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Oilseeds and Products

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Report Highlights:

Total oilseed production for 2000/2001 is forecast to be 9.3 MMT, down 19% from the 1999/2000 record of 11.5 MMT. The combination of reduced supply with a slightly increased domestic consumption will work together to lower 2000/2001 canola ending stocks to 1.1 MMT.

Includes PSD changes: Yes
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Oilseeds Production - Overview

Total oilseed production was up nearly 11% to 11.5 million metric tonnes (MMT) for 1999/2000 above 1998/99 total oilseeds production. Total oilseeds area in Canada for 1999-2000 was 2.2% larger than in 1998/99. Area planted to soybeans and rapeseed (canola) increased 2% and 2.2%, respectively.

Record canola yields and production were broken in 1999, with an average of 28.2 bushels/acre (bu/acre), up from the previous record yield of 25.1 bu/acre in 1998, an increase in production of 14% on only a two percent increase in area harvested. Acreage was the second-highest on record, making canola the second-largest crop after wheat and exceeding barley acreage by over one-third. Canola crush for 1999/2000 remains virtually unchanged at 3.0 MMT from the 1998 total of 3.06 MMT.

In Ontario, despite the very dry growing season, soybean yields were down just slightly in 1999 to 40.5 bu/acre from the record 41 bu/acre set in 1998. Soybean crush for 1999 was up almost 18% at 1.9 MMT versus 1998.

Outlook for 2000/2001

Strengthening world prices for wheat are expected due to tightening world supplies and reduced US production in 2000/01. Producers will be switching out of oilseeds and into durum, barley and special crops in order to minimize production costs and maximize net returns. Area planted to oilseeds is expected to be down 15% from 6.6 million hectares in 1999/2000 to 5.6 million hectares for 2000/2001. With the anticipated drop in oilseed acreage and the assumption that record yields will not continue from previous years, total oilseed production for 2000/2001 is forecast to be 9.3 MMT, down 19% from 1999/2000.

Canola plantings for 2000/2001 are forecast to be 4.6 million hectares, down almost 18% from the 1999/2000 estimate. Lower anticipated yields due in part to dryer planting and expected growing conditions not to mention burdensome beginning stocks will bring production down by more than 24% to 6.6 MMT for 2000/2001 from the 1999/2000 figure. The combination of reduced supply with a slightly increased domestic consumption will work together to lower 2000/2001 ending stocks to 1.1 MMT.

Soybean acreage overall is expected to be relatively unchanged from 1.0 MMT in 1999/2000. Increased Ontario soybean plantings will be almost offset by reduced plantings in Quebec. With the assumption that yields will not be as good for the 2000/2001 growing season, post forecasts that Canadian production will be 2.7 MMT for 2001/200, down 3.6% from the 1999/2000. The reduced supply is countered on the demand side by reduced exports of 1.0 MMT, down 16.7% from 1999/2000, as well as reduced soybean crush, which is forecast to be down 8.6% from the 1999/2000 figure.

Policy Development and Industry News

Oilseed Processors' Joint Declaration

On October 14, 1999, in Geneva, Switzerland, oilseed associations from Brazil, Argentina, the European Union, and United States signed a joint declaration to which the Canadian Oilseed Processors Association (COPA) became signatory on November 18, 1999. The purpose of the declaration is to establish a unified level playing field negotiating position for the next agricultural trade round. By signing the joint agreement, the parties agreed to reciprocal objectives to be implemented as part of a WTO agreement which provides that all WTO member countries eliminate import tariffs and other trade barriers for oilseeds and oilseed products. In addition to these level playing objectives, the joint agreement indicated support for the following mutual undertakings: to actively encourage WTO negotiators to provide an increasing portion of total domestic support for agriculture in a decoupled form; and, to not implement any other trade distorting practices.

China and Canada Reach Trade Agreement

Canadian Trade Minister Pierre Pettigrew announced in November 1999 that Canada and China had reached an agreement on a wide range of market access issues related to China's entry into the World Trade Organization (WTO). In the agreement, China has committed to significantly improving access for many agricultural commodities, including canola and canola oil upon admittance into the WTO. In a limited number of sectors, China will adopt tariff rate quotas (TRQs) in which a low tariff is established on import volumes. For canola oil, a TRQ of 600,000 MT will be implemented, which will grow at a rate of 13.5%, compounded annually for five years to a maximum of 1.13 MMT. The TRQ will then be eliminated within six years of accession to the WTO. The in-quota tariff is nine percent, while the out of quota tariff is 85%. Canola oil would then face the same tariff as soybean oil, which is its main competitor. There would be no tariff on Canadian canola seed. China's acceptance into the WTO would increase potential demand for Canadian agricultural products, although increased canola oil sales to China might reduce demand for canola seed.

China Increases Imports of Canadian Canola

China imported 1.1 MMT of Canadian canola in the 1998/99 crop year. For the 1999/2000 crop year to date, China has imported 1.2 MMT, and if the trend continues, China could import nearly 2 MMT by the end of the current crop year. A combination of factors including a weak Canadian dollar and low canola prices help explain the increased Chinese imports. China tends to prefer canola over soybeans due to the higher oil it contains.

Japanese Canola Buyers Expect to Increase Purchases

According to the March 1 edition of Agriline Daily, Japanese canola buyers expect imports of Canadian canola to increase in 2000 if weak prices continue, perhaps exceeding last year's record of 2.2 MMT.

COPA Member Firms Continue to Process GMO Seed

The Canadian Oilseed Processors Association (COPA) has announced that "COPA members will process oilseeds grown from varieties approved by the Federal Government of Canada, including

both genetically enhanced and non-genetically enhanced seed, in order to meet requirements of our suppliers and customers." The group says that any decision to move against GM crops should be based on scientifically credible evidence of risk, and notes that no such evidence exists to date. COPA member firms are ADM Agri-Industries Ltd., CanAmerica Foods Ltd., Canbra Foods Ltd., and Cargill Limited.

53 New Canola Varieties Recommended for Registration

More than 50 new canola varieties have been recommended for registration in the 1999/2000 crop year. Statistics for the latest recommended varieties include 49 Argentine and 6 Polish varieties. The group includes 23 conventional canola varieties, 28 herbicide-tolerant varieties, and two low-linolenic oil varieties. Among those that will have seed available for the 2000 crop year include four new Roundup Ready varieties: Canterra 1867 developed by Intermountain Canola/Cargill; LG3455 from Limagrain; a limited amount of LG3535 also from Limagrain; and an as-yet unnamed variety from the University of Alberta A989NR. Other companies working with Monsanto who will demonstrate new Roundup Ready varieties this year include Proven Seed and Svalöf Weibull. For more details on newly recommended canola varieties, please visit Alberta Agriculture's website at <http://www.agric.gov.ab.ca/index.html> and follow the link from "Crop" to "Canola" where the new varieties are listed.

CGC Develops Test for Roundup-Ready Soybeans

In September 1999, the CGC introduced an enzyme linked immuno-sorbent assay (ELISA) test procedure that identifies the presence of Roundup-Ready soybean varieties in shipments of Canadian soybeans. While the test kits are commercially available, they were evaluated independently by scientific staff at the CGC's Grain Research Laboratory in Winnipeg. As a result of testing, specific limitations were put in place regarding the certification that the CGC will provide. CGC documentation will indicate either a positive or negative response to the presence of Roundup-Ready varieties at a 0.3% threshold for detection.

Identity-Preserved and Non-GMO Premiums

According to the Canola Council of Canada, specialty identity-preserved (IP) canola crops account for a small portion of the 8.8 MMT 1999 canola crop. Growers who practiced an IP system for canola average \$20/tonne with Cargill's Inter-Mountain Canola in Calgary, Alberta. Canola growers in Southern Alberta were able to collect a \$40/tonne premium on specialty canola such as high-oleic varieties and non-GMO varieties if the canola was processed at the Lethbridge-based Canbra Foods Ltd. An official with Canbra Foods said that the \$40/tonne premiums on the high-oleic/low-linolenic canola are introductory and will diminish as the agronomics of the cultivar improve. In western Ontario, elevators were offering premiums for IP and non-GMO soybean varieties in the range of \$7/MT to \$22/MT. While industry sources predict that there is room for growth in IP and niche marketing, due to the fact that COPA has announced that it will continue to accept all varieties of oilseeds, large-scale non-GMO segregation is unwarranted at this time.

Oilseed Industry Consolidation

During the year, Canbra Foods Ltd. was acquired by James Richardson International through an offer for outstanding shares; shares of Canbra, formerly a public company, were delisted from trading. Late in the year, the Canadian Agra Foods (formerly Northern Lite Canola) canola crushing plant at Sexsmith, Ontario, was sold to Helin Oil Co., a small soybean crusher and vegetable oil distributor of Whitby, Ontario.

CanAmera Plant Shut Down in 1999

According to the Manitoba Co-operator, 48 workers at the CanAmera Foods' Harrowby crushing plant near Russel, Manitoba, were laid off September 1 due to a combination of economic and labor issues. The plant, which shut down on August 31, can crush 1,400 metric tonnes of canola a day. The plant later reopened on September 17.

Canola Crusher Employees Return to Work

The last of the 170 striking workers at the Canbra Foods Ltd. canola crushing plant in Lethbridge, Alberta returned to work on Tuesday, April 25, after a wage settlement was reached last week. The strike began on March 27, and union members sought, but failed to prevent wage roll backs. Canbra, is a wholly-owned subsidiary of agribusiness firm James Richardson International, and is one of four key Canadian canola crushers with a daily crushing capacity of 1,200 metric tonnes.

Surge in Elevator Construction Continues

The construction boom of advanced, high throughput country terminal elevators in western Canada continued throughout 1999. Among the new projects announced were: Agricore at Grenfell, Saskatchewan (SK); Arborg, Elva, La Riviere, Manitoba (MB); and near Lacombe, Alberta (AB). The Lacombe facility will have a 17,000 metric tonne storage capacity will full-train 1120-car rail spot and high-speed dryer. Other companies include Dreyfuss Canada at Regina and Aberdeen, SK.; Pioneer Grain at Whitewood and Watson, SK., and Kemnay, MB.; United Grain Growers (UGG) at Camrose and Vermilion, Alberta. UGG will also build a \$4.7 million, 9,000 metric tonne elevator at Cupar, SK., to replace a previous elevator which burned down in December while in the midst of an upgrade. CMI Terminal, a local producer group, plans an elevator near Naicam, SK., with Agricore. Northwest Terminal announced a \$5 million expansion to its three year old facility in Unity, SK.

Canadian Grain Commission Freezes Mandatory Fees until 2003

Federal Agriculture and Agri-Food Minister Lyle Vanclief announced that Canadian Grain Commission (CGC) fees for mandatory services will be frozen until 2003. The CGC has received an injection of new federal financial assistance totaling C\$83 million over the next four years. The finance package includes a one-time payment of C\$20 million to offset the CGC's accumulated operating deficit, and an increase in the CGC's annual federal appropriation from C\$6 million to C\$20 million. This appropriation will rise to C\$23 million by 2003. (For more information, see GAIN report CA0035.)

C\$3.27 Million to Fund Grain Quality Testing Research

On April 7, the Government of Canada (GOC) committed funding of up to \$3.27 million to help grain producers and industry work together with researchers to develop rapid grain quality testing techniques. Funding under the initiative will go toward projects that investigate new techniques that can be used to complement the existing grain quality testing process and support the development of automated grain quality testing techniques to keep pace with customer demands and new developments in plant breeding technology. (For more information, see GAIN report CA0045.)

According to an April 13 news article from the Western Producer, as a result of more than a year's worth of program review and the cash infusion from the GOC, the CGC plans on offering an arbitration system to farmers who are dissatisfied with the results of protein tests at primary elevators. Starting August 1, the commission will, for a fee, make a binding determination of protein content. Other changes to the CGC include: increasing of the number of grain inspectors for the current crop year with the hope of hiring more staff next year; studying the possible elimination of shrinkage allowances at primary elevators (primary elevators currently are allowed to deduct shrinkage up to a specified limit from the weight of the grain delivered). The commission will not go ahead with changes that will require amendments to the *Canada Grains Act*, where discussion was held regarding ending mandatory inward inspection of grain cars arriving at terminals, and creating a single grading standard for primary and export positions.

New Canadian Grain Transport Law Expected by August 1

Reuters reports Canada Transport Minister David Collenette stated on March 31 that the Canadian government intends to introduce legislation by late April to reform the western Canadian grain and transportation system. The federal government, which has spent more than two years studying the issue of how to save money by improving the efficiency of prairie grain handling and transportation, has promised legislated changes by August 1, the beginning of Canada's crop year. A new law on the transport of grain would attempt to balance the widely disparate views of thousands of farmers, private grain handling companies, two major railways and the Canadian Wheat Board. Trade sources report it is likely that the Canadian Wheat Board will retain a role in grain transportation and a revenue cap will be imposed on the railways. (For more information, see GAIN report CA9093.)

Port of Prince Rupert Back in Operation

Prince Rupert Grain Ltd. (PRG) resumed full operations in October 1999 after a six month period of reduced activity. In the last three months of 1999, nearly 1.3 MMT of grain were handled at PRG, an increase of nearly 700,000 MT over the same period in 1998. Total grain shipped through the port for 1999 was 1.8 MMT versus 2.7 MMT for 1998. The port has an annual capacity of 12 MMT that is expandable to 24 MMT, with storage capacity of 1.2 MMT. PRG has storage capacity (wheat equivalent) of 202,000 tonnes, with an annual design throughput in excess of 5 MMT.

For additional information regarding the Canadian oilseed industry, please visit the following websites:

Agriculture and Agri-Food Canada:

- Market Analysis Div.: <http://www.agr.ca/policy/winn/biweekly/English/index2e.htm>
- Agri-Food Trade Network: <http://atn-riae.agr.ca/public/htmldocs/e1919001.htm>
- Oilseed Industry Directory: <http://atn-riae.agr.ca/public/htmldocs/e0352.htm>

Canadian Grain Commission: <http://www.cgc.ca>

The Department of Foreign Affairs and International Trade:

- Main page - <http://www.dfait-maeci.gc.ca>
- News releases - <http://198.103.104.118/minpub/mainmenu.asp?Language=E>

Prince Rupert Port Authority: <http://www.rupertport.com>

The Western Producer: <http://www.producer.ca>

Table 1: Canola/Rapeseed PS&D

PSD Table						
Country	Canada					
Commodity	Oilseed, Rapeseed				(1000 HA)(1000 MT)	
	Revised	1998	Prelimin.	1999	Forecast	2000

	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Area Planted	5477	5477	5643	5599	0	4600
Area Harvested	5421	5421	5585	5564	0	4550
Beginning Stocks	361	361	449	887	0	2049
Production	7588	7643	7450	8700	0	6600
MY Imports	150	137	100	125	0	150
MY Imp. from U.S.	110	129	80	125	0	140
MY Imp. from the EC	20	0	10	0	0	0
TOTAL SUPPLY	8099	8141	7999	9712	0	8799
MY Exports	3900	3604	3400	4000	0	4000
MY Exp. to the EC	0	3	0	0	0	0
Crush Dom. Consumption	3200	3063	3500	3000	0	3100
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	550	587	600	663	0	600
TOTAL Dom. Consumption	3750	3650	4100	3663	0	3700
Ending Stocks	449	887	499	2049	0	1099
TOTAL DISTRIBUTION	8099	8141	7999	9712	0	8799
Calendar Year Imports	134	134	140	152	0	150
Calendar Yr Imp. U.S.	115	115	115	145	0	140
Calendar Year Exports	3952	3952	2700	3793	0	3600
Calndr Yr Exp. to U.S.	380	380	380	223	0	200

Table 2: Soybean PS&D

PSD Table						
Country	Canada					
Commodity	Oilseed, Soybean				(1000 HA)	(1000 MT)
	Revised	1998	Prelimin.	1999	Forecast	2000

	Old	New	Old	New	Old	New
Market Year Begin		09/1998		09/1999		09/2000
Area Planted	980	980	997	999	0	1000
Area Harvested	980	980	997	999	0	1000
Beginning Stocks	188	188	145	239	0	219
Production	2737	2737	2700	2800	0	2700
MY Imports	150	254	150	640	0	400
MY Imp. from U.S.	128	251	148	610	0	380
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	3075	3179	2995	3679	0	3319
MY Exports	850	876	575	1200	0	1000
MY Exp. to the EC	400	269	250	220	0	300
Crush Dom. Consumption	1550	1578	1700	1860	0	1700
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	530	486	560	560	0	500
TOTAL Dom. Consumption	2080	2064	2260	2260	0	2200
Ending Stocks	145	239	160	219	0	119
TOTAL DISTRIBUTION	3075	3179	2995	3679	0	3319
Calendar Year Imports	104	104	166	420	0	300
Calendar Yr Imp. U.S.	100	100	160	409	0	280
Calendar Year Exports	915	908	625	875	0	900
Calndr Yr Exp. to U.S.	150	150	100	87	0	150

Table 3: Canola/Rapeseed Meal PS&D

PSD Table						
Country	Canada					
Commodity	Meal, Rapeseed				(1000MT) (%)	

	Revised	1998	Prelimin.	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Crush	0	0	0	0	0	0
Extr. Rate, 999.9999	0.57	0.570029	0.518	0.57	0	0.570968
Beginning Stocks	37	38	20	35	0	27
Production	1824	1746	1813	1710	0	1770
MY Imports	5	4	5	8	0	5
MY Imp. from U.S.	5	4	5	8	0	5
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	1866	1788	1838	1753	0	1802
MY Exports	1386	1259	1283	1200	0	1250
MY Exp. to the EC	0	52	0	36	0	40
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	460	494	530	526	0	522
TOTAL Dom. Consumption	460	494	530	526	0	522
Ending Stocks	20	35	25	27	0	30
TOTAL DISTRIBUTION	1866	1788	1838	1753	0	1802
Calendar Year Imports	5	4	5	5	0	5
Calendar Yr Imp. U.S.	5	4	5	5	0	5
Calendar Year Exports	1400	1429	1250	1380	0	1400
Calndr Yr Exp. to U.S.	1244	1244	1200	1200	0	1250

Table 4: Soybean Meal PS&D

PSD Table						
Country	Canada					
Commodity	Meal, Soybean				(1000MT) (%)	
	Revised	1998	Prelimin.	1999	Forecast	2000

	Old	New	Old	New	Old	New
Market Year Begin		09/1998		09/1999		09/2000
Crush	0	0	0	0	0	0
Extr. Rate, 999.9999	0.790323	0.790241	0.764706	0.790323	0	0.788235
Beginning Stocks	5	5	5	5	0	5
Production	1225	1247	1300	1470	0	1340
MY Imports	750	791	700	750	0	780
MY Imp. from U.S.	700	780	700	750	0	780
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	1980	2043	2005	2225	0	2125
MY Exports	30	34	40	100	0	50
MY Exp. to the EC	5	4	5	40	0	10
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	1945	2004	1960	2120	0	2070
TOTAL Dom. Consumption	1945	2004	1960	2120	0	2070
Ending Stocks	5	5	5	5	0	5
TOTAL DISTRIBUTION	1980	2043	2005	2225	0	2125
Calendar Year Imports	775	775	700	790	0	750
Calendar Yr Imp. U.S.	774	774	700	780	0	740
Calendar Year Exports	62	63	70	71	0	70
Calndr Yr Exp. to U.S.	11	12	15	39	0	30

Table 5: Canola/Rapeseed Oil

PSD Table						
Country	Canada					
Commodity	Oil, Rapeseed				(1000MT) (%)	
	Revised	1998	Prelimin.	1999	Forecast	2000
	Old	New	Old	New	Old	New

Market Year Begin		08/1998		08/1999		08/2000
Crush	0	0	0	0	0	0
Extr. Rate, 999.9999	??	??	??	??	0	??
Beginning Stocks	20	36	50	24	0	25
Production	1344	1287	1336	1260	0	1300
MY Imports	10	9	10	80	0	60
MY Imp. from U.S.	10	9	10	80	0	60
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	1374	1332	1396	1364	0	1385
MY Exports	750	760	675	800	0	800
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	574	548	651	539	0	555
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	574	548	651	539	0	555
Ending Stocks	50	24	70	25	0	30
TOTAL DISTRIBUTION	1374	1332	1396	1364	0	1385
Calendar Year Imports	11	31	10	39	0	30
Calendar Yr Imp. U.S.	10	30	20	38	0	30
Calendar Year Exports	750	831	740	621	0	700
Calndr Yr Exp. to U.S.	500	499	500	523	0	500

Table 6: Soybean Oil PS&D

PSD Table						
Country	Canada					
Commodity	Oil, Soybean				(1000MT) (%)	
	Revised	1998	Prelimin.	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		09/1998		09/1999		09/2000
Crush	0	0	0	0	0	0

Extr. Rate, 999.9999	??	??	??	??	0	??
Beginning Stocks	11	11	11	11	0	11
Production	270	269	280	315	0	290
MY Imports	20	12	20	20	0	20
MY Imp. from U.S.	20	12	20	20	0	20
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	301	292	311	346	0	321
MY Exports	35	39	35	40	0	35
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	255	242	265	295	0	275
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	255	242	265	295	0	275
Ending Stocks	11	11	11	11	0	11
TOTAL DISTRIBUTION	301	292	311	346	0	321
Calendar Year Imports	13	13	20	25	0	20
Calendar Yr Imp. U.S.	13	13	20	25	0	20
Calendar Year Exports	30	31	35	35	0	35
Calndr Yr Exp. to U.S.	25	29	25	25	0	25

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