

# Grain Farmers of Ontario



# Three into one

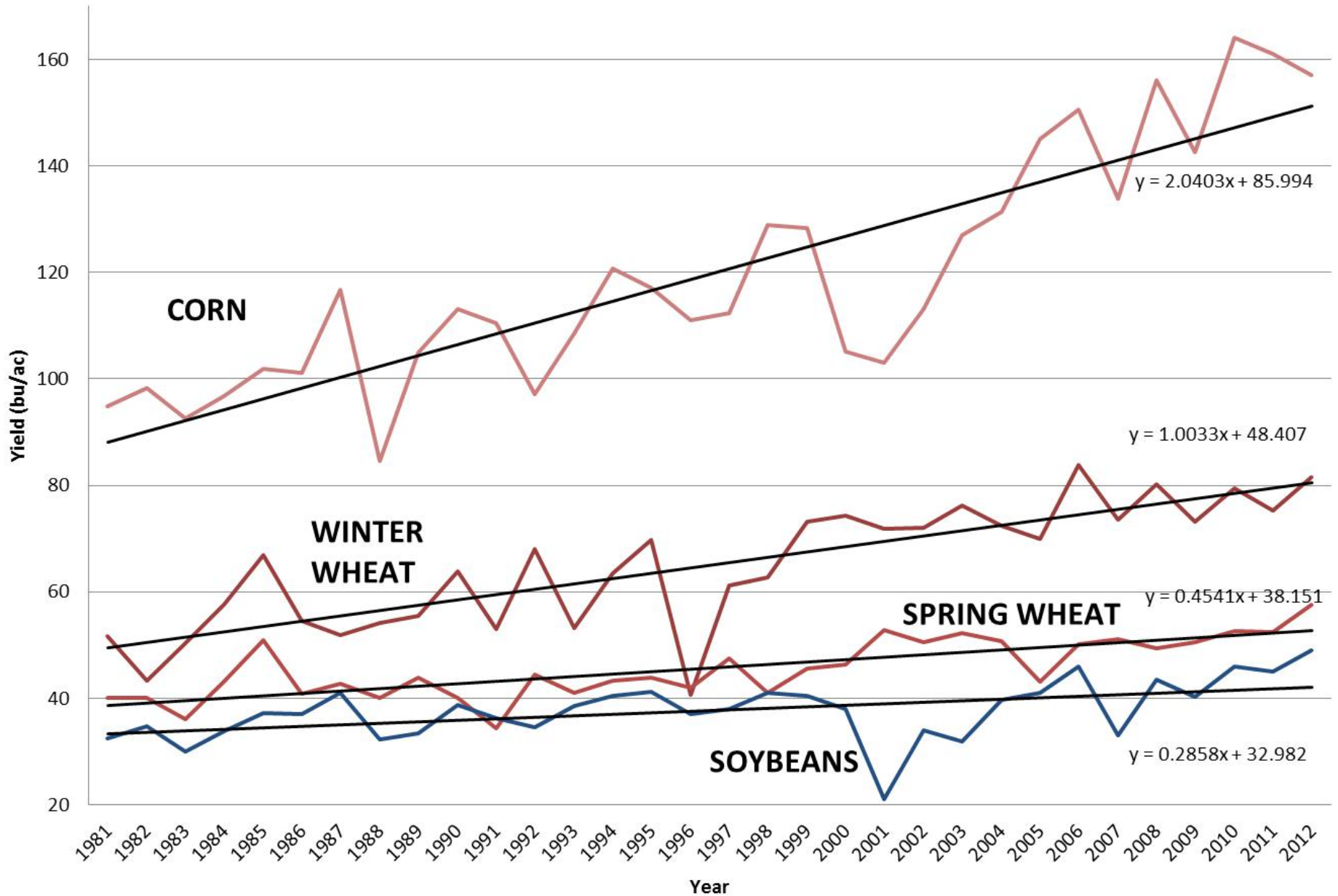


# Economic impact

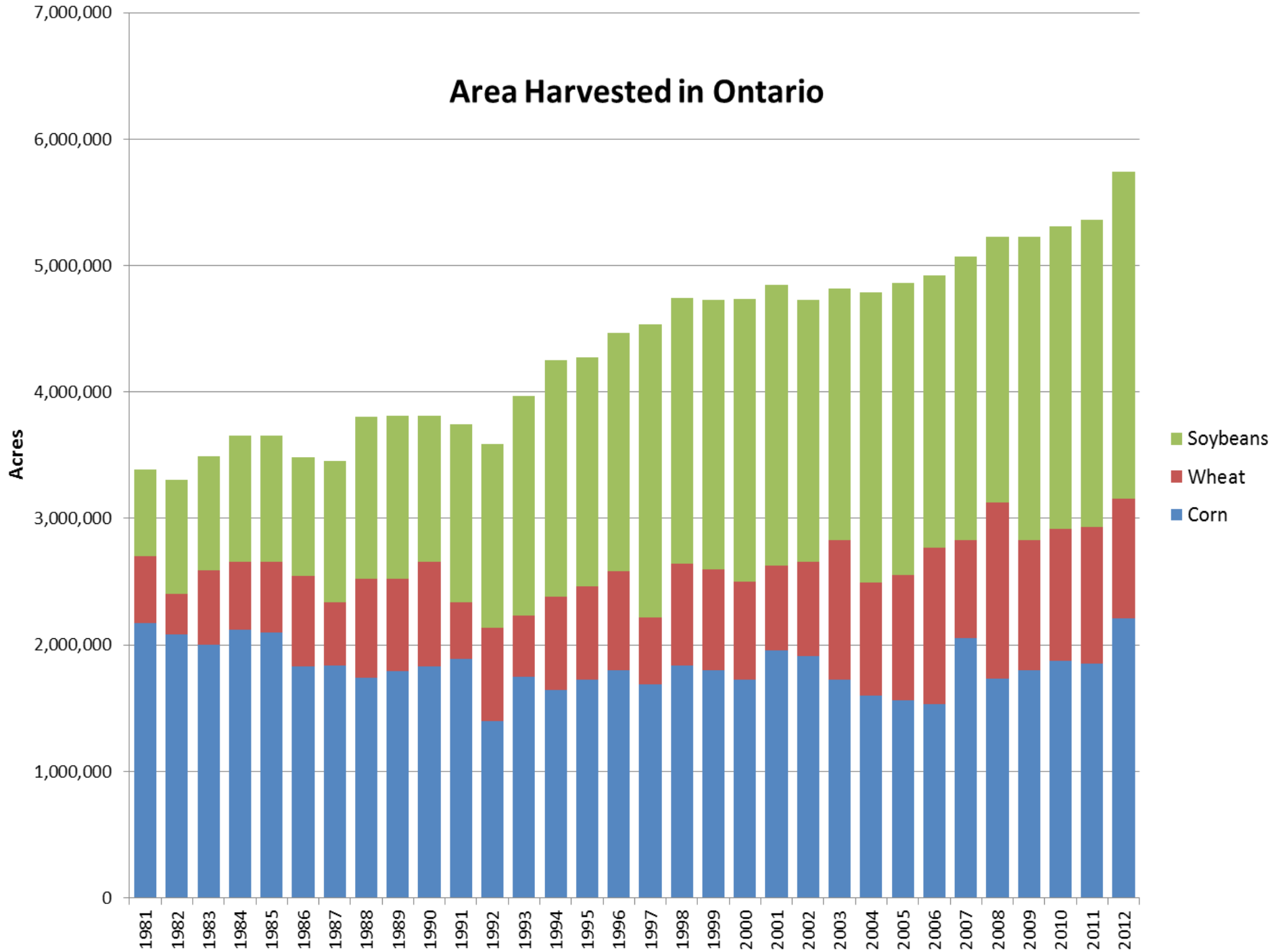
- 28,000 farmers
- 5 million acres of farmland across Ontario
- \$2.5 billion in farm gate receipts
- \$9 billion in economic output
- 40,000 jobs in the province



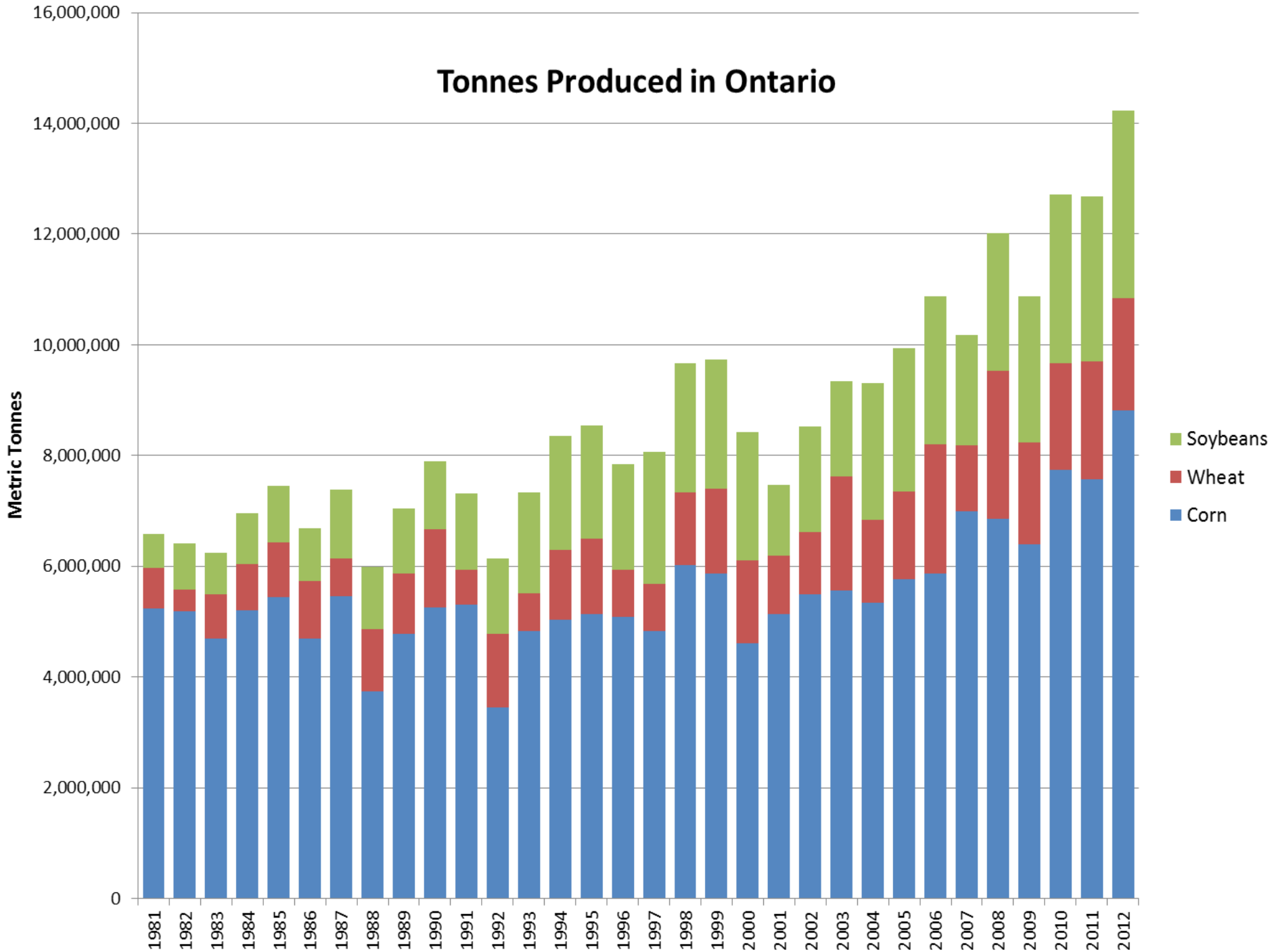
# Ontario Crop Yield Trends 1981 - 2012 (bu/ac)



# Area Harvested in Ontario



# Tonnes Produced in Ontario



# Ontario in the Canadian context

Agriculture Economic Statistics 2008-2010, Statistics Canada

	Average production \$	Average production % of national average
<b>1. Ontario</b>	<b>\$9.63 bil</b>	<b>23.24</b>
2. Saskatchewan	\$8.59 bil	20.73
3. Alberta	\$8.56 bil	20.60



# Ontario grain production in the Canadian context

	2011 grain production by province \$	2011 national total grain production \$	Average grain production % of national average	Arable Land
Alberta				24 million acres
wheat*	\$2,345,730,400	\$5,694,111,000	41%	
canola	\$3,091,226,000	\$8,215,410,000	59%	
barley	\$932,832,000	\$1,589,918,500	38%	
	<b>\$6,369,788,400</b>	<b>\$15,499,439,500</b>		
Saskatchewan				51 million acres
wheat*	\$2,256,698,600	\$5,694,111,000	40%	
canola	\$4,071,194,000	\$8,215,410,000	50%	
barley	\$499,892,500	\$1,589,918,500	31%	
	<b>\$6,827,785,100</b>	<b>\$15,499,439,500</b>		
Ontario				5 million acres
wheat*	\$565,968,000	\$5,694,111,000	10%	
corn	\$1,737,432,000	\$2,565,288,000	68%	
soybeans	\$1,320,092,500	\$1,889,603,500	70%	
	<b>\$3,623,492,500</b>	<b>\$10,149,002,500</b>		

Source: Agriculture and Agri Food Canada

\* Excluding durum





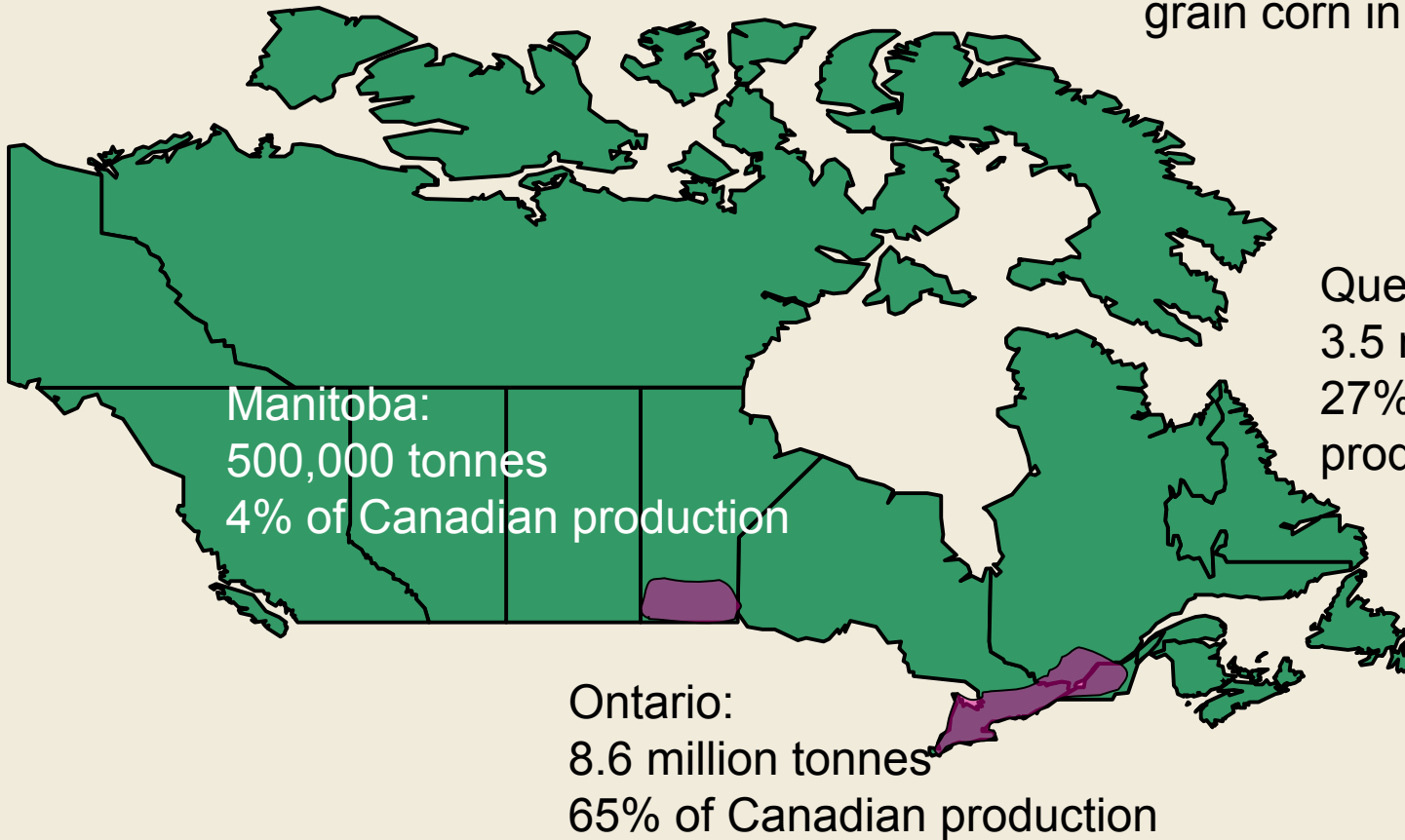
Corn



# Canada's corn production

13.1 million tonnes of grain corn in 2012

Quebec:  
3.5 million tonnes  
27% of Canadian production

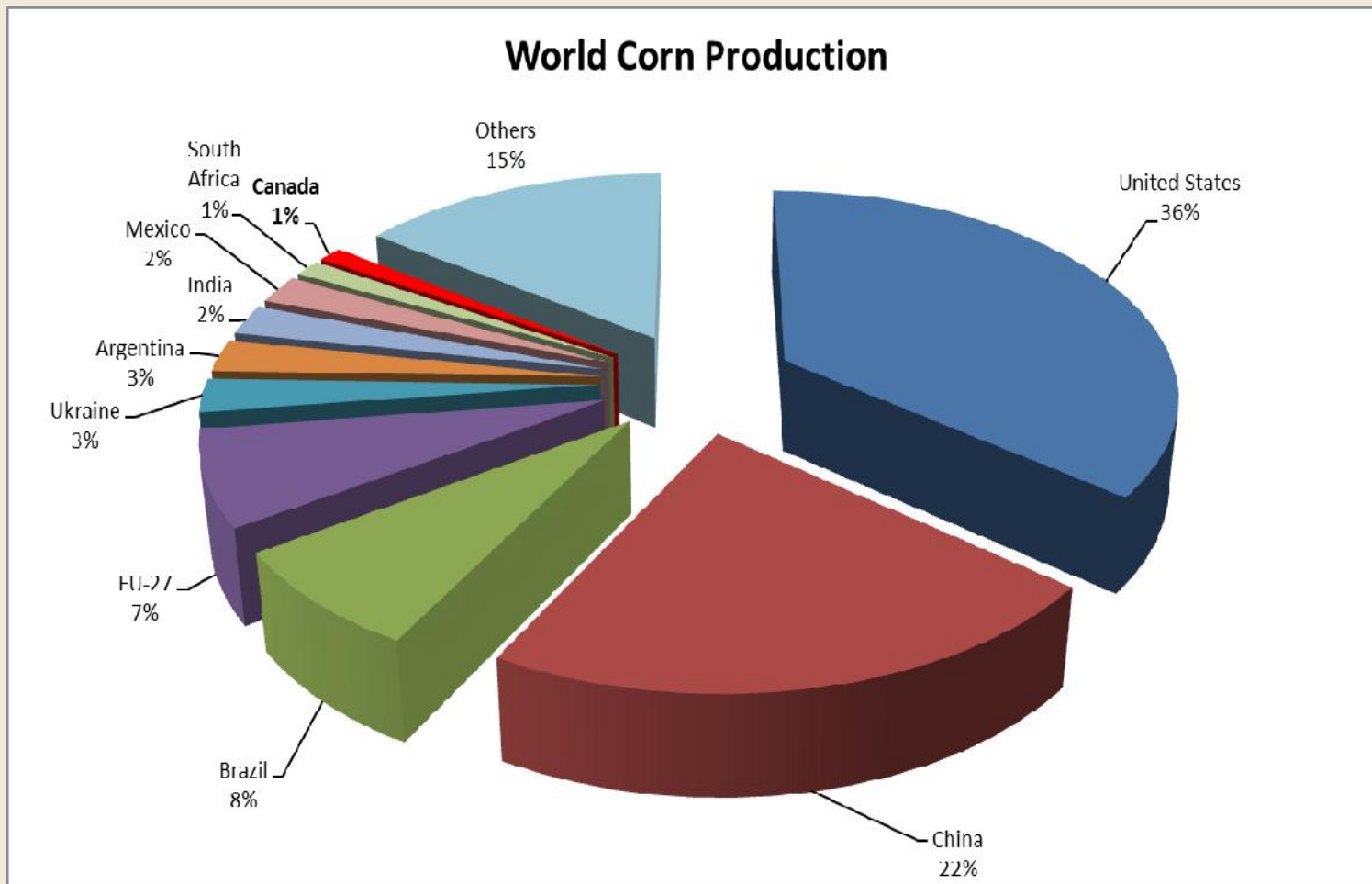


# Ontario corn supply and demand

Planted acres 2012	2,190,000
Yield	(158.5 bu/acre) 9.95 T/ha
Carry in (tonnes)	921,640
Imports	138,100
Production	<u>8,817,187</u>
	<b>9,876,927</b>
Feed	2,960,500
Exports	1,008,000
Other industrial	4,486,000
Seed	<u>150,000</u>
<b>Demand</b>	<b>8,604,500</b>
Carry out (tonnes)	1,272,427



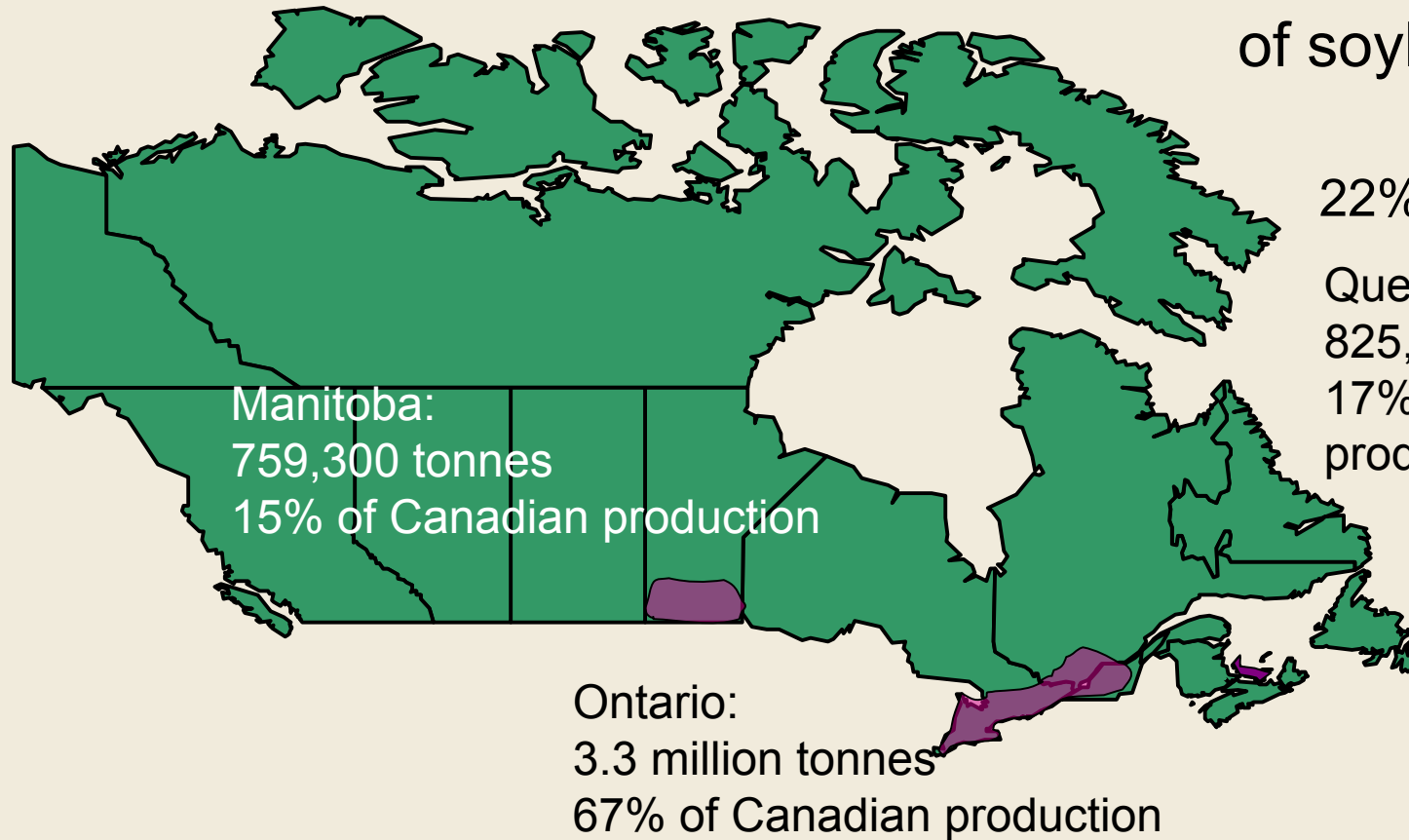
# Canadian corn in a global context (2012)



Soybeans



# Canada's soybean production



4.9 million tonnes  
of soybeans in  
2012

22% non-GM

Quebec:  
825,000  
17% of Canadian  
production

PEI:  
38,100  
1% of  
Canadian  
production

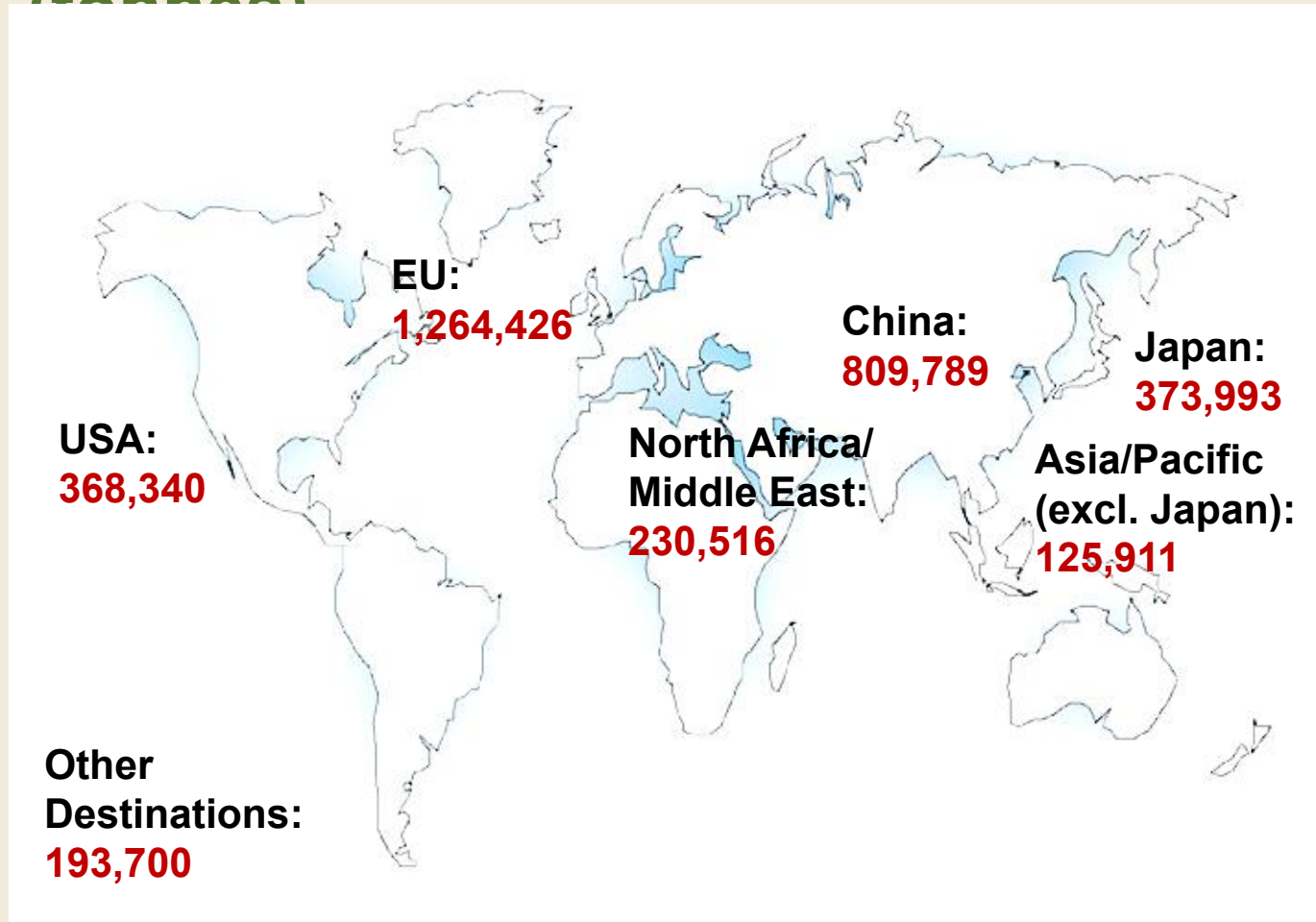


# Ontario soybean supply and demand

Planted acres 2012	2,645,000
Yield	(47.4 bu/acre) 3.19 T/ha
Imports	200,000
Production	<u>3,300,000</u>
	<b>3,500,000</b>
Crush	1,400,000
Exports	1,600,000
Seed	<u>60,000</u>
<b>Demand</b>	<b>3,060,000</b>
Carry out (tonnes)	440,000



# Ontario soybean and oil exports 2012 (tonnes)

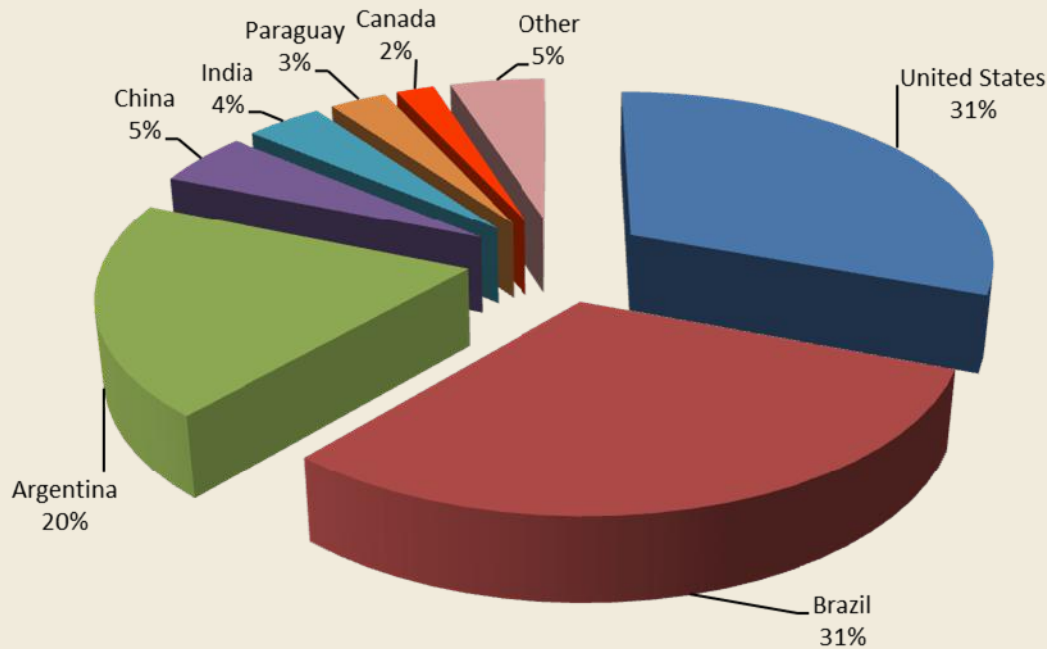


Source: Statistics Canada





# Canadian soybeans in a global context



## 2012 production

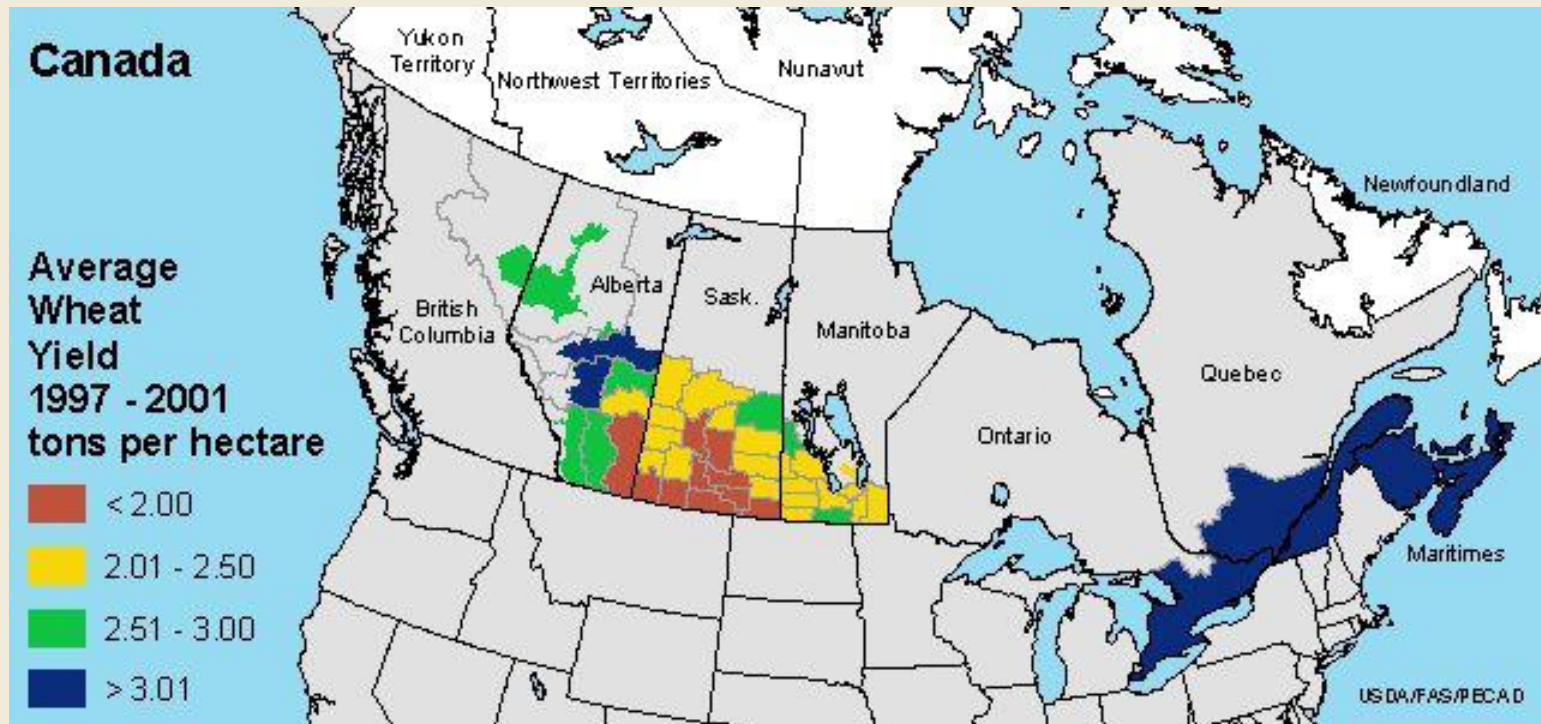
USA	82.5 MMT
Brazil	82.0 MMT
Argentina	54.0 MMT
China	12.6 MMT
India	11.5 MMT
Paraguay	7.7 MMT
<b>Canada</b>	<b>4.9 MMT</b>
Other	14.0 MMT



Wheat



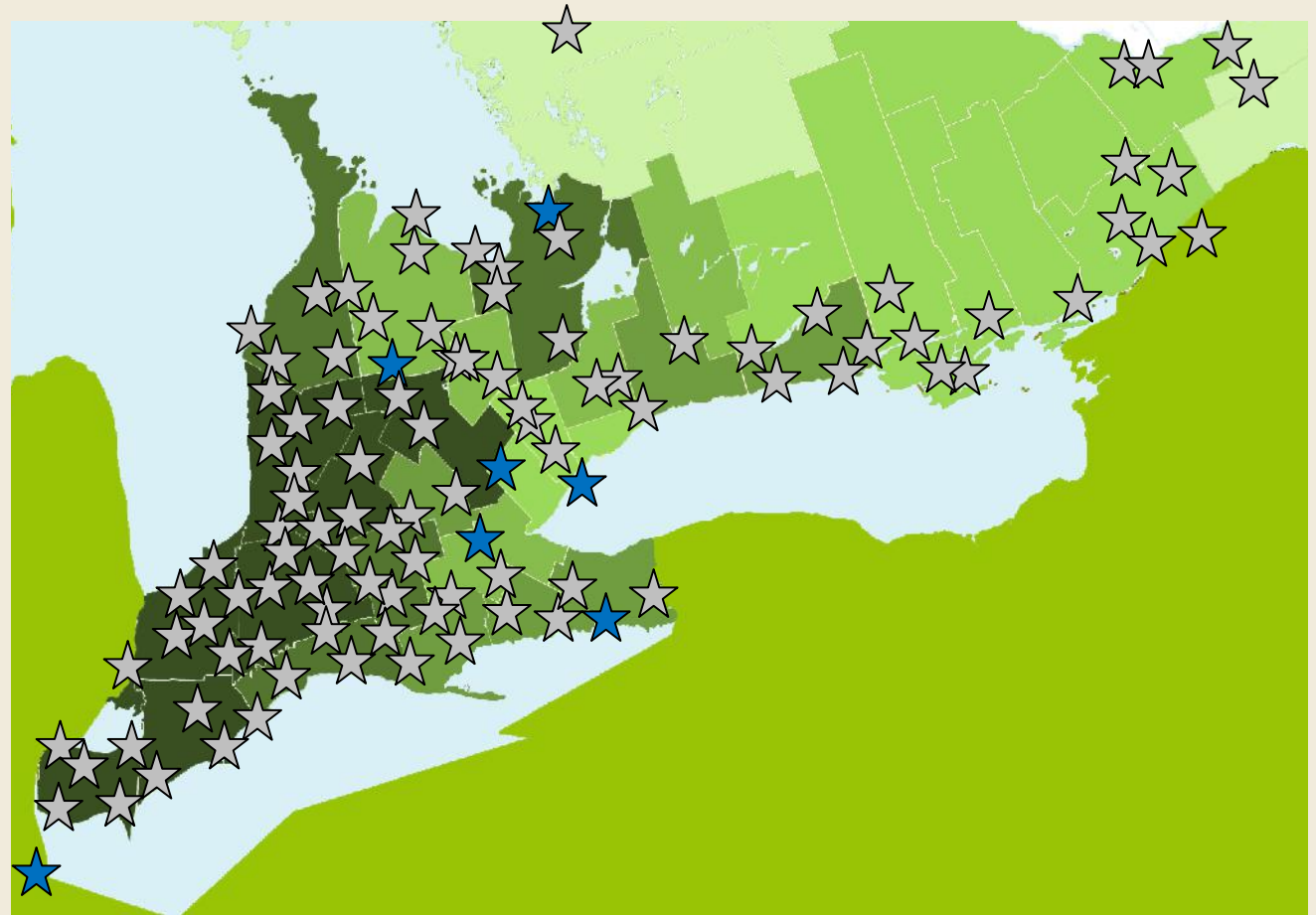
# Canadian wheat production



# Ontario winter wheat is produced within a few hours of 60% of Canada's milling capacity and the largest soft wheat mill in North America in Toledo, OH

440,000 MT  
to local flour mills  
+ 440,000 MT  
to animal feed  
+ 617,500 MT  
overseas export  
+ 262,100 MT  
to nearby US  
= **1,763,600 MT**  
winter wheat in 2011

★ Mills  
☆ Elevators



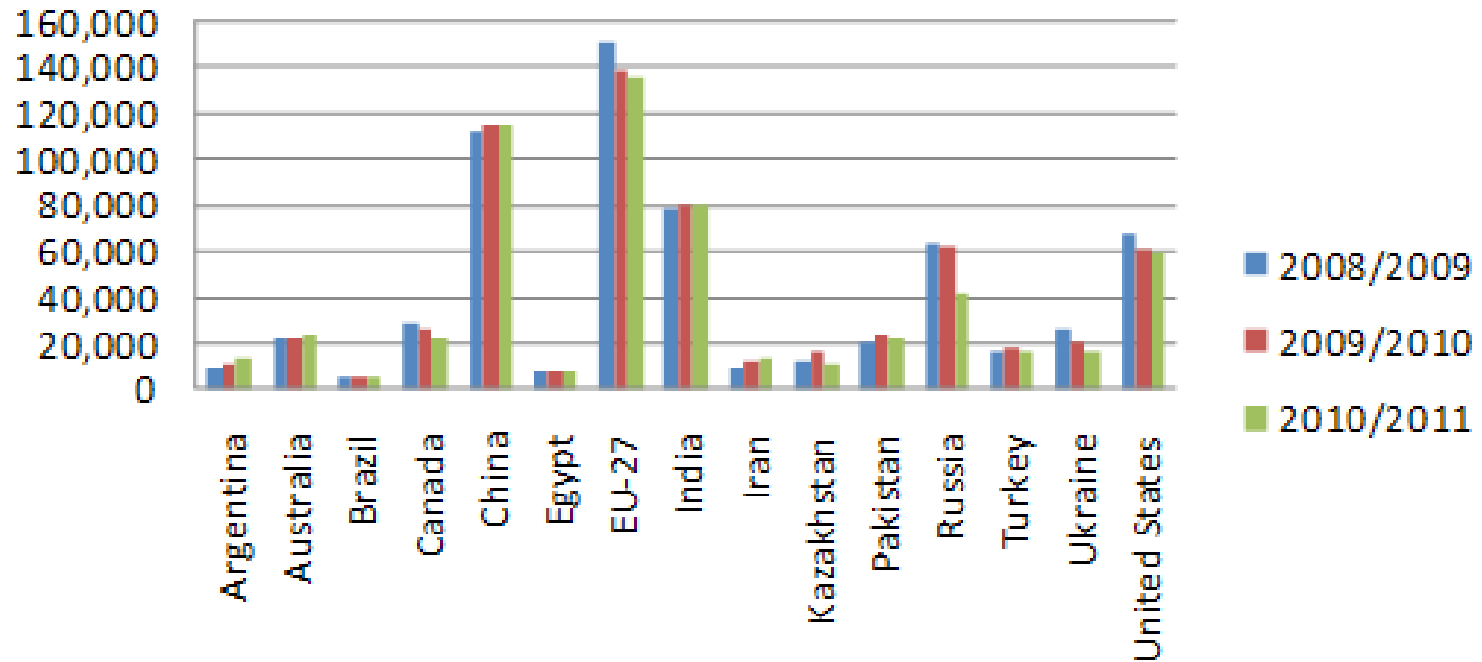
Value: \$501,874,796

Employed: 4,075

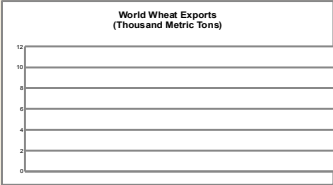


# Canadian wheat production in a global context

## World Wheat Production (Thousand Metric Tons)



# Canadian wheat exports in a global context



# Life after the Canadian Wheat Board

- August 1/2010 Federal Government deregulated the purchase of wheat and barley in Western Canada that had been a monopoly
- Canadian Wheat Board or “CWB” as it is now known is a competitor along with the private grain trade for the purchase of producers wheat and barley
- CWB’s new act allows them to trade in other commodities
- CWB has no grain facilities but has handling agreements with the private trade both in the country locations and at the port
- CWB has both pooling options and forward contracts



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Thank you for your time

