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Report Highlights:

"What's New, Eh?" * Canada and Cairns Group Call for Complete Elimination of Export Subsidies * Strong Livestock Sector Sends Net Cash Income Higher in 2001 * Potato Production up Again * Proposal to Expand Irradiated Food List * CWB Reduces Grain Export Numbers * CWB Increases Initial Payments for 2002/03 Crop Year * Tentative Settlement for Port of Prince Rupert Docks * CFA Tells U.S. to Call off Trade Dogs * CAFTA Gets New President; Former Executive Director Returns * B.C. Pine Beetle Epidemic Spreads * United Opposition Demands Softwood Lumber Aid * Canada Connect Program

...and MORE!

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Ottawa [CA1], CA

This Week in Canadian Agriculture is a weekly review of Canadian agricultural industry developments of interest to the U.S. agricultural community. The issues summarized in this report cover a wide range of subject matter obtained from Canadian press reports, government press releases, and host country agricultural officials and representatives. Substantive issues and developments are generally also reported in detail in separate reports from this office.

Disclaimer: Any press report summaries in this report are included to bring U.S. readership closer to the pulse of Canadian developments in agriculture. In no way do the views and opinions of these sources reflect USDA's, the U.S. Embassy's, or any other U.S. Government agency's point of view or official policy.

CANADA AND CAIRNS GROUP CALL FOR COMPLETE ELIMINATION OF EXPORT SUBSIDIES: According to a November 26, 2002 Agriculture and Agri-Food Canada (AAFC) news release, Canada and Cairns Group members are calling on all countries to eliminate export subsidies, developed countries within three years and developing countries within six. Previously, Canada and Cairns Group members submitted an export competition proposal to the World Trade Organization outlining the Group's position on export subsidies, export credits and international food aid. "Export subsidies are the most trade-distorting form of government support and it is critical that we eliminate them as quickly as possible," said AAFC Minister Lyle Vanclief. "We are continuing to work towards trade rules that level the playing field, allowing producers in both developed and developing countries to compete in a fairer environment." The full news release is available on the internet at:
<http://www.agr.gc.ca/cb/news/2002/n21126ae.html>

STRONG LIVESTOCK SECTOR SENDS NET CASH INCOME HIGHER IN 2001: Statistics Canada's farm income data for 2001 show net cash income - the difference between a farmer's cash receipts and operating expenses -reached C\$8.7 billion in 2001. Despite the sharply higher cost of inputs such as feed and fertilizer, this increase was mainly due to a booming livestock sector and marginal growth in crop receipts, as farmers substantially reduced their grain and oilseed stocks. Farmers' net cash income rose 26.7% from 2000, as both cash receipts and operating expenses hit record highs. Net cash income increased for the second straight year, rebounding from annual declines during the late 1990s. Cash receipts reached C\$36.3 billion in 2001, up 9.8% from 2000. Livestock receipts rose 10.9%, as a record number of cattle, pigs, chickens and eggs were sold at higher prices. Program payments jumped 32.6%, the result of higher payments delivered through crop insurance and income disaster programs coupled with the additional federal and provincial support that was delivered through one-time emergency assistance programs.

FARM RECEIPTS NOT AS ROSY IN 2002: According to the latest farm cash receipt data released by Statistics Canada, many Canadian farmers faced difficulties from January to September, as cash receipts from crops and livestock declined. Farm cash receipts from agricultural commodities and program payments totaled C\$25.2 billion, down C\$1.5 billion (-5.7%) from the same period of 2001 and the first decrease since 1998. Crop receipts dropped 1.5% from the same period of 2001. Lower deliveries for most of the major grains and oilseeds more than offset the increase in prices for all of them. At C\$9.9 billion, crop receipts remained 2.9% below the previous five-year average (1997 to 2001). Livestock revenues fell for the first

time since 1998 for the January-to-September period as prices for the major commodities slumped after peaking in 2001. Receipts for livestock stood at \$13.3 billion, down 5.8% from the same period of 2001 but up 12.3% from the previous five-year average. Program payments decreased for the first time since 1997, falling 20.6% to \$2.1 billion in the first nine months of 2002. Most of this decrease can be attributed to the completion of one-time emergency assistance payments implemented in 2001, coupled with reduced payments delivered through income disaster and provincial stabilization programs.

POTATO PRODUCTION UP AGAIN: Statistics Canada released its first estimate of potato production and although output did not reach its full potential due to variable weather, production in 2002 reached 4.72 million metric tons (104,113,000 cwt.), up 11.9% from 2001's production of 4.2 million metric tons (93,047,000 cwt.), but up only 3.4% from 2000. According to Statistics Canada, 13,200 acres (5 300 hectares) or 3% of the planted acreage had to be abandoned this year due to weather related problems in certain regions. Yields were higher, 247.9 cwt./acre (27.78 tonnes/hectare) than in 2001, but down from 2000's average yield of 255.9 cwt./acre (28.69 tonnes/hectare). The export demand for fresh and processed potato products (mostly frozen french fries) continue to drive Canadian potato acreage and production increases. In the period from 1991 to 2001, Canadian potato production rose 49%. For this same period, the exports of processed potato products went from 235 million pounds (106,512 MT) to 1,611 million pounds (730,593 MT). For more on Canada's frozen french fry industry, see the Frozen French Fry Report, CA2127.

PROPOSAL TO EXPAND IRRADIATED FOOD LIST: Health Canada is proposing regulatory changes which would expand the list of irradiated foods allowed to be sold in Canada. The proposed amendments would be made to the existing provisions in the Canadian Food and Drug Regulations. Currently wheat, flour, whole wheat flour, potatoes, onions, whole and ground spices and dehydrated seasoning preparations are the only foods permitted to be irradiated and sold in Canada. The proposed additions to the table are: fresh and frozen ground beef, fresh and frozen poultry, prepackaged fresh, frozen, prepared and dried shrimp and prawns, and mangoes. According to Health Canada, the approved areas of use in the U.S. include the areas of use covered in the Canadian regulatory proposal with the exception of shrimps and prawns, but consideration is being given by the US government to new proposed uses of the food irradiation for control of food borne pathogens in crustaceans and processed crustaceans. Health Canada claims that both consumers and industry are likely to benefit from the longer durable shelf life of irradiated foods as a result of the reduction of spoilage bacteria in these foods. In the case of the irradiation of refrigerated fresh chicken, the durable life was found to be in the range of 14 to 22 days, a period two to three times that of non-irradiated fresh chicken. Health Canada's proposal was published in The Canada Gazette, Part I, on November 23, 2002. There is a 90 public comment period.

STUDY LINKS SALMON FARMING TO SEA LICE IN WILD STOCKS: The Pacific Fisheries Resource Conservation Council (PFRCC), an independent organization to advise the governments of Canada and British Columbia, and the Canadian public, issued an advisory to Canada's and British Columbia's Fisheries Ministers warning that there were dramatic decreases in the numbers of spawning pink salmon in the Broughton Archipelago, the area between the northern tip of Vancouver Island and B.C.'s southern coast has and raised concerns over the

potential impact of salmon aquaculture and sea lice. The PFRCC recommends that Canada and B.C. undertake urgent actions to maximize the chance of safe passage of fish through the Broughton Archipelago during April 2003. The report says that concerns arose after sharp drops in the number of pink salmon spawners in 2002 compared to the brood year numbers in 2000. Some observers have related the cause to sea lice originating from local salmon farms. The numbers of pink salmon spawning in local streams decreased from 3.615 million fish in 2000 to 147 thousand fish returning in 2002. The BC Salmon Farmers Association (BCSFA), and two of its members with farming operations in the area, have told the PFRCC that they are committed to working with the council and other stakeholders to research the causes of the low return of pink salmon.

IMPRISONED ALBERTA FARMERS CUT OFF FROM MEDIA: The November 21, 2002 *National Post* reported that Alberta farmer Jim Chatenay, is no longer allowed to speak to the news and media due to Alberta policies preventing inmates from talking to the media. Chatenay had provided readers with two reports of his imprisonment from inside the Lethbridge provincial Correctional Centre. According to a spokesperson with the Alberta Solicitor-General's Department, the provincial government has a long-standing policy that does not facilitate media interviews with jailed offenders. The Correctional Service of Canada's policy for federal institutions allows media and inmates to do interviews, except in rare cases. The article states that Chatenay will be released on November 23. Chatenay and 12 other Alberta farmers were jailed after refusing to pay Canada Customs fines for taking grain across the U.S. border to protest the Canadian Wheat Board's (CWB) sales and marketing monopoly over Western grain producers.

Mr. Chatenay, who is a farmer-elected Wheat Board director, donated a sack of grain to a Montana 4-H Club during the April, 1996, protest at the border crossing between Coutts, Alta., and Sweetgrass, Montana. Three other Albertan farmers, John Turcato, Bill Moore and Ron Duffy, remain behind bars until December 4. In his last report, Chatenay said the remaining farmers are refusing to pay fines on principle.

SASKATCHEWAN JUDGE ADJOURNS APPEAL BY SASKATCHEWAN FARMERS: The November 26 edition of *Agriweek* reported that a Regina, Saskatchewan judge last week unexpectedly adjourned an appeal by 28 Saskatchewan farmers previously convicted for their parts in border demonstrations against the CWB monopoly in 1997 and 1998. The cases will be heard in January and February of 2003. The article states that the farmers are the last of more than 200 to be charged and tried in connection with the Farmers for Justice demonstrations. It is interesting to note that the appeal will be heard once the CWB Board of Director elections are safely over. It makes one wonder as to whether or not the case was postponed so as to not lend additional support for pro-voluntary CWB candidates in the current election.

CWB REDUCES GRAIN EXPORT NUMBERS: According to a November 21, 2002 article from the *Western Producer*, the Canadian Wheat Board's already low export projections have been scaled back even lower. With a sizable portion of the crop going unharvested this fall, chief executive officer Greg Arason said the marketing agency is looking at a 2002/03 wheat and barley export program of around eight million metric tonnes (MMT). That's made up of four to 4.5 MMT of wheat, three million tonnes of durum and a few hundred thousand tonnes of barley. The CWB had previously talked about exports of around 10 MMT this year due to the drought-reduced crop, but those numbers were cut by harvest problems. A few years ago the

CWB was forecasting potential annual wheat exports of 26 MMT by 2004/05. The article states that this year's exports by the CWB will be the lowest since the 1959/60 crop year, when the agency exported 7.9 MMT, made up of 6.5 MMT of wheat and 1.4 MMT of barley. In the 1990s, Canadian wheat and durum exports averaged 19 million tonnes. Last year, the four top foreign buyers (Japan, Iran, United States and Mexico) together bought 4.3 MMT of Canadian wheat, which is about how much the CWB expects to export in total this year. The CWB has said it will carefully choose among potential customers to get the best price. That means some regular buyers of Canadian wheat will have to go elsewhere, but Arason expressed confidence those customers will be back. The November 28 edition of *Good Morning Ontario* provided additional details on major grain exports, reporting that Canada's major grain exports will total only four to five million metric tonnes through the west coast this year, according to Ward Weisensel of the CWB.

CWB INCREASES INITIAL PAYMENTS FOR 2002/03 CROP YEAR: According to a November 25, 2002 Canadian Wheat Board (CWB) news release, the CWB announced that 2002/03 initial payments for wheat, durum, feed and designated barley will increase effective November 27, 2002. The payment increase announcement comes just a little more than one week prior to the closing of polls for farmers either seeking election or in the case of CWB incumbents, re-election, to the CWB Board of Directors. The increase in initial payments for wheat will be C\$21 to C\$67.50 per tonne, depending upon the grade. In the case of durum, the increase will be C\$21 to C\$35 per tonne. For feed barley, the increase will be C\$20 per tonne, while the increase for designated barley will be C\$15 and C\$18 per tonne. The following lists the initial payment, adjustment payment, and total payments to date by grade. No. 1 Canada Western Red Spring Wheat 12.5%: C\$181.00, C\$64.50, C\$245.50; No. 1 Canada Western Amber Durum 12.5%:

C\$195.00, C\$28.00, C\$223.00; No. 1 CW Barley: C\$130.00, C\$20.00, C\$150.00; SS CW 2 Row Barley: C\$190.00, C\$18.00, C\$208.00. Farmers who delivered wheat, durum, barley and designated barley to the CWB between August 1, 2002 and November 26, 2002, will receive an adjustment payment. The payments will be mailed on December 6, 2002 or received by direct deposit on December 3, 2002. Polls for the CWB election close December 5, 2002. A complete listing of payments for all grades in dollars per tonne and dollars per bushel is posted on the CWB's website at: http://www.cwb.ca/en/contracts/farmer_payments/current.jsp

ONTARIO WHEAT BOARD TERMINATES MARKETING MANAGER: According to the November 25 edition of *Canadagrains Online*, Jim Whitelaw, the OWB's marketing manager, has been fired. Whitelaw says he was given the following notice upon arrival at his office on the November 22: "You are advised that as a result of an operational review and decision to move in a different direction, your position with the Ontario Wheat Board will be terminated." The news was greeted in the grain trade by what one observer described as "a tidal wave of disbelief." Whitelaw led the board's recent move to offer a variety of marketing choices which have been enthusiastically taken up by growers as alternatives to pooling.

TENTATIVE SETTLEMENT FOR PORT OF PRINCE RUPERT DOCKS: The November 22 edition of *Good Morning Ontario*, covering a *Resource News* article reported that a tentative agreement has been reached between the 100-plus members of the Grain Workers Union (GWU), Local 333 and Prince Rupert Grain Ltd., according to Canada's Labour Minister, Claudette

Bradshaw. The information available is that the two sides reached a tentative settlement with the aid of federal conciliators, but the agreement still has to be ratified by the union membership. No details were available on terms of the settlement. A spokesman with the GWU's main office in Vancouver could not confirm whether or not a settlement had been reached, but said an executive meeting had been called to discuss the negotiation process which took place. Mediated negotiations between Prince Rupert Grain Ltd. and its 100-plus workers resumed on November 19. The grain employees at both Vancouver and Prince Rupert have been working without a contract since the previous ones expired Dec. 31, 2000. Grain will continue to flow through the northern British Columbia port of Prince Rupert despite the lockout of grain workers in the Vancouver grain terminals.

MORE ETHANOL MAY BE IN CANADA'S FUTURE: The same edition of *Good Morning Ontario* wrote that the Canadian government wants to boost the use of ethanol in gasoline to help implement the Kyoto protocol on climate change. Reuters reports that the government wants 35% of the gasoline sold in Canada by 2010 to contain 10% ethanol as part of its drive to limit greenhouse gases that are blamed for global warming. An earlier initiative had set the goal of increasing ethanol fuel use from the current level of 240 million liters a year to 1 billion liters in 2010, enough ethanol to blend into 25% of Canada's gasoline. Current vehicles can use up to 10% ethanol-blended gasoline without any adjustment to, or effect on, the engine. The government also proposed the production of 500 million liters of biodiesel by 2010.

CANADA'S FOOD PYRAMID FLAWED, SAYS U.S. STUDY: According to the November 22 edition of *Good Morning Ontario*, dairy farmers, along with cattle and hog producers, will be unhappy with the latest results of a study by the Harvard School of Public Health. It says that Canadian and U.S. food guidelines (the food pyramid) are flawed and if revised would significantly reduce the number of people dying from heart attacks, strokes and other chronic diseases. One of its main complaints with the current guidelines is the idea that dairy should be eaten in high amounts. It also says that the idea that all fats are bad; all complex carbohydrates are good and all protein sources offer the same nutrition is totally inaccurate. The Harvard study looked at 100,000 men and women and concluded that those who eat very little butter, red meat, white rice, white bread, potatoes, pasta and sweets, and reduce other dairy, were more likely to reduce the risk for major chronic diseases.

AG CANADA RELEASES BUSINESS RISK MANAGEMENT CONSULTATION PAPER: According to a November 23, 2002 *Canada NewsWire* release, a discussion paper on the design of the next generation of agricultural business risk management programs is available on-line. Within Agriculture and Agri-Food Canada's (AAFC) new Agricultural Policy Framework (APF), designed to strengthen the competitiveness and profitability of Canada's agriculture and agri-food sector, federal, provincial and territorial governments have been working to improve business risk management programming. The paper proposes business risk management improvements through an expanded production insurance system and a stronger Net Income Stabilization Account (NISA) program that combines the objectives of income stabilization, disaster coverage and support for farm investment. The document is subject to change based on the outcome of consultations with industry and federal-provincial-territorial negotiations. To view more detailed analysis of the proposed program elements, visit the following AAFC APF websites: http://www.agr.gc.ca/cb/apf/brm_e.html

http://www.agr.gc.ca/cb/apf/brmdeck_e.html

TASK FORCE URGES QUICK ACTION TO ADDRESS FARMER'S NEEDS: In a November 27, 2002 press release, the Task Force on Future Opportunities in Farming presented its final report to Prime Minister Jean Chrétien and members of the National Liberal Caucus following country-wide consultations with Canadians. The Final Report expands upon the Interim Report to provide final observations and recommendations designed to assure the future health and prosperity of Canada's agriculture and agri-food industry, and rural communities. "Securing Agriculture's Future: Invest Today ~ Prosper Tomorrow" stresses the importance of environmental and financial sustainability, sustainable rural communities, domestic and international market opportunities, the diversity of farmers, and periodic review of agriculture and agri-food policy. The Interim and Final Reports should be viewed as two components of a plan having one goal: a secure future for our agriculture and agri-food industry. Prime Minister Chrétien established the Task Force on Future Opportunities in Farming on March 29, 2001. Since then, the Task Force has visited all provinces, met with Canadian producers, processors, exporters, educators, researchers and governments, and received written submissions from individuals and organizations from across Canada. In Spring 2002, the Task Force presented its Interim Report to the Prime Minister and the agriculture and agri-food industry. Since that time, the federal government has taken steps to implement a number of the interim recommendations, recommendations that came directly from consultations with farmers and others in the industry. The interim report is available at: http://www.liberal.parl.gc.ca/agriculture/interim_report_en.doc
The final report is available at:
http://www.liberal.parl.gc.ca/agriculture/agriculture_report_en.pdf

WILL MORON JIBE HURT CANADIAN FARMERS? The November 25 edition of *Good Morning Ontario* covered a *Reuters* article by David Ljunggren that the fact that a top Canadian official could dismiss U.S. President George W. Bush as "a moron" is a telling indication of how far political ties between the world's two largest trading partners have deteriorated over the last 18 months. The reported insult by Francoise Ducros, communications director to Prime Minister Jean Chrétien, reflects increasing frustration inside Ottawa with Bush's perceived unilateral approach to international affairs since he won the 2000 election. "The fundamental problem with the current administration in Washington is that it's highly unintelligent," one senior Canadian official told *Reuters* a few days before the comments were made to journalists in Prague during a NATO summit. Bilateral trade is worth around \$1 billion a day, with Canada sending 85% of its exports south. But the list of irritants is growing. Canada is locked into costly trade disputes with Washington over exports of softwood and wheat. Earlier this year, Transport Minister David Collenette likened some leading U.S. players to bullies on an ice hockey rink. This may not be the frame of mind Canadian farmers want their leaders in when they go up against the U.S. in battles over agricultural issues such as the Wheat Board.

CFA TELLS U.S. TO CALL OFF TRADE DOGS: The November 21, 2002 *Western Producer* reported that American farmers are launching trade challenges against Canadian farmers because Canadians are beating them in the marketplace and because they do things differently, says Canadian Federation of Agriculture (CFA) president Bob Friesen. "These challenges come because on many fronts we outcompete the U.S.," said Friesen after a debate with the president of the North Dakota Farm Bureau in front of the Manitoba Farm Writers and Broadcasters

Association. "We don't like the U.S. just looking for excuses." During the debate, Friesen highlighted what he considers examples of American trade harassment. Friesen said the leader of a national American hog producer organization recently told him that his group was thinking of launching another trade challenge against Canadian hog producers. The reason: the American herd is not growing, but Canada's has expanded by 25%. Friesen also attacked the North Dakota Wheat Commission's trade challenge of the Canadian Wheat Board. "Call off the dogs in the U.S.," said Friesen. Friesen said American farmers often lobby for trade challenges regardless of the evidence.

CAFTA GETS NEW PRESIDENT; EXECUTIVE DIRECTOR RETURNS: According to the November 21 edition of the *Western Producer*, Ted Menzies, a former president of the Western Canadian Wheat Growers Association, has replaced Ontario soybean grower Liam McCreary as president of the Canadian Agri-Food Trade Alliance (CAFTA). He operates a 5,000-acre farm south of Calgary and will be a member of the federal trade advisory committee. Saskatchewan cattle producer and Canadian Cattlemen's Association president Neil Jahnke is the new vice-president of the group. Early in 2003, CAFTA will re-open its Ottawa office staffed by returning executive director Patty Townsend, a former Ottawa lobbyist for Prairie Pools Inc. and then Agricore. She currently is executive director of the Agriculture Institute of Canada. Menzies said his main job as CAFTA president will be to pressure the federal government to stick to its trade agenda of pressing for more open borders, an end to export subsidies in all their forms, and a sharp reduction in domestic subsidies. He said one of his main points will be reminding the government that CAFTA represents farmers in sectors that make up 70% of Canadian agriculture.

B.C. PINE BEETLE EPIDEMIC SPREADS: According to November 25, 2002 *Globe and Mail* coverage of a *Reuters News* article, the tree-killing beetle epidemic is spreading rapidly through British Columbia (B.C.) forests, with the deadly insects now found in an area nearly three-quarters the size of Sweden, according to B.C. officials. The tiny pine beetles in the province's Interior region have seriously infested 3.6 million hectares of forests up from 3.2 million last year and have now destroyed up to 108 million cubic metres (m³) of lodgepole pine timber. Provincial officials tracking the beetle infestation warned in a report that the amount of destroyed trees could reach 150 million m³ next year unless the weather turns cold enough to kill larvae before they hatch. This year's winter in the Cariboo region, where the bugs have hit the hardest, is not expected to be particularly cold. "This is clearly an epidemic of catastrophic proportion," said Larry Pedersen, B.C.'s chief forester. B.C. has not had a major bug-killing cold snap for several years, and the fires that once raced through the forests each summer are now fought by a multi-million dollar control effort. The area of epidemic is now considered to stretch from Fort St. James in northeastern B.C. 1,150 kilometres south to near Cranbrook. The province has increased the amount of lumber that forest companies can cut in infected areas, but much of the lumber in the region normally goes to the United States, which has imposed duties on Canadian softwood.

UNITED OPPOSITION DEMANDS SOFTWOOD LUMBER AID: According to the November 27, 2002 *Globe and Mail*, in a rare show of unity, the leaders of Canadian opposition parties demanded the Liberal government provide financial assistance for workers and loan-guarantees for companies hurt by a long-running softwood lumber dispute with the U.S. At a press

conference in Ottawa, opposition leaders said Ottawa must take action immediately against the crushing weight of 27% U.S. duties imposed on all cross-border shipments of softwood timber. The issue of softwood lumber has moved out of the spotlight since early October when the Liberals unveiled a C\$246.5-million package designed to sustain workers and communities while Ottawa tries to resolve the deadlock through international tribunals and negotiations with the U.S. Opposition politicians immediately derided the package as inadequate help for a sector struggling to cope with the large duties, especially for heavy lumber-producing provinces such as British Columbia and Quebec. "While the government continues to have this discussion [of loan guarantees], mills are closing, people are losing their jobs and a restructuring of our industry is going on," said Canadian Alliance leader Stephen Harper. Trade Minister Pierre Pettigrew is reluctant to provide loan guarantees for businesses forced to pay the U.S. tariff because of fears the measure could trigger retaliation from U.S. lumber industry interests.

CANADA CONNECT: The Canada Connect Program, FAS Canada's version of the Commercial Service's Gold Key Program, has been successfully running for two years. Over 40 companies have utilized this one-on-one matchmaker service since 2000, with 219 appointments booked between U.S. exporters and Canadian buyers. A newly-designed brochure, promoting extended services of Canada Connect, has been developed and is being mailed to the Trade Assistance Promotion Office of FAS, State Regional Offices, State Department of Agricultural Offices, and Department of Commerce Export Assistance Centers throughout the U.S. and FAS Cooperators with interests in Canada. We encourage all recipients to provide this information to all interested exporters. Additional copies are available by sending an email to: baileym@usda-canada.com /or/ baileym@fas.usda.gov .

Did You Know ...that total U.S. agriculture, fish and forest product exports to Canada in FY2002 (Oct. - Sept.) were \$10.8 billion and exceeded the level exported to the fifteen European Union member states by more than \$3.0 billion.

Recent Reports from FAS/Ottawa:

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CA2132	Exporter Guide	11/19/2002

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