

## 2021 WINTER FORAGE MARKET PRICE DISCOVERY



January 2021

Saskatchewan Forage Council

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# winter forage market price discovery

## SASKATCHEWAN FORAGE COUNCIL

Sincere thanks to everyone who was contacted to share their insight and current perspectives on this valuable industry. Your input, expertise and willingness to share are greatly appreciated!

### 1. Review of Production Season 2020

Hay production yields in 2020 were below the long-term provincial average for the fourth year in a row. Moisture conditions were adequate early on, but following a colder than normal spring, the weather turned hot and dry and rain shortfalls were reported across broad areas of the province. Moisture conditions remain a serious concern across much of the province, as most areas received minimal or below-average rainfall, along with hot temperatures and drying winds throughout the growing season. Dry conditions have continued into the winter, with below-average or minimal snowfall in most areas.

Average provincial hay yields on dry land are reported as 1.2 tons per acre (alfalfa), 1.1 tons per acre (alfalfa/brome and wild hay), 1.0 tons per acre (other tame hay) and 1.9 tons per acre (greenfeed). On irrigated land, the estimated average hay yields are 2.8 tons per acre (alfalfa), 2.3 tons per acre (alfalfa/brome), 2.0 tons per acre (wild hay) and 4.2 tons per acre (greenfeed). Most of the hay going into winter is rated as fair to good in quality. Table 1. illustrates Saskatchewan's dryland yield estimates for the 2020 growing season.

**Table 1. 2020 Saskatchewan Dryland Hay Yield Estimates (tons/acre)**

Region	Date	Estimated 2020 Hay Yield (short tons/acre)			
		Alfalfa	Alfalfa/Grass	Other Tame Hay	Greenfeed
<b>Southeast</b>	Aug 12	1.1	1.2	0.86	1.7
<b>Southwest</b>	Aug 12	0.93	.86	0.99	1.6
<b>East Central</b>	Aug 12	1.1	1.1	0.8	1.8
<b>West Central</b>	Aug 12	1.2	1.2	0.84	1.9
<b>Northeastern</b>	Aug 12	2.2	1.9	1.5	3.2
<b>Northwestern</b>	Aug 12	1.6	1.5	1.6	2.1
<b>Provincial AVERAGE</b>	<b>Aug 15</b>	<b>1.35</b>	<b>.97</b>	<b>0.82</b>	<b>1.5</b>

**Source:** Saskatchewan Ministry of Agriculture, August, 2020<sup>1</sup>.

During summer and fall reporting, most producers indicated that they would have adequate supplies of hay, straw, greenfeed and feed grain heading into winter. However, producers in drier areas in the southern and central regions reported concern about adequate winter feed supplies, and shortages were anticipated. Due to the dry conditions this year, dugout, slough and well levels have been low and there are serious concerns with livestock water supplies. As winter progresses, mild temperatures and below average snowfall across much of the province has allowed for extended grazing on corn, swaths and crop aftermath, easing the pressure on feed stores.

While overall feed quality is not superior, due to lack of moisture in many areas and excess moisture in some others regions, the majority of tests are reported as general book value. Lesser protein is being reported in many cases, but is being managed successfully. There have been some scattered reports of higher nitrates in annuals.

Producers continue to implement management strategies including baling intentional greenfeed, feeding straw and grain and silaging and salvaging grain crops. They continue to purchase some forages, which traded steadily and in reasonable volume from early August through September. It is estimated that that 50 per cent to 90 per cent of livestock operations (regionally-dependent) are using some form of annual forage for winter feed.

Forage listings were fairly strong through mid-November. However, trade was light with listings staying unsold from 1-3 weeks. Trades of forages continued to slow thereafter and December and January saw forage listings staying on the market for much longer than they had in the fall; some for more than four weeks. Reasonably-priced perennial forages did see some movement through October/November, but sales have dwindled significantly. There continues to be some demand for straw, and it's selling where available, and where transportation is affordable to the buyer.

Alberta saw above-average rainfall in many areas, hampering both grain and forage production. Feed stocks are considered to be adequate in dry areas and good to excess elsewhere. Forage prices fell from summer to late fall, as salvage from hail or drought areas allowed for forage needs to be met in other ways. Feed supplies across the province are estimated to be adequate to excess, but this projection will depend on early spring rains to positively impact early growth and allow early turn-outs.

Manitoba livestock feed supplies were a challenge, after three consecutively dry summers across much of the agriculture acres in the province. With forage yields reported at 33 to 66 per cent of normal, cattle producers are using alternative feed sources, including baling of non-conventional crop residue and an increase in greenfeed silage.

As is the case across a widening area of North America, moisture conditions in Saskatchewan remain a serious concern, minimal or below average rainfall across much of the province this year, along with hot temperatures and drying winds throughout the growing season. Parts of the southern and central regions reported short, or very short, topsoil moisture conditions for most of the year. Significant precipitation is needed over-winter to replenish moisture levels in soil, on hay land and pastures and dugouts. Provincially, hay and pasture land topsoil is rated at 19 percent adequate, 37 per cent short and 44 per cent very short (as at October 19, 2020).

**Figure 1. Comparison of North American Drought Conditions; June 30 and November 30, 2020.**  
 (Source: North American Drought Monitor, 2020)

# North American Drought Monitor

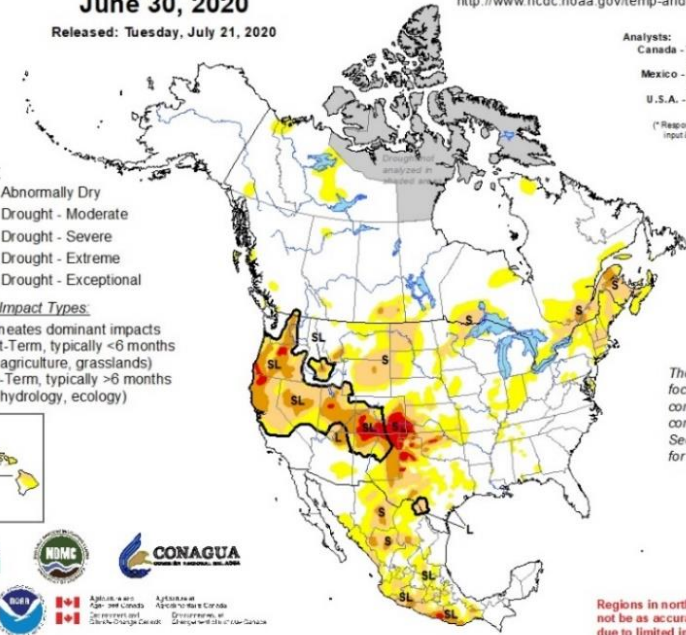
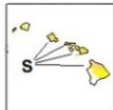
June 30, 2020

<http://www.ncdc.noaa.gov/temp-and-precip/drought/nadm>

Released: Tuesday, July 21, 2020

- Intensity**
- D0 Abnormally Dry
  - D1 Drought - Moderate
  - D2 Drought - Severe
  - D3 Drought - Extreme
  - D4 Drought - Exceptional

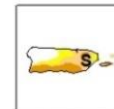
- Drought Impact Types**
- ~ Delineates dominant impacts
  - S = Short-Term, typically <6 months (e.g. agriculture, grasslands)
  - L = Long-Term, typically >6 months (e.g. hydrology, ecology)



Analysts:  
 Canada - Trevor Hadwen  
 Alyssa Klein\*  
 Mexico - Reynaldo Pascual  
 Minerva Lopez  
 U.S.A. - Adam Hartman

(\* Responsible for collecting analysts' input & assembling the NA-DM map)

The Drought Monitor focuses on broad-scale conditions. Local conditions may vary. See accompanying text for a general summary.



Regions in northern Canada may not be as accurate as other regions due to limited information.

# North American Drought Monitor

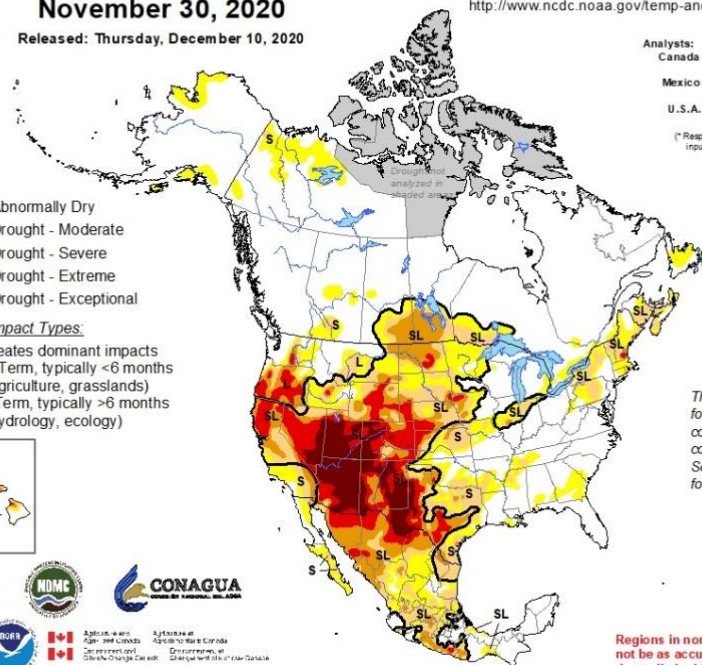
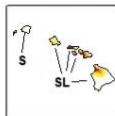
November 30, 2020

<http://www.ncdc.noaa.gov/temp-and-precip/drought/nadm>

Released: Thursday, December 10, 2020

- Intensity**
- D0 Abnormally Dry
  - D1 Drought - Moderate
  - D2 Drought - Severe
  - D3 Drought - Extreme
  - D4 Drought - Exceptional

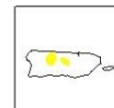
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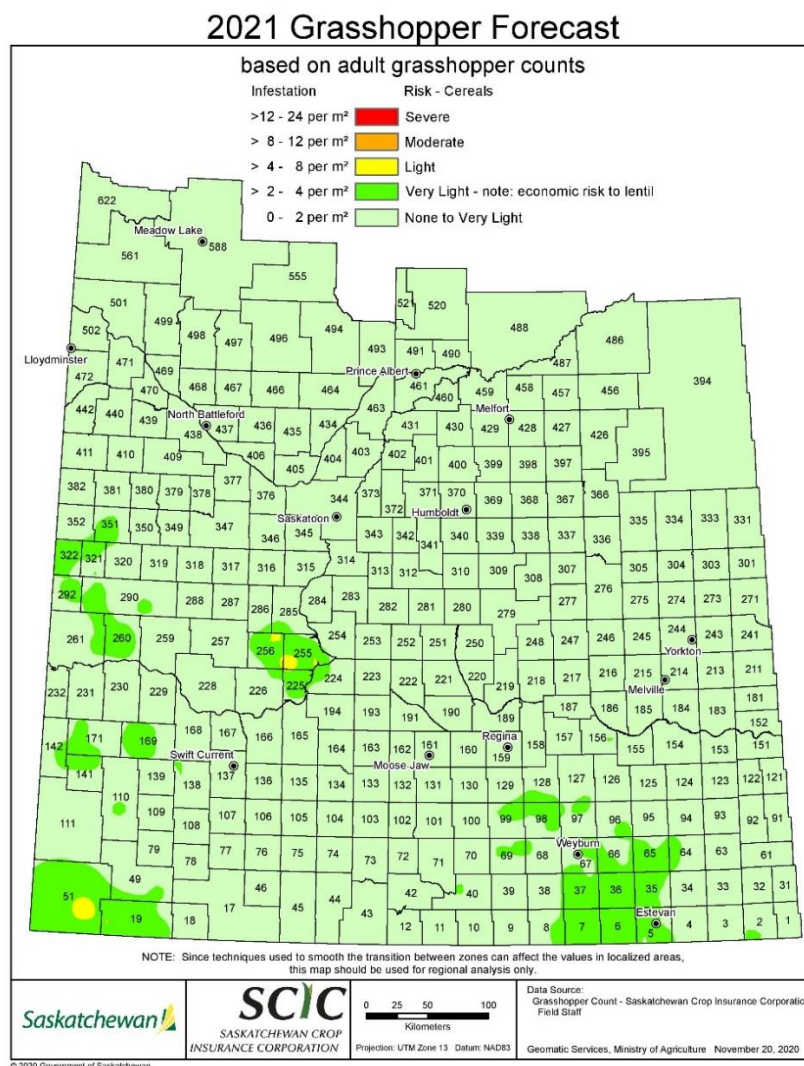


## 2. Field Pest Impact and Projections for 2021 Growing Season

The 2021 provincial grasshopper forecast survey was completed on 1,170 sites throughout the province in August 2020. Relatively light populations were seen throughout the province with some exceptions. Heavy populations (15 m<sup>2</sup>) were detected near Birsay; populations greater than 10 m<sup>2</sup> were detected near Birsay and Dinsmore. Moderate counts (5-10 m<sup>2</sup>) were found in the southwest (RM 141, RM 19, RM 169, RM 51), southeast (RM 7, RM 98, RM 37), west-central (RM 290, RM 351, RM 321, RM 256) and central (RM 225) regions. Highly localized heavy populations may not always be apparent on the map due to the smoothing function used to produce it. Two-striped grasshoppers were indicated as dominant in many regions where species identification occurred. However, clearwing grasshopper numbers were very high in pasture (40 m<sup>2</sup>) in the RM of Laurier in the southeast in late-July. This population was also affecting nearby cereal crops. This grasshopper population and others in the province were experiencing an outbreak of the fungus, *Entomophthora grylli*, which was dramatically reducing grasshopper numbers by infecting and killing them.

**Figure 2. 2021 Saskatchewan Grasshopper Forecast**

(Source: Saskatchewan Ministry of Agriculture, 2020<sup>2</sup>)



The survey and forecast map are intended to provide general information on risk levels. The actual severity of grasshopper infestations may differ from the 2021 forecast map, depending on weather conditions in the spring. Hot and dry conditions favour growth and development of several grasshopper species.

### **3. Regional Forage Conditions in Saskatchewan**

Year-over-year there was a sharp contrast between late production-season conditions. Harvest of grain crops in 2019 was hampered by rainfall and in some areas, early snow, resulting in an abundance of feed-quality grain; some of it harvested in spring of 2020. The dry conditions of the 2020 growing season prompted an early harvest of dry, good quality product across most of the province. Economically-priced feed grains have been much harder to find, with prices continuing to rise.

At January 13<sup>th</sup>, there is very light snow cover across much of the southern part of the province, allowing crop residue and corn grazing to continue in many areas. It's important to note that corn across much of the province was damaged by early September frost, inhibiting cob development and reducing tonnage. Indications from regional specialists are that the main forage purchases for the year were made early; prices are settled and trade is currently slow. In spring planning discussions (which are reported as infrequent, to date) producers are not indicating a major shift to produce more perennial forages (seeding). Planned greenfeed, along with increased use of silage and corn grazing is the direction producers continue to indicate going, however, rising grain prices may have an impact on the amount of greenfeed. Prices of \$13 to 15/bushel for canola, \$9/bushel for durum wheat and .38/lb for green lentils may not make greenfeed an economical proposition. Pasture conditions are of grave concern in the areas already noted as being very short of moisture.

Regional Observations:

#### ***a) South-West and South-Central Regions***

The southern regions experienced another very dry year, with topsoil moisture on hay and pastures reported at concerning low levels. There was some early snowfall, much heavier in the south-west, but mild temperatures and snow melt allowed for a long fall and early-winter grazing period in some areas.

On hayland and pasture, topsoil moisture is rated as 15 per cent adequate, 38 per cent short and 47 per cent very short at October 19, 2020. Early snow impeded corn, stubble and crop residue grazing in some areas, but mild temperatures and melting opened that up again in other areas.

Most of the region's producers reported being well prepared for another year of low hay production, with greenfeed, straw and silage strategies. Strong greenfeed, straw and silage usage will be complimented by the addition of hay closer to calving. Grain and pellets are being added to rations, in many cases. An early, dry grain harvest resulted in less feed quality grain and much higher prices for commodities like barley. Forage quality is reported as fair to good, with few nitrate issues. Forage that is trading is generally hay purchased in smaller lots from within the region.

Regional Specialists indicate 2020 culling rates closer to normal levels. The continued success of silage and greenfeed programs in the south-central and south-west regions is expected to result in more silage being seeded, along with a reliance on greenfeed. Pasture health and a lack of carry-over continues to be a concern that will be seen into the spring. Poor pastures may be a major influence on the cut forage sector for the region through spring and into fall 2021, resulting in cows turned out into hay fields, thus increasing forage demand from annuals or from off farm.

***b) South-East Region***

Spring moisture conditions were favourable in the south-east. Harvest of forages and grain proceeded on schedule and with fewer issues than in 2019. Conditions are now dry across much of the south-east, with hayland and pasture topsoil moisture ranked as short to very short.

Producers in this region are reporting generally adequate forage and feed grain supplies, with a continued high dependence on greenfeed. Drier conditions have resulted in some concern about nitrates, but forage users are blending off this feed accordingly, with straw, silage and hay all being utilized. Silage and greenfeed utilization is expected to continue, as producers plan for the next growing season

Hayland and pasture topsoil moisture was rated as six per cent adequate, 48 per cent short and 44 per cent very short, at October 19th. Snow cover is currently below normal. Cattle have continued to forage late where crop residue is available.

***d) North-East Region***

Dry conditions have been reported in this region, with concern about hayland and pasture health going into 2021. Most annual greenfeed and silage, with the exception of corn, was put up in advance of frost so nitrates have not been a serious issue. Frost damage to corn crops resulted in reduced tonnage. There was some concern reported about nitrates in fall grazing.

Topsoil moisture on hayland and pasture is rated as one per cent surplus, 52 per cent adequate, 37 per cent short and 10 per cent very short.

This region continues to utilize a mixture of greenfeed, hay, straw, pellets and grain, and silage has become standard over the past few years. Straw and greenfeed ration bases have become most common. This is anticipated to continue into the future as more producers are investigating silage production and continue to graze corn in larger numbers. Producers have bought forages and will continue to trade for fair-priced product. It's estimated that one-third of producers in this region purchase at least some feed each year. Regional Specialists report a growing number of inquiries about forage mixes; mostly annuals.

Unlike last year, producers in this area are concerned about forage supplies and spring pasture conditions going into spring 2021. At time of writing, lack of snowfall and warmer temperatures were allowing an extended period of grazing on corn and crop residue.

***e) East-Central Region***

As in other regions of the province, drier conditions resulted in a much easier, and earlier, harvest of forages and grain this year. Concerns about adequate moisture exist in south and south-eastern portions of the region, but moisture is considered adequate to good in areas farther north.

At October 19th, hayland and pasture topsoil moisture was rated as six per cent adequate, 32 per cent short and 62 per cent very short.

Forage stocks are reported to range from adequate to light, and in the event of a late spring turn-out, on-farm supplies could be short in some areas. Cull numbers appear to be on par with long-term averages, but that could change as feed stocks tighten. Greenfeed is well-utilized, usually mixed with hay, pellets and grain. There are reports of low protein, which will affect feed strategies. Plans reported for 2021



include increased planting of annuals for baling, silage, or bale silage. Strengthening grain prices could be a factor in plans for greenfeed; making it a less economically viable option.

***f) West-Central/ Central Region***

This region is experiencing a fourth year of dry conditions, resulting in sub-par forage conditions. Hayland and pasture topsoil moisture conditions are rated as 24 per cent adequate, 56 per cent short and 20 per cent very short. Snow cover has been light across much of the region, allowing stubble and corn grazing into January. The need for spring runoff to recharge water supplies has reached a critical level.

There was heavy culling in this region over several dry years, which seemed to level off in 2020. Many producers report adequate forage, provided spring turn-out dates are earlier, rather than later. Moving into spring, pastures are in very poor condition, which may be the greatest challenge for this region, going forward. Increasing dependence on corn for grazing and silage continues to be the good news story for many producers. Feed quality is not high, in general, with lower total digestible nutrients (TDN) reported in hay, and high crude protein (CP) in greenfeed. Inquiries about seeding perennial forages remain focused on improvement of existing stands that have suffered over several years of drought.

***g) North-West and North-Central Regions***

For much of the season, rainfall maintained adequate or surplus amounts of moisture. Some areas of the north-west had above-average rainfall, resulting in some flooding and drowned-out low spots early in the season. Conditions became drier as the production season progressed and snowfall across much of the north-west is, so far, below average. As of the final crop report (October 19, 2020), hay and pasture land topsoil moisture was rated at 50 per cent adequate, 37 per cent short and 13 per cent very short.

While producers are using hay, greenfeed, silage, canola forage, straw, pellets, alternatives and grain, greenfeed and silage use has notably increased in recent years. Barley, oats and corn, along with some polycrop mixtures, are all being used for silage. Lower perennial forage production was compensated for with greenfeed and silage. Producers in the region are relying on grazing corn and silage corn even more so than in recent years. Forage swath dry-down was made difficult due to repeated rain events in some locations, as these regions were among the few that experienced good moisture levels. Feed quality is variable and includes some reports of higher nitrates.

Producers, overall, report adequate feed stocks. Moisture conditions, especially in the western areas, are not considered to be a problem.

## 4. Current Forage Freight Rates in Saskatchewan

Hay transporters reported steadily decreasing demand throughout the fall. Early harvest across much of the province resulted in more time for producers to complete fall work, and many have what they hope will be adequate feed supplies. Demand for forages from far distances was less than in 2020 and wait times for bookings were short. All of the transporters interviewed reported a very slow late fall/winter. Forage movement was light province-wide and between provinces; much of the trade was short-haul and neighbour-to-neighbour.

Forage transportation rates remained consistent with the September Forage Market Discovery report. Operators typically maintain steady pricing throughout the year, for consistency. Standard hourly rates continue to be commonly applied to short-haul distances and to compensate for loading/unloading time and labour. Fuel surcharges are also commonly applied.

**Table 3. Hay Transport Costs Saskatchewan January 2021**

	Rate (\$/loaded mile) @34-37 bales	Hourly Rate (\$/hour)	Transporters Surveyed
<b>Provincial Average</b>	<b>\$6.34*</b> (>100 miles); <b>\$8.00</b> (< 100 miles)	<b>\$164.38</b>	<b>12</b>

\*Note: a mobilization fee or empty travel fee may be additional to this rate.

Diesel prices continue to be a major factor in forage production costs and transportation costs. Carbon taxation on diesel is approximately 5.3 cents per litre with increases continuing until 2022 to reach 13.4 cents/litre (SARM, 2018). Diesel prices started high in early 2020, dropping in March as a result of Covid-19 restrictions and remaining below 2019 figures well into October. Prices began to climb again in November and December, but the yearly average remains below 2019 reports.

On December 31, 2020, Natural Resources Canada reported average diesel retail pricing in Regina SK to be \$1.021/litre and \$1.028/litre in Saskatoon as compared to Dec 31, 2019, when average prices of \$1.279/litre in Regina and \$1.274/litre in Saskatoon were reported. It's anticipated that diesel prices may continue a steady climb back up and many transporters continue to add fuel surcharges, often as much as 10 per cent, to compensate. Most charge a rate for empty travel and mobilization charges continue to fall in the \$120 to \$185/hour range.

## 5. Current & Projected Saskatchewan Forage Prices for 2021

Forage prices were obtained throughout the fall of 2020; up to and including January 12th, 2021. Prices were assembled from listings, personal phone calls to producers, livestock nutritionists, feedlots, hay growers, and transporters.

Fall was mild and open, with harvest completed early; a marked change from fall 2019. Favourable harvest conditions meant quality grain, and a sharp decrease in the availability of feed grains. The following comments outline some comparisons between observations from last year's report, and the current market climate.

2020: Hay sales continual; some excess hay listed due to more greenfeed being used on-farm instead.	2021: Hay sales were steady August through October, slowing to normal and low rates by end of harvest. Listings and trades late December through early January were very slow.
2020: Maximum price is lowered, feeding forages other hay is maximized; some buyers may be waiting until spring to buy a few extra loads.	2021: Very similar to 2020, the trend to use forages other than perennial forages continues; producers appear to be waiting until later winter/early spring to evaluate needs.
2020: Sellers are sitting on forages for a longer period of time, at the asking price. Many are willing to deal.	2021: Forage inventory sales are meeting more traditional levels, after two rather unusual years. Listings are repeated, or on the market for longer periods of time, on par with long-term averages.
2020: Planning was successful in previous year(s) and that pattern was repeated. Grain producers opting to produce forage may have trouble profiting, as forage user filled needs early.	2021: Plans for silage and greenfeed that have proven successful in the past few years have become the norm, and that forward-planning has strengthened, but rising grain prices are almost certain to affect greenfeed planting intentions.
2020: Many neighbour-to-neighbour trades have occurred. Greenfeed crops, unharvested crops and straw were high-trade commodities between neighbours.	2021: Neighbour-to-neighbour trade of hay, greenfeed and straw were similar to last year. Inventories of feed-quality grain are less than last year and grain prices are soaring to levels well above this time a year ago; not anticipated in August/September 2020. This will make grain production much more economical than planned greenfeed, and will decrease greenfeed availability.

Covid19 was a comparatively unknown entity at this time last year. The uncertainty around the ongoing global pandemic and its world-wide impact will definitely be a factor for all ag sectors in 2021, although negative impacts have not been seen on forages, to date. Food production has continued relatively normal business patterns, but market uncertainty will be a factor as restrictions continue.

Average prices reported in Table 4a are those *collected from December 1<sup>st</sup> 2020 to January 12<sup>th</sup> 2021*. The average prices collected from August through January were then collectively averaged to produce the figures in **Table 4b**.

**Table 4a. Average Current Forage Prices in Saskatchewan as at January 12, 2021**

Forage Type	Simple Average Price (\$/Tonne)	Weighted Average Price (\$/Tonne)	High (\$/Tonne)	Low (\$/Tonne)	# of Trades Simple/Weighted
Grass Hay	\$127.36	\$137.19	\$167.33	\$73.41	20/6
First Cut Alfalfa	\$156.36	NA	\$182.54	\$111.72	3/NA
Second Cut Alfalfa	\$150.09	NA	\$173.28	\$132.28	5/NA
Alfalfa/Grass Mix	\$135.74	\$140.42	\$173.28	\$81.63	36/7
Greenfeed	\$108.17	\$106.74	\$143.30	\$81.63	8/2
Clover	NA	NA	NA	NA	NA
Cereal Straw	\$52.80	\$49.82	\$77.16	\$33.07	19/12
Pulse Straw	\$62.46	NA	\$77.16	\$55.12	1/2

**Table 4b. Average Fall Long (Aug-Jan) Forage Prices in Saskatchewan at January 12, 2021**

Forage Type	Simple Average Price (\$/Tonne)	Weighted Average Price (\$/Tonne)
Grass Hay	\$123.30	\$115.60
First Cut Alfalfa	\$136.19	\$129.67
Second Cut Alfalfa	\$172.24	\$178.39
Alfalfa/Grass Mix	\$131.63	\$132.88
Greenfeed	\$105.47	\$98.60
Clover	NA	NA
Cereal Straw	\$56.58	\$58.92
Pulse Straw	\$68.07	\$72.26

The Saskatchewan Crop Report of October 19, 2020 indicated that producers in most regions were comfortable with their on-farm inventory. Mild temperatures and light snow cover have allowed longer-season corn, swath and crop residue grazing in many areas; alleviating pressure on feedstocks. An early September frost did prevent cob finishing on corn crops in many areas and that, combined with drought issues, reduced tonnage and grazing days in many areas.

Overall, there appears to be confidence in sufficient inventory at this time, but early spring rains to promote an early to normal start to the growing season will be key. Many Regional Specialists have indicated adequate supplies to May 1<sup>st</sup>, but not enough to last through to June, which could support sales and average prices for perennial forages into late spring. Continued drought into the spring could put a critical strain on grazing and result in herd reduction. Snow pack remains light, even following a January 12<sup>th</sup> storm that swept the Prairies, and little to no late fall precipitation was reported across the province. If producers run low on feedstocks into the spring, Regional Specialists have indicated that many plan to turn livestock out on pasture early. If forages aren't yet mature enough, this will negatively impact yield and available amount of summer and fall grazing.

The near-term risks over this year will revolve around markets and weather. Keep an eye on rising grain prices that could determine affordability of feed grains and affect the amount of planned greenfeed that is included in 2021 plans. With strong futures on canola, barley and spring wheat, many acres that might have gone into greenfeed production will be planted with grain harvest in mind.

Feed stocks were reported as adequate in most areas and mild temperatures well into January have reduced the pressure on those stocks, so price increases are not likely to be dramatic if spring conditions are normal. Pricing appears to have returned to more predictable levels, after two years of unusual activity province-wide. Producers have a strong comfort level with their strategies around silage, corn and greenfeed, lessening their dependence on perennials. Listings of perennial forages over the past few weeks have been very low. This is an indication that sales were slow, and sellers are waiting to monitor purchaser's feeding needs, and subsequent potential for demand, later into the winter.

**Greenfeed:** No longer considered an 'alternative' forage, greenfeed continues to be used by an estimated 50 to 60 per cent of producers, for an estimated 50 per cent of their forage needs. The September Forage Market Pricing Survey saw a weighted average of \$92.74/tonne, and noted that those prices did not align with what producers were prepared to spend. The weighted average came out at \$98.60/tonne, consistent with fall pricing. While early indications from producers were that they planned to seed similar acres of greenfeed again in 2021, the change in grain prices over the past few months will almost certainly alter those plans, as grain crops become more profitable.

**First and second cut alfalfa:** The current asking price for first cut straight alfalfa is \$156.63/tonne (simple average). As in winter 2020, few offers of premium second cut straight alfalfa are listed. Poor conditions for second cut alfalfa limited good supplies in parts of the western provinces. Moving forward, a basic first cut alfalfa can be expected to be in the \$140-150/tonne range provincially, but superior quality products needed for the dairy industry can still expect to fetch a higher price in the range of or above \$200/tonne.

**Alfalfa/grass mix:** Alfalfa/grass mixed hay had a high number of listings throughout fall, tapering off in December. The current weighted and simple averages are \$140.42/tonne and \$135.74/tonne, respectfully (majority as asking prices). The average fall-long weighted price for alfalfa/grass was \$132.8/tonne, with a weighted average price of \$131.63/tonne- asking prices held fairly steady. Many listings advertised for two or more weeks before being removed or sold and listings in late December into January were very few. Larger lots or higher-priced lots are being listed for more than a month. Mixed forage is likely to trade at settled prices of \$110 - \$120/tonne. If winter weather conditions become more seasonal and/or producers fear late turn-outs in the spring, in some regions with traditionally higher forage prices (southwest/west central) it may stretch somewhat higher.



**Grass:** Grass hay prices have been slightly higher fall-long than the more average price seen in September; in the \$122/tonne range. Currently prices sit at \$137.19/tonne (weighted average) and \$127.36/tonne (simple average). Prices are likely to settle out a bit lower, closer to the projected average of \$110 - \$120/tonne for mixed hay.

**Straw:** has been widely used over the past three years, and there was an adequate supply on offer in fall 2020/21. There are strong numbers of straw listings, although fewer than a year ago. Straw is generally sold on a per-bale basis with the current asking price of \$49.82/tonne (weighted average) for cereal and \$52.80/tonne (weighted average) for pulse straw. This aligns with historic prices and is indicative of the year. The fall-long average price on cereal straw is \$58.92/tonne weighted average. Pulse straw has traded at a slightly higher average in the \$65 - 70/tonne range throughout the fall and into winter. Its value is anticipated to hold. While there may be some cereal straw remaining unsold in April 2021, it's not likely to be in the quantities that were available a year ago. Prices are likely to remain steady, at levels close to cost recovery of \$15-20/bale.

**Clover:** Greenfeed has filled the forage gap that clover filled in the 1990's. No listings of clover were offered during the reporting period. Clover remains a lower-priced feedstuff.

**Silage:** Use of silage continues to be strong across the prairies, in both beef and dairy sectors. Indications from feed companies, agronomists and producers are for silage acres to continue at current and probably higher levels in 2021. Corn silage yields were reported as average to below average by with drier regions noting 6 to 10 ton/acre yields and areas with higher precipitation or very timely rains at 10 to 12 ton/acre yields. Silages prices reported ranged from \$52.00/tonne to \$80.00/tonne, dependent on quality. Barley, oats and perennial forage silage is being used, as well as corn, although corn remains steady. There were reports of increases in baled silage in some areas, particularly in the north-east.

**Standing Corn:** The use of standing corn for grazing is continuing to increase province-wide. When surveyed provincially, targets remain at 200 cow days/acre, with the hopes of 225-275 cow days/ acre. Early September frost hampered final cob maturity and that, combined with drought, reduced tonnage in many areas.

**Certified Organic Hay:** Often listings claim forage is organic but are found to not be certified upon further investigation. Premiums for organic hay continues to lack. Organic prices continue to sit within the average range for non-certified forages.

**Standing Hay:** prices for standing hay have held steady through 2020, after some adjustments in 2018/2019. Agreements for standing hay exist primarily neighbour-to-neighbour, or with habitat conservation agencies like Ducks Unlimited Canada, Nature Conservancy of Canada and Saskatchewan Wildlife Federation. Most agreements follow one of three trade guides: crop share, price per acre or price per weight of harvest. For an overview of production costs and evaluation of the value of standing hay, refer to the Fall 2020 Forage Market Price Discovery Report, page 15.

### ***Small Square Bales***

The price for small square bales reported is based on listings from December 15, 2020 to January 12, 2021. Current small alfalfa/grass square bale prices held steady through fall 2020. Slightly higher prices year-over-year could be indicative of higher demand, but many listings are repeat, or long-term. Straw prices are averaging \$3.40/bale, on par with the 2020 price range of \$2.50 to \$5.00/bale. Higher prices for bales fall-winter reflects the work that went into hauling and stacking. Listings (supply) can be found throughout the province.

Assuming an average square bale weight of 65lb/bale, average small square alfalfa and alfalfa/grass hay is priced at \$220.46/tonne and \$186.54/tonne respectively.



**Table 5. Square Bale Asking Prices Saskatchewan  
December, 2020 through January 12, 2021**

<b>Forage Type</b>	<b>Average Price (\$/bale)</b>	<b>Range (\$/bale)</b>
<b>Alfalfa*</b>	\$6.50 (2 listings)	\$6.00 - \$7.00
<b>Alfalfa/Grass</b>	\$5.50 (8 listings)	\$4.00- \$7.00
<b>Grass</b>	\$5.80 (5 listings)	\$5.00 - \$7.00
<b>Greenfeed</b>	\$4.50 (1 listing)	
<b>Straw</b>	\$3.40 (5 listings)	\$2.50 - \$4.00

\*Very low number of listings for alfalfa hay over this time period could account for the lower price year-over-year

### ***Dehydrated Alfalfa and Timothy Products***

There are two operational dehy plants left in the province (CanPro Arborfield and Norquay) and several facilities located in south-central Alberta. Agreements with alfalfa producers are long-standing and tend not to fluctuate from year to year; \$35/tonne has remained steady. Table 6. depicts the average price for sun-cured and dehy products in Saskatchewan for the 2020/2021 growing seasons. Note that product is not currently available as summer 2020 production has been sold out.

**Table 6. Average Saskatchewan Processed Alfalfa Product Prices for 2020-2021**

<b>Product Type</b>	<b>Price (\$/Tonne)</b>
Dehydrated Alfalfa Pellet (16-17% Crude Protein)	\$350 avg
Sun cured Alfalfa Pellets (15% Crude Protein)	\$322.50 avg
Organic Sun cured Alfalfa	not priced in 2020

**Table 7. Estimated Alberta Compressed Timothy Prices for 2020-2021**

Product Type	Price (\$/tonne)
Supreme compressed timothy	\$310; 50.00 (add'l premium on pet food quality)
Premium compressed timothy	\$305 avg
Choice compressed timothy	\$200 range*
Standard compressed timothy	\$160 avg
Utility compressed timothy	\$110 avg

\*Significant drop from previous year due to over-supply in Australia and Washington

Poor production in Washington and Australia in 2018, along with high international and domestic demand, saw record high prices for compressed Timothy in 2019. Good production in both Washington and Australia in 2019 has since created much more competitive pricing for compressed Timothy, especially for mid- and lower-quality classes, as they are in over-supply. The current over-supply situation in Australia has that country trading this commodity at much lower prices, impacting the international market. In addition to the challenges created by over-supply, there are currently unusually high and climbing freight costs and greatly increased wait time to ship product. Transport ships handling freight out of China are working at over-capacity and are oftentimes returning empty, rather than waiting for a back-haul. As a result, Canada is not currently playing as large a role in the compressed Timothy global market.

## 6. Additional 2021 Provincial Forage Market Considerations

Saskatchewan 550-lb steers averaged \$213/cwt in the fourth quarter of 2020; 2 per cent below 2019 but up 1 per cent from the five-year average. Cow-calf profitability is projected to have decreased slightly, but in general, remains positive. Beef cow culling rates are expected to be 11.5 per cent in 2020, down from 13.5 per cent in 2019 and in-line with the long-term average. Fewer culls would indicate most producers have reached a comfort level with both feedstocks and herd size, after the hard culls of the past two years. Forage demand, and the resulting prices are stabilized. Lower cow marketings, down 12 per cent in 2020 with packing plant disruptions, will support cow inventories on January 1, 2021. As 2021 proceeds, there is risk of drought in North and South America that could force producers to reduce numbers, if pastures and hayland continue to suffer. This reduction in numbers could be a first indication that forage prices may climb, or at the least, hold.

The dairy sector saw a strong increase in silage production in 2020, in part to compensate for a forage inventory shortage from the previous number of years and in response to the higher dry forage prices that resulted. There's been a trend toward utilization of more by-product fibre sources to replace dry forages in diets, primarily in the form of hulls from cereals and pulses. Beet pulp has been more available as a fibre substitute, as well, but pricing remains strong due to higher-than-normal commodity pricing; distillers production cut, and high grain prices due to shifts in world trade. Moving into 2021, dairy producers will continue to make forage quality a priority, to reduce the need for grain supplementation.

The agricultural community continues to wonder about the potential impact of carbon taxation on production costs, which are passed on to the purchaser. Alberta's already depressed economy has been further strained by restrictions imposed to slow the spread of Covid19, which have had a devastating impact on business in that province. Agriculture, as an essential-service sector that has continued to thrive despite the pandemic, is proving to be an economic mainstay to many provincial budgets. This could mean

that the present slow-down in Alberta will have less of a negative influence on Saskatchewan prices than it might have if the ag sector as a whole were suffering.

Pastures are in very poor condition across much of this province, due to widespread drought conditions, July onward. A good start to the 2021 growing season will be critical, in order for pasture growth to get ahead of livestock. If turn-out is prolonged, there is a likelihood of producers running out of feed before they can get cattle to pasture. Higher-quality forages would be needed at that time and dry-lot feeding livestock may still be forage user's best option at that time. It is a double-edged sword as early turn-out may further damage weak perennial plants' ability to meet growth potential already stressed by 2020 conditions.

Figure 3. shows a marked decrease in general hay and pasture topsoil conditions over last year's report. Pastures in many parts of the province are in critical need of moisture, rest and optimal spring growing conditions to begin recovery.

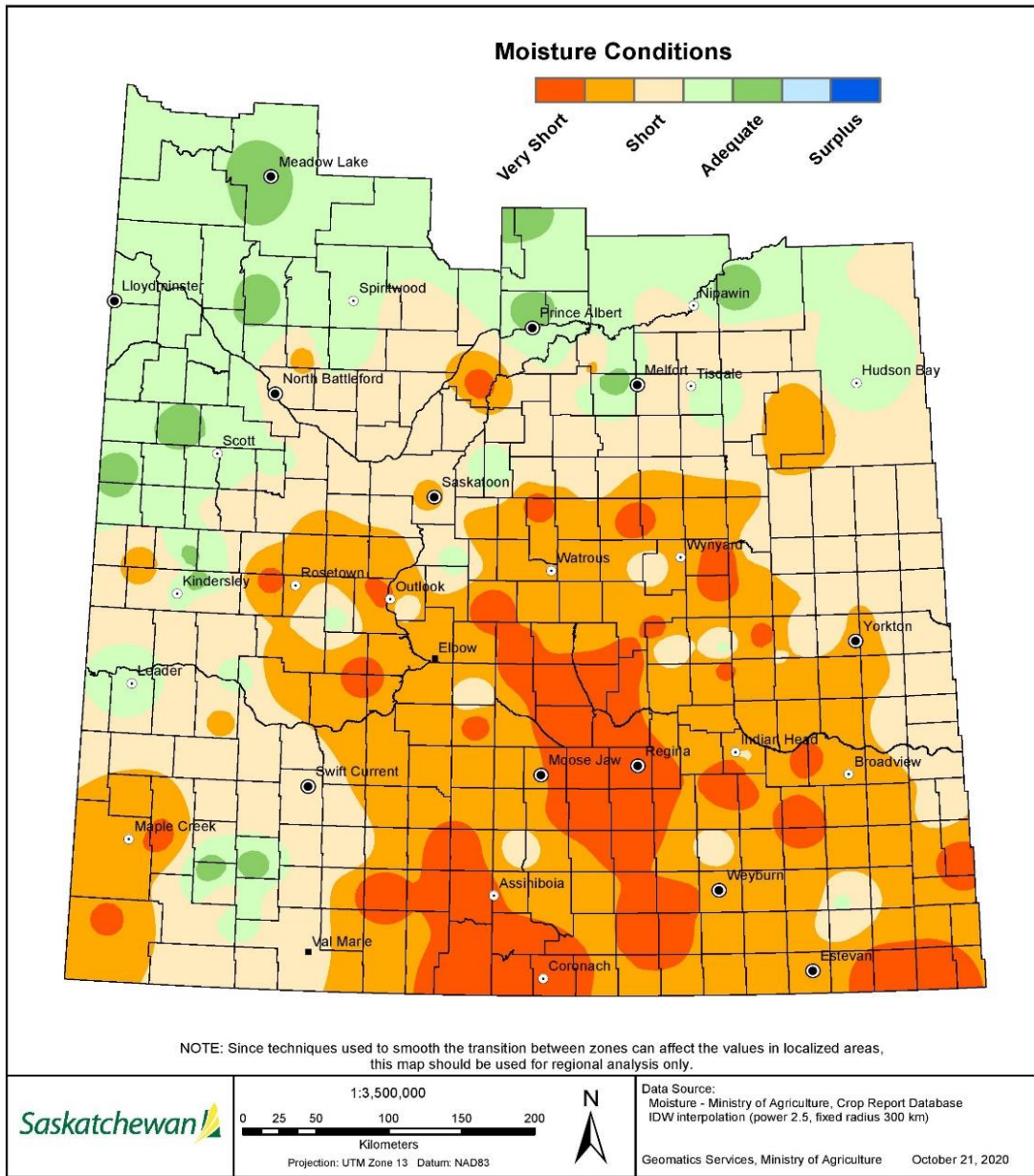
Interest in seeding new forage stands has not been strong in recent years, largely due to risks associated with less than optimum spring seeding conditions. Marginal annual cropland seeded to greenfeed has been filling the perennial forage gap, instead of being seeded to new perennial stands. If soil moisture and spring conditions improve, we might have anticipated an uptake in perennial forage seeding, but surging grain prices are likely to have an impact on those decisions, encouraging producers to seed those marginal annual croplands to higher-value grain crops.



**Figure 3. Hay and Pasture Topsoil Moisture Conditions Final 2020 Crop Report October 19, 2020**

(Source: Saskatchewan Ministry of Agriculture, 2020<sup>3</sup>)

## Hay and Pasture Topsoil Moisture Conditions October 19, 2020





## 7. Current Alternative Feedstuff Prices

The use of silage, straw, planned and unplanned (salvage) greenfeed as primary forage sources continues to be in Saskatchewan. These feedstuffs are often paired with feed grain or alternatives to balance livestock rations. Quality of forages across the province, despite drought conditions, is reported as fair, with some areas reporting fair to good. Most livestock producers have reported adequate supplies of hay, straw, greenfeed. Feed grains and barley used in producing many alternatives were in shorter supply this year and prices for barley have increased significantly.

Those producing alternative feeds provided valuable feedback on what indications they are receiving about the forage supply/demand through winter 2021. Most report that the clientele base continues to be mainly existing customers, but there are more inquiries from new customers as compared to winter 2020, when there was more economically-priced feed grain available.

Table 8. lists average prices for a variety of alternative feed sources in Saskatchewan. Unless otherwise specified, they are reported as picked up at the plant (FOB).

**Feed grain** prices can impact forage and livestock prices. Feed grains are less plentiful than January 2020, thanks to a dry and early harvest. Some processors have reported that a strong feed grain export market is driving the price up and reducing the amount of feed grain being sold domestically, more than a lack of inventory. Barley is priced in the \$235/tonne range (January 12, 2020), a sharp increase from \$165/tonne in January 2020 and \$202/tonne in 2019. Current feed wheat prices are at \$220/tonne compared to \$163.50 at this time last year. Feed grains do go into the pelleting and DDGS process, and those costs will reflect current purchase prices. There has been some change even since the early-January interviews with alternative feedstuffs suppliers; this will be an area to watch.

**Grain screenings** include cracked or broken grain and pulse seeds as well as chaff, weed and other crop seeds. Many grain handling facilities contract their screenings out ahead of time to existing customers and unprocessed screenings are usually moved out quickly. Pelleters indicate that the supply of good quality screenings is adequate and there is no trouble securing pulse screenings.

**Table 8. Alternative Feedstuff Prices and Availability as at January 13, 2021**

Commodity	Locations (FOB)	Winter 2021 Price	Details	Demand; Availability	Winter 2020 Price
Barley Pellets	Moosomin N Battleford Clavet Wolseley	\$295-350/tonne	Barley pellets, up to 20% CP, fortified with vitamin, minerals and Rumensin	Very low demand	\$220-239
Canola Meal	Lloydminster Clavet Foam Lake	\$335-431/tonne	Loose	Longer wait times; could be 6 mos on new contract.	\$285-357/tonne
Canola Meal		No local production	Pellets	NA	Not produced locally currently
Alfalfa Pellets	Aborfield Norquay	\$312/tonne avg	16-17% CP –dehydrated	Steady demand; sold out 2020. Export demand steady to firm.	\$350/tonne
Alfalfa Pellets	Arborfield Norquay	\$288/tonne avg	15% CP – sun cured		\$322/tonne
Alfalfa Cubes	Red Deer	\$540/tonne avg	Cow 7/8" cubes		\$600/tonne
Oat Hulls (ground)			Hulls ground. 31MT/superB		\$25-30/tonne
Organic Oat Hulls (ground)			Hulls ground. 31MT/superB		\$55 avg/tonne
Grain and Grain Screening Pellets	Clavet Wolseley N Battleford Central Butte	\$257-332/tonne	12-14% CP, bare with no add-ins	High; wait times vary; 2 to 4 weeks.	\$185-260/tonne average
Fortified Grain and Grain Screening Pellets	Clavet Wolseley N Battleford Central Butte	\$249-341/tonne	12-13% CP, fortified with Rumensin, vitamin/mineral (backgrounder type)	High; wait times vary; 2 to 4 weeks	\$210-317/tonne average \$288/tonne average
Fortified Grain and Grain Screening Pellets	Clavet Wolseley N Battleford Central Butte	\$201-355/tonne	14% CP, fortified with Rumensin, vitamin/mineral mix (range/cow type)	High; wait times vary; 2 to 4 weeks	\$210-313/tonne average \$260/tonne average
Fortified Grain and Grain Screening Pellets	Clavet Wolseley N Battleford	\$296-479/tonne	High Energy, fortified with Rumensin, vitamin/mineral mix Suited for heifer development or other high energy uses.		\$245-436/tonne
Fortified Grain and Grain Screening Pellets	Clavet Wolseley Wilkie N Battleford	\$270-408/tonne	Bull Development and Show Rations, 12-20% CP, with Rumensin, vitamin & mineral	Average; 1-2 week wait time.	\$244-379/tonne average \$287/tonne average
Corn Dried Distillers Grains	Stoughton Moosomin Belle Plain	\$295-350/tonne		High demand; short supply.	\$225-340/tonne
Wheat Dried Distillers Grains	Unity Belle Plain	\$250 - \$295/tonne		No movement. Many orders cancelled due to lack of supply.	\$225-260/tonne

**Grain and grain screening pellets** are available to producers from numerous retailers across Saskatchewan. Pellets may be used in feedlot, backgrounding, cow-calf, range or finishing operations. Current prices for a variety of different pellet types are listed in Table 8. The higher usage by cow-calf producers continues to hold steady, with some pricing increases. Demand is noted as steady, with longer wait times that range from 1 to 4 weeks. Processors report that inventory of feed grains is not particularly short, but a strong export market is driving prices and reducing the amount of feed grain being sold domestically.

**Canola meal** is the protein-dense product left remaining after canola is crushed for oil. There are several canola crushing facilities across Saskatchewan. With canola prices on the rise, canola meal prices can be expected to keep pace.

**Alfalfa pellets** include dehydrated alfalfa or sun-cured alfalfa pellets. Saskatchewan product is currently sold out with only current contracts being filled, and pricing is on par with last year. Long-term alfalfa supply agreements at roughly \$35/tonne in-field appear to remain consistent.

**Distillers grain products** are the by-products remaining following ethanol production. Different distillers' products that can be used as livestock feed supplements include wet distillers' grains, distillers' syrup, and dried distillers' grains (DDG). The coronavirus and low oil prices have hit the biofuel business hard, and ethanol plants across North America are on slow-down, with many shutting down completely. This has resulted in a severe shortage of DDG, and many companies are unable to source it at present.

## 8. Forage Price Trends in Neighbouring Jurisdictions

**Table 9.** Forage (Asking) Prices in Adjacent Provinces and States (Winter)

Forage Type	Alberta		Manitoba		Montana*		North Dakota*	
	Price Range	Avg Price (\$/Tonne)	Price Range	Avg Price (\$/Tonne)	Price Range	Avg Price (\$/Tonne)	Price Range	Avg Price (\$/Tonne)
Alfalfa 1 <sup>st</sup> Cut	\$110.20-152.86	\$135.27	\$117.09-192.85	\$149.44	\$139.82-257.27	\$179.61	1 listing	\$139.82
Alfalfa 2 <sup>nd</sup> Cut	\$165.30-181.04	\$173.17	\$117.09-161.63	\$142.72	\$139.82-279.64	\$230.71	1 listing	\$188.76
Alfalfa/Grass	\$52.90-165.30	\$110.14	\$110-165.30	\$128.14	\$97.88-247.78	\$146.38	\$102-262.17	\$146.21
Grass	\$67.82-205.70	\$106.66	\$82.65-176	\$113.48	1 listing	\$236.46	\$94.79-104.87	\$98.82
Straw	\$24.24-66.12	\$37.91	\$13.22-22.04	\$18.73	\$61.63-110.63	\$80.53	\$41.94-74.91	\$59.42
Greenfeed	1 listing	\$83.60	\$80.81-129.65	\$102.06	1 listing	\$132.83	\$118.85-121.18	\$120.15
Pulse Straw	\$24.24-35.82	\$30.17	-	-	-	-	1 listing	\$41.94

\*American prices have been converted to CDN currency values average for January 4-11, 2021 (\$1USD = \$1.2688CDN)

### **Alberta**

Weather conditions and forage production varied across Alberta. Forage yields were high, but harvest of quality stored forage was a challenge. Salvage crops from hail or drought and an unknown grain market allowed for forage needs to be met in dry areas and central regions. An open fall allowed for an excess of straw to be baled. As of late fall, the rise in grain prices make grain that was not pre-priced an expensive feed option. Bale silage is increasingly being used as a means of putting up hay and greenfeed in many wet areas. Feed supplies are currently ranked as 'enough' to excess but there will need to be early spring rains positively impacting the start to spring growth and delays in turn-out. In these dry regions, forage supply may be tight.

### **Manitoba**

The final Manitoba Crop Report for 2020 (October 20, 2020) reported that growing season rainfall across most of Manitoba was between 70 and 80 per cent of normal precipitation, with certain districts experiencing more or less. Heat unit accumulations were generally higher than average. Livestock feed supplies were a challenge, after three consecutively dry summers (depending on locale). Forage yields are reported at 33 to 66 per cent of normal, causing cattle producers to look at alternative feed sources like baling of non-conventional crop residue and an increase in greenfeed silage. Manitoba does not typically have a significant number of public trades available for analysis. Manitoba had little hay on offer, at time of writing. There is currently a fair amount of wheat, oats and barley straw listed.

### **Montana** (from Hay Reports; December 2020 and January 2021)

December 18, 2020: Hay sold generally steady. Ranchers continue to buy hay for winter needs and supplies continue to tighten. Hay supplies along the Wyoming border are tight as many loads continue to sell out of southern Montana into Wyoming. Winter weather has been mild across much of the state which has helped curb feeding demand. While many locations remain open some ranchers are still supplementing hay as regrowth is limited due to the drought this summer. Drought conditions remain unchanged from last week. Additional snowfall is expected over the next week but totals are expected to be light. Currently 32.02% of the state is in Moderate drought or worse.

January 8, 2021: Hay sold steady to 10.00 higher. Round hay supplies are tight and buyers are purchasing rounds at the same price as squares. Hay continues to ship to Wyoming in large quantities. Delivered prices range from 175.00-210.00 delivered to Northern and Central Wyoming depending on the quality and distance. Rain and snow fell across much of state and currently 34.49% of the state is in Moderate drought or worse, a marginal increase of 2.47% since last report December 18th, 2020.

### **North Dakota**

Not a lot of hay is trading currently, and only a small amount of straw for sale is on offer. There was little change in prices from December to January, and many of the same ads are still listed or have been re-posted. The Northern United States are suffering the same drought concerns as southern Saskatchewan, and precipitation and good spring growing conditions will be needed to alleviate those concerns, this spring.

## 9. Forage Seed Prices

The average retail price of commonly purchased and seeded forage species in Saskatchewan is presented in Table 10. This information reflects general forage seed prices at the current time. Prices represent Certified #1 seed, unless otherwise specified.

**Table 10. Forage Seed Prices in Saskatchewan as at January 12, 2021**

Class	Species	2020 Average Price \$/lb	2021 High (\$/lb)	2021 Low (\$/lb)	2021 Average Price \$/lb
<b>Grasses</b>	Certified Smooth Brome ****	\$4.63	\$5.99	\$4.19	<b>\$4.97</b>
	Smooth Brome (Common)****	\$3.91	\$4.75	\$4.35	<b>\$4.58</b>
	Certified Meadow Brome ****	\$5.08	\$5.99	\$4.35	<b>\$5.06</b>
	Meadow Brome (Common)***	\$4.25	\$5.60	\$4.65	<b>\$4.77</b>
	Hybrid Brome****	\$5.47	\$7.91	\$4.99	<b>\$5.79</b>
	Russian Wildrye **	\$9.00	\$9.80	\$8.49	<b>\$9.14</b>
	Tall Fescue *****	\$3.45	\$3.77	\$3.40	<b>\$3.55</b>
	Fairway Crested Wheatgrass****	\$5.88	\$6.74	\$5.50	<b>\$6.25</b>
	Kirk Crested Wheatgrass ***	\$5.32	\$5.85	\$5.50	<b>\$6.24</b>
	Crested Wheatgrass (Common)***	\$4.88	\$5.50	\$4.70	<b>\$5.06</b>
	Intermediate Wheatgrass *****	\$4.42	\$5.10	\$4.50	<b>\$4.85</b>
Pubescent Wheatgrass ****	\$5.91	\$7.45	\$4.90	<b>\$6.45</b>	
<b>Legumes</b>	Alfalfa - hay variety *****	\$5.17	\$5.20	\$3.95	<b>\$4.78</b>
	Alfalfa - creeping root *****	\$5.06	\$4.95	\$4.78	<b>\$4.89</b>
	Alfalfa (Common) *****	\$4.18	\$4.90	\$3.97	<b>\$4.57</b>
	Cicer Milk Vetch ***	\$6.06	\$5.60	\$5.30	<b>\$5.50</b>
	Sainfoin *****	\$3.89	\$5.30	\$3.00	<b>\$3.67</b>
	Alsike Clover ****	\$4.20	\$5.24	\$3.50	<b>\$4.20</b>
	Norgold Sweet Clover*****	\$2.83	\$2.99	\$2.55	<b>\$2.83</b>
	Common Sweet Clover ***	\$2.32	\$2.50	\$2.25	<b>\$2.33</b>
	Hairy Vetch****	\$3.17	\$3.50	\$3.26	<b>\$3.39</b>
<b>Native</b>	Western Wheatgrass ***	\$10.57	\$11.22	\$9.50	<b>\$10.57</b>
	Northern Wheatgrass ***	\$12.48	\$16.94	\$10.00	<b>\$12.48</b>
	Slender Wheatgrass ***	\$4.74	\$5.15	\$4.06	<b>\$4.73</b>
	Green Needlegrass ***	\$19.52	\$26.56	\$14.00	<b>\$19.52</b>
	June Grass ***	\$33.45	\$38.50	\$28.00	<b>\$33.45</b>
	Canada Wildrye***	\$13.51	\$17.38	\$9.15	<b>\$13.51</b>
	Purple Prairie Clover (legume)***	\$46.45	\$60.00	\$19.36	<b>\$46.45</b>

\* denotes the number of companies reporting price for that species.



Producers should contact seed companies or distributors for specific information related to product attributes and availability as well as any guarantees of quality, certification or other parameters that are specific to that company, species or variety.

Native seed prices listed are current January 2021 prices as per the major forage retailers. Prices do fluctuate regularly for these species, depending on demand and availability. There are several native seed growers who harvest and market seed directly across Western Canada. A listing of native seed producers may be found through the Native Plant Society of Saskatchewan at <https://www.npss.sk.ca>.

Tame forage seed prices have remained reasonably consistent over the over the past three years, with some fluctuations. A general frost in mid-May set development back somewhat and damaged some established stands with the greatest impact being on perennial ryegrass. Despite challenges from pests, hail, heat, wind and shortage of moisture, forage seed quality was reported as generally good, with average to below average yields.

Interest in novel or 'cocktail' mixes of annuals/biennials continues to build, and more of these mixes are being seeded for soil improvement and livestock feed on cropland.

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