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Approved by:

Gary Groves

U.S. Embassy

Prepared by:

Matthew Cahoon

Report Highlights:

Based on the assumption of near-normal yields and abandonment rates, total production of oilseeds in Canada for 2003/04 is forecast to increase to 8.4 million metric tonnes (MMT) from 5.9 MMT in 2002/03. Supplies are forecast to increase considerably as higher production more than offsets the low carry-in stocks. Imports, mostly from the U.S., are expected to decline to 800,000 metric tonnes (MT) from 880,000 MT in 2002/03. Total exports are forecast to increase to 3.8 MMT from 2.9 MMT expected for 2002/03. In Canada, grains and oilseed prices are expected to decline due to lower world prices and appreciation of the Canadian dollar.

Includes PSD changes: Yes

Includes Trade Matrix: No

Annual Report

Ottawa [CA1], CA

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OILSEED PRODUCTION OVERVIEW - 2002/03

Canola (Rapeseed)

Seeding

According to the Canadian Grain Commission (CGC), extremely dry conditions, combined with cooler than normal weather in April and May, delayed seeding of cereal and oilseed crops. Planting in Western Canada was only 75% complete by the end of May. Heavy rains fell in the southern areas of Saskatchewan and Alberta during the first week of June, further delaying planting in those regions. Seeding continued into the third week of June in those areas that received heavy rains. Northern and central growing areas of Saskatchewan and Alberta remained dry and crops were planted into dust. Germination was quite uneven in these regions, with some crops not emerging until rains fell in July. Seeding progressed rapidly in eastern Saskatchewan and Manitoba, with planting in these areas finishing during the first week of June.

Growing Conditions

Cool weather during May and early June slowed crop growth and development across the Prairies. Heavy rains in the southern Prairies did improve soil moisture conditions, especially in Alberta and Saskatchewan. The heavy rains caused some flooding in all three provinces resulting in some reseeded, especially in southern Alberta. Warmer than normal temperatures during the second half of June increased crop stress, especially in the parched regions of northern Alberta and Saskatchewan. The dry conditions caused uneven emergence in canola crops, with many fields having three to four stages of development.

The warmer than normal weather continued through July, which caused severe stress to all crops. Yield potential for canola crops declined rapidly under the stressful conditions. The rainfall pattern of the spring continued into July, with the heaviest rainfall reported in the southern Prairies. Northern regions reported minimal amounts during the month, with only isolated areas reporting enough rainfall to improve crop prospects. Even in the regions that had received adequate moisture during the spring, severe heat stress began to take a toll on production prospects.

The warm temperatures accelerated crop development, especially in eastern areas of the Prairies. A cool, wet weather pattern settled over the Prairies during the first week in August, bringing significantly above normal rainfall to the dry areas in Saskatchewan. A significant frost during the first week of August damaged the crops in northern and central areas of Saskatchewan and Alberta. The rains brought a flush of secondary growth in the drought regions and delayed maturity in southern areas.

Harvest Conditions

The harvest started in southern Manitoba and southeastern Saskatchewan in the third week of August. Frequent rains during the last week of August and first two weeks of September resulted in a reduction in grade pattern of the mature crops in the eastern Prairies. Severe frost was reported by the middle of

the month in Saskatchewan and Alberta, which brought an end to the growing season in most areas. Harvest during the last half of September continued to be plagued by frequent light to heavy showers. In eastern growing areas, significant harvest progress was made during the last two weeks of September, while western areas continued to struggle with poor drying conditions. The uneven growth of crops in Alberta and Saskatchewan continued to slow harvest activity into October. Frequent rainfall combined with cooler than normal temperatures delayed further progress. Snow during the last two weeks of October brought an end to harvest activity. The Manitoba canola harvest was completed by the end of October while the Saskatchewan canola crop was estimated to be only 65% harvested as of October 15th. In Alberta, the harvest was delayed by wet weather and as of October 15th only 40-50% of their canola crop was harvested. As with most crops grown in western Canada, a portion of the 2002 canola crop would not be harvested until the spring of 2003.

Production and Grade Information

Canadian farmers planted 3.89 million hectares of canola in 2002, which is a slight increase from 2001. The final 2002 yield estimate of approximately 1250 kilograms per hectare (kg/ha) is less than the 1300 kg/ha reported in 2001 and about eight percent below the 10-year mean of 1363 kg/ha.

With less harvested area of 2.86 million hectares and a drop in yield, total canola production in Canada is down 27% to 3.58 million metric tonnes (MMT) according to estimates by Statistics Canada reported in *Field Crop Reporting Series No. 8*, December 5, 2002. The largest proportion of western Canadian 2002 production, 40%, was grown in Manitoba. Saskatchewan accounted for 37% while Alberta and British Columbia accounted for 23%.

Initially, there was concern for canola that was shriveled, underdeveloped and green due to the extreme drought in many regions. In some of the drought areas there were also reports of germination within the canola pods once rainfall arrived in late summer and early fall. In some areas, as a result of inadequate weed and pest control, canola samples were downgraded due to the presence of high levels of admixture. The grade pattern of the 2002 crop was further affected by the cool, wet conditions experienced after August. Sprouted, immature, heated, and weathered kernels were evident in many areas in northern Alberta and Saskatchewan where the harvest was delayed due to wet and cold weather.

Quality

Western Canadian canola tested in the 2002 harvest survey is slightly below average in oil content but well above average in protein content. While the oil content is 0.4% below the 10-year mean, protein content is 2.6% higher.

The oil content of No. 1 Canada canola from producers in western Canada varied from 35.9% to 49.4%. Compared to 2001, average oil content, 42.5%, is 0.3% lower while average protein content, 23.2%, is 0.9% higher. The average oil contents decreased significantly in the lower grades of canola. The oil content of canola exports from Vancouver was 41.7% in November 2002, about 0.5% lower than the 2001/02 mean of 42.2%. The oil content of the remaining Vancouver exports in the 2002/03

shipping season will likely remain below 42% on an 8.5% moisture basis. The oil content of Thunder Bay exports in November decreased to below 41% on an 8.5% moisture basis.

Average chlorophyll content for No. 1 Canada canola is 13 milligrams per kilogram (mg/kg), significantly lower than the 17 mg/kg in 2001.

The CGC 2002 survey shows lower average oleic acid content, 60.6%, and higher average linolenic acid content, 10.6%. Total average saturated fatty acids content, 7.0%, is 0.2% lower than in 2001. The average iodine value of 115 units, calculated from the fatty acid composition, is higher than the 2001 survey.

The average erucic acid, 0.11%, and the average total seed glucosinolates, 12 micromoles/gram, are both similar to average values from 2001.

Table 1: No. 1 Canada Canola Harvest Survey - 2002 Quality Data

Quality parameter	2002	2001	1992-2001 Mean
Oil content ^(a) , %	42.5	42.8	42.9
Protein content ^(b) , %	23.2	22.3	20.6
Oil-free protein content ^(b) , %	43.3	41.8	43.3
Chlorophyll content, milligrams per kilogram in seed	13	17	14
Total glucosinolates ^(a) , micromole per gram	12	11	12
Free fatty acids, %	0.35	0.35	0.25
Erucic acid, % in oil	0.11	0.11	0.32
Linolenic acid, % in oil	10.6	9.4	10.2
Oleic acid, % in oil	60.6	61.9	60.2
Total saturated fatty acids ^(c) , % in oil	7.0	7.2	6.9
Iodine value	115	112	115

(a) 8.5% moisture basis

(b) N (nitrogen) x 6.25; 8.5% moisture basis

(c) Total saturated fatty acids are the sum of palmitic (C16:0), stearic (C18:0), arachidic (C20:0),

behenic (C22:0), and lignoceric (C24:0).

Soybeans

Weather in the major soybean regions of Canada was quite varied for 2002. According to the Ontario Ministry of Agriculture and Food (OMAF), the majority of soybean planting was delayed until late May and early June due to wet cold conditions. Some localized replanting was necessary but the majority of the province started out with good plant stands.

Dry, hot conditions the remainder of the growing season took its toll resulting in yellow leaves, flower and pod abortion, leaf puckering, as well as the "green bean syndrome".

At harvest, green soybeans were an issue, particularly in the southwest. The majority of fields had less than 15% green soybeans, but some fields in the counties of Elgin, Lambton, Chatham-Kent, Essex, and Middlesex had much larger percentages. The green beans resulted in discounts being applied and some challenges in marketing beans.

In Ontario, the moisture conditions were quite variable. Although some regions actually harvested above average yields, other parts of Ontario were not so fortunate. Yields ranged from 8 to 65 bushels per acre (bu/ac) depending mainly on the amount of rainfall received in late July-August. Ontario experienced excellent fall harvest conditions during most of the month of October. Operations slowed at the end of the month with the onset of cold and rainy weather. Despite some green soybeans in various Ontario counties, the harvest concluded with overall average yields.

In Manitoba, moisture conditions were adequate and growing conditions were ideal. Quebec was somewhat on the dry side but generally ideal.

Canadian farmers in eastern Canada planted 1.03 million hectares of soybeans in 2002, which is a slight decrease from 2001. The final 2002 yield estimate of approximately 2300 kilograms per hectare (kg/ha) is significantly higher than the 1550 kg/ha reported in 2001.

Although area harvested decreased slightly, in yield, total soybean production in Canada is up almost 43% to 2.33 MMT tonnes according to estimates by Statistics Canada reported in *Field Crop Reporting Series No. 8*, December 5, 2002, due to increased yields as Ontario recovered from the drought conditions in 2001.

OMAF cautioned that attention should be paid to seed quality for 2003. Although the germination and vigor of much of seed for 2003 is excellent, the dry weather of 2002 was detrimental to some seed lots. Seed coats were easily damaged during harvest and during processing over the winter. This has resulted in extremely poor germination for some seed lots.

OILSEED OUTLOOK - 2003/04

Agriculture and Agri-Food Canada (AAFC), citing the April 24, 2003 Statistics Canada (STC) seeding intentions survey, conducted during late March, reported that in western Canada, the areas seeded to winter wheat, canola, flaxseed and soybeans are expected to increase, while the areas seeded to spring wheat, durum, coarse grains, pulses and special crops are expected to decrease, as is the area in summerfallow.

In eastern Canada, the increase in the area seeded to winter wheat more-than offsets the decrease in the area seeded to soybeans and coarse grains. Although soil moisture reserves in western Canada are better than a year ago, there are dry areas in north-eastern Alberta, north-western Saskatchewan and south-central Manitoba, and timely rains will be required.

Canola

Area seeded to canola in 2003/04 is estimated to increase significantly, but will remain slightly below the five-year average. Production is expected to rise by almost 65% to 5.9 MMT, as a return to near-normal yields from drought-reduced levels supplements the increase in harvested area. Supplies are forecast to increase considerably, as higher production more than offsets the relatively low carry-in stocks and reduced imports. As a result, domestic crush and exports are expected to increase. Carry-out stocks are forecast to return to more historical levels. According to AAFC, average canola prices are expected to fall due to higher Canadian and world canola/rapeseed production and a stronger Canadian dollar.

Soybeans

Area seeded in Canada is expected to decrease by six percent as lower area in Ontario and Quebec more-than offsets higher area in Manitoba. Production is forecast to increase by seven percent to 2.5 MMT due to higher yields. With supplies increasing, domestic crush is expected to increase slightly while exports are forecast to rise. AAFC reports that prices are forecast to decline due to lower U.S. soybean prices related to higher U.S. and South American production.

Table 2: Canola (Rapeseed) PS&D

PSD Table						
Country	Canada					
Commodity	Oilseed, Rapeseed			(1000 HA)(1000 MT)		
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		08/2001		08/2002		08/2003
Area Planted	3957	3957	3700	3994	0	4400
Area Harvested	3765	3765	2860	2860	0	4300
Beginning Stocks	1237	1088	1100	1100	390	510
Production	4926	4926	3580	3580	0	5900
MY Imports	226	226	220	230	0	200
MY Imp. from U.S.	216	225	210	220	0	200
MY Imp. from the EC	0	0	1	0	0	0
TOTAL SUPPLY	6389	6240	4900	4910	390	6610
MY Exports	2673	2673	2200	2200	0	3000
MY Exp. to the EC	0	4	0	0	0	0
Crush Dom. Consumption	2272	2293	1980	2000	0	2500
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	344	174	330	200	0	300
TOTAL Dom. Consumption	2616	2467	2310	2200	0	2800
Ending Stocks	1100	1100	390	510	0	810
TOTAL DISTRIBUTION	6389	6240	4900	4910	0	6610
Calendar Year Imports	218	237	220	227	0	200
Calendar Yr Imp. U.S.	215	231	210	226	0	200
Calendar Year Exports	2500	3963	2300	2420	0	3000
Calndr Yr Exp. to U.S.	217	243	125	157	0	300

Table 3: Canola (Rapeseed) Meal PS&D

PSD Table						
Country	Canada					
Commodity	Meal, Rapeseed				(1000 MT)(PER CENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		08/2001		08/2002		08/2003
Crush	2272	2293	1980	2000	0	2500
Extr. Rate, 999.9999	0.570863	0.569996	0.570707	0.57	ERR	0.57
Beginning Stocks	15	22	16	21	13	15
Production	1297	1307	1130	1140	0	1425
MY Imports	3	3	3	30	0	3
MY Imp. from U.S.	3	3	2	29	0	2
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	1315	1332	1149	1191	13	1443
MY Exports	799	799	725	750	0	850
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	500	512	411	426	0	563
TOTAL Dom. Consumption	500	512	411	426	0	563
Ending Stocks	16	21	13	15	0	30
TOTAL DISTRIBUTION	1315	1332	1149	1191	0	1443
Calendar Year Imports	5	3	3	14	0	3
Calendar Yr Imp. U.S.	5	1	1	14	0	2
Calendar Year Exports	775	998	725	765	0	850

Calndr Yr Exp. to U.S.	775	983	725	756	0	850
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Table 4: Canola (Rapeseed) Oil PS&D

PSD Table						
Country	Canada					
Commodity	Oil, Rapeseed				(1000 MT)(PER CENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		08/2001		08/2002		08/2003
Crush	2272	2293	1980	2000	0	2500
Extr. Rate, 999.9999	0.420335	0.42041	0.420707	0.42	ERR	0.42
Beginning Stocks	48	48	28	29	18	20
Production	955	964	833	840	0	1050
MY Imports	33	34	55	50	0	30
MY Imp. from U.S.	32	33	55	50	0	30
MY Imp. from the EC	0	1	0	0	0	0
TOTAL SUPPLY	1036	1046	916	919	18	1100
MY Exports	470	583	450	490	0	600
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	538	434	448	409	0	480
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	538	434	448	409	0	480
Ending Stocks	28	29	18	20	0	20
TOTAL DISTRIBUTION	1036	1046	916	919	0	1100
Calendar Year Imports	60	47	55	32	0	30

Calendar Yr Imp. U.S.	60	47	55	27	0	30
Calendar Year Exports	520	701	450	529	0	600
Calndr Yr Exp. to U.S.	520	539	450	482	0	550

Table 5: Soybean PS&D

PSD Table						
Country	Canada					
Commodity	Oilseed, Soybean				(1000 HA)	(1000 MT)
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2001		09/2002		09/2003
Area Planted	1080	1059	1025	1030	0	970
Area Harvested	1070	1046	1020	1025	0	965
Beginning Stocks	220	185	150	172	200	200
Production	1630	1635	2335	2335	0	2500
MY Imports	1000	982	750	650	0	600
MY Imp. from U.S.	1000	978	750	645	0	595
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	2850	2802	3235	3157	200	3300
MY Exports	450	495	650	700	0	800
MY Exp. to the EC	100	98	125	260	0	300
Crush Dom. Consumption	1697	1671	1750	1800	0	1850
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	553	464	635	457	0	500
TOTAL Dom. Consumption	2250	2135	2385	2257	0	2350
Ending Stocks	150	172	200	200	0	150
TOTAL DISTRIBUTION	2850	2802	3235	3157	0	3300
Calendar Year Imports	938	739	750	766	0	600

Calendar Yr Imp. U.S.	938	734	750	762	0	595
Calendar Year Exports	560	598	650	548	0	800
Calndr Yr Exp. to U.S.	90	90	100	86	0	150

Table 6: Soybean Meal PS&D

PSD Table						
Country	Canada					
Commodity	Meal, Soybean				(1000 MT)(PER CENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2001		09/2002		09/2003
Crush	1697	1671	1750	1800	0	1850
Extr. Rate, 999.9999	0.78079	0.790545	0.78	0.790556	ERR	0.79027
Beginning Stocks	30	25	30	25	30	10
Production	1325	1321	1365	1423	0	1462
MY Imports	1100	1094	1100	1050	0	1030
MY Imp. from U.S.	1100	1093	1100	1050	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	2455	2440	2495	2498	30	2502
MY Exports	130	96	130	150	0	150
MY Exp. to the EC	40	18	40	50	0	50
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	2295	2319	2335	2338	0	2342

TOTAL Dom. Consumption	2295	2319	2335	2338	0	2342
Ending Stocks	30	25	30	10	0	10
TOTAL DISTRIBUTION	2455	2440	2495	2498	0	2502
Calendar Year Imports	1100	1004	1100	1076	0	1030
Calendar Yr Imp. U.S.	1100	1004	1100	1075	0	1030
Calendar Year Exports	125	104	130	107	0	150
Calndr Yr Exp. to U.S.	42	42	40	58	0	70

Table 7: Soybean Oil PS&D

PSD Table						
Country	Canada					
Commodity	Oil, Soybean				(1000 MT)(PER CENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		09/2001		09/2002		09/2003
Crush	1697	1671	1750	1800	0	1850
Extr. Rate, 999.9999	0.168533	0.170557	0.168571	0.17	ERR	0.17027
Beginning Stocks	7	6	13	10	9	10
Production	286	285	295	306	0	315
MY Imports	80	93	120	110	0	100
MY Imp. from U.S.	80	93	120	110	0	100
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	373	384	428	426	9	425
MY Exports	20	21	25	20	0	20
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0

Food Use Dom. Consump.	340	353	394	396	0	395
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	340	353	394	396	0	395
Ending Stocks	13	10	9	10	0	10
TOTAL DISTRIBUTION	373	384	428	426	0	425
Calendar Year Imports	75	75	120	125	0	100
Calendar Yr Imp. U.S.	75	75	120	125	0	100
Calendar Year Exports	30	30	25	20	0	20
Calndr Yr Exp. to U.S.	30	30	25	20	0	20

POLICY DEVELOPMENT AND INDUSTRY NEWS

The table below at the end of the report lists all reports regarding developments in the oilseed sector since the 2002 Oilseeds and Products Annual Report.

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CA3014	Canola Council Aims for Stable Production of 7 MMT	3/14/2003
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CA3012	Maxim Corn and Soybean Seed Treatment Approved by Canada	2/21/2003
CA3011	Outlook for Canadian Soybeans	2/21/2003
CA3010	Agricore United Sees Little Chance of More Drought	2/13/2003
CA3005	Canadian Grain Commission Begins Consultations on Proposed Variety Eligibility Declaration System	1/23/2003
CA3005	Vancouver Grain Terminals and Grain Workers Union Reach Arbitrated Agreement	1/23/2003
CA3004	Agriculture Canada Releases 2003/04 Grains and Oilseeds Estimates	1/17/2003
CA3003	Health Canada Releases Report in Response to Biotechnology Expert Panel Report	1/09/2003
CA2145	Canada Seeking New Markets for Canola in Iran	12/20/2002
CA2134	Canada Is the Top Market for U.S. Farm, Fish, and Forest Exports	11/22/2002
CA2134	Below-Average Crop Yields and Quality for Saskatchewan in 2002	11/22/2002
CA2132	Exporter Guide	11/19/2002
CA2130	Farmer Seeks Supreme Court Appeal Against Monsanto	11/07/2002
CA2128	Drought Cuts Canadian Seed Supplies	10/31/2002
CA2128	GM Canola Accounts for 63% of Acreage in 2002, Says Canola Council	10/31/2002
CA2117	Ontario Plans Emergency Meeting on "Green Soybeans"	10/03/2002
CA2111	Saskatchewan Farmer Loses Appeal in Canola Fight	9/12/2002

CA2111	Ontario Farmers Adopting Herbicide-Tolerant Soybeans	9/12/2002
CA2109	Grain Stocks down Sharply for 2002 Reports Statistics Canada	9/10/2002
CA2105	Biotech Committee Recommends Voluntary Labeling of GM Foods	8/30/2002
CA2090	Quality and Safety in Canada's Grains and Oilseeds Sector	8/08/2002
CA2089	Biotech Crop Use Continues to Rise in Ontario	8/01/2002
CA2086	75% of Alberta Agricultural Land Driest in 133 Year History	7/18/2002
CA2082	Soybean Pilot Project Announced	7/05/2002
CA2082	Canola Production in Canada Uncertain	7/05/2002
CA2081	Biodiesel in Ontario Gets a Tax Break	6/28/2002
CA2080	Less Soybeans, Spring and Winter Wheat; More Durum, Barley, Oats and Canola Acres Says Statistics Canada	6/28/2002
CA2076	Canada Announces C\$5.2 Billion for Agriculture	6/20/2002
CA2074	Canada Pushes for Tariff Parity for Canola Entering Iran	6/14/2002
CA2069	Grain Commission Cautions That Grain Mixed with Helix Treated Canola Seeds Will Be Destroyed	6/06/2002
CA2061	New Minor-Use Pesticide Initiative to Help Farmers	5/30/2002
CA2055	Seeding Pace Slow in Western Canada	5/03/2002
CA2049	Oilseed and Products Annual Report	5/07/2002

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