	3,291,105.0	23,178.6	3,968,860.5	10,232.0	16,432	2,931,006
Red clover	-	-	-	-	-	14,331.2	-	6,614.4	-	-	5,236
Sainfoin/Sulla	120.6	41,450.2	59.4	56,222.4	29.8	176,384.0	246.5	168,005.8	179.8	127	110,516
Smooth-stalked meadowgrass	-	-	-	-	-	-	-	11,244.5	-	-	2,811
Subterranean clover	12.9	-	-	-	-	-	-	-	-	3	-
Tall fescue	3,852.4	1,815,873.3	3,531.2	1,412,615.4	1,267.0	1,481,405.1	1,526.1	2,287,259.5	1,716.2	2,379	1,749,288
White clover	-	-	-	-	-	10,803.5	-	-	-	-	2,701
Spain - Total	46,980.1	36,106,466.2	55,119.1	47,303,984.0	65,543.6	64,612,986.9	73,102.7	62,837,681.9	54,515.6	59,052.2	52,715,279.8

Czech Republic

- Data shows 38 grasses and legume seed species for the Czech Republic, but only two crops average more than 5000 acres (Italian ryegrass, 9,200 ac., and red clover, 12,800 ac.).
- 2012 acres up 14% (6,000 ac.), primarily due to increased acres of Italian ryegrass and red clover.
- Until 2012, Czech acreage had been falling annually since 2008 (65,300 acres), hitting a recent low in 2011 of 43,000 acres.

Czech Republic	2008		2009		2010		2011		2012	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Alsike clover	88.0	8,598.7	98.4	11,222.4	48.4	2,469.4	87.3	4,630.1	51.3	75	6,730
Bentgrass	729.1	149,705.9	762.7	149,527.3	423.8	54,238.1	462.3	78,711.4	635.1	603	108,046
Bermseem/Egyptian clove	-	-	-	-	1.2	-	-	-	12.4	3	-
Birdsfoot trefoil	20.6	2,204.8	26.3	2,226.8	23.6	176.4	34.7	3,527.7	21.1	25	2,034
Brome	34.7	12,346.9	19.8	176.4	50.1	11,024.0	22.8	6,393.9	22.3	30	7,485
Canary grass/Reed canar	33.5	44,096.0	-	-	26.8	9,260.2	2.0	25,796.2	0.7	13	19,788
Cocksfoot	2,386.8	538,191.7	1,865.3	260,849.9	1,308.7	295,090.4	1,492.2	189,171.8	1,339.4	1,678	320,826
Common velvetgrass	-	-	-	-	0.0	-	0.0	-	0.2	0	-
Common vetch	73.7	46,521.3	416.5	239,639.7	783.9	141,548.2	129.5	69,230.7	130.4	307	124,235
Crested dogstail	58.8	-	60.9	-	84.7	-	5.0	-	43.2	51	-
Crimson clover	3,436.3	1,320,234.2	4,827.5	1,470,138.6	5,005.2	1,602,933.7	5,364.7	1,804,628.8	5,982.5	4,923	1,549,484
Fenugreek	2.5	-	-	-	-	-	5.0	1,322.9	5.7	3	331
Festulolium	5,091.9	2,457,690.6	3,229.3	1,061,743.5	1,278.5	611,324.9	775.0	461,464.6	1,307.5	2,336	1,148,056
Golden oatgrass	111.6	6,614.4	95.2	6,085.2	118.9	3,858.4	120.5	7,716.8	125.7	114	6,069
Hairy vetch	338.5	130,303.7	222.5	97,143.5	99.2	16,932.9	106.6	32,851.5	-	153	69,308
Hungarian vetch	221.2	200,857.3	162.8	97,650.6	569.9	270,639.2	266.4	116,193.0	134.2	271	171,335
Hybrid ryegrass	976.4	546,790.4	1,024.8	515,482.2	93.0	59,220.9	238.3	165,580.5	771.3	621	321,769
Italian/Westerwold ryegra	8,903.4	6,103,327.4	10,327.1	7,106,467.3	8,301.5	6,713,836.5	8,520.8	7,909,499.5	10,384.5	9,287	6,958,283
Kidney vetch	7.4	-	24.8	2,050.5	33.0	1,190.6	47.1	-	32.7	29	810
Lucerne/Alfalfa	3,187.8	548,333.8	2,662.7	359,889.5	2,395.2	139,563.8	1,946.8	307,128.6	2,137.0	2,466	338,729
Meadow fescue	6,000.9	2,842,648.6	4,346.8	1,353,637.0	2,254.9	1,120,170.7	1,755.3	741,915.2	1,910.6	3,254	1,514,593
Meadow foxtail	172.9	39,245.4	163.6	20,967.6	198.0	35,078.4	194.2	29,103.4	251.5	196	31,099
Others meadowgrass	84.3	31,308.2	118.0	25,090.6	179.1	59,970.6	306.3	86,428.2	194.7	176	50,699
Perennial ryegrass	3,568.5	1,674,986.6	2,172.1	824,705.4	2,609.9	1,182,610.6	2,851.8	1,271,508.2	3,333.1	2,907	1,238,453
Persian clover	3.5	881.9	6.5	617.3	7.4	-	4.0	66.1	-	4	391
Red clover	15,380.0	2,959,723.5	14,898.4	1,961,566.5	11,915.7	1,004,903.7	9,730.0	1,895,466.6	12,315.4	12,848	1,955,415
Red fescue	5,368.5	1,963,594.9	4,167.7	879,847.5	3,154.5	733,294.4	3,405.5	943,654.4	3,156.8	3,851	1,130,098
Sainfoin/Sulla	16.1	5,512.0	30.6	10,803.5	12.4	4,586.0	4.7	2,204.8	20.8	17	5,777
Sheep's / hard fescue	304.0	81,357.1	47.1	7,782.9	144.9	18,740.8	329.3	77,829.4	365.8	238	46,428
Small timothy	80.4	16,756.5	32.8	2,932.4	67.6	6,438.0	24.1	-	29.8	47	6,532
Smooth-stalked meadowg	886.6	198,873.0	712.5	110,923.5	641.0	131,009.2	668.1	78,270.4	776.7	737	129,769
Sweet scented vernal gra	24.8	661.4	7.6	-	18.6	441.0	9.9	441.0	54.6	23	386
Tall fescue	3,085.4	1,884,001.6	2,871.2	1,028,495.1	2,655.7	1,253,737.5	2,058.6	717,221.4	1,337.5	2,402	1,220,864
Tall oatgrass	329.3	-	329.3	73,949.0	157.5	23,172.4	208.3	27,119.0	202.1	245	31,060
Timothy	4,086.0	1,271,949.1	3,755.2	1,004,837.6	2,071.8	350,673.4	1,810.2	337,995.8	2,237.2	2,792	741,364
Trefoil	12.4	5,732.5	-	-	16.4	5,512.0	13.4	-	19.8	12	2,811
Tufted hairgrass	65.0	-	60.0	15,323.4	34.7	1,499.3	-	-	-	32	4,206
White clover	148.3	220.5	48.1	793.7	52.5	661.4	47.9	1,322.9	28.5	65	750
White sweet clover	-	-	-	-	2.5	-	-	-	-	0	-
Czech Republic - Total	65,319.0	25,093,269.8	59,594.3	18,702,566.6	46,840.8	15,865,806.9	43,048.6	17,394,394.8	49,372.3	52,835.0	19,264,009.5

Sweden

- Swedish seed production centers around timothy (9,900 ac.), red clover (6,000 ac.), red fescue (4,400 ac.), and meadow fescue (3,600 ac.).
- Total Swedish grass and legume seed acres averages 31,000.
- Annual production at 15 million lbs.
- Swedish acres and production very consistent, with acres within 2,000 of their average, and production ranging from 14.6 to 16.8 million lbs. the past 4 years. .



Timothy plant for seed

Sweden	2008		2009		2010		2011		2012	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Alsike clover	354.4	84,443.8	418.1	69,451.2	439.5	102,743.7	417.4	61,513.9	371.3	400	79,538
Canary grass/Reed canary	62.0	9,701.1	62.0	2,425.3	62.0	3,307.2	2.5	441.0	2.7	38	3,969
Cocksfoot	325.6	174,620.2	410.9	127,657.9	454.6	456,173.1	291.4	112,665.3	366.0	370	217,779
Common vetch	-	-	-	-	-	-	-	-	-	-	-
Festulolium	471.2	377,461.8	494.0	211,881.3	401.5	344,610.2	265.6	87,089.6	156.0	358	255,261
Italian/Westerwold ryegrass	0.5	-	37.7	57,765.8	10.7	7,496.3	19.6	37,922.6	-	14	25,796
Lucerne/Alfalfa	0.2	-	0.2	-	0.2	-	0.5	-	-	0	-
Meadow fescue	4,143.1	2,224,863.7	3,771.3	1,558,132.2	3,636.7	3,540,688.3	3,296.4	2,167,979.8	3,211.4	3,612	2,372,916
Perennial ryegrass	1,637.5	1,326,848.6	1,612.5	1,273,051.5	1,830.7	1,525,721.6	1,769.5	1,513,374.7	1,954.5	1,761	1,409,749
Red clover	4,713.7	1,339,195.5	4,954.8	1,064,257.0	6,634.0	854,801.0	6,653.8	743,899.5	6,820.5	5,955	1,000,538
Red fescue	4,305.8	4,438,041.9	4,738.8	4,845,709.4	4,870.2	4,642,647.4	4,412.7	3,338,067.2	4,027.3	4,471	4,316,116
Sheep's / hard fescue	31.0	7,937.3	44.1	14,331.2	39.9	12,787.8	77.4	9,921.6	67.0	52	11,244
Smooth-stalked meadowgr	1,132.1	771,459.5	1,017.3	853,037.1	959.8	679,078.4	1,101.6	598,382.7	1,011.3	1,044	725,489
Tall fescue	831.0	286,183.0	1,172.5	518,348.5	1,533.9	512,616.0	1,877.1	914,110.1	2,011.3	1,485	557,814
Timothy	10,031.6	3,789,169.3	9,304.7	3,957,395.5	9,989.9	3,881,770.9	10,514.5	4,813,078.4	9,845.4	9,937	4,110,354
White clover	1,567.6	388,485.8	1,271.0	283,316.8	1,543.3	325,208.0	1,696.1	169,328.6	1,823.0	1,580	291,585
Sweden - Total	29,607.5	15,218,411.5	29,310.1	14,836,760.6	32,406.9	16,889,649.9	32,396.0	14,567,775.0	31,667.6	31,077.6	15,378,149.3

Poland

- Total Polish acres at 31,000 in 2012, only 2,000 acres below their average.
- Production dominated by perennial ryegrass (10,900 ac. in 2012), Italian ryegrass (9,000 acres in 2012) and 4,300 acres of red fescue.
- The above 3 crops accounts for 77% of Poland's acres.
- No production numbers available.

Poland	2008		2009		2010		2011		2012	5 Yr Avg	4 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Bentgrass	108.1	-	82.3	-	99.7	-	93.2	-	59.0	88	-
Birdsfoot trefoil	-	-	0.5	-	1.2	-	2.7	-	2.0	1	-
Brome	42.7	-	27.8	-	7.4	-	1.2	-	-	16	-
Cocksfoot	1,571.1	-	1,372.2	-	1,285.9	-	767.6	-	648.0	1,129	-
Common vetch	799.3	-	989.5	-	924.5	-	664.6	-	667.1	809	-
Crimson clover	12.6	-	6.2	-	-	-	-	-	-	4	-
Festulolium	384.2	-	82.8	-	39.9	-	57.8	-	39.7	121	-
Hairy vetch	14.9	-	83.1	-	24.8	-	-	-	-	25	-
Hybrid ryegrass	654.0	-	400.8	-	188.0	-	222.2	-	637.6	421	-
Italian/Westerwold ryegrass	4,468.2	-	5,167.8	-	4,510.4	-	7,327.5	-	9,073.1	6,109	-
Lucerne/Alfalfa	310.2	-	209.6	-	150.3	-	173.6	-	88.0	186	-
Meadow fescue	1,700.5	-	1,059.7	-	726.6	-	698.4	-	355.9	908	-
Others meadowgrass	-	-	-	-	0.2	-	0.5	-	-	0	-
Perennial ryegrass	11,174.1	-	11,494.1	-	11,315.0	-	10,865.1	-	10,926.6	11,155	-
Red clover	2,869.4	-	3,111.7	-	3,633.2	-	3,124.9	-	2,292.5	3,006	-
Red fescue	6,653.6	-	5,925.2	-	6,544.7	-	5,955.0	-	4,363.8	5,888	-
Sainfoin/Sulla	3.2	-	13.1	-	7.4	-	0.7	-	37.9	12	-
Sheep's / hard fescue	90.5	-	51.6	-	129.2	-	322.2	-	49.8	129	-
Smooth-stalked meadowgr	836.3	-	536.2	-	1,188.4	-	935.7	-	364.8	772	-
Tall fescue	1,178.2	-	1,477.8	-	1,184.7	-	566.9	-	404.2	962	-
Timothy	1,560.7	-	1,099.1	-	1,133.1	-	1,055.2	-	1,026.0	1,175	-
White clover	53.3	-	39.7	-	28.8	-	12.6	-	67.5	40	-
Poland - Total	34,485.1	-	33,230.8	-	33,123.6	-	32,847.8	-	31,103.7	32,958.2	-

UK

- U.K. acres consistently around 13,800, although 2012 saw acres rise to 15,900.
- Acres dominated by perennial ryegrass (2012 = 74% of all grass/legume seed acres).
- Only other crop of note is hybrid ryegrass (1,600 ac.).
- Annual production averages 12.5 million lbs.

UK	2008		2009		2010		2011		2012	5 Yr Avg	3 Yr Avg
	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Lbs	Ac	Ac	Lbs
Cocksfoot	731.6	425,526.4	691.9	-	406.7	264,576.0	297.6	110,240.0	247.5	475	266,781
Common vetch	312.5	295,443.2	287.7	-	238.1	235,913.6	168.6	240,323.2	335.8	269	257,227
Hairy vetch	-	-	-	-	-	-	-	26,457.6	-	0	8,819
Hybrid ryegrass	863.0	650,416.0	1,130.9	-	1,254.9	1,327,289.6	1,331.8	1,058,304.0	1,619.2	1240	1,012,003
Italian/Westerwold ryegrass	312.5	372,611.2	436.5	-	448.9	612,934.4	443.9	546,790.4	428.3	414	510,779
Perennial ryegrass	9,637.3	9,189,606.4	9,662.1	-	9,334.7	8,933,849.6	10,475.5	10,834,387.2	11,872.8	10196	9,652,614
Red clover	163.7	28,662.4	198.4	-	193.4	6,614.4	307.5	39,686.4	417.9	256	24,988
Red fescue	868.0	615,139.2	865.5	-	887.8	773,884.8	682.0	917,196.8	677.3	796	768,740
Timothy	114.1	30,867.2	121.5	-	141.4	2,204.8	17.4	30,867.2	8.4	81	21,313
Tall fescue	-	-	-	-	-	-	-	-	11.9	2	-
White clover	124.0	2,204.8	22.3	-	81.8	2,204.8	129.0	6,614.4	275.3	126	3,675
UK - Total	13,126.6	11,610,476.8	13,416.8	-	12,987.8	12,159,472.0	13,853.3	13,810,867.2	15,894.3	13,855.8	12,526,938.7

Summary

- EU farmers do not appear to respond to commodity prices the way North American farmers do, as acreages of grass and legume seed have not decreased as they have in Canada and the USA.

- With the positive prices for most North American commodities, including corn, soybeans, wheat, canola and field peas, many growers have switched from growing grass and legume seed crops to these more attractive cash crops.
- Oregon grass and legume seed acres are 50,000 less than their 10 year average (2012 =449,000 acres, compared to the 10 year average of 501,000 acres).
- Although Canada does not keep official acreage statistics for grass and legume seed production, acreages are estimated to have decrease by 50 to 60% of the 10 year average.
- Effects from the 2008 world economic crisis, which devastated the housing industry in the USA, still has lingering effects in the North American turf grass seed markets.

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