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Report Highlights:

Western Canadian wheat acreage could increase significantly in 2001 if prices for 2001/02 continue to advance. Wheat also has the appeal of comparatively low per-acre input costs. Some acreage could also be diverted from canola and possibly special crops in 2001 because of weak markets and higher input costs for these crops. Good moisture conditions across the eastern prairies also favor less summerfallowing in 2001. Under the assumption that yields return to average levels, total grain and coarse grain production for 2001/02 is estimated to increase by almost seven percent to 54.5 MMT.

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Grain Production 2000/01 - Overview

Total wheat area in Canada for 2000/01 was almost six percent higher, recovering from the ten year low of 10.4 million hectares harvested in 1999/2000. Area harvested to durum wheat jumped up 49% above the 1999/2000 low of 1.8 million hectares, while non-durum wheat area decreased three percent to 8.46 million hectares. Barley area harvested increased about 12% from 1999/2000 acreage to 4.5 million hectares for 2000/01. Corn area harvested for 2000/01 was 1.1 million hectares, a decrease of about four percent below 1999/2000 levels. Harvested oat acreage declined to 1.3 million hectares in 2000/01, a drop of about seven percent relative to 1999/2000.

Yields for total wheat in 2000/01 were down from the record high from the 1999/2000 level of 38.5 bu/acre to 36.6 bu/acre. This is still nearly nine percent above the ten-year average of 33.7 bu/acre. Barley yields for 2000/01 were down slightly from the record 60.3 bu/acre set in 1999 to 55.8 bu/acre, just slightly above the ten-year average of 55.6 bu/acre. Corn yields for 2000/01 were 100.9 bu/acre, down by 20% from 1999/2000 levels, and down 10% from the ten-year average of 112 bu/acre. Oat yields for 2000/01 are the second highest on record at 68.7 bu/acre, compared to the record set in 1993 of 69.5 bu/acre. 2000/01 yields are slightly above the 68.4 bu/acre recorded for 1999/2000, and well above the ten-year average of 63.6 bu/acre.

The wheat harvest in 2000/01 was 26.8 million metric tons (MMT), down just slightly from the 1999/2000 production of 26.9 MMT. Durum production for 2000/01 increased 30% above 1999/2000 levels to 5.6 MMT. Barley production for 2000/01 increased over two percent above 1999/2000 levels to 13.5 MMT. Corn production in 2000/01 plummeted nearly 26% relative to the record 9.1 MMT produced in 1999/2000, and dropped below the ten-year production average of 7.3 MMT. Oat production decreased almost seven percent in 2000/01 to 3.4 MMT.

Total production of the six wheat and course grains (wheat excluding durum, durum, barley, corn, oats, and rye) in Canada declined in 2000/01 by almost five percent from 53.3 MMT to 50.8 MMT. The 2000 growing season produced a moderately-reduced quantity of somewhat lower-quality crops in western Canada. Production in western Canada was limited by extreme dryness in southern and east-central Alberta and excess rain in eastern Saskatchewan and Manitoba. The Ontario wheat crop was of normal size but quality was reduced by fusarium disease. The eastern Canadian corn crop was cut considerably by late planting and poor growing-season conditions. The 2000/01 harvest of all wheat in Canada was very similar to that of 1999/2000, though a sharp decline in non-durum types was offset by a jump in the durum crop, the second-highest in history at 5.6 million. Production of non-durum spring wheat in western Canada fell eight percent. Feed grain production in 2000/01 (barley, corn, oats, rye) for Canada was 7% lower than the 1999/2000 levels at 23.9 MMT.

The 2000/01 prairie wheat crop was of significantly lower quality than either of the previous two crop years, although higher than the 10-year average despite rain damage during the harvest and extensive fusarium disease in the eastern prairies. About 55% of western spring wheat and over half the durum was in the two top grades. Protein content of the 2000 wheat crop was above long-time normals but below that of the previous two years.

Outlook for 2001/2002

World wheat prices are expected to start a substantial recovery by mid-2001, based on the decline in stocks and the possibility that some growing regions may experience weather difficulties. Western Canadian wheat acreage could increase significantly in 2001 if it appears prices for 2001/02 will continue to advance. Wheat also has the appeal of comparatively low per-acre input costs. Some acreage could also be diverted from canola and possibly special crops in 2001 because of weak markets and higher input costs for these crops. Good moisture conditions across the eastern prairies also favor less summerfallowing in 2001. Under the assumption that yields return to average levels, total grain and coarse grain production for 2001/02 is estimated to increase by almost seven percent to 54.5 MMT.

Wheat (excluding durum)

Production is currently estimated to be unchanged in 2000/01 at 21.2 MMT. Increased plantings are anticipated to offset lower expected yields. However, as mentioned before, an increase in prices could influence last minute planting decisions, resulting in additional area devoted to wheat acreage. Increased exports, offset by reduced domestic consumption will reduce carry-out stocks slightly for the crop year relative to 2000/01.

Durum

Canadian production is expected to increase two percent above the 2000/01 production level to 5.7 MMT. This will be the second largest on record after 6.0 MMT was reached in 1998/99. With the assumption of constant domestic demand for Canadian durum and exports forecast to be 3.9 MMT, the increase in available durum supplies will result in ending stocks increasing to a burdensome 3.4 MMT for 2000/01.

Barley

Increases in area harvested combined with increases in expected yields for barley in 2001/02 will lead to increased Canadian production of 14.8 MMT, an increase of almost 10%. Increased exports and domestic consumption will not be able to offset total barley supplies available, causing 2001/02 ending stocks to rise by nearly 13% to 3.5 MMT.

Corn

Canadian production is expected to recover in 2001/02 to 8.9 MMT, an increase of approximately 31% over 2000/01, assuming that yields will return to normal levels. Production could challenge that of 1999/2000 in which the second largest crop was recorded. This increase in supplies will only be partially offset by increased exports and domestic consumption, resulting in ending stocks increasing 30% to 1.3 MMT.

Oats

Canadian production is estimated to be up almost six percent from 1999/2000 levels to 3.6 MMT for 2001/02 due to increased area harvested and yield levels similar to those in the previous crop year. Smaller total supplies due to lower beginning stocks coupled with a reduction in forecast exports will leave ending stocks in 2001/02 relatively unchanged from 2000/01 levels.

POLICY DEVELOPMENT AND INDUSTRY NEWS

The following segments are excerpts from recent GAIN reports covering Grain and Feed issues. Many sections contain references to more in-depth GAIN reports. A table at the end of the report lists all Grain and Feed reports submitted since the 2000 Grain and Feed Annual Report.

1. TRADE

CITT Statement of Reasons on Imports of U.S. Grain Corn

On March 22, the Canadian International Trade Tribunal (CITT) released its final statement of reasons (SOR) regarding its decision that certain grain corn imported from the U.S. did not cause injury nor pose a threat of injury to corn producers west of the Ontario-Manitoba border "the regional market". In the SOR, while a linkage was made between the financial injury sustained by western Canadian corn producers and U.S. corn imports, diversified producers who grow corn for on-farm feeding purposes constitute almost one-third of corn production, and are thus insulated from the negative effects of U.S. corn imports on domestic corn prices. The CITT noted that since most or all of the regional market's on-farm corn production has not been injured, a substantial proportion of corn growers whose corn production does not enter the commercial market have not been injured by U.S. corn imports. In addition, the CITT also noted that there was a certain proportion of commercial corn production that was not injured by imports of U.S. grain corn. As a result of these two circumstances of non-material injury, the CITT concluded that the minimum injury threshold had not been met by the standard of "all or almost all" and that there was no threat of injury to producers or all or almost all of the production in the regional market. The CITT decision overturned a final determination from the Canada Customs and Revenue Agency (CCRA) which had imposed an interim duty of US\$1.30/bushel after revising the level of injury down from US\$1.58/bushel. For more information, see GAIN report CA1039.

New Canadian Agri-food Trade Group Formed

A February 20 meeting in Ottawa between the Canadian Alliance of Agri-Food Exporters (CAAFE) and the Agri-Industry Trade Group (AITG) resulted in the formation of the Canadian Agri-Food Trade Alliance (CAFTA), folding the parallel interests of the two groups into one. A common purpose in trade negotiations and the strengthening of Canadian exporters' voices in Canada's official trade negotiating position are the foundation to the CAFTA rationale. There are now eleven member organizations, including Agricore, Cargill, the Canadian Cattlemen's Association, the Canada Beef Export Federation, the Canola Council of Canada, the Canadian Oilseed Processors Association, the Canadian Sugar Institute, the Canadian Sugar Beet Producers Association, the Malting Industry Association of Canada, the Ontario Soybean Growers, and the

newly joined Grain Growers of Canada. The organization is seeking to broaden its membership in CAFTA, which is conditional on support for its pro-trade liberalization stance, before the next WTO round begins. The principal goals of CAFTA in agricultural trade negotiations are to target the elimination of all tariffs and export subsidies as well as the accelerated reduction/improved discipline on all trade-distorting domestic subsidy programs.

Iraq Halts Grain Imports from Canada

The February 20 edition of *Agriline Daily* reported that Iraq has halted grain imports from Canada to protest Ottawa's support of US and British airstrikes last week. The article notes that during the first five months of the 2000/01 crop year, Iraq imported 310,000 metric tonnes of Canadian wheat, almost double exports for the same period in the previous crop year. Total exports in crop year 1999/00 were 262,000 metric tonnes, representing the first sales to the country from Canada since the UN imposed trade sanctions in 1990.

Grain Growers of Canada Seek Level Playing Field

The newly formed Grain Growers of Canada (GGC) has emphasized the need for equity in income support provided for Canadian grain and oilseed farmers. The GGC has announced a three-phase plan for meeting this objective that would see the Canadian government increase domestic assistance as allowed for under international trade agreements, create a new national committee to establish a long-term approach to farm income and safety nets, and pursue international farm subsidy agreements that reduce or eliminate production and trade distorting agricultural subsidy programs. For more information, see GAIN report CA0189, CA0182, and CA0097.

Canada Distances Itself from Cairns Group Proposal on Market Access

The Government of Canada (GOC) announced on November 9 that Canada is not participating in a market access proposal submitted to the WTO by the Cairns Group. The decision not to participate in the current submission is partly due to its lack of compatibility with Canada's stand on supply management. At a November 13 meeting in Ottawa of the Grain Growers of Canada, producers of more export-oriented products objected strongly to Canada's market access position, calling it inconsistent with the GOC's movement in the general direction of freer trade. Further, the producers indicated the lack of support for the Cairns Group proposal would diminish both Canada's and the Cairns Group standing in the World Trade Organizations negotiations. For additional information, See GAIN Report CA0179.

2. CANADIAN WHEAT BOARD

CWB "Disappointed...Not Surprised" at Acceptance of NDWC Section 301 Petition

The Canadian Wheat Board is disappointed, but not surprised by the announcement that the U.S. is continuing its trade challenge into Canadian farmers' trading practices. "Unfortunately, politics have overshadowed the weakness of this inaccurate and unsubstantiated petition," said

CWB President and CEO Greg Arason. "We will not be bullied by their strong-arm tactics. We know that as long as Canadians do a good job of selling any commodity that is in competition with American products, they will try to set up roadblocks."

Minister Goodale Defends CWB, Considers U.S. Pasta Exports to Canada in Response to 301 Petition

On September 28, 2000, CWB Minister Ralph Goodale and Agriculture Minister Lyle Vanclief spoke at the S. Dakota State University NAFTA conference. Minister Goodale defended the CWB against the NDWC's section 301 petition, and blamed increased EU and US subsidies for exacerbating the oversupply of and resulting low prices of grains in the world market. The minister's response to the 301 petition was strident: "... we must find a response -- maybe your (U.S.) pasta exports (75% of which flow into Canada)." Minister Vanclief discussed the benefits of the NAFTA; defended the CWB against the NDWC's section 301 petition; noted the growing importance of Canada as a market for US corn, barley and wheat; mentioned the benefits of the Record of Understanding; and discussed Canada's agricultural trade position. To view the full text of Minister Goodale's remarks, see GAIN report CA0154. For Minister Vanclief's remarks, see GAIN report CA0153.

CWB Director Presses Plan to Test Dual Marketing System

Canadian Wheat Board elected director James Chatenay is proposing a four point plan to test the principle of a dual market. First, he proposes that 10% of each farmer's annual production be exempt from the monopoly. Second, the monopoly would apply only to export grain. Third, export licenses for grain that producers wish to export under the buy-back system should be given automatically and without charge by the Board. Finally, he proposes that his own electoral district in central Alberta be removed from the CWB's jurisdiction for three years as a test for a voluntary dual-market system.. For more information, see GAIN report CA1052.

Supreme Court of Canada Dismisses Appeal Against CWB

According to a March 16 *Agriline Daily* article, the Supreme Court of Canada dismissed, without comment, application to appeal two lower court decisions which upheld the constitutionality of the *Canadian Wheat Board Act*, ending a 7-1/2 year court challenge. The lawsuit, brought by the Alberta Barley Commission, the Western Canadian Wheat Growers Association, and 21 producers in October, 1993, charged that the Act contravened the *Charter of Rights and Freedoms*. A ruling, handed down in April, 1997, stating to the effect that the Charter does not apply to commercial or property rights, was upheld by the Federal Appeals Court in June, 2000.

CWB Appoints Ag Economist to Develop Performance Benchmarks

On March 15, the Canadian Wheat Board announced that it had appointed an agricultural economist as project coordinator to develop performance benchmarks for the CWB. Dr. Richard Gray of the University of Saskatchewan's Department of Agricultural Economics is now seeking comments and input from farmers and other interested parties on proposed approaches to benchmark CWB performance in wheat marketing. Dr. Gray has prepared an introductory report

that outlines the benchmark development process and provides an overview of the proposed concepts to be used in developing the benchmarks. In addition, preliminary reports from three other academics were prepared by Dr. David Buschena (Montana State University), Dr. Troy Schmitz (Arizona State University), and Dr. James Vercammen (University of British Columbia), addressing benchmark procedure issues that required further detailed investigation. Comments on these reports will be accepted until April 27th, 2001. The reports may be accessed by visiting the following website: <http://www.usask.ca/agriculture/agec/working.htm>

CWB Signs Deal with China for 500,000 Tons of Wheat

The Team Canada 2001 trade mission to China and Hong Kong resulted in the Canadian Wheat Board signing an agreement to supply 500,000 tonnes of wheat to the China National Cereals, Oils and Foodstuffs Import and Export Corp. The deal, which marked the 40th anniversary of active grain trading between Canada and China, is estimated to be worth about C\$125 million. Former Saskatchewan premier Roy Romanow, who's leading the province's delegation on the trip, says the Team Canada mission was an "important catalyst" in bring about the agreement. Romanow also called the deal "very important" for Saskatchewan farmers, given that 60% of Board wheat comes from the province, putting its share of the deal at about \$75 million.

CWB Announces New Payment Options

The February 20 edition of *Canada Agriculture Online* reports that the Canadian Wheat Board has broadened the Producer Payment Options program for 2001-02. Enhancements will make it possible for growers to price additional classes of wheat and feed barley, lock in futures prices after delivery, and change the basis contract futures month any time before the contract month expiry date. As well, daily prices will be offered. Growers can lock in a fixed price for a given quantity of wheat (excluding durum) or feed barley (offered as a pilot program) based on CWB pool return outlooks (PROs). The feed barley program, called the Guaranteed Delivery Contract with an Early Payment Option, went into effect September 5, 2000. Under the early payment option, producers receive 90% of the mid-point of the Pool Return Outlook, minus deductions, in two payments. The initial payment will be made upon delivery and the difference will be issued by the CWB shortly after. The guaranteed delivery ensures farmers will have opportunity to deliver their feed barley by December 31 to meet sales commitments early in the crop year. Or they can lock in a basis over the Minneapolis Grain Exchange futures price for wheat (not barley) and later lock in a futures price. These payment options will be available every business day from March 22 to July 31, 2001. Minimum contract size for both options is 20 tonnes. For related information see GAIN Report CA0130.

CWB Releases Export Projections

On February 19, the CWB issued its second-quarter report covering the period from August 1 thru February 4. Highlights include continued good sales of high quality durum to Morocco and strong sales to Algeria. With the increased sales activity to Morocco it is likely to become Canada's number two market for durum after Algeria. Last year over 50% of Canadian durum exports went to these two countries. Strong growth continues in direct rail shipments from country elevators to U.S. Gulf ports destined for Caribbean and Central American countries and

to mills in Mexico. The CWB's winter rail program is on target to hit about 800,000 tonnes by the end of March. Key destinations for these wheat and durum wheat shipments include North Africa, Italy and Latin America. Through the second quarter, farmer deliveries of all grains and oilseeds were up about 260,000 tonnes compared to last year, totaling some 18.3 million tonnes. Deliveries of durum wheat, barley and oats more than offset the decline in red spring wheat and canola. The total export program is slightly ahead of last year at 12.9 million tonnes. Higher levels of barley, oats and flaxseed shipments account for the increase on a year-to-year basis. The CWB predicts exports of wheat, durum and barley for the 2000-01 crop year at 18.2 million tonnes, down slightly from 19.0 million tonnes last year. The CWB states that it is on target for exports at 40% of the total at the end of January. It expects exports of Prairie wheat, durum and barley to be about 14.4 million tonnes or 80% of the total program by the end of May.

CWB Refuses Contract Calls for Durum Wheat

The January 22 edition of *Agriweek* reported that last week the CWB announced that it will not accept any #1, #2 or #3 durum under the Series B contract. No explanation was given other than that the CWB already has enough durum to meet nearby needs. The CWB generally accepts 100% of its contract calls and has only refused once before in the last decade to take any contracted amounts of board grain. Despite a near record crop of 5.6 MMT, the CWB raised initial payments for durum by up to C\$68/mt in December. At the time of the article's printing, the latest CWB's Pool Return Outlook was optimistic and raised prices by an additional C\$5/mt. Producers who took these to be positive market signals are now puzzled. A possible explanation is that the CWB has simply failed to sell enough durum wheat for delivery over the next few months. Exports in the 2000/01 crop year are slightly ahead of a year ago, and commercial stocks are not out of line with amounts normally available at this time of the year. While producers will be able to roll their contracts in Series C and D, unless the CWB catches up with its durum sales, acceptance under these contracts may also be low.

Support Crumbling for Canadian Wheat Board

CWB chairman Ken Ritter nearly lost his place as a board director in the farmer held December 2000 directors elections. Ritter would have lost it if he had been opposed by one instead of three challengers, who split the anti-monopoly vote, or if 91 voters who supported another candidate on the first ballot had not named Ritter as second choice. After two counts, Ritter won by just 17 votes. In all, the three pro-monopoly directors who were returned got just 291 more first-ballot votes than needed to win. The two directors who oppose the monopoly won by a combined 1,400 votes. The total of first-ballot votes for anti-monopoly candidates was 52% of total ballots returned. For more information, see GAIN reports CA1006 and CA0204.

Survey Says Grain Farmers Want Marketing Choice

According to the November 27 edition of *Canada Agriculture Online*, the results of an opinion survey released the previous week by the Alberta Barley Commission (ABC) indicate that 75% of prairie farmers want the right to sell their grain to anyone. Almost 11,000 grain farmers responded to the phone survey conducted in mid-November. "The CWB has been quite vocal in telling everyone how strong farm support is for the monopoly," said Ken Sackett, chairman of the

ABC, "but our poll suggests the board is out of touch or in denial. Support for the CWB monopoly was rumored to have reached all-time lows, and out polling has confirmed it." Surveyed farmers were asked this question: "Are you in favor of having the ability to sell your grain to any buyer, including the Canadian Wheat Board, in domestic and export markets. Or do you support the current Canadian Wheat Board and its traditional monopoly?" Support for the voluntary option was 81% in Alberta, 76% in Saskatchewan, and 69% in Manitoba. Based on these numbers, Sackett concluded, if the CWB and federal government don't soon take action, "support for dual marketing might switch to demand for eliminating the CWB altogether."

CWB Announces Organic Grain Program

The Canadian Wheat Board has announced that as of early 2001, growers of organic grain may deal directly with the CWB on producer-direct (buy-back) sales. Until now, growers have had to complete their transactions through an elevator company. The CWB will also offer these growers, on a trial basis, the same credit arrangements available to customers and accredited exporters. The changes, which follow consultations between organic growers and the CWB earlier this year, will not give organic growers complete freedom from pooling and single-desk selling, as many had hoped. Last year, 85 of an estimated 800 certified organic farmers on the prairies marketed wheat, durum and barley themselves under the buy-back program. The remainder sold their grain through the grain trade. For more information, see GAIN report CA0199.

CWB Negotiates Annual Supply Agreement with Japan

The November 27 edition of *Agriline* reports the CWB has negotiated an annual supply agreement with the Japan Food Agency. The arrangements calls for 1.2 MMT of milling wheat and 25,000 tons of food-grade barley. Prices will be determined through tenders.

Auditor General Review of CWB Begins

The Canadian Wheat Board (CWB) reported that the Auditor General's office began a comprehensive review of CWB accounting practices and reporting systems, as well as a broader examination to assess the efficiency and effectiveness of management practices. Key operational areas to be examined include: marketing of grain, country services and grain transportation, management of financial operations, communications and corporate policy, and price pooling and payments to farmers. Amendments to the Canadian Wheat Board Act in 1998 provided for a one-time audit of the CWB's accounts and financial transactions by the Auditor General. The entire review is expected to be completed by June 2001, with the report on results of the examination ready by Fall 2001.

Canadian Wheat Exports to Mexico Soar

The August 17, 2000 *Globe and Mail* reports Mexico is the world's sixth-largest buyer of wheat from Canada, the world's No. 2 exporter. A decade ago, Mexico was No. 28, before moving up to 11th place prior to NAFTA taking effect in 1994. Since then, wheat shipments by the Canadian Wheat Board to Mexico have soared more than tenfold to 676,000 tonnes in the last crop year

from 62,000 in 1990/91. "NAFTA has been a big help, because Mexico doesn't buy wheat from anybody else than Canada and the U.S. now," said a market analyst at the Canadian Wheat Board. Since 1993, Canadian exports to Mexico have jumped about 100%, according to Statistics Canada. During the same period, Mexican exports to Canada have surged 157%.

CWB Looks to Sell Quality, Not Quantity to China

The Canadian Wheat Board retains interest in the Chinese market despite decreased import demand. During a recent CWB trade mission, delegates were told that China plans to purchase quality Canadian grain rather than volume to blend with their own production. For more information, see GAIN report CA0059.

CWB Announces 2000/01 Initial Payments by Grade

The Canadian Wheat Board announced the 2000/01 initial payments of various grades of wheat and barley on July 31, 2000. Beginning with the 2000/01 crop year, the CWB is expanding the range of initial payments for protein designated grades of No. 1 and 2 CWRS and CWAD to include all deliveries from 11% to 15.5% protein. The previous ranges were 12.0% to 15.0% for No. 1 and 2 CWRS and 12.5% to 14.0% for No. 1 and No. 2 CWAD. The CWB suggested that the expansion of protein ranges and changing of the base grade on CWRS more accurately reflects the value of protein in wheat and durum. For more information, please see the CWB news release at: <http://www.cwb.ca/publicat/nr/jul3100.htm>

CWB Pilot Program Broadens Definition of Export Agents

The Canadian Wheat Board will run a pilot program in 2000/01 to allow companies that do not own elevators to become export agents. The program, which began August 1, 2000, is limited to dealers who pick up grain on farms and truck it directly to domestic or U.S. users. The program will be available to all companies and will be reviewed at the end of the crop year.

3. BIOTECHNOLOGY

Scientific Panel Critical of GOC Regulatory System for GM Food Products

An expert scientific panel, commissioned by the Canadian government, has released a report on the Regulation of Food Biotechnology in Canada which concludes that GM crops and foods in Canada should be subject to more rigorous testing, and that the level of government support for independent research on the safety of food biotechnology is inadequate. In response, the GOC has assured the public that the government will study the report in detail to determine how it can help to improve Canada's regulatory system for GM food products. On February 5, 2001 the Royal Society of Canada released their report entitled: *Elements of Precaution: Recommendations for the Regulation of Food Biotechnology in Canada*. The Expert panel raised serious questions about the regulation of GM food and made 53 recommendations to the GOC, concluded that GM crops and foods in Canada should be subject to more rigorous testing, and that the level of government support for independent research on the safety of food

biotechnology is inadequate. Although the GOC is not bound by the panel's recommendations, GOC Ministers have assured the public that the government will study the report in detail to determine how it can help to improve Canada's regulatory system for GM food products. For more information see CA1017.

CGC to Offer Kits to Identify Starlink Corn

The Regional Director of the Canadian Grain Commission (CGC) has contacted export elevators in eastern Canada to inform them that the CGC will be offering a test (when kits become available) to identify Starlink corn. Each elevator will be asked to supply a bin sample for testing corn that is already stored in Canada. Testing on lakera will be done on a random basis. After a specific time period (to be determined by CGC) the elevators will be responsible for ensuring the shipment is Starlink-free.

AAFC Moves Away from GM Durum Research, Proceeds with Spring Wheat GM Research

Agriculture and Agri-Food Canada (AAFC) has decided to back away from proposals to fund research into genetically modified durum wheat. According to Jim Boles, the head of AAFC's cereal research center, the decision was made in part because of uncertainty about market reaction, but also because herbicide resistance is not such an issue for durum wheat as it is for bread wheat. The department will continue its eight-year matching investment initiative with Monsanto to develop an herbicide-resistant hard red spring wheat, which could be on the market by 2003. For an expected Agriculture Canada investment of \$800,000 or slightly more, Monsanto will invest more than \$1 million.

AAFC Launches GMO Environmental Impact Project

A long-term project to determine the impact of genetically modified crops on the environment has been launched at Agriculture and Agri-Food Canada's Lethbridge Research Centre. The 12-year project is the first of its kind in Canada and will draw upon researchers from several disciplines. The research will involve a variety of crops, and will be based upon a four-year crop rotation, continued for three cycles. (For more information, see GAIN report CA0136).

4. FARM INCOME

Provincial Shares of the New C\$833 Million in Farm Aid

Given the early March federal announcement of \$500 (CDN funds) million in fresh federal farm money for the whole country, the provinces are supposed to put up another \$333 million to make it \$833 million. The federal money will be conditional on provincial matching and will be allocated among the provinces according to their share of national crop-based gross farm income. If all provinces contributed the 40% share expected of them, Quebec and Manitoba will get about \$83 million each, Ontario \$200 million, Saskatchewan \$220 million, Alberta \$160 million and B.C. \$58 million. It was understood that the money will be sent out automatically based on

NISA (Net Income Stabilization Account) program. Farmers not currently participating in NISA will have to apply. The payments will be based on 'average eligible net sales' as defined in the NISA regulations and will be subject to a per-farm limit pro-rated on the first \$125,000 of annual crop income. Last week, at a semi-annual federal-provincial ministers' meeting, Vanclief also announced that the limit per farm on the spring cash advance program will be raised to \$50,000 from \$20,000, costing the federal treasury another \$45 million in interest. The program has been reasonably popular; last year (its first year) 31,000 farmers took out a total of \$356 million, averaging about \$11,000 per farm. For more information, see GAIN reports CA1034 and CA0101.

Vanclief Targets EU, U.S. Farm Subsidies

In a January 4, 2001 speech delivered to the Oxford Farming Conference, Federal Agriculture Minister Lyle Vanclief said that inflated farm subsidies in Europe and the United States are driving down international prices and having a negative impact on farmers from Canada and around the world. Vanclief noted that European wheat producers receive 13 times more government support per tonne than Canadian producers and that US wheat producers receive eight times more assistance. Vanclief indicated that Canada will continue to press for an international level playing field for farmers at the World Trade Organization (WTO) agricultural talks. For more information, please see the speech at: <http://www.agr.ca/cb/speeches/s010104e.html>.

Ontario Corn Producers Envy Quebec Farm Income Program

Ontario corn producers see that Quebec producers are weathering depressed commodity prices far better than their other Canadian counterparts. According to research from the Guelph University, Quebec grains and oilseeds producers are the best off in the country. For the past three years, Quebec has spent C\$457.3 million on farm supports. Ontario spent C\$194.8 million. To view the full text, see GAIN report CA0156.

5. TRANSPORTATION

CWB, Grain Industry Troubled by Transportation

The transportation tug-of-war between the CWB and the grain companies continues as the CWB announced that as shipper it would pay all grain freight charges. Grain companies continue to pay freight charges without reimbursement from the CWB. A backlog of vessels at the Port of Vancouver has cost the board \$3.7 million in demurrage in the crop year to-date, with the possibility of reaching \$7.2 million by year end. The CWB blames over-allocation of cars to non-board grains for the loading delays. For more information, see GAIN reports CA0190, CA0102, and CA0058.

CWB and Omnitrax Agreement To Increase Grain Volumes at Churchill

According to a CWB September 7, 2000 news release, the Canadian Wheat Board (CWB) and OmniTRAX announced they have signed an agreement that will result in increased use of the port of Churchill in the current crop year. "If all goes as planned, we will move more grain through the port of Churchill than any year in the past decade," said Adrian Measner, CWB Executive Vice-President of Marketing. As part of the agreement, OmniTRAX will provide financial incentives that reduce CWB costs and encourage additional utilization of the port. "Both sides were very keen on finding ways to improve the profitability of the port," said Gary Rennick, Chief Operating Officer of OmniTRAX. "I believe the investments we are making to improve the port will benefit all users both this year and in the future. In particular, our present dredging program will provide the ability to service larger vessels in the port."

Little Grain Movement Through Port of Prince Rupert

The Western Producer reports that, for the third year in a row, the grain shipping through the Northern B.C. port of Prince Rupert has been halted. CWB spokesperson Jim Pietryk said given the size of the 2000 sales program, it should come as no surprise that the Prince Rupert program has wound down. The CWB is ahead of its grain shipping targets and only about 15% of the crop remains to be shipped by the end of the crop year, which can be handled at Vancouver. Additional factors include the lower freight rate to Vancouver and the fact that the major grain handling companies prefer to move grain through their wholly-owned terminals at Vancouver as opposed to the jointly-owned Prince Rupert facility. The 210,000 capacity terminal opened in 1985; shipments have averaged 3.7 MMT over the past 5 years, with a high of 5.3 MMT in 1991/92 and a low of 1.7 MMT in 1999.

6. CANADIAN GRAIN COMMISSION

CGC Reviews Producers' Pricing Options

The September 14 Western Producer reports the Canadian Grain Commission has been asking various players in the grain industry whether to continue its current rule allowing grain delivered into an elevator to be left unpriced for 90 days. The CWB wants the 90-day pricing rule left intact. The board says the rule strikes a balance between giving farmers flexibility in marketing their crop and ensuring the handling and transportation system operates efficiently. A spokesperson for the Canadian Canola Growers Association said the 90-day pricing rule may inhibit grain companies from offering their own competitive programs for storing and pricing grain.

New CGC Rules to Ensure Fairer Reading on Protein Tests

The Canadian Grain Commission introduced new rules that will ensure a more accurate reading on protein tests. In the past, protein tests have differed from elevator to elevator. The new system allows a margin of error on protein content for Canada Western Red Spring, Amber Durum, Extra Strong, and Red Winter Wheat. If the elevator operator's reading is within plus or minus 0.4% of the CGC's protein measurement, the elevator's test results will stand. If the

reading goes beyond that, the elevator operator must pay the producer accordingly. The decision is important because producers often receive a premium for protein content. Typically wheat has just been sold based on grade and dockage.

CGC Fees Remain Unchanged for Ninth Consecutive Year

According to the July 31, 2000 edition of *Agriweek*, the Canadian Grain Commission, for the ninth straight year, is maintaining unchanged fees for weighing and inspection services required under the *Canada Grain Act*; holding the rate was made possible by a relaxation of the federal government's edict that agencies like the Commission should be financially self-supporting from user fees, and an accompanying \$83-million infusion of federal money. Fees will not change before 2004/05.

CGC Announces Grain on Ground Discussion Paper

The Canadian Grain Commission (CGC) has circulated an options paper proposing changes to its grain on the ground policy. In Fall 1999, CGC became aware of several primary elevators that had stored grain on the ground without seeking permission. The CGC's current position is that grain stored on the ground cannot be subsequently received into a primary elevator. The industry has expressed dissatisfaction with the current CGC policy, leading to the review. For more information, see GAIN report CA0088.

New Grading System for Eastern Canadian Wheat

The Eastern Standards Committee (ESC) has supported a Canadian Grain Commission (CGC) proposal to reinstate grading Eastern red wheat according to three classes: Canada Eastern Hard Red Spring, Canada Eastern Hard Red Winter, and Canada Eastern Soft Red Winter. Because each of these classes of wheat has different end-use and processing qualities, identifying them in this way will give processors more precision and flexibility. For more information, see GAIN report CA0053.

7. SEED RESEARCH

Fusarium-resistant Wheat Variety Rejected

A fusarium-resistant wheat variety code-named HY644 developed by Agriculture Canada scientists was rejected for registration by the Recommending Committee for Grains. The new variety is almost completely immune to fusarium attack, but because the HY644 kernels look very much like those of mainline hard red spring bread wheats, some Canadian Grain Commission inspectors could not tell them apart. Canadian grading regulations strictly require that wheats of different types must have kernel visual distinguishability (KVD) a process that involves being able to determine variety by visual inspection. There may be opportunity for the new variety in the United States where KVD is not an issue. For more information, see GAIN report CA1047.

8. RELATED GRAIN AND FEED NEWS

Dakota Growers Pasta Co. Will Allow Canadian Durum Growers to Join

According to the January 10, 2001 edition of *Agriline Daily*, the Dakota farmer-owned pasta operation with three plants in North Dakota and Minnesota will allow Canadian durum growers to join following a 253-215 vote at its annual meeting held the previous week. However, to sell durum to the mill at Carrington, N. Dakota, Canadian members would first have to go through the CWB's export permit and buy-back process, which few are likely to do.

New Program to Encourage HACCP Approach in Food Industry

Minister of Agriculture and Agri-Food Lyle Vanclief has announced a \$C11.4 million program to help national associations and groups who produce, market, distribute and prepare food to develop food safety risk management strategies using the Hazard Analysis Critical Control Point (HACCP) approach. The partnership program with the food industry is called the Canadian Food Safety Adaptation Program (CFSAP) and, according to Vanclief, will help the agri-food industry to develop enhanced food safety management systems and help maintain Canada's reputation nationally and internationally as a reliable supplier of safe food and beverages. The program will be delivered by the Canadian Food Inspection Agency which will allocate funding to eligible groups. Federal monies will come from the C\$60-million-per-year Canadian Adaptation and Rural Development (CARD) fund which was introduced in the 1995 federal budget and is a major part of the Government of Canada's approach to assist agriculture and the agri-food sector in becoming more competitive in the global marketplace.

New Ethanol Plant Planned

The October 31, 2000 London Free Press reports Commercial Alcohols Inc. announced it will build an ethanol plant in Varennes, Que., for \$ 100 million, with help from the provincial government. Provincial investing agency SGF plans to invest \$ 25 million in the form of convertible debentures in Commercial Alcohols. The plant should start operations in the first quarter of 2002 and have about 50 full-time employees. Commercial Alcohols calls itself the largest producer and distributor of industrial alcohol and fuel ethanol in Canada with distilleries in Chatham and Tiverton.

New Organic Flour Mill Adds Value to Crops

FarmGro Organic Foods Inc., a C\$14 million plant that recently opened east of Regina, Saskatchewan, can add value to 15,500 tonnes of crop per year as well as clean about 18,000 metric tonnes per year of organic grains and specialty crops. The plant was financed by organic farmers, the Saskatchewan government, a commodity and food trading company, and other investors. Chairman of the board Bob Balfour states that the organic food industries in North America, Europe, and Asia have really "taken off" in the last few years. According to Balfour, in the US, expansion has exceeded 20% per year for the past six years, the Japanese market is growing 35% annually and Canada appears to be on par with the US. The plant is currently

processing certified organic products such as white and whole wheat flour for the baking industry and durum semolina for the pasta trade. FarmGro plans to offer cleaning and bagging of grains and specialty crops such as hard spring wheat, durum, soft spring wheat, malt barley, oats, flax, rye, triticale, lentils and peas. FarmGro operates within the CWB system, meaning that wheat, durum, and barley are purchased through the buyback program and then an export permit or permit to process is obtained.

Table 1: All Wheat PS&D

PSD Table						
Country	Canada					
Commodity	Wheat				(1000 HA)(1000 MT)	
	Revised	1999	Prelimin.	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001

Area Harvested	10,364	10,367	10,900	10,970	11,200	11,200
Beginning Stocks	7,435	7,435	7,375	7,375	7,125	7,635
Production	26,850	26,900	26,800	26,800	26,900	26,900
TOTAL Mkt. Yr. Imports	175	14	150	60	20	20
Jul-Jun Imports	175	14	150	50	20	20
Jul-Jun Import U.S.	130	13	0	50	20	20
TOTAL SUPPLY	34,460	34,349	34,325	34,235	34,045	34,555
TOTAL Mkt. Yr. Exports	19,165	18,771	19,000	17,900	18,500	18,500
Jul-Jun Exports	19,373	19,066	19,000	17,900	18,500	18,500
Feed Dom. Consumption	3,900	4,625	4,200	4,695	4,300	4,300
TOTAL Dom. Consumption	7,920	8,203	8,200	8,700	8,500	8,500
Ending Stocks	7,375	7,375	7,125	7,635	7,045	7,555
TOTAL DISTRIBUTION	34,460	34,349	34,325	34,235	34,045	34,555

Table 2: Durum Wheat PS&D

PSD Table						
Country	Canada					
Commodity	Wheat, Durum				(1000 HA)	(1000 MT)
	Revised	1999	Prelimin.	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001

Area Harvested	1,760	1,760	2,600	2,620	2,650	2,650
Beginning Stocks	1,948	1,948	1,792	1,793	2,193	2,700
Production	4,259	4,300	5,400	5,600	5,700	5,700
TOTAL Mkt. Yr. Imports	9	9	1	7	1	1
Jul-Jun Imports	9	9	1	6	1	1
Jul-Jun Import U.S.	8	8	1	6	1	1
TOTAL SUPPLY	6,216	6,257	7,193	7,400	7,894	8,401
TOTAL Mkt. Yr. Exports	3,571	3,571	3,900	3,600	3,900	3,900
Jul-Jun Exports	3,773	3,773	3,900	3,600	3,900	3,900
Feed Dom. Consumption	351	373	650	600	600	600
TOTAL Dom. Consumption	853	893	1,100	1,100	1,100	1,100
Ending Stocks	1,792	1,793	2,193	2,700	2,894	3,401
TOTAL DISTRIBUTION	6,216	6,257	7,193	7,400	7,894	8,401

Table 3: Barley PS&D

PSD Table						
Country	Canada					
Commodity	Barley				(1000 HA)(1000 MT)	
	Revised	1999	Prelimin.	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001

Area Harvested	4,069	4,069	4,500	4,550	4,800	4,800
Beginning Stocks	2,737	2,737	3,071	3,071	2,811	3,107
Production	13,196	13,196	13,500	13,500	14,800	14,800
TOTAL Mkt. Yr. Imports	32	33	40	36	10	10
Oct-Sep Imports	40	33	40	30	10	10
Oct-Sep Import U.S.	32	32	0	30	10	10
TOTAL SUPPLY	15,965	15,966	16,611	16,607	17,621	17,917
TOTAL Mkt. Yr. Exports	1,724	2,392	2,000	2,600	3,200	3,200
Oct-Sep Exports	1,707	2,385	2,000	2,500	3,100	3,100
Feed Dom. Consumption	9,956	9,809	10,502	10,100	10,200	10,200
TOTAL Dom. Consumption	11,170	10,503	11,800	10,900	11,200	11,200
Ending Stocks	3,071	3,071	2,811	3,107	3,221	3,517
TOTAL DISTRIBUTION	15,965	15,966	16,611	16,607	17,621	17,917

Table 4: Corn PS&D

PSD Table						
Country	Canada					
Commodity	Corn				(1000 HA)(1000 MT)	
	Revised	1999	Prelimin.	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001

Area Harvested	1,150	1,102	1,075	1,100	1,190	1,190
Beginning Stocks	885	885	950	1,329	350	1,009
Production	9,096	9,161	6,800	6,800	8,900	8,900
TOTAL Mkt. Yr. Imports	691	1,022	1,600	2,000	800	800
Oct-Sep Imports	1,084	1,119	1,300	2,000	800	800
Oct-Sep Import U.S.	1,080	882	1,300	2,000	800	800
TOTAL SUPPLY	10,672	11,068	9,350	10,129	10,050	10,709
TOTAL Mkt. Yr. Exports	363	448	100	120	200	200
Oct-Sep Exports	378	448	100	120	200	200
Feed Dom. Consumption	7,400	7,240	6,900	6,900	7,000	7,000
TOTAL Dom. Consumption	9,359	9,291	8,900	9,000	9,200	9,200
Ending Stocks	950	1,329	350	1,009	650	1,309
TOTAL DISTRIBUTION	10,672	11,068	9,350	10,129	10,050	10,709

Table 5: Oats PS&D

PSD Table						
Country	Canada					
Commodity	Oats				(1000 HA)(1000 MT)	
	Revised	1999	Prelimin.	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001

Area Harvested	1,398	1,398	1,300	1,300	1,400	1,400
Beginning Stocks	1,088	1,088	1,057	1,057	862	662
Production	3,641	3,641	3,400	3,400	3,600	3,600
TOTAL Mkt. Yr. Imports	5	4	5	5	10	10
Oct-Sep Imports	5	4	5	5	10	10
Oct-Sep Import U.S.	4	4	5	5	10	10
TOTAL SUPPLY	4,734	4,733	4,462	4,462	4,472	4,272
TOTAL Mkt. Yr. Exports	1,300	1,524	1,300	1,800	1,600	1,600
Oct-Sep Exports	1,383	1,383	1,300	1,800	1,600	1,600
Feed Dom. Consumption	2,091	1,753	2,100	1,700	1,700	1,700
TOTAL Dom. Consumption	2,377	2,152	2,300	2,000	2,000	2,000
Ending Stocks	1,057	1,057	862	662	872	672
TOTAL DISTRIBUTION	4,734	4,733	4,462	4,462	4,472	4,272

Table 6: Rye PS&D

PSD Table						
Country	Canada					
Commodity	Rye				(1000 HA)(1000 MT)	
	Revised	1999	Prelimin.	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001

Area Harvested	169	169	115	115	140	140
Beginning Stocks	166	166	162	162	100	88
Production	387	387	260	260	310	310
TOTAL Mkt. Yr. Imports	4	4	0	6	5	5
Oct-Sep Imports	5	5	0	6	5	5
Oct-Sep Import U.S.	5	5	0	6	5	5
TOTAL SUPPLY	557	557	422	428	415	403
TOTAL Mkt. Yr. Exports	86	87	75	100	100	100
Oct-Sep Exports	79	83	75	100	100	100
Feed Dom. Consumption	200	222	185	150	140	140
TOTAL Dom. Consumption	309	308	247	240	230	230
Ending Stocks	162	162	100	88	85	73
TOTAL DISTRIBUTION	557	557	422	428	415	403

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