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, December 2019
World Wheat Ending Stocks

Source: International Grains Council, November 2019

Volume (Million Tonnes)


Volume (est.): 271

Source: International Grains Council, November 2019

www.CanadianWheat.ca
World Wheat Ending Stocks

- **End Stocks (million metric tonnes)**
  - **Rest of World End Stocks**
  - **China End Stocks**
  - **World Stocks/Use Ratio**

- **2017/18**:
  - Rest of World: 150
  - China: 100
  - World: 250

- **2018/19 (est.)**:
  - Rest of World: 150
  - China: 100
  - World: 250

- **2019/20 (f’cast)**:
  - Rest of World: 150
  - China: 100
  - World: 250

**Stocks/Use Ratio**

- 25%
- 27%
- 29%
- 31%
- 33%
- 35%
- 37%

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

Source: International Grains Council, November 2019

End Stocks (million metric tonnes)

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

Stocks/Use Ratio (excl. China)

Source: International Grains Council, November 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>761.6</td>
<td>+3.9%</td>
</tr>
<tr>
<td>Total Supply</td>
<td>1,009.9</td>
<td>1,003.6</td>
<td>1,026.8</td>
<td>+2.3%</td>
</tr>
<tr>
<td>Consumption</td>
<td>739.3</td>
<td>738.6</td>
<td>755.9</td>
<td>+2.3%</td>
</tr>
<tr>
<td>End Stocks</td>
<td>270.6</td>
<td>265.3</td>
<td>271.0</td>
<td>+2.1%</td>
</tr>
</tbody>
</table>

Source: International Grains Council, November 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><strong>Production</strong></td>
<td>36.4</td>
<td>38.1</td>
<td>35.1</td>
<td>-7.9%</td>
</tr>
<tr>
<td><strong>Total Supply</strong></td>
<td>46.6</td>
<td>47.8</td>
<td>45.5</td>
<td>-4.8%</td>
</tr>
<tr>
<td><strong>Consumption</strong></td>
<td>36.9</td>
<td>37.4</td>
<td>37.8</td>
<td>+1.1%</td>
</tr>
<tr>
<td><strong>End Stocks</strong></td>
<td>9.7</td>
<td>10.4</td>
<td>7.6</td>
<td>-26.9%</td>
</tr>
</tbody>
</table>

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

All Wheat

Canada, 24.1mmt, 14%

Rest of World, 148.9mmt, 86%

World Total = 173 Million Tons

Durum

Canada 55%, 4.7mmt

Rest of world 45%, 3.9mmt

World Total = 8.6 Million Tons

Source: International Grains Council, November 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, 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

Saskatchewan farmers look skyward as drought conditions persist

BY CEILIDH 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

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

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

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

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Prepared by Agriculture and Agri-Food Canada's Science and Technology Branch. Data provided through partnership with Environment Canada, Natural Resources Canada, Provincial and private agencies. Produced using near real-time data that has undergone some quality control. The accuracy of this map varies due to data availability and potential data errors.

www.CanadianWheat.ca
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

Dylan Short • Updated: September 6, 2019

Farmers make headway on Saskatchewan harvest, but rain slowing progress

BY DAVID GILES • GLOBAL NEWS
Posted September 26, 2019 11:37 am

WEATHER

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

BY MALIKA KARIM • GLOBAL NEWS
Posted October 8, 2019 11:58 am
Updated October 8, 2019 12:11 pm

Crops, News, Weather

Snow, cold grind Alberta harvest to virtual standstill

By MarketsFarm OCTOBER 4, 2019
2019 Growing Season - Harvest Progress

October Spring Wheat Harvest Progress (Saskatchewan)

% of Spring Wheat Combined

2017 | Week 1 | 95% | Week 2 | 98% | Week 3 | 100% | Week 4 | 100%
2018 | Week 1 | 65% | Week 2 | 72% | Week 3 | 92% | Week 4 | 99%
2019 | Week 1 | 52% | Week 2 | 66% | Week 3 | 84% | Week 4 | 92%

Source: Saskatchewan Ministry of Agriculture, https://publications.saskatchewan.ca

www.CanadianWheat.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, 4%
- Other Winter Wheats, 5%

Source: Statistics Canada, Table 32-10-0359-01, October 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, December 2019

www.CanadianWheat.ca
# Canadian Major Crops, Estimated Seeded Area

<table>
<thead>
<tr>
<th>Crop</th>
<th>2018-19 ‘000 Hectares Seeded</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>8,145</td>
<td>+8%</td>
</tr>
<tr>
<td>Durum</td>
<td>2,503</td>
<td>1,980</td>
<td>-21%</td>
</tr>
<tr>
<td>Canola</td>
<td>9,232</td>
<td>8,481</td>
<td>-8%</td>
</tr>
<tr>
<td>Soybeans</td>
<td>2,558</td>
<td>2,313</td>
<td>-10%</td>
</tr>
<tr>
<td>Pulses</td>
<td>3,343</td>
<td>3,588</td>
<td>+7%</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: Statistics Canada, Table 32-10-0359-01, December 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>9,957</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Spring Wheat</td>
<td>6,395</td>
<td>7,006</td>
<td>7,601</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, December 2019
Canadian Major Crops, Estimated Production

<table>
<thead>
<tr>
<th>Crop</th>
<th>2018-19 (000’ Metric Tonnes)</th>
<th>2019-20 (000’ Metric Tonnes) (f’cast)</th>
<th>%∆Y/Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat (excl. Durum)</td>
<td>26,456</td>
<td>27,371</td>
<td>+3%</td>
</tr>
<tr>
<td>Durum</td>
<td>5,745</td>
<td>4,977</td>
<td>-13%</td>
</tr>
<tr>
<td>Canola</td>
<td>20,343</td>
<td>18,649</td>
<td>-8%</td>
</tr>
<tr>
<td>Soybeans</td>
<td>7,417</td>
<td>6,045</td>
<td>-18%</td>
</tr>
<tr>
<td>Pulses</td>
<td>6,417</td>
<td>7,081</td>
<td>+10%</td>
</tr>
<tr>
<td>Barley</td>
<td>8,380</td>
<td>10,383</td>
<td>+24%</td>
</tr>
<tr>
<td>Oats</td>
<td>3,436</td>
<td>4,157</td>
<td>+21%</td>
</tr>
</tbody>
</table>

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

Yield (Kilograms per Hectare)

Source: Statistics Canada, Table 32-10-0359-01, December 2019

www.CanadianWheat.ca
## 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, November 19, 2019
# Canadian Durum Supply and Disposition

<table>
<thead>
<tr>
<th></th>
<th>Thousand Metric Tonnes (August-July)</th>
<th>2017-18</th>
<th>2018-19</th>
<th>2019-20 (f’cast)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carry-In</td>
<td></td>
<td>1,828</td>
<td>1,426</td>
<td>1,676</td>
</tr>
<tr>
<td>Production</td>
<td></td>
<td>4,962</td>
<td>5,731</td>
<td>4,998</td>
</tr>
<tr>
<td>Exports &amp; Domestic Use</td>
<td></td>
<td>5,372</td>
<td>5,505</td>
<td>5,699</td>
</tr>
<tr>
<td>Exports</td>
<td></td>
<td>4,342</td>
<td>4,526</td>
<td>4,700</td>
</tr>
<tr>
<td>Domestic Use</td>
<td></td>
<td>1,030</td>
<td>979</td>
<td>999</td>
</tr>
<tr>
<td>End Stocks</td>
<td></td>
<td>1,426</td>
<td>1,676</td>
<td>1,000</td>
</tr>
</tbody>
</table>

Source: aimis-simia.agr.gc.ca, November 19, 2019
P&H invests in new terminal

By Sean Pratt Reading Time: 3 minutes

Richardson completes west coast terminal expansion

By Brian Cross Published: May 11, 2016
News
0 comments

P+H plans new east-central Alberta elevator

Grain firm already in local input retail business

Viterra opens new Sask. elevator

By Brian Cross Published: October 11, 2018
News

Cargill begins rail expansion at Alberta facility

New Canada grain mega-terminal opens on Canadian Pacific line

Written by Mischa Wanek-Libman, editor
Canadian Export Capacity, Growth in Canadian Grains and Oilseed Exports

Source: aimis-simia.gc.ca

Volume (thousand metric tonnes)

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009-10</td>
<td>30,000</td>
</tr>
<tr>
<td>2010-11</td>
<td>31,000</td>
</tr>
<tr>
<td>2011-12</td>
<td>32,000</td>
</tr>
<tr>
<td>2012-13</td>
<td>33,000</td>
</tr>
<tr>
<td>2013-14</td>
<td>34,000</td>
</tr>
<tr>
<td>2014-15</td>
<td>35,000</td>
</tr>
<tr>
<td>2015-16</td>
<td>36,000</td>
</tr>
<tr>
<td>2016-17</td>
<td>37,000</td>
</tr>
<tr>
<td>2017-18</td>
<td>38,000</td>
</tr>
<tr>
<td>2018-19</td>
<td>39,000</td>
</tr>
<tr>
<td>2019-20</td>
<td>40,000</td>
</tr>
</tbody>
</table>

(f'cast)

Source: aimis-simia.gc.ca

Canadian Wheat.ca

Clean, Consistent, Quality.