2019 Western Canadian Wheat
Canadian Wheat & Durum Production

Cereals Canada
Daniel Ramage
Presentation Overview

- Review of world wheat situation
- Review of the 2019 growing season in Western Canada
- Review of historical and 2019 production
World Wheat Situation
World Wheat Consumption, Production and Ending Stocks

Source: USDA PSD Online, October 2019

Source: USDA PSD Online, October 2019
World Wheat Ending Stocks

Source: International Grains Council, October 2019

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (Million Tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/11</td>
<td>190</td>
</tr>
<tr>
<td>2011/12</td>
<td>190</td>
</tr>
<tr>
<td>2012/13</td>
<td>150</td>
</tr>
<tr>
<td>2013/14</td>
<td>190</td>
</tr>
<tr>
<td>2014/15</td>
<td>210</td>
</tr>
<tr>
<td>2015/16</td>
<td>210</td>
</tr>
<tr>
<td>2016/17</td>
<td>230</td>
</tr>
<tr>
<td>2017/18</td>
<td>240</td>
</tr>
<tr>
<td>2018/19 (est.)</td>
<td>271</td>
</tr>
<tr>
<td>2019/20 (f’cast)</td>
<td>300</td>
</tr>
</tbody>
</table>

www.CanadianWheat.ca
World Wheat Ending Stocks

End Stocks (million metric tonnes)

- Rest of World End Stocks
- China End Stocks
- World Stocks/Use Ratio

Source: International Grains Council, October 2019
World Wheat Ending Stocks (excl. China)

End Stocks (million metric tonnes)

- 2017/18
- 2018/19 (est.)
- 2019/20 (f’cast.)

Stocks/Use Ratio (excl. China)

Source: International Grains Council, October 2019

www.CanadianWheat.ca
# World Wheat Supply and Disposition

<table>
<thead>
<tr>
<th>Million Metric Tonnes</th>
<th>2017/18</th>
<th>2018/19 Est.</th>
<th>2019/20 F’cast</th>
<th>%ΔY/Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>761.8</td>
<td>733.0</td>
<td>762.3</td>
<td>+4%</td>
</tr>
<tr>
<td>Total Supply</td>
<td>1,009.9</td>
<td>1,003.6</td>
<td>1,027.2</td>
<td>+2.4%</td>
</tr>
<tr>
<td>Consumption</td>
<td>739.3</td>
<td>738.6</td>
<td>756.1</td>
<td>+2.4%</td>
</tr>
<tr>
<td>End Stocks</td>
<td>270.6</td>
<td>265.0</td>
<td>271.1</td>
<td>+2.3%</td>
</tr>
</tbody>
</table>

Source: International Grains Council, October 2019
## World Durum Supply and Disposition

<table>
<thead>
<tr>
<th></th>
<th>2017/18</th>
<th>2018/19 Est.</th>
<th>2019/20 F’cast</th>
<th>%ΔY/Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>36.4</td>
<td>38.2</td>
<td>35.6</td>
<td>-6.8%</td>
</tr>
<tr>
<td>Total Supply</td>
<td>46.6</td>
<td>47.9</td>
<td>46.1</td>
<td>-3.8%</td>
</tr>
<tr>
<td>Consumption</td>
<td>36.9</td>
<td>37.4</td>
<td>37.8</td>
<td>+1.1%</td>
</tr>
<tr>
<td>End Stocks</td>
<td>9.7</td>
<td>10.5</td>
<td>8.2</td>
<td>-21.9%</td>
</tr>
</tbody>
</table>

Source: International Grains Council, October 2019
World Export Volume, 2019-20 (forecast)

**All Wheat**
- Canada, 24.1mmt, 14%
- Rest of World, 149.0mmt, 86%

**World Total = 173 Million Tons**

**Durum**
- Canada, 4.9mmt, 59%
- Rest of world, 3.4mmt, 41%

**World Total = 8.3 Million Tons**

Source: International Grains Council, October 2019, Million Metric Tonnes
Where Do Canadian **Wheat** Exports Go?

Canadian Exports of Wheat (excl. durum), 2018-19 Crop Year

Source: Canadian Grain Commission, Exports of Canadian Grain and Flour, October 2019
Where Do Canadian Durum Exports Go?

Canadian Exports of Durum, 2018-19 Crop Year

Source: Canadian Grain Commission, Exports of Canadian Grain and Flour, October 2019
2019 Growing Season for the Canadian Prairies
2019 Growing Season

Western Canadian growing season characterized by:

- Relatively dry and cool conditions across the Prairies throughout seeding and the early growing season.
- Early crop progress was slow in many areas due to dry and cool conditions, was but sustained by timely precipitation and modern farming practices.
- Overall growing conditions were mixed. Although some regions faced continued environmental stress (e.g. dryness and cool weather), production and quality was balanced by suitable growing conditions in other areas.
- Extended cool and rainy/snowy conditions across much of the Prairies impacted the harvest and has led to relatively high incidences of downgrading.
2019 Growing Season – Precipitation (Early Season)
**2019 Growing Season – Precipitation (Early Season)**

**Shortage of rain slows crops**

*By Sean Pratt* Reading Time: 3 minutes

**Southern Alberta crops in dire need of rain**

*BY QUINN CAMPBELL AND DEMI KNIGHT* • GLOBAL NEWS

Posted June 21, 2019 6:49 pm

**Dry conditions hold back winter cereals on the Prairies**

*By William DeKay* Reading Time: 3 minutes

**Seeding on schedule but dry conditions concern**

Pasture lands and forage crops are struggling to emerge because of cool, dry conditions

*By Celidh Millar* • GLOBAL NEWS

Posted June 17, 2019 5:56 pm

Updated June 18, 2019 6:42 am
2019 Growing Season – Precipitation (Summer)
2019 Growing Season – Precipitation (Summer)

Rain pulls farmers back from the brink
By Brian Cross
Published: June 27, 2019
News, Weather

Crop conditions creep near five-year average, soil moisture levels still a concern
Alberta Crop Report: Conditions as of June 25
By Alberta Agriculture
Published: June 28, 2019
Crops, News, Weather

Crops progressing thanks to rain
By Mario Glass
Glacier MarketsFarm
Published: July 17, 2019
Crops
0 comments

Tour finds above average crops in Saskatchewan, Manitoba
By Western Producer Crop Tours: Manitoba-Saskatchewan
Published: August 2, 2019
News

Manitoba crops progressing quickly in hot and humid weather
By MarketsFarm
Published: July 24, 2019
Crops, Weather
2019 Temperature during Growing Season

Number of Days with Temperature above 30°C

April 1, 2019 to October 14, 2019

Map showing the number of days with temperature above 30°C during the growing season in Canada. The map is color-coded to indicate the number of days ranging from 0 to more than 27. Major cities such as Edmonton, Calgary, Regina, and Winnipeg are marked on the map.
2019 Growing Season – Precipitation (Harvest)
2019 Growing Season – Precipitation (Harvest)

Rain and cool weather delaying harvest

Harvest well behind 5-year average for this time of year, reports Ministry of Agriculture

Rainy weather leaves some Alberta farmers fighting to harvest crops

Farmers make headway on Saskatchewan harvest, but rain slowing progress

Manitoba farmers plagued by record-breaking autumn rain, with snow about to fall

Snow, cold grind Alberta harvest to virtual standstill
2019 Growing Season - Harvest Progress

October Spring Wheat Harvest Progress (Saskatchewan)

<table>
<thead>
<tr>
<th>Year</th>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>95%</td>
<td>98%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>2018</td>
<td>65%</td>
<td>72%</td>
<td>92%</td>
<td>99%</td>
</tr>
<tr>
<td>2019</td>
<td>52%</td>
<td>66%</td>
<td>84%</td>
<td>92%</td>
</tr>
</tbody>
</table>

Source: Saskatchewan Ministry of Agriculture, https://publications.saskatchewan.ca
2019 Canadian Wheat and Durum Production
Share of total wheat production, by class, 2019-20

- Canada Western Red Spring (CWRS), 69%
- Canada Prairie Spring Red (CPSR), 5%
- Canada Western Amber Durum (CWAD), 15%
- Canada Northern Hard Red (CNHR), 2%
- Other Winter Wheats, 5%
- Other, 4%

Source: https://aimis-simia.agr.gc.ca, September 20, 2019
Where is Wheat Grown in Canada?

Spring Wheat, average share of total production (2015-19)
- Saskatchewan, 41%
- Alberta, 38%
- Manitoba, 19%
- Other, 2%

Durum Wheat, average share of total production (2015-19)
- Saskatchewan, 81%
- Alberta, 19%

Source: Statistics Canada, Table 32-10-0359-01, October 2019
Estimated Seeded Area in Canada

Source: Statistics Canada, Table 32-10-0359-01
## Canadian Major Crops, Estimated Seeded Area

<table>
<thead>
<tr>
<th>Crop</th>
<th>2018-19 '000 Hectares Seeded f’cast</th>
<th>2019-20 '000 Hectares Seeded f’cast</th>
<th>%ΔY/Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat (excl. Durum)</td>
<td>7,570</td>
<td>8,142</td>
<td>+8%</td>
</tr>
<tr>
<td>Durum</td>
<td>2,499</td>
<td>1,980</td>
<td>-21%</td>
</tr>
<tr>
<td>Canola</td>
<td>9,232</td>
<td>8,479</td>
<td>-8%</td>
</tr>
<tr>
<td>Soybeans</td>
<td>2,558</td>
<td>2,310</td>
<td>-10%</td>
</tr>
<tr>
<td>Pulses</td>
<td>3,310</td>
<td>3,588</td>
<td>+8%</td>
</tr>
<tr>
<td>Barley</td>
<td>2,628</td>
<td>2,996</td>
<td>+14%</td>
</tr>
<tr>
<td>Oats</td>
<td>1,235</td>
<td>1,459</td>
<td>+18%</td>
</tr>
</tbody>
</table>

Source: aimis-simia.agr.gc.ca, October, 2019
## Canadian Estimated Seeded Area, Wheat

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>%Δ Y/Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Wheat</td>
<td>9,061</td>
<td>10,010</td>
<td>9,953</td>
<td>-1%</td>
</tr>
<tr>
<td>Spring Wheat</td>
<td>6,395</td>
<td>7,006</td>
<td>7,597</td>
<td>+8%</td>
</tr>
<tr>
<td>Durum</td>
<td>2,106</td>
<td>2,503</td>
<td>1,980</td>
<td>-21%</td>
</tr>
<tr>
<td>Winter Wheat</td>
<td>560</td>
<td>501</td>
<td>376</td>
<td>-25%</td>
</tr>
</tbody>
</table>

Source: Statistics Canada, Table 32-10-0359-01, October 2019
## Canadian Major Crops, Estimated Production

<table>
<thead>
<tr>
<th>Crop</th>
<th>2018-19 (000’ Metric Tonnes) (f’cast)</th>
<th>2019-20 (000’ Metric Tonnes) (f’cast)</th>
<th>%ΔY/Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat (excl. Durum)</td>
<td>26,456</td>
<td>27,493</td>
<td>+4%</td>
</tr>
<tr>
<td>Durum</td>
<td>5,731</td>
<td>4,998</td>
<td>-13%</td>
</tr>
<tr>
<td>Canola</td>
<td>20,343</td>
<td>19,358</td>
<td>-5%</td>
</tr>
<tr>
<td>Soybeans</td>
<td>7,267</td>
<td>6,480</td>
<td>-11%</td>
</tr>
<tr>
<td>Pulses</td>
<td>6,325</td>
<td>7,811</td>
<td>+23%</td>
</tr>
<tr>
<td>Barley</td>
<td>8,380</td>
<td>9,987</td>
<td>+19%</td>
</tr>
<tr>
<td>Oats</td>
<td>3,436</td>
<td>4,016</td>
<td>+17%</td>
</tr>
</tbody>
</table>

Source: aimis-simia.agr.gc.ca, September 20, 2019
Canadian Wheat Production

Source: Statistics Canada, Table 32-10-0359-01, October 2019
Canadian Wheat Yields

Source: Statistics Canada, Table 32-10-0359-01
# Wheat (excluding durum) Supply and Disposition

<table>
<thead>
<tr>
<th></th>
<th>Thousand Metric Tonnes (August-July)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017-18</td>
</tr>
<tr>
<td>Carry-In</td>
<td>5,103</td>
</tr>
<tr>
<td>Production</td>
<td>25,415</td>
</tr>
<tr>
<td>Exports &amp; Domestic Use</td>
<td>25,539</td>
</tr>
<tr>
<td>Exports</td>
<td>17,570</td>
</tr>
<tr>
<td>Domestic Use</td>
<td>7,969</td>
</tr>
<tr>
<td>End Stocks</td>
<td>5,053</td>
</tr>
</tbody>
</table>

Source: aimis-simia.agr.gc.ca, September 20, 2019
## Canadian Durum Supply and Disposition

<table>
<thead>
<tr>
<th></th>
<th>2017-18</th>
<th>2018-19</th>
<th>2019-20 (f’cast)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Carry-In</strong></td>
<td>1,828</td>
<td>1,426</td>
<td>1,619</td>
</tr>
<tr>
<td><strong>Production</strong></td>
<td>4,962</td>
<td>5,731</td>
<td>4,998</td>
</tr>
<tr>
<td><strong>Exports &amp; Domestic Use</strong></td>
<td>5,372</td>
<td>5,563</td>
<td>5,542</td>
</tr>
<tr>
<td><strong>Exports</strong></td>
<td>4,342</td>
<td>4,598</td>
<td>4,700</td>
</tr>
<tr>
<td><strong>Domestic Use</strong></td>
<td>1,030</td>
<td>965</td>
<td>842</td>
</tr>
<tr>
<td><strong>End Stocks</strong></td>
<td>1,426</td>
<td>1,619</td>
<td>1,100</td>
</tr>
</tbody>
</table>

Source: aimis-simia.agr.gc.ca, September 20, 2019
P&H invests in new terminal
By Sean Pratt

Richardson completes west coast terminal expansion
By Brian Cross

P+H plans new east-central Alberta elevator

CN Rail Moves Record Amount Of Grain
Category: Agriculture News MB
Published: Monday, 03 June 2019 10:18

Viterra opens new Sask. elevator
By Brian Cross

Cargill begins rail expansion at Alberta facility
Written by Mischa Wanek-Libman, editor

New Canada grain mega-terminal opens on Canadian Pacific line
September 05, 2018 | Class I, Freight, News
Canadian Export Capacity, Growth in Canadian Grains and Oilseed Exports

Source: aimis-simia.gc.ca

Volume (thousand metric tonnes)


(f'cast)

Thousand Metric Tonnes

Source: aimis-simia.gc.ca