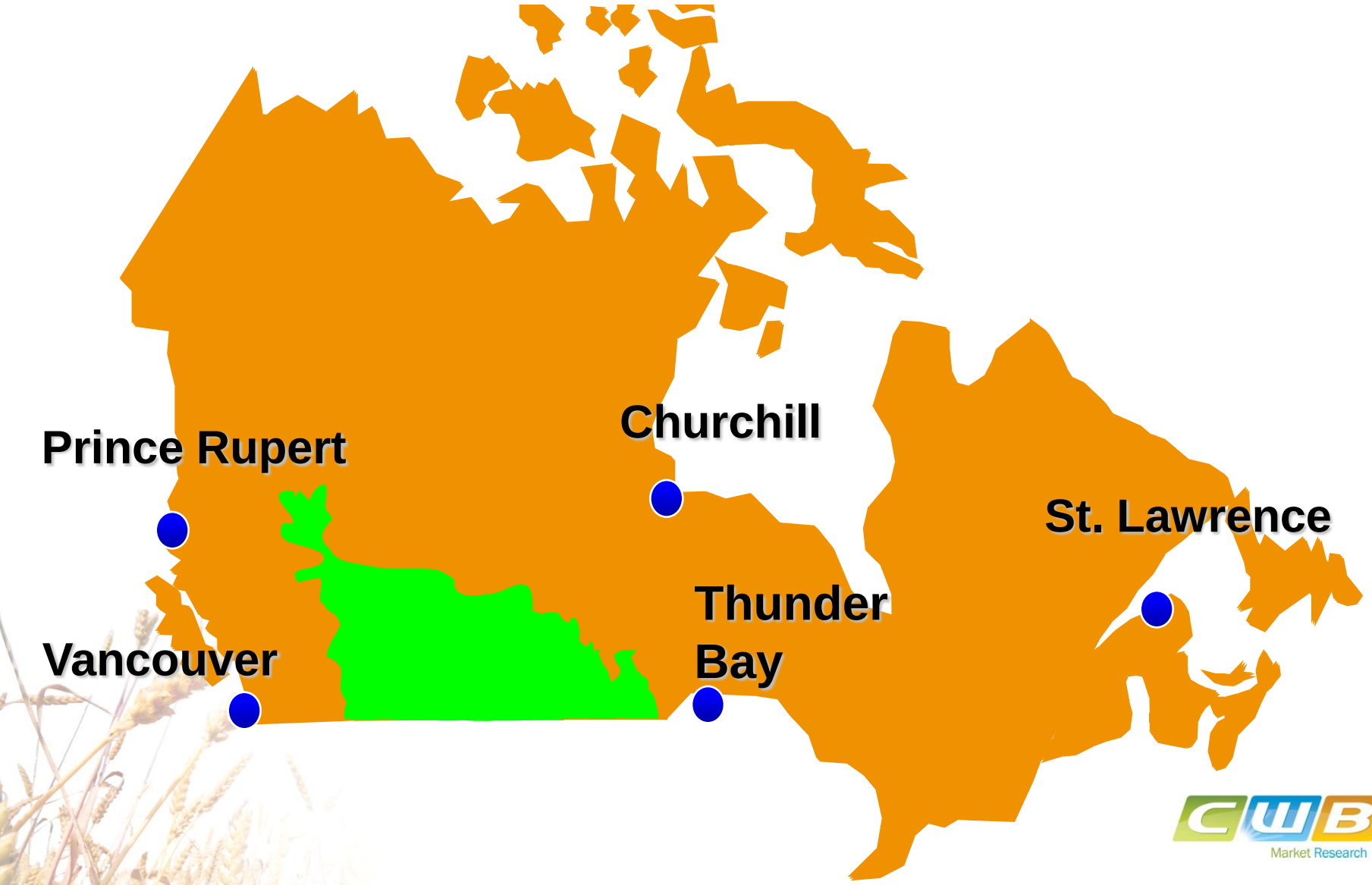
2013 Canadian Situation
November 8, 2013

IAOM Mideast & Africa Conference
Sousse, Tunisia

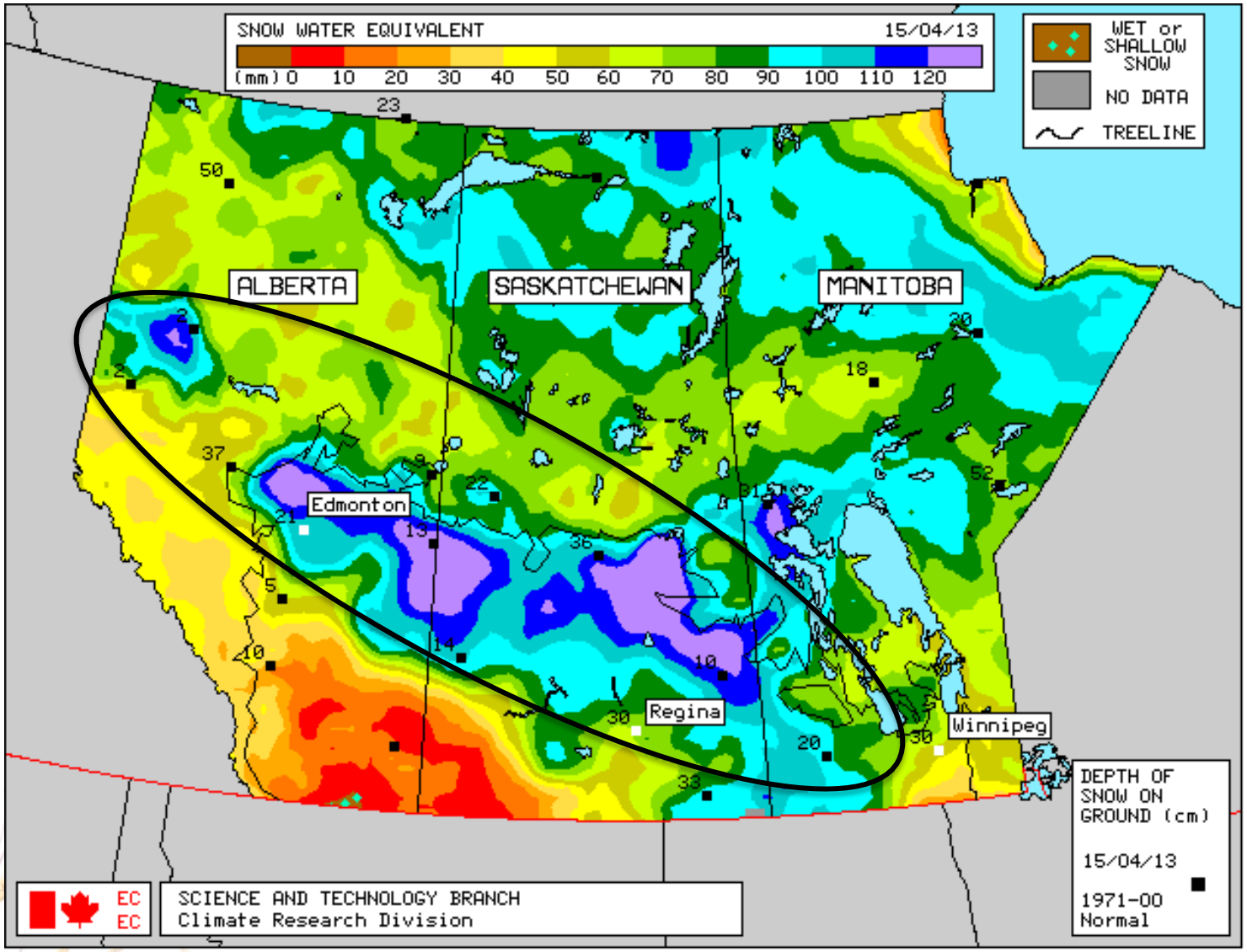
Jean-Benoit Gauthier - CWB

Canada's growing region



Growing Season

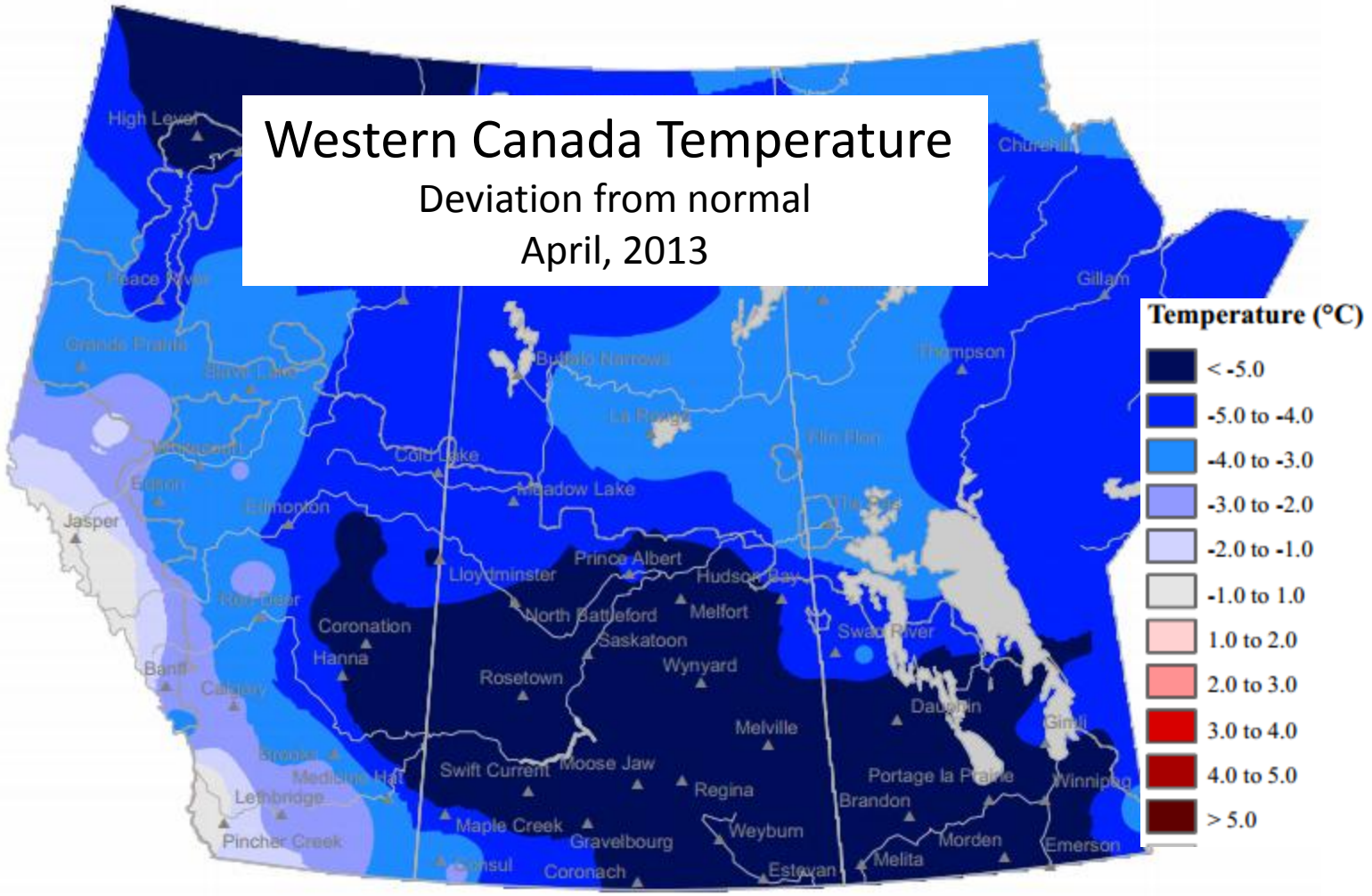
- Cold, long winter resulted in a slow start to planting.
- Minimal planting before the first of May, but dry weather through the month boosted planting progress.
- Heavy rains in the southern areas slowed planting and reduced overall planted area.


SNOW WATER EQUIVALENT
15/04/13
(mm) 0 10 20 30 40 50 60 70 80 90 100 110 120
WET or SHALLOW SNOW
NO DATA
TREELINE
ALBERTA
SASKATCHEWAN
MANITOBA
Edmonton
Regina
Winnipeg
23
50
2
2
37
21
13
9
22
36
5
10
14
30
10
33
31
18
20
52
30
20
EC
EC
SCIENCE AND TECHNOLOGY BRANCH
Climate Research Division
DEPTH OF SNOW ON GROUND (cm)
15/04/13
1971-00 Normal

Western Canada Temperature

Deviation from normal

April, 2013



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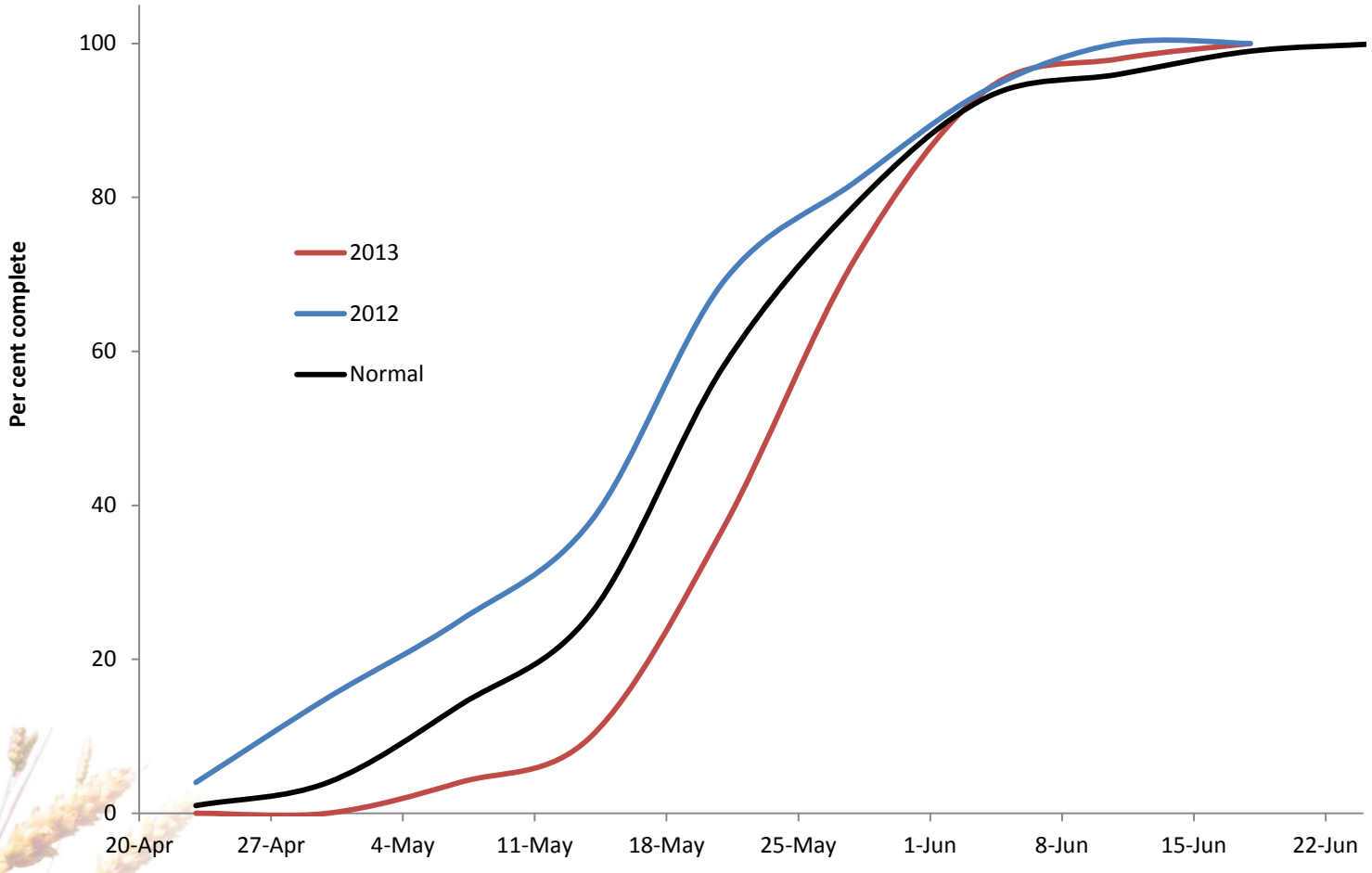
Western Canada Seeding Progress



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Growing Season

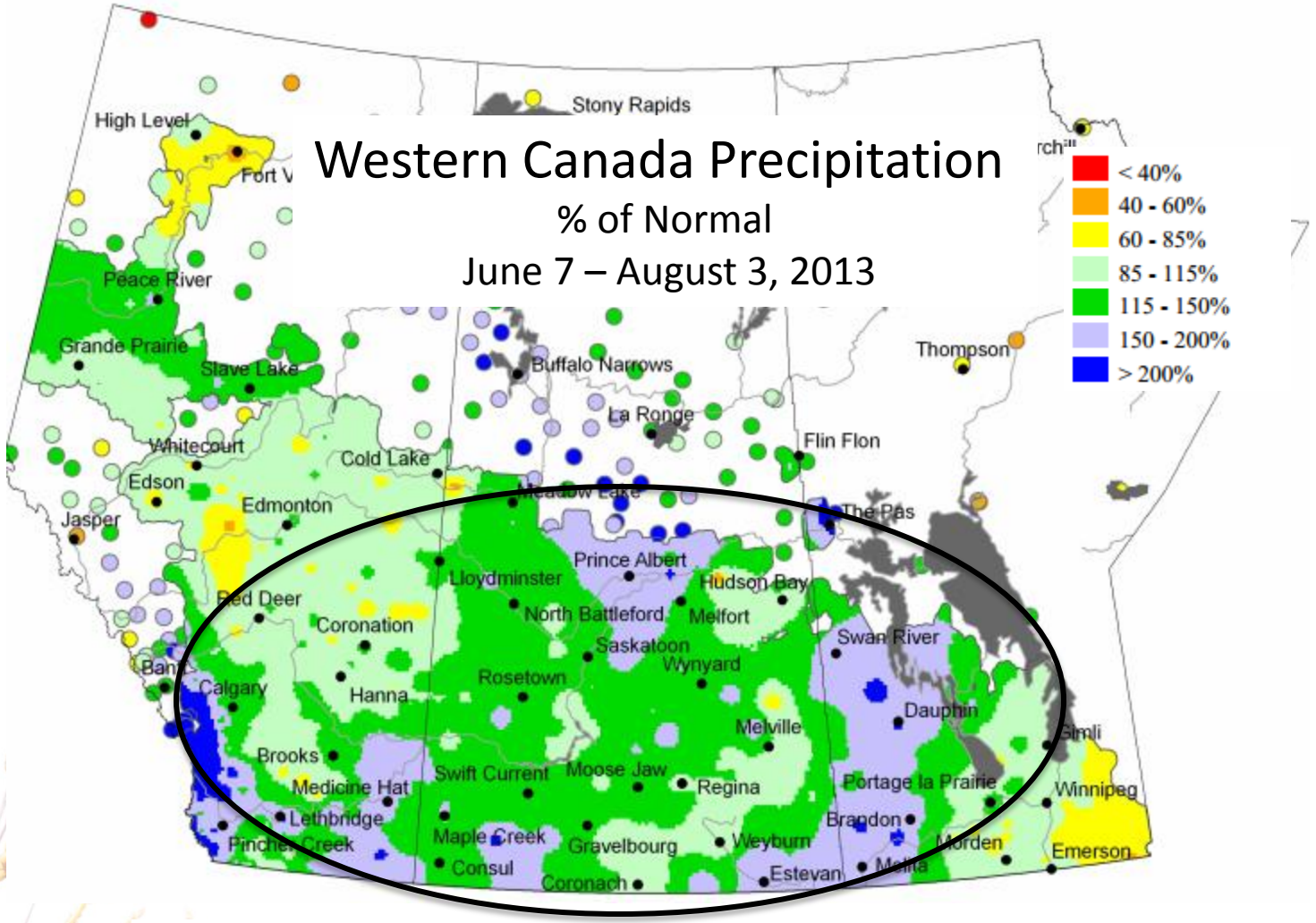
- Rainfall was close to normal during June and July, with temperatures slightly below normal.
- Cooler than normal weather during the reproductive stage (late July and early August) minimized stress on the crop.
- Warm weather in late August and September allowed crops to mature before the first fall frost.

CWB Market Research

Western Canada Precipitation

% of Normal

June 7 – August 3, 2013



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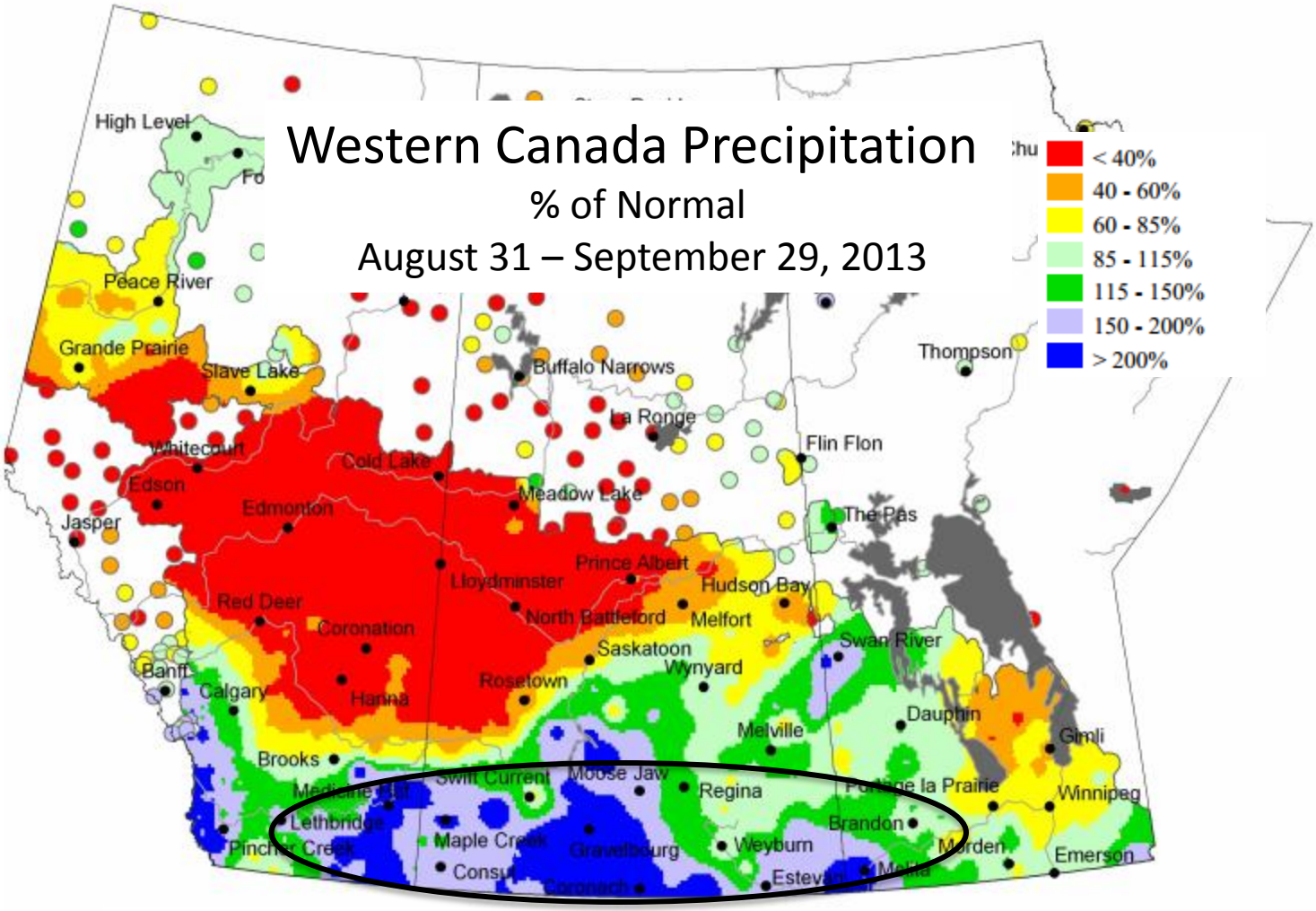
Western Canada Precipitation

% of Normal

August 31 – September 29, 2013



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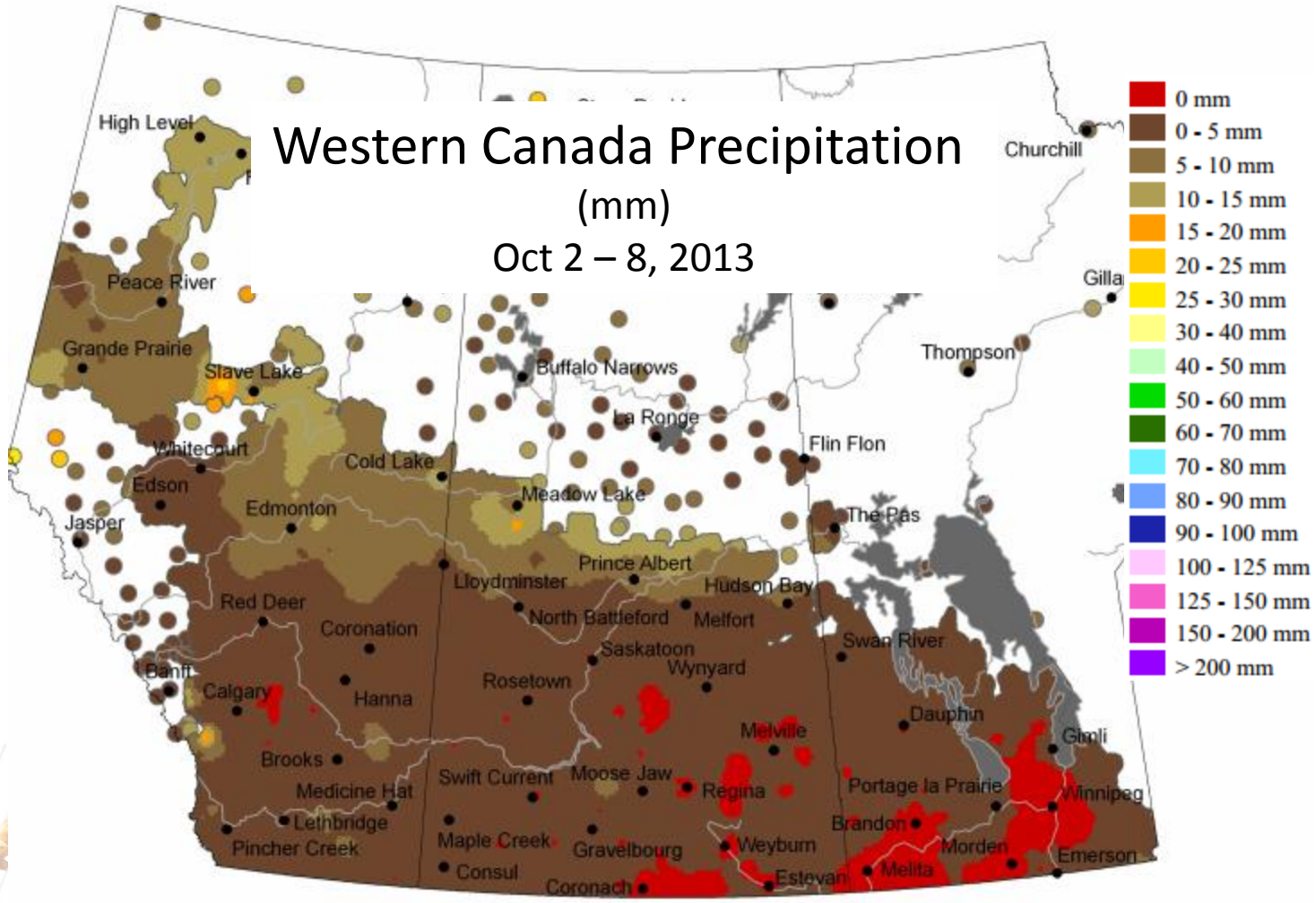
Western Canada Precipitation

(mm)

Oct 2 – 8, 2013



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Growing Season

- Harvest progress, although later than normal, proceeded rapidly in September.
- CWRS quality was boosted by the mostly dry weather experienced in September in central and northern areas.
- CWAD regions (especially eastern growing areas) experienced downgrading due to heavier than normal rainfall in southern areas.

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Western Canada Harvest Progress

15-Oct-13

	MB	SK	AB	W. Can.
Winter Wheat	100	100	100	100
Spring wheat	98	94	99	96
Durum	98	96	100	97
Oats	98	85	96	90
Barley	99	96	98	97
Flax	89	64	76	67
Canola	99	93	96	95
Peas	100	100	100	100
All Crops	99	93	98	95
Last Year	100	100	100	100
Average	100	99	98	99
Last week	97	90	94	92

CWB Market Research

Western Canada Grain Production (million tonnes)

	2008-12 Avg.	Stats. Can. 2011	Stats. Can. 2012	CWB MR 2013	% Change 2013/14	Stats Can Jul	Stats Can Sept
All Wheat	22.42	22.75	24.92	31.39	26.0%	27.96	30.46
Spring Wheat	16.85	17.79	18.38	24.09	31.1%	21.54	23.55
CWRS	14.62	15.79	15.90	20.53	29.1%		
Durum	4.37	4.17	4.59	5.79	26.1%	5.12	5.58
Winter Wheat	1.20	0.79	1.95	1.51	-22.6%	1.30	1.33
Oats	3.15	2.71	2.25	3.01	33.5%	2.66	2.90
Barley	8.94	7.31	7.50	9.28	23.7%	8.43	8.89
Rye	0.22	0.17	0.31	0.21	-32.2%	0.13	0.17
Flax (incl. Solin)	0.66	0.37	0.49	0.67	37.8%	0.61	0.66
Canola	11.63	14.06	13.21	16.81	27.3%	14.66	15.89
Six Major Grains	47.01	47.36	48.68	61.37	26.1%	54.44	58.98
Peas	2.93	2.12	2.82	3.93	39.4%	3.30	3.78
Lentils	1.21	1.53	1.47	1.72	17.0%	1.57	1.71

CWB Market Research

WESTERN CANADA WHEAT QUALITY AND PRODUCTION ESTIMATES

Market Research Estimates For 2013

		#1	#2	#3	#4	#5	CF	Total
CWRS	%	37.0%	32.0%	25.0%	0.0%		6.0%	
	tonnes	7,596,620	6,570,050	5,132,851	0		1,231,884	**20,531,405**
CWAD	%	16.0%	19.0%	32.0%	23.0%	10.0%		
	tonnes	926,265	1,099,939	1,852,529	1,331,505	578,915		**5,789,154**

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Protein Levels (%) from CGC Harvest Survey

		2008	2009	2010	2011	2012	2013
CWRS	**#1**	13.4	13.2	13.2	**13.0**	**13.6**	**12.8**
	#2	13.4	13.2	13.4	**13.2**	**14.1**	**12.8**
	#3	13.7	13.4	13.5	**13.2**	**14.4**	**13.3**
	#4		*14.6	13.4	**12.6**		
	All Grades	13.5	13.2	13.4	**13.1**	**13.9**	**12.9**
CWAD	**#1**	13.5	12.9	13.4	**12.2**	**12.7**	**11.8**
	#2	12.9	12.8	12.7	**12.2**	**12.8**	**11.5**
	#3	13.0	12.8	12.7	**12.5**	**13.6**	**12.1**
	#4	12.2	12.7	12.5	**12.5**		**11.5**
	#5	14.1	13.6	13.0	**13.2**		
	All Grades	13.2	12.8	12.8	**12.3**	**12.9**	**11.8**

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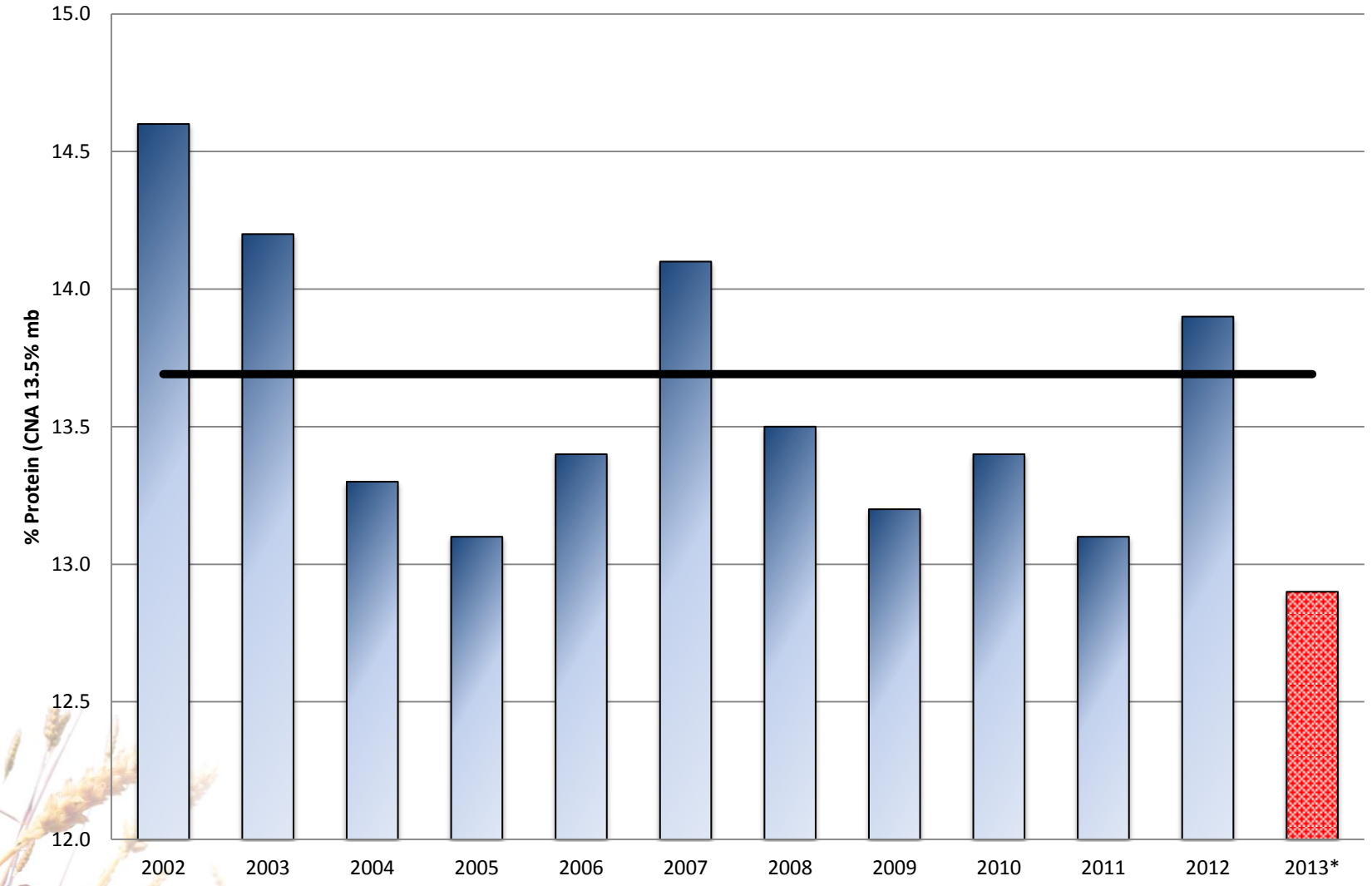
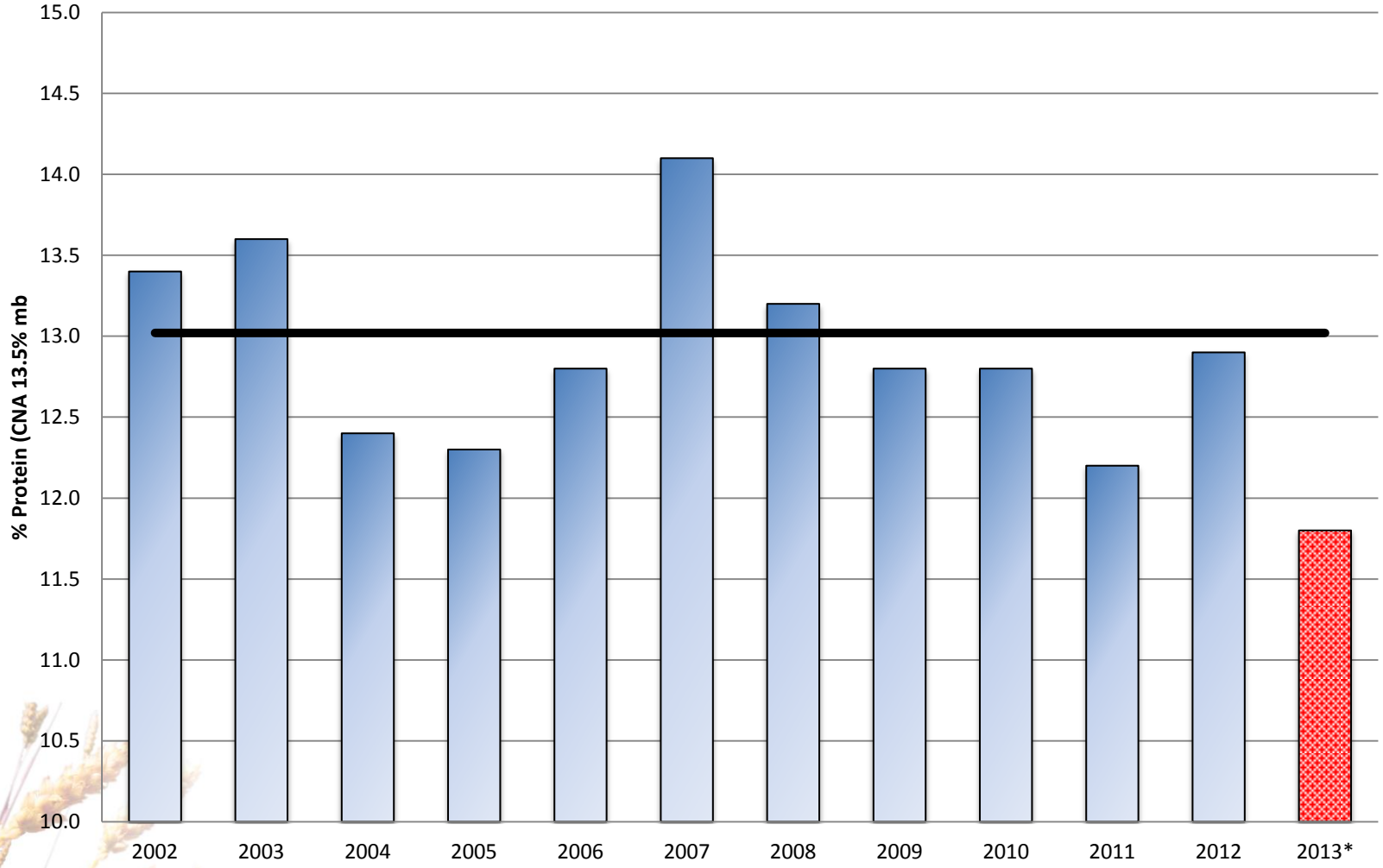
CWRS Protein Content

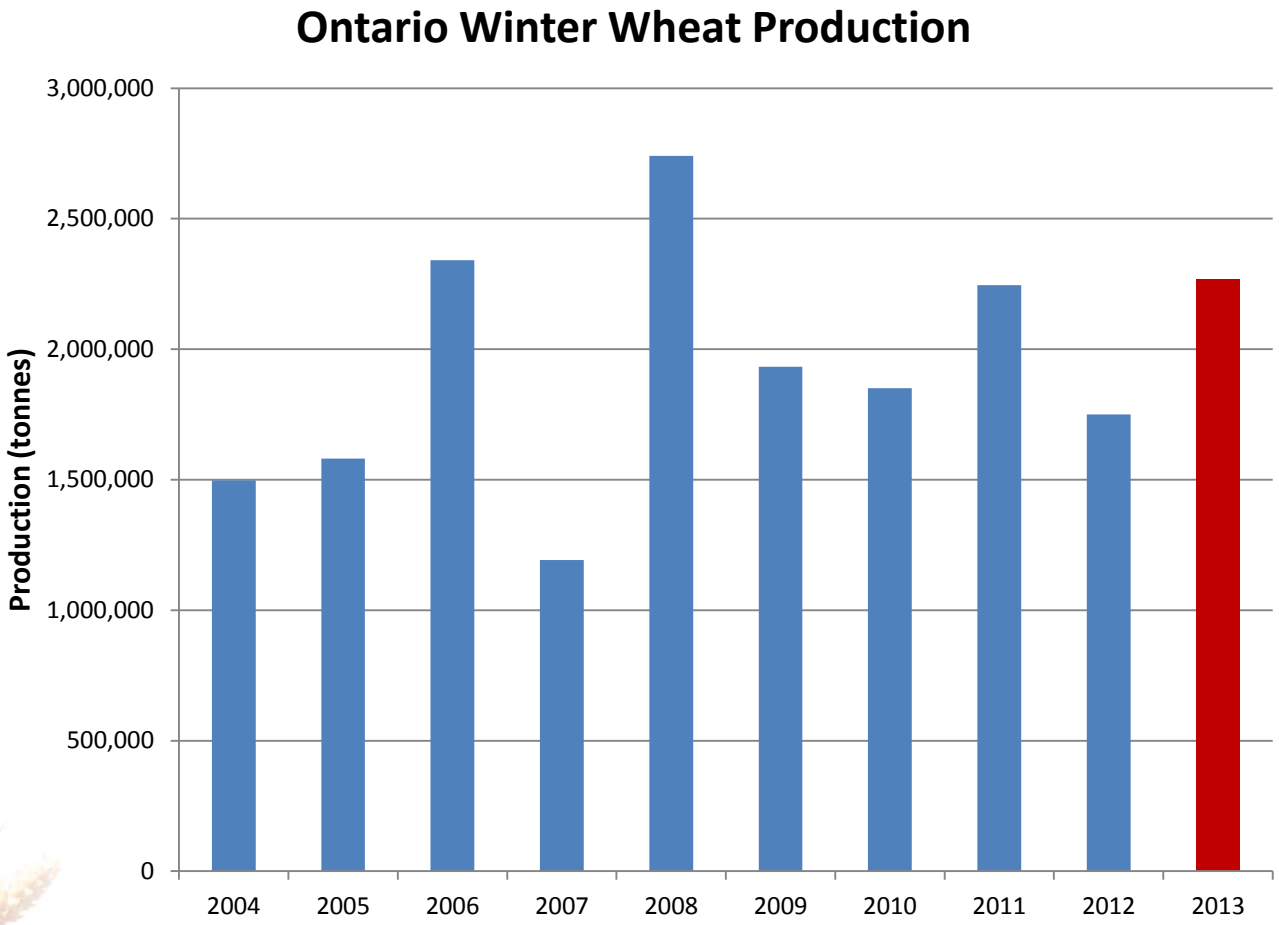


Market Research

CWAD Protein Content



Market Research



Market Research

Canada Wheat Supply and Demand (million tonnes)					
	2011-12	2012-13	δ	2013-14*	δ
Area (mil. ha)	8.54	9.63	*1.09*	9.99	*0.36*
Yield (MT/ha)	2.96	2.83	*-0.13*	3.40	*0.58*
Carry-in	7,359	5,932	*-1,428*	5,057	*-875*
Production	25,288	27,205	*1,917*	33,983	*6,778*
Total Supply	32,726	33,211	*485*	39,105	*5,894*
Domestic Use	9,295	8,715	*-580*	9,575	*860*
(Feed/Residual)	4,585	4,228	*-357*	4,750	*522*
Exports	17,500	19,439	1,939	20,775	1,336
Carry-Out	5,932	5,057	-875	8,755	3,698

δ - denote year over year change

Statistics Canada/CWB*

CWB Market Research

Canada Durum Supply and Demand (thousand tonnes)					
	2011-12	2012-13	δ	2013-14*	δ
Area (mil. ha)	1.62	1.88	*0.26*	1.94	*0.06*
Yield (MT/ha)	2.58	2.46	*-0.11*	2.98	*0.52*
Carry-in	1,566	1,486	*-80*	1,131	*-355*
Production	4,172	4,627	*455*	5,790	*1,163*
Total Supply	5,755	6,129	*374*	6,936	*807*
Domestic Use	686	756	*70*	935	*179*
(Feed/Residual)	279	336	*57*	515	*179*
Exports	3,583	4,242	659	4,400	158
Carry-Out	1,486	1,131	-355	1,601	470

δ - denote year over year change

Statistics Canada/CWB*

CWB Market Research

Thank you

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Market Research