



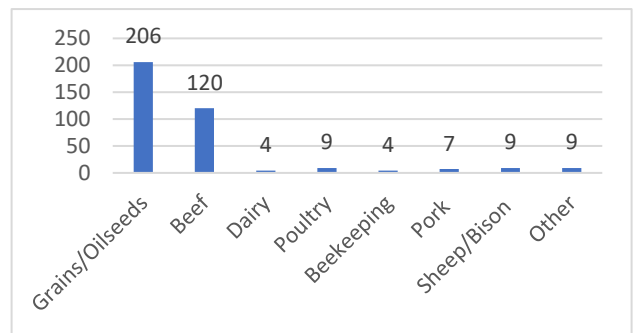
COVID-19 Survey Results March 25th- April 5th, 2020

Introduction

On March 24, 2020, APAS launched an online survey to collect data from agricultural producers about the impacts of COVID-19 on Saskatchewan agriculture. Responses were collected until April 5 from a total of 262 respondents, with a summary of the data shown below. Based on the initial results, APAS has updated the survey questions and will be collecting additional data on an ongoing basis during the pandemic. New versions of the survey will be released each Monday morning at apas.ca/survey.

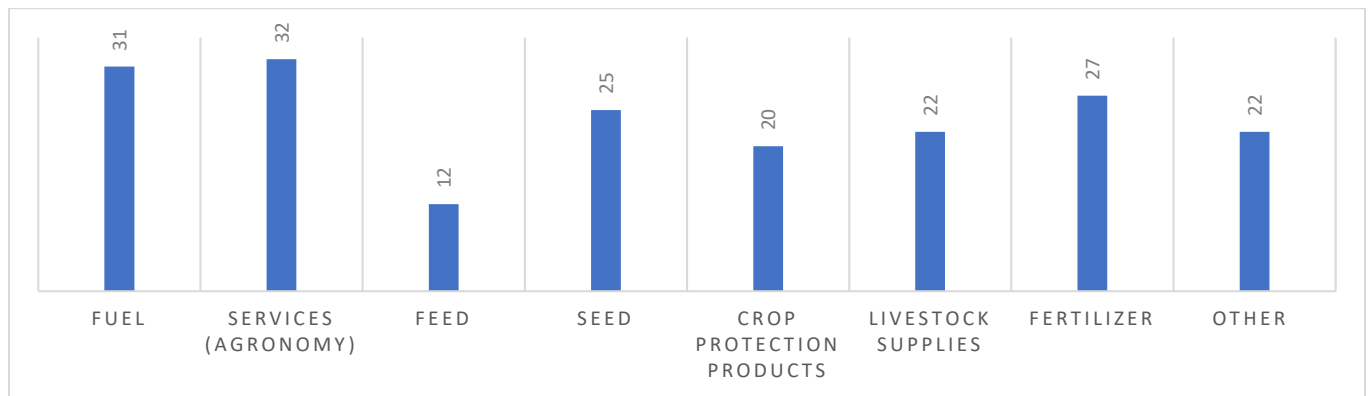
Farm Type

When asked to describe their operation, 206 respondents (of 261 total) chose Grains and Oilseeds; 120 chose Beef, and 42 chose other operations.



Disruption of Input Purchases & Deliveries

Of the 116 respondents (of 262 total) that indicated they were experiencing some form of disruption to the purchase or delivery of farm inputs, 28 percent noted disruptions to services (e.g., agronomy), 27 percent noted fuel disruptions, and 23 percent noted fertilizer disruptions.



Input Costs

Fifty-nine percent of respondents noted that they have not seen the price of their inputs increase or do not anticipate an increase. However, 41 percent of respondents have seen the cost of inputs increase or anticipate a future increase as a result of COVID-19. Of those experiencing or anticipating cost increases, many believe increases will be seen in the cost of labour and fertilizer. Some respondents also expressed anxiety about potential supply chain breakdowns that could reduce the availability of products.

Delays in Sales/Deliveries of Farm Products

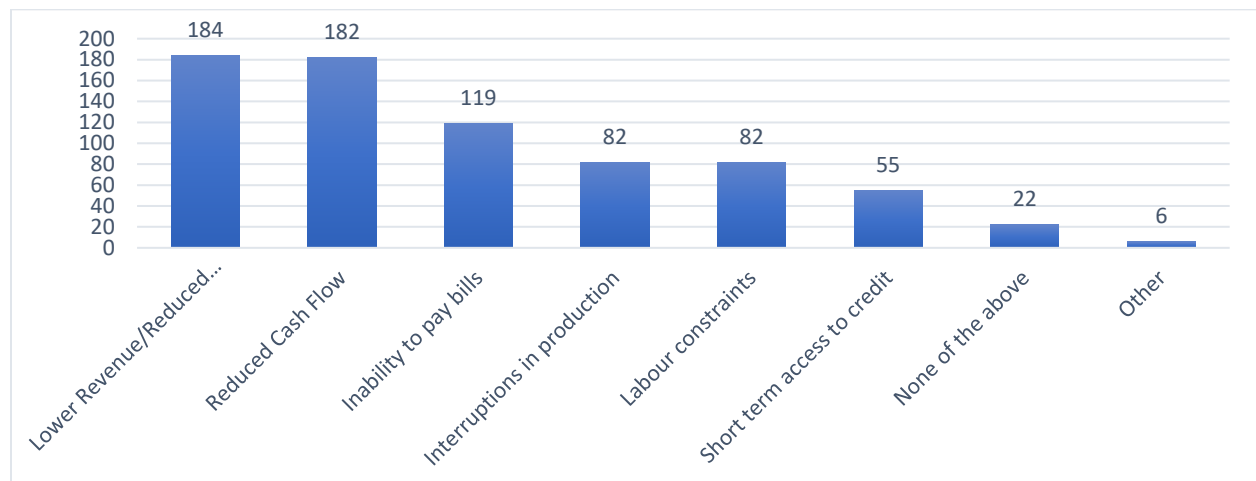
Forty-five percent of respondents reported experiencing a delay in the delivery and sale of farm production, while 55 percent have not yet experienced delays. Of those that have experienced delays, most described these occurring at the elevator or feedlot, where new safety protocols have slowed delivery processes. Other issues being reported include delayed delivery of parts and grain samples, as well as a fall in the price of livestock as processors slow or stop the acceptance of new production. Livestock producers are also concerned about fewer buyers attending livestock auctions and reduced on-farm purchases of breeding stock.

Anticipation of Delays in Sales/Deliveries of Farm Products

When asked if they expected future delays in sales or deliveries of farm production, 71 percent of respondents indicated that they do. Producers are anticipating increasing issues in the supply chain as more workers are unable to work because of the virus, and as commodity prices decline, making it uneconomical to continue the movement of product.

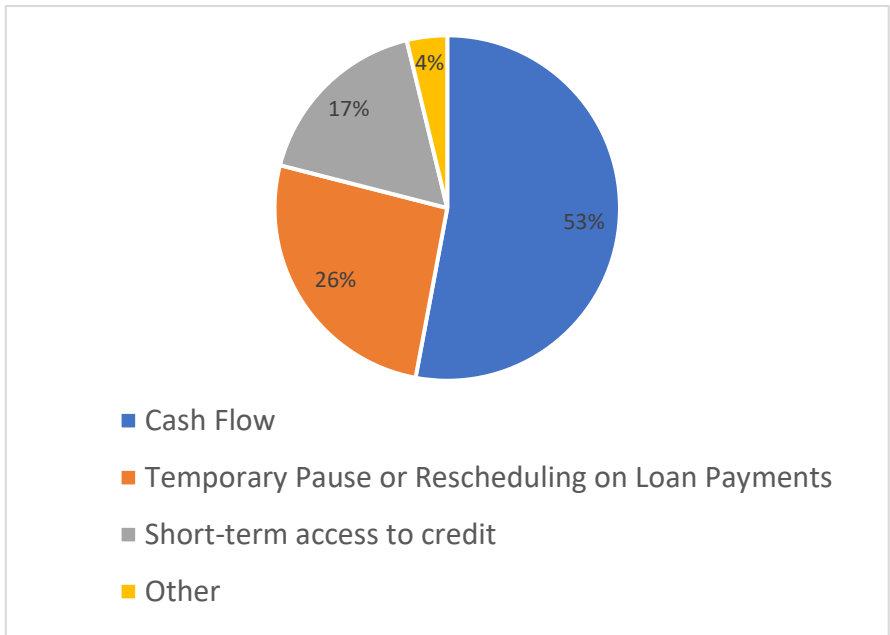
Anticipated Results of COVID-19

When asked about the future impact of COVID-19, most respondents anticipate the following: Lower Revenues/Reduced Commodity Prices (72 percent); Reduced Cash Flow (71 percent); and an Inability to Pay Bills (46 percent).



Financial needs for Operations

Producers noted a few immediate financial needs for their operations, which include cash flow (53 percent); temporary pause or rescheduling of loan payments (26 percent); and short-term access to credit (17 percent).



Dealing with Financial Institutions

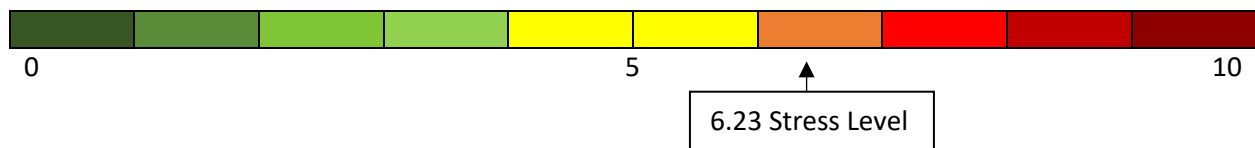
When asked if they were having difficulty or encountering restrictions with their financial institutions as a result of COVID-19, 18 percent of producers responded that they are, while 82 percent did not report having difficulty dealing with financial institutions. Of those experiencing difficulties, 48 percent reported that their difficulties were related to managing and repaying existing loans.

Farm Labour

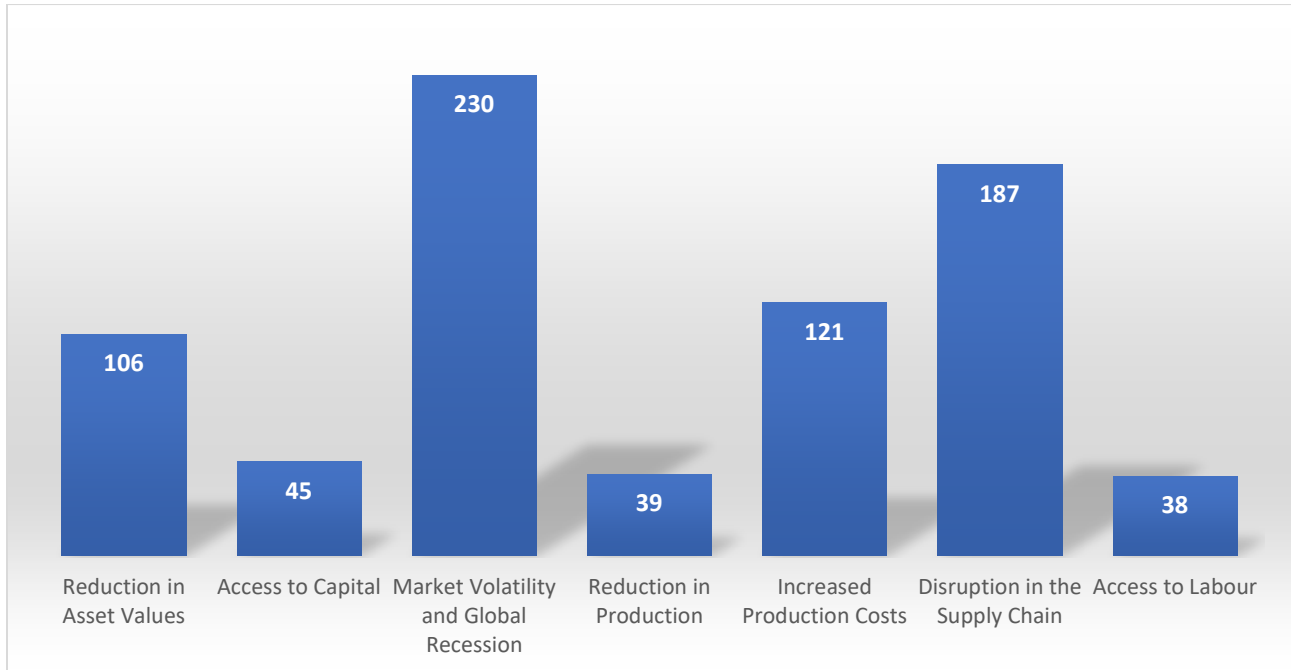
Respondents have not yet indicated difficulty in finding farm labour as a result of COVID-19, with 82 percent reporting that they have not experienced problems and 18 percent reporting they have experienced problems. At the same time, several respondents suggested that local students could provide a source of domestic labour this summer.

Stress Level

Producers noted an average stress level of 6.23, with the lowest reported stress level being 1 and the highest reported stress level being 10. Five percent reported a stress level of 10 (unbearable levels of stress). Although a number of producers indicated significant stress, others noted that social isolation is in some ways easier for them as they are accustomed to working alone.



Top Three Business Concerns



Additional Issues

In recent weeks, producers have contacted the APAS office to report several other agricultural, financial, and supply chain issues. The following section highlights some of these issues.

Bandwidth

Producers have informed APAS of telecommunication disruptions that have created problems with online auction services for machinery, parts, and livestock. The next version of our survey will include a question to determine how widespread this problem is.

Apiaries

Apiaries have reached out to APAS to express concern about recent travel restrictions and their ability to get key inputs from outside of Canada.

Farm Credit Canada

Announcements from the federal government regarding the increased financial capacity of Farm Credit Canada have left some producers concerned that few details have been released. Concern has also been expressed by those that do not use FCC to finance their operations.