



Stay ahead of the curve



FarmShift: **Wheat 2017**

Wheat Marketing and Certified Seed Practices in Western Canada

Available: Three reports and an omnibus

1. Wheat Seed Report
2. Wheat Marketing Report
3. Wheat Marketing Contract Use – a Sub-Report from Wheat Marketing
4. The Omnibus section - insert your own proprietary questions

Choose any or all of the reports and/or omnibus questions.





FarmShift: Wheat 2017

Earlier FarmShift: Wheat studies have explored how farmers have transitioned to the open market for wheat, explored which of their production and marketing practices are changing, and tracked the use of certified wheat seed on the prairies. In our 2017 study, we build upon our learnings from these previous studies, and offer a menu of three syndicated reports, as well as an omnibus opportunity.

- 1. Wheat Seed Report** – Tracking growers' use of certified wheat seed since 2010, including the segment of yearly buyers for all of their wheat acres. New this year is (1) a special investigation into why the Manitoba market is so much further ahead in certified seed use – probing into attitudes, agronomics, economics and convenience, and (2) a look at which specific wheat varieties growers are likely to select for their next certified seed purchase beyond 2017.
- 2. Wheat Marketing Report** – Monitoring shifts that are occurring in wheat marketing since 2012. Includes portion of the 2016 crop sold to date, portion sold to each grain company and elsewhere (flour mills, feed mills, ethanol plants, US direct). Contract use will again be tracked in detail – zeroing in on contracts from Viterra, Richardson, and Cargill and also exploring perceptions of grain companies regarding the contracts they offer. This year's study also tracks growers' satisfaction with their wheat marketing efforts and a self-assessment of their marketing skills with comparatives to canola. Use of external wheat marketing advice, information sources and gaps also continues to be monitored.
- 3. Wheat Marketing Contract Use Sub-Report** – An extract from the larger Wheat Marketing Report, this sub-report will focus on which particular wheat marketing contracts growers are using from Viterra, Richardson and Cargill, and whether this has shifted since a year ago. The sub-report will also delve into how growers perceive the different grain companies when it comes to the wheat marketing contracts they offer and if any companies stand out favourably or unfavourably, and why.
- 4. The Omnibus section** – Where organizations can insert their own proprietary questions and receive the results on a confidential basis. Questions can be on any topic.



Who will be interested in this study?

The reports are for companies and organizations with an interest in how growers are managing their wheat production and marketing. Companies involved in product advancement and research will be well served by the analysis of grower needs and preferences.

Previous subscribers to FarmShift: Wheat Seed and Open Market Wheat will find particular value in the continuity provided by the 2017 reports. Those with distinct interest in the specific wheat marketing contracts growers are using will be well-served by the Contract Use Sub-report. Clients in the wheat seed business will find enhanced content in the 2017 study and can draw lessons from the Manitoba experience.

The omnibus is for those companies and organizations looking for insight on their own particular topics. Some may have just a few questions, while others might need a longer battery of questions to fully address their topic.

You can subscribe to any of the reports and/or purchase just omnibus questions.

Topics and questions to be addressed



Wheat Seed Report

✔ Certified seed purchase behaviours (tracking)

- What are growers' purchase patterns for certified wheat seed? We use an “RFM” approach that covers recency of last purchase, frequency of purchasing over the last 5 years, and amount purchased.
- How many purchased certified seed for any of their wheat in 2016? How many expect to for their 2017 wheat crop and how many have already done so?
- What is the size of each of the key user segments – yearly buyers for all their wheat acres, yearly buyers for some acres, occasional buyers, and infrequent buyers? What characteristics distinguish each of these segments?

✔ Special investigation into why the Manitoba market is so different (NEW)

- What are the factors that are contributing to higher certified wheat seed use in Manitoba vs the other western provinces? To what degree do the following play a role: disease pressures, seed quality, yield-chasing mindset, perceived value vs cost of certified seed, convenience of buying (location/distance and treating seed), variety availability/supply, contracting requirements, attitudes towards common seed, bad experiences with common seed?

✔ Wheat varieties growers are considering for their next purchase (NEW)

- How many growers already know which varieties they will be purchasing the next time they use certified seed (i.e. beyond 2017)? Which wheat varieties are in their consideration set? And when (what year) are these varieties likely to be purchased?

✔ Channel use (tracking)

- From what channel was certified wheat seed last purchased (seed grower, grain company, independent retailer)?

✔ Variety characteristics and traits (tracking)

- What variety characteristics are most important to wheat growers (we have been tracking a list of 11)?
- What diseases are of most concern?
- What do farmers think is the most important agronomic improvement that could be made in wheat?

✔ Trends in certified wheat seed use and channels since 2010

✔ Analysis of differences by province and farm size





Wheat Marketing – Full Report

✔ Marketing skills assessment (tracking)

- How do growers assess their marketing skill levels – are they beginner, intermediate or advanced? Do they think their wheat marketing skills have improved in the last couple of years? To what do they attribute this to? How many have taken courses or seminars to improve their wheat marketing knowledge and skills?
- Overall, how do growers think their wheat marketing skills compare with their canola marketing skills? Which crop are they better/worse at?

✔ 2016 wheat marketing (tracking)

- What portion of the 2016 wheat crop is already sold and delivered, what portion is sold but not delivered, and what portion is not yet contracted? How does this compare to growers' marketing practices over the last three years?
- Where have farmers been marketing their 2016 wheat crop? What portion has been sold to each grain company? What portion has gone direct to flour mills, feed mills, ethanol plants, or into the US?
- How do growers perceive the different grain companies when it comes to the wheat marketing contracts they offer? Has this changed from a year ago? Do any companies stand out, either favourably or unfavourably? If so, why?
- Which marketing contracts have growers been using for their 2016 wheat crop? For the second year, we take a detailed look at usage of specific contracts offered by Viterra, Richardson, and Cargill. This series of questions covers 5 contracts from Viterra, 4 from Richardson Pioneer and 10 from Cargill (see additional detail on the following page. Contract use (share of growers using each particular contract) will be captured and shifts noted from 2015.

✔ Satisfaction with wheat marketing results (tracking)

- How satisfied are growers with the results of their wheat marketing efforts? How does this compare to satisfaction levels from a year ago – are they changing?

✔ Information sources, gaps and needs (tracking)

- What information sources are growers using for advice on wheat marketing?
- How many are using a paid marketing consultant (independent or affiliated)? How many are using a broker?
- Where are they getting their pricing information from? Are they getting adequate price signals to help them decide what type/class of wheat to grow?
- What are their attitudes towards the pricing information they are receiving? Is finding information a challenge? How confident are they in the reliability of information? Could they market their wheat better if they had better information?
- In what areas are growers lacking knowledge to assist them with marketing? Where do they need more information? Is there anything critical that is missing, that could improve their business decision making, and if so, what?

✔ Trends since 2012

✔ Analysis of differences in wheat marketing practices by province, farm size, and age



Wheat Marketing Contact Use – A Sub-Report from Wheat Marketing

- ✔ For organizations whose interest is focused on growers' use of various marketing contracts.
- ✔ How do growers perceive the different grain companies when it comes to the wheat marketing contracts they offer? Has this changed from a year ago? Do any companies stand out, either favourably or unfavourably? If so, why?
- ✔ Which marketing contracts have growers been using for their 2016 wheat crop? For the second year, we take a detailed look at usage of specific contracts offered by Viterra, Richardson, and Cargill, including both simple and advanced contracts:
 - Use of Viterra's contracts: Basis, Fixed Futures, Deferred Delivery, Futures Tracker™ and Target Price Agreement
 - Use of Richardson Pioneer's contracts: Market Manager™, Basis Selector™, Price Selector™, Price Optimizer™
 - Use of Cargill's contracts: Fixed Futures, Basis First, Deferred Delivery, Grain Pricing Order, PaceSetter®/PaceSetter Xtra®/PaceSetter Ultra®, PriceProtector® Put/Call/Target, MarketTracker® Market Order, MarketTracker® Working Order, Focal Point and Bonus Offer®
- ✔ Contract use (share of growers using each particular contract) will be captured and shifts noted from 2015.
- ✔ Analysis of differences by province, farm size, and age



The Omnibus Section – add your own topics and questions

- ✔ For organizations that have their own questions they would like to add to the survey, the omnibus is an economical way to gather insight.
- ✔ **Omnibus questions don't have to be about wheat; they can cover any topic.** They can be posed only to sub-groups of the sample, for example canola growers, or growers with a certain farm size.
- ✔ The FarmShift team will work with you to develop your questions, and they could cover such diverse topics as:
 - Reactions to a new concept, trait or product
 - Brand awareness, perceptions, usage, purchase intentions
 - Attitudinal questions (agree/disagree)
 - Company or brand ratings
 - Information needs, information seeking practices



Methodology

This year's wheat reports and omnibus results will be based on a survey of 450 western Canadian wheat growers. The methodology will deploy a telephone recruit to an online questionnaire.

Farmers participating in the study will be the main/joint decision-maker on their operation, not be planning to retire or exit farming in the next five years, have 200+ acres wheat in 2016 and be planning to grow wheat in 2017.

The 450-sample will target a non-proportional sampling plan of 150 surveys per province. Final study data will be weighted to reflect the actual distribution of wheat growers and their acres. A sample of 450, after accounting for the non-proportional sampling approach, is accurate within +/- 4.9 % at the 95% confidence level. This sampling plan is robust enough to allow the results to be reliably analyzed for statistically significant differences by various sub-groups, including province, farm size and age.





Deliverables

- Clients purchasing **Wheat Seed, Wheat Marketing or Contract Use** receive a report in PowerPoint format, including an executive summary and the detailed findings and implications. Executive summaries are also provided separately in pdf format.
- Clients purchasing **omnibus** questions receive a report in PowerPoint format containing their own results, together with tables showing their results by province, farm size, and age (other demographic or behaviour variables are available on a custom basis).
- Conference call presentation and discussion of the results is available (an in-person presentation can be arranged for an added fee).



Timing

Early bird pricing deadline	February 23, 2017
Client consultation and design of omnibus questions	February 2017
Omnibus questions finalized	February 28, 2017
Survey data collection	March 2017
Delivery of reports	May 31, 2017



Costs

	Before Feb. 23	After Feb. 23
Wheat Seed Report	\$12,000	\$15,000
Wheat Marketing Full Report	\$20,000	\$25,000
Wheat Marketing Contract Use Sub-Report	\$5,000	\$7,500
Package of Wheat Seed Report and Wheat Marketing Full Report	\$30,000	\$35,000
Omnibus questions:		
Closed-ended question	\$1,500	\$2,000
Per three rating / ranking / scaling questions	\$2,000	\$2,500
Open-ended questions	\$2,500	\$3,000

If a large segment of omnibus questions are purchased by a single client, we will develop a package price.



About FarmShift

FarmShift is the prime source for farmer-focused market research in Canada, conducting a wide range of both syndicated and custom market research.

Through the course of ongoing research and discussion with farmers, the retail channel, and agricultural companies, our experienced agricultural market research team is constantly watching for fundamental shifts that might impact farmers' practices, needs, and expectations. We explore these shifts, trends, and opportunities via our line of syndicated studies.

As well, our market research group provides a full range of customized quantitative and qualitative research services. We have also adapted the most widely used market research techniques to the specific conditions faced in agriculture and food. No matter how complex your challenge or how intricate your opportunity, we have the depth to design a study that produces actionable results.

FarmShift: Wheat 2017 is the latest study in our syndicated series, which began in 2007.

Other FarmShift syndicated studies include:

Changing Practices	Future of Corn & Soy	Future of Canola	Wheat Marketing Practices
Precision Farming	Media Mix / Social Media	Business on the Colony	Certified Wheat Seed
Fertilizer Retailing	Million \$ Farms	Large-Acreage Farmers	Wheat Production Strategies

Our syndicated FarmShift studies enjoy over 100 subscribers, including equipment, crop protection, grain, seed, technology, and financial services companies, as well as agricultural industry associations and government. For more information on the full line-up of FarmShift studies, please visit FarmShift.com.

Study Team



SHARON BARKER Director, Research Strategy

Sharon heads up the research practice and is involved in the design and implementation of all FarmShift syndicated studies and custom research projects. Sharon has over 20 years of experience in conducting strategic research in the agricultural sector among producers, retailers, manufacturers and employees, as well as research targeting Canadian consumers. Sharon's experience includes market research related to brand strategy development, biotechnology, crop input and agronomic services, financial services, retailer needs assessment, grain marketing, risk management and consumer attitudes and perceptions of agricultural issues. She has a Bachelor of Commerce degree, majoring in marketing from the University of Calgary. Sharon is based in Calgary.



JOANNA KORMAN Senior Associate

Joanna specializes in tailoring leading edge consumer and business-to-business research techniques to the complex decision-making processes required in agriculture. With over 25 years of experience in agriculture, Joanna's particular areas of research expertise include brand health and brand positioning, new product development, pricing, customer satisfaction and loyalty. She has considerable experience in the life sciences sector and a high level of familiarity with agricultural products across Canada. Previously Joanna headed up the agricultural division as Senior Vice-President for a major North American research company. Joanna has a Master's degree in Agricultural Economics from the University of Manitoba and resides in B.C.



RON KROEKER Senior Associate

Ron specializes in qualitative research, including depth interviews with end users, vendors and channel partners. Ron is particularly adept at investigation requiring innovative approaches. Ron's career in marketing extends over three decades with experience in various roles in agribusiness. Much of this experience was gathered building and managing industry-leading brands. Prior to joining Blacksheep, Ron provided leadership in sales and market development for a software system utilizing GPS technology for food production traceability. He managed sales and marketing functions for 10 years with a leading agricultural retailer, during which time he was awarded CAMA's prestigious Agri-Marketer of the Year title. Ron has a diploma in Agriculture from the University of Manitoba and resides in B.C.



RUSSELL JEFFREY Managing Partner

Russell provides industry relevant expertise and insight to the development of clients' research solutions. Russell brings over 25 years of progressive management experience to FarmShift, including the management of some of Canadian agriculture's most known brands. In 2003, Russell left the corporate sector to found an integrated marketing firm with extensive capabilities in agriculture, leading to the establishment of FarmShift. Russell has a Master's of Science in Agricultural Economics and lives in Winnipeg with his family.

Sign-up Form

Wheat Seed Report
Cost is \$12,000 until Feb 23, 2017 and \$15,000 thereafter.

Wheat Marketing Full Report
Cost is \$20,000 until Feb 23, 2017 and \$25,000 thereafter.

Wheat Marketing Contract Use Sub-Report
Cost is \$5,000 until Feb 23, 2017 and \$7,500 thereafter.

Package of both Wheat Seed and Wheat Marketing Full Reports
Cost is \$30,000 until Feb 23, 2017 and \$35,000 thereafter.

Omnibus questions
A quote will be provided based on the number and type of questions you have.

Cost of omnibus questions:	Before Feb. 23	After Feb. 23
Closed-ended question	\$1,500	\$2,000
Per three rating / ranking / scaling questions	\$2,000	\$2,500
Open-ended questions	\$2,500	\$3,000

Please indicate approximately how many proprietary questions you anticipate: _____

All study documentation is confidential and strictly for the internal use of participating organizations. The reports are syndicated and may not be reproduced in any way, or disclosed to any other party, in any manner whatsoever, without the prior written consent of FarmShift Inc. Omnibus results are the sole property of the client who purchases them and may be used or distributed in any way the client prefers.

In the unlikely event of an insufficient number of subscribers, the study could be postponed or cancelled.

50% of study cost is due upon sign-up, and 50% is due upon receipt of deliverables. Costs exclude applicable taxes.

Company Name

Phone number

Name

Position

Signature

Date

Please sign, scan, and email to info@farmshift.com.

FarmShift

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