



IAOM MEA – DUBAI 2019

CANADIAN WHEAT MARKET OUTLOOK

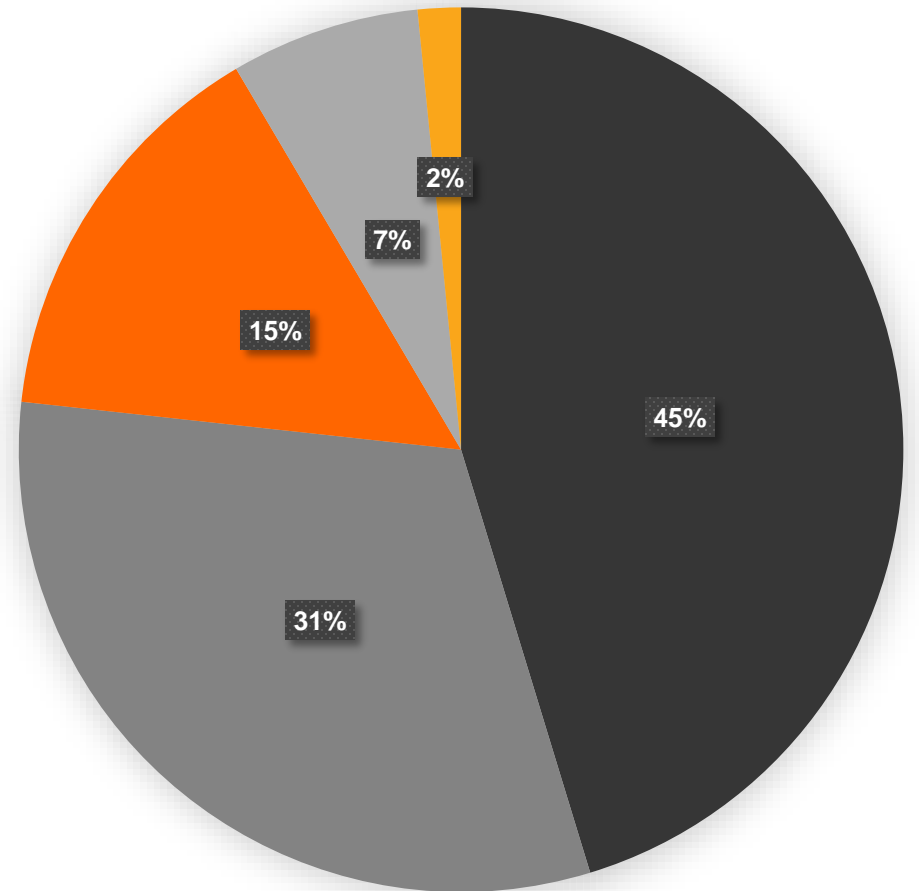
ENSURING QUALITY AND QUANTITY OF YOUR AGRICULTURAL PRODUCTS

WHEN YOU NEED TO BE SURE

SGS

WHEAT IN
CANADA:
> 90 % FROM THE
3 PRAIRIE
PROVINCES

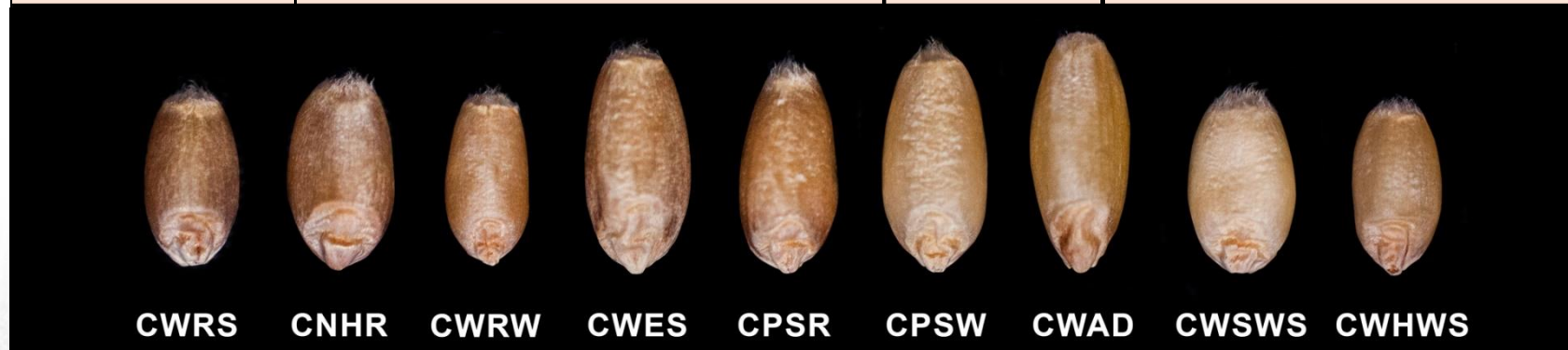
WHEAT PRODUCTION CANADA



■ Saskatchewan ■ Alberta ■ Manitoba ■ Ontario ■ Rest

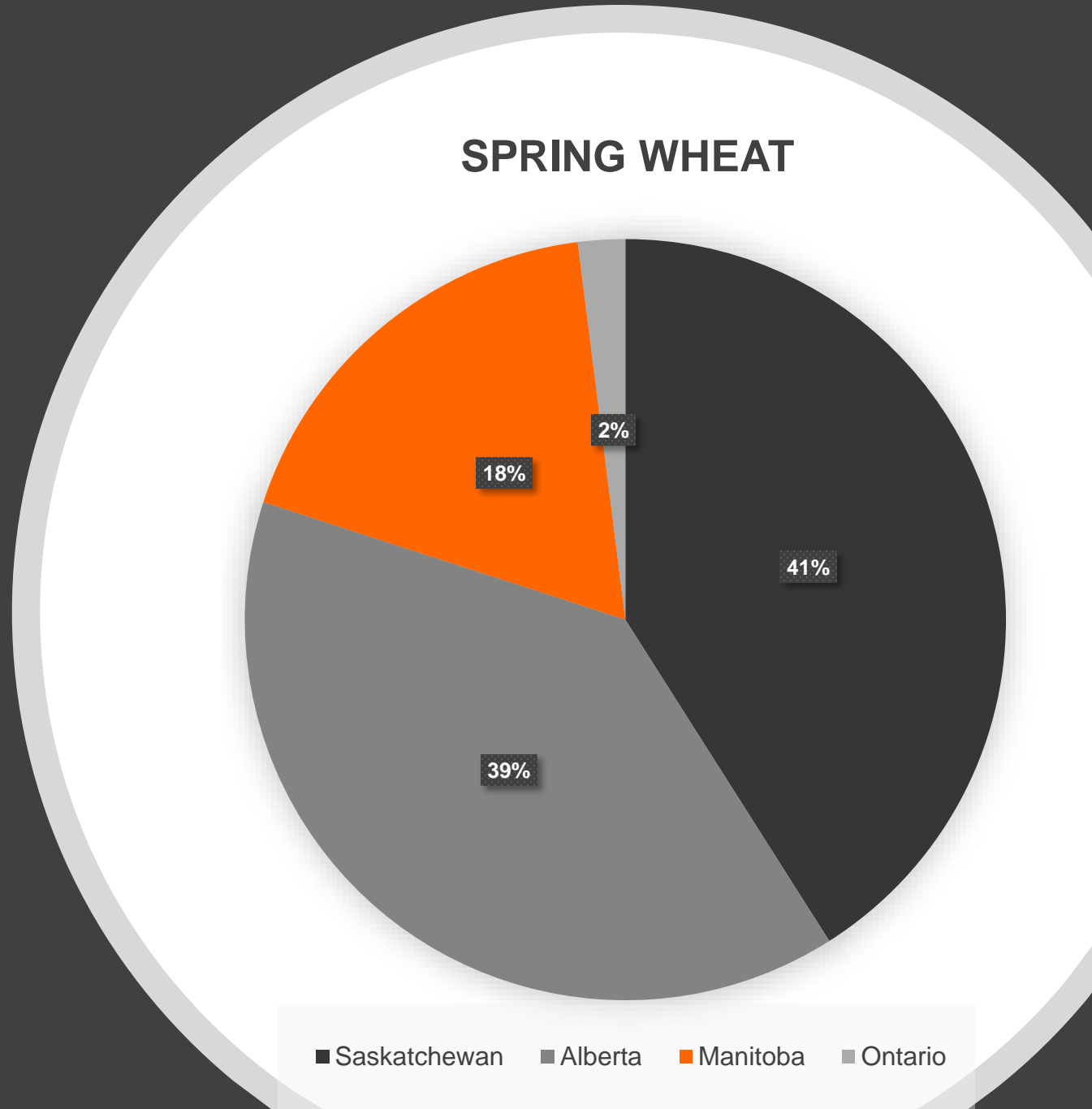
WHEAT CLASSES IN WESTERN CANADA

Wheat Class		% of wheat grown	Best for:
CWRS	CANADIAN WESTERN RED SPRING	68	Breads
CWAD	CANADIAN WESTERN AMBER DURUM	22	Pasta, couscous
CPS	CANADIAN PRAIRIE SPRING	4	Blending, flour yield
CNHR	CANADIAN NORTHERN HARD RED	2	Blending, cost?
CWSWS	CANADIAN WESTERN SOFT WHITE SPRING	2	Cakes, pastries
CWRW	CANADA WESTERN RED WINTER	1	Bread, steam buns
CWSP	CANADIAN WESTERN SPECIAL PURPOSE	1	High yielding
CWHWS	CANADIAN WESTERN HARD WHITE SPRING	-	"White" noodles, bread
CWES	CANADA WESTERN EXTRA STRONG	-	Blending

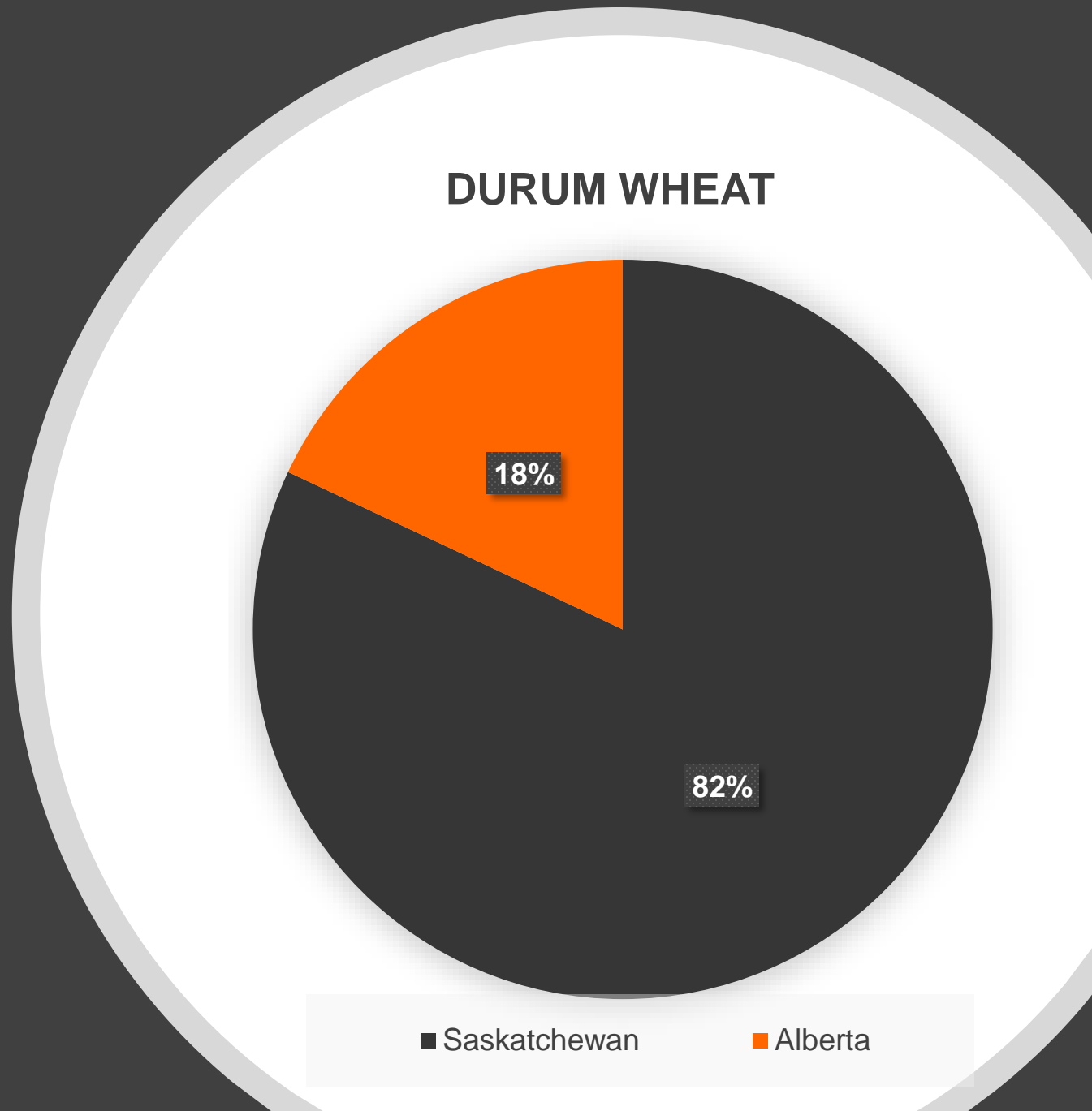


CWRS CNHR CWRW CWES CPSR CPSW CWAD CWSWS CWHWS

CANADIAN WESTERN RED SPRING (CWRS)



CANADIAN WESTERN AMBER DURUM (CWAD)

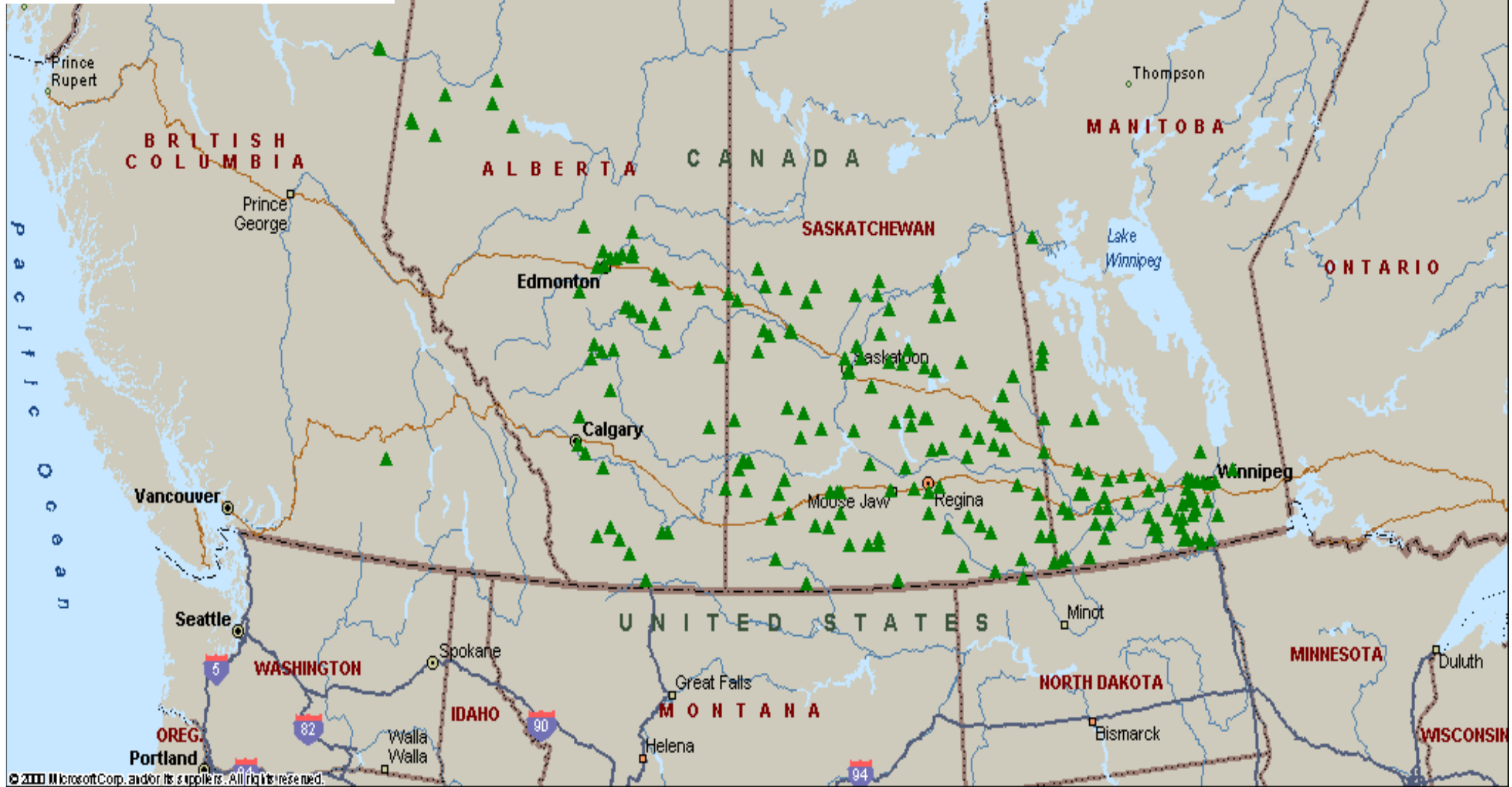


Licensed Grain Elevators – 335

Manitoba – 82 (1,496,110)

Saskatchewan – 173
(3,661,408)

Alberta – 77 (1,834,160)

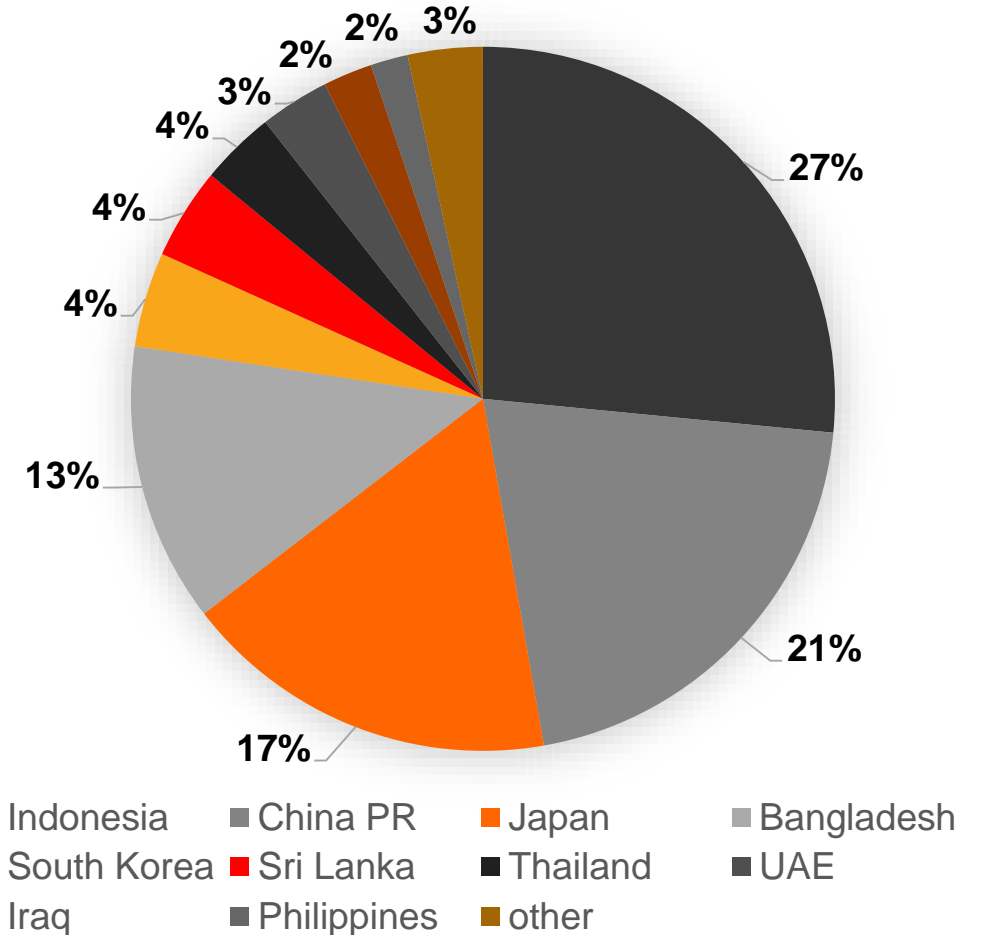




WHEAT SHIPMENTS TO ASIA

	2018-2019	2017-2018
Indonesia	2427.6	1694.9
China PR	1892.7	1065.5
Japan	1585.0	1537.7
Bangladesh	1174.1	1164.0
South Korea	399.0	140.6
Sri Lanka	384.3	442.4
Thailand	314.8	112.7
UAE	291.9	285.4
Iraq	207.3	100.0
Philippines	156.7	335.1
other	314.5	413.2
Asia Total	9147.9	7291.5
tot. Can. wheat exp.	18253.0	
wheat exports to Asia	50.1%	

2018-2019 EXPORTS TO ASIA



SUPPLY & DEMAND CANADIAN DURUM WHEAT

	CARRY-INN	PRODUCTION	EXPORTS	FEED	CARRY-OUT
2017 - 2018	1,828	4,962	4,342	587	1,426
2018 - 2019	1,426	5,745	4,526	596	1,676
2019 - 2020 (f)	1,676	4,998	4,700	579	1,000

source: Agriculture and Agri-Food Canada

SUPPLY & DEMAND CANADIAN WHEAT (EXCL. DURUM)

	CARRY-INN	PRODUCTION	EXPORTS	FEED	CARRY-OUT
2017 - 2018	5,103	25,415	17,570	3,977	5,053
2018 - 2019	5,053	26,456	19,764	3,457	4,240
2019 - 2020 (f)	4,240	27,494	19,000	3,674	5,000

source: Agriculture and Agri-Food Canada

THE 2019 CLIMATOLOGICAL CONDITIONS



■ Erratic & delayed start

- Too wet in the east
- Too dry in the west

■ June/July recovery

■ August

- First half: good conditions
- Second half: intermittent rain started, slowdown in harvesting

■ September

- Mainly intermittent rain until last week of September
- First signs of sprout damage.

■ October

- First half: cool & wet
- Second half better, except for snow and frost during last days



2019 CROP QUALITY UPDATE



- In normal years around 90 % of CWRS is N° 2 or better
- Beginning of October, ca. 50 % CWRS harvested
 - 27% # 1 CWRS
 - 46% # 2 CWRS 73 % N° 2 or better
 - 15% # 3 CWRS
 - 12% CW FEED



- End of October, ca. 96 % CWRS harvested
 - 25% # 1 CWRS
 - 37% # 2 CWRS 62 % N° 2 or better
 - 23% # 3 CWRS
 - 15% CW FEED
- CGC's harvest sample program
 - 22 Oct CGC: 82 % N° 2 or better
 - 29 Oct CGC: 78 % N° 2 or better

- The predominant (down-) grading factor is sprouted grains
- All companies are managing it by doing Hagberg FN on all farmer receipts and then when railcars are loaded inland; again at receipt at the terminals and all shipments are tested incrementally
- As usual, Canadian exporters will manage
- One word of advise for the Buyers: include FN in your contracts



WHEAT AND FLOUR QUALITY

	GRADE:	NO. 1 AND 2	
	YEAR:	2019	2018
CWRS QUALITY			
Wheat:			
Protein, %		14.2	13.9
Falling Number, sec.		366	389
Milling (Buhler Lab Mill):			
Yield – total products basis, %		76.5	75.7
Flour:			
Protein (14% M.B.), %		13.6	13.2
Wet Gluten, %		37.7	36.8
Gluten Index		87.5	88.7
Ash (14% M.B.), %		0.50	0.45

DOUGH RHEOLOGY AND BAKE TEST



	GRADE:	NO. 1 AND 2	
	YEAR:	2019	2018
CWRS QUALITY			
Farinograph:			
Absorption, %		67.9	68.9
Dough Development Time, min.		6.9	7.8
Stability, min.		9.6	13.1
MTI, BU		30	22
Alveograph:			
P (height), mm		105	124
L (length), mm		121	109
P/L		0.91	1.1
W, 10 ⁻⁴ J,		411	451
Extensograph, 45 min.			
Maximum resistance (Rmax), BU		359	425
Extensibility (Length), mm		208	200
Area (cm ²)		101	110
Bake - Pup loaf:			
Bake Loaf Volume, cm ³		1036	1090
Bake Loaf Height, mm		109.1	118.4
Specific Volume, cm ³ /g		6.6	7.3

CONTACT US

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FOR MORE INFORMATION

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