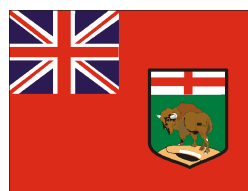


Bi-weekly Bulletin

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MANITOBA: GRAINS, OILSEEDS, AND LIVESTOCK



While wheat still dominates the agricultural landscape in Manitoba, there has been an increase in area seeded to oilseeds and special crops, and strong growth in the livestock sector, including both beef and pork. Spring wheat continues to be the most important crop grown in Manitoba, accounting for more than 38% of production in 1999-2000, followed by canola at 22% and barley at 15%. Other major crops include oats and flax. As a result of the end of the Western Grain Transportation Act (WGTA), and low international grain prices, Manitoba's producers have adjusted and diversified their farming

operations. This issue of the *Bi-weekly Bulletin* examines the supply and disposition of grains, oilseeds and special crops in Manitoba, and provides an overview of the livestock and food processing sectors.

Land and Climate

Manitoba lies roughly at the centre of North America as the easternmost of the three Prairie provinces, and occupies about 650,000 square kilometers (km²) of land and water. In 1999, about 3.5% of the Canadian population, or 1.14 million people lived in Manitoba. About 680,000 people reside in the capital city of Winnipeg. The northern three-fifths of Manitoba are situated on the Canadian shield and are dominated by deciduous boreal forest as far north as the climate permits. The eastern extremity of the province is also built on the

Canadian shield and is characterized predominantly by forests and lakes. As such, agricultural land is confined to 77,321 km², or roughly 12% of Manitoba's landmass. The area is roughly the shape of a triangle that is bordered to the west by Saskatchewan, the south by the United States (U.S.) and the third border that stretches diagonally from the northwest to the southeast, cutting across Lake Winnipeg. The combined land in crops, pasture and summerfallow has remained fairly constant for the latter part of the twentieth century.

Most of the agricultural soil in Manitoba is black soil, which is richer in organic material than the brown or dark brown soils found farther west. As such, the soil is very productive and supports a wide range of grains, oilseeds and special crops.

Warm, sunny summers and cold bright winters characterize Manitoba's climate. According to the *National Ecological Framework for Canada*, the average January temperature for the agricultural area of Manitoba is -17.6 degrees Celsius (EC), while the average July temperature rises to 19.4EC. Manitoba receives more precipitation than the other Prairie provinces with average annual precipitation of 510 millimeters (mm), including 120 mm of snow and 390 mm of rain.

Did you know?

- ... the first load of Manitoba grown wheat was shipped to England in 1874.
- ... the first Western Canadian grain elevator was built at Gretna, Manitoba in 1879.
- ... the Winnipeg Grain & Produce Exchange, now called the Winnipeg Commodity Exchange, was opened in 1887 to provide a venue for cash sales of wheat, oats, and barley.
- ... the total number of hogs has more than doubled since 1983, while the total number of cattle and calves has doubled since 1950. The total number of people in Manitoba has still not doubled since 1921.
- ... there were 58,024 farms in Manitoba in 1941. In 1996, there were 24,383.
- ... there were 684 licenced primary elevators in Manitoba in 1962. Now, there are 206.

Agriculture and Economy

Manitoba enjoys a strong and stable economy with a diversified economic base and relatively large service sector which ensures that it is less susceptible to large economic fluctuations than many other regions. Agriculture makes an important contribution to Manitoba's overall economy. While in 1999 primary agriculture only contributed to



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3.0% of the provincial gross domestic product (GDP), food and beverage manufacturing contributes approximately another 3.5%, or 25% of the GDP from total manufacturing. About 10% of the jobs in Manitoba are associated with agricultural production.

Winnipeg is the centre of the Western Canadian grain industry, and is home to the following: the headquarters of the Canadian Wheat Board (CWB), the Canadian Grain Commission, the Canadian International Grains Institute, the Winnipeg Commodity Exchange, the

Canada Grains Council, the Canola Council of Canada, Pulse Canada, Agricore, and numerous other grain companies and producer organizations.

MANITOBA: POPULATION

	1981	1986	1991	1996
Total Population	1,026,241	1,071,232	1,091,942	1,113,898
Farm Population	98,375	86,505	79,610	79,840
Farm Population (%)	9.59%	8.08%	7.29%	7.17%
Number of Census Farms	29,442	27,336	25,706	24,383
Average Size of Census Farms (ha)	263	283	300	317

Source: Statistics Canada

MANITOBA: AREA SEEDED

	1998	1999	2000
thousand hectares.....		
Winter Wheat	36.4	36.4	52.6
Durum	80.9	16.2	42.5
Spring Wheat:	1,195.9	1,236.2	1,475.0
<i>CW Red Spring</i>	1,092.7	1,165.5	1,416.4
<i>Prairie Spring</i>	40.5	28.3	16.2
<i>CW Extra Strong</i>	48.6	36.4	28.3
<i>CW Soft White Spring</i>	2.0	2.0	2.0
<i>Other Spring</i>	12.1	4.0	12.1
Total Wheat	1,313.2	1,288.8	1,570.1
Oats	404.7	327.8	398.6
Barley	526.1	429.0	505.9
Rye (all)	48.6	34.4	22.3
Mixed Grains	8.1	8.1	12.1
Corn	38.4	44.5	58.7
Total Coarse Grains	1,025.9	843.8	997.6
Flax ^{1/}	283.3	210.4	176.0
Canola	1,112.9	1,003.6	951.0
Total Oilseeds	1,396.2	1,214.0	1,127.0
TOTAL GRAINS & OILSEEDS	3,735.3	3,346.6	3,694.7
Dry Peas	105.2	42.4	64.7
Dry White Pea Beans	20.2	40.5	50.6
Dry Coloured Beans	20.2	28.3	44.5
Lentils	6.1	6.5	16.2
Mustard Seed	4.0	2.8	2.4
Sunflower Seed	50.6	56.7	62.7
Canary Seed	20.2	6.1	20.2
Buckwheat	12.1	10.1	12.1
Total Special Crops	238.6	193.4	273.4
TOTAL CROPS	3,973.9	3,540.0	3,968.1
Summerfallow	182.0	607.0	152.0
TOTAL AREA	4,155.9	4,147.0	4,120.1

^{1/} excludes solin

Source: Statistics Canada

Transportation Policy

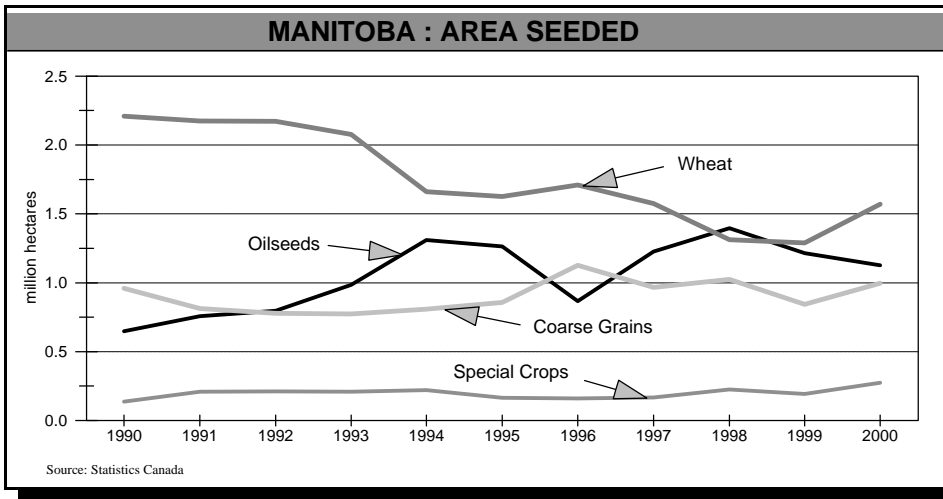
In 1995, the WGTA was repealed and the subsidy on rail transportation of grain was removed as of the 1995/96 grain year. The result was increased costs to the farmer for transporting grain from the farm to the export position. As most grain from Western Canada is exported through the Pacific Coast, farmers in Manitoba faced the sharpest increase in transportation costs. On the other hand, flax exports through Thunder Bay and malting barley and oat exports to the U.S. are more cost effective through Manitoba than through other prairie shipping points. Effective August 1, 2000, farmers will be deducted freight to Thunder Bay or Vancouver, but will receive a rebate directly from the CWB based on the proportion of wheat shipped through Churchill, to accurately reflect the value of the Port of Churchill.

Port of Churchill

The Port of Churchill is located at the northern extremity of Manitoba on the Hudson Bay. The Port has been serviced by OmniTRAX Canada since 1996, and operates from mid-July to early November. The elevator, with 140,000 tonnes (t) storage capacity, has the ability to clean, grade, store, and transfer bulk grains from railcars to oceangoing vessels. While the Port has a shipping capacity of over 1 million tonnes (Mt), only 415,000 t of grain were shipped through Churchill in 1999, a 30.5% increase over 1998. The Port of Churchill offers an efficient and lower cost alternative for shipping grain to many of Canada's offshore customers serviced off the Atlantic seaboard. The province and the federal government are funding a major dredging program which will help to facilitate the growth of the Port.

Number of Farms

In 1998, there were 22,110 farms in Manitoba with revenues over \$10,000. The number of farms of that size has decreased by 1.7% since 1996, and 6% since 1990, for a reduction of 1,415 farms. The number of farms in Canada



with revenues over \$10,000 has decreased by only 0.5% since 1990.

In terms of revenue, farms in Manitoba tend to be larger than the average farm size for Canada. When comparing farms in Manitoba with farms in Canada, fewer farms fall into the lower revenue classes (\$10,000-24,999 and \$25,000-49,999) and a higher percentage of farms fall into the higher revenue classes. In fact, as a percentage, only Quebec has a lower percentage of farms represented in the lowest revenue class (\$10,000-24,999).

Farm Income

While farms in Manitoba are quite diversified, 51.7% of all farms with revenues over \$10,000 are classified as grain and oilseed farms. The only other province with a higher concentration of grain and oilseed farms is Saskatchewan with 75.8% of their farms in the same class. Thus, Manitoba and Saskatchewan are very vulnerable to the depressed global prices for grains and oilseeds.

In 1999 the estimated total value of farm receipts was \$2.95 billion, with receipts from crop production valued at \$1.42 billion and livestock at \$1.31 billion. Realized net income for 1999 was valued at \$260 million, marginally greater than the five-year (1994-1998) average. According to Agriculture and Agri-food Canada forecasts published in March 2000, realized net income for 2000 is expected to increase to \$464 million, because a decrease in crop receipts due to low international prices for

grains and oilseeds will be more than offset by increases in livestock receipts and program payments.

Farmland Values

Overall, the Manitoba market for farmland is up slightly, although the majority of the province shows a holding pattern. Farmland values for 2000 increased 0.6% over 1999, after increasing marginally the year before, and 0.7% in 1998. Throughout the province there are pockets of strong local demand for land in areas of intensive livestock operations and specialty crop production. In contrast, wet growing conditions, low commodity prices and limited production have reduced the demand for land in southwestern Manitoba.

Area Seeded

Total area seeded to grains, oilseeds and special crops increased marginally from 3.95 million hectares (Mha) in 1990 to 3.97 Mha in 1998 but decreased to 3.54 Mha in 1999 due to adverse weather that left 400,000 hectares (ha) too wet to seed. For 2000, Statistics Canada estimates that total area seeded is 3.97 Mha. In general, since 1990, area seeded to wheat has trended downwards. Area seeded to coarse grains (barley, oats, rye, corn and mixed grains) has stayed steady. The area seeded to oilseeds (canola and flax) trended upwards until 1998 when the trend was reversed. There has been a small increase in area seeded to special crops. Summerfallow has dropped 58% since 1990 to 152,000 ha in 2000, while the area seeded to tame hay increased 11% between 1990 and 1999 to 793,200 ha.

GRAINS, OILSEEDS, AND SPECIAL CROPS PRODUCTION AND PROCESSING

Wheat

Since 1990, when the record seeded area for all wheat was 2.21 Mha, the area seeded to wheat has been declining. For 2000, seeded area for wheat recovered by 21.8% from 1999 to 1.57 Mha. As very little durum wheat or winter wheat is grown in Manitoba, most of the area is seeded to **Canada Western Red Spring**. Minimal amounts of Extra Strong, Prairie Spring, and Soft White Spring varieties are grown as well. Since 1996-1997, wheat production and usage has been decreasing, but in 2000-2001 marketings are expected to rebound to 3.3 Mt, along with the increase in area seeded.

In 1999, the value of shipments for flour, prepared cereals and feed reached about \$414.7 million, a 132.1% increase over 1990. Only two of Canada's 26 largest flour mills, ADM Milling in Winnipeg, and Prairie Flour Mills in Elie, are located in Manitoba and have a combined 24-hour capacity of 5,100 hundredweight (cwt). Based on the published capacities of the 26 largest mills in Canada, Manitoba has less than 3% of Canada's milling capacity, although it produces nearly 11% of Canada's wheat. In addition, there are two smaller mills and an ethanol production facility in Manitoba that use wheat as an input. Feed use has been declining, due to abundant supplies of feed barley. A clear majority of the wheat produced in Manitoba is exported in the unprocessed form.

The largest strawboard plant in Canada, Isoboard Enterprises, is located in Elie, Manitoba. Isoboard began operations in 1998, and currently produces about 100-110 million square feet (mln ft²) of medium density fibre strawboard, an environmentally friendly product used in the construction of furniture, cabinetry, and countertops. When Isoboard reaches its capacity, it will produce 144 mln ft² of strawboard and will use 200,000 t of wheat straw per year.

Coarse Grains

The area seeded to coarse grains has fluctuated throughout the 1990s, decreasing until 1993 and then increasing to 1.13 Mha in 1996. Since 1996, area seeded has remained around 1 Mha. For 2000, seeded area is 1 Mha. **Barley** is the most important coarse grain produced and 505,900 ha was seeded in 2000, an 18% increase over 1999. **Oats** are also an important crop, with 398,600 ha seeded in 2000. Since 1995 the area seeded to **corn** has been expanding, due to the availability of higher yielding, short season hybrids. Both **rye** and **mixed grain** production have been decreasing throughout the latter part of the 1990s.

While the majority of barley produced is destined for the feed market, approximately 15-20% of barley is selected for malting purposes and is either used domestically to produce malt or exported as malting barley. While domestic processors typically prefer 2 row malting varieties, 6 row is preferred by American customers, and as such about 85% of the barley grown in Manitoba is 6 row, due to its

proximity to the U.S. Manitoba has one of the six main malting plants in Canada, Dominion Malting, which sources both 2 row and 6 row varieties from Manitoba and Saskatchewan, and the malt is either used domestically or exported. Because of tight supplies of feed barley in Western Canada due to a growing livestock industry, and high transportation costs, very little feed barley is exported.

Two of the seven major oat processing facilities in Western Canada, Can-Oat Milling in Portage la Prairie and Emerson Milling in Emerson, are located in Manitoba, with a combined daily capacity of 412 tonnes per day. This means that Manitoba has 24% of the processing capacity in Western Canada, while it produces about 26% of the oats. About half of the oats grown in Manitoba are exported in the unprocessed form, with the main customer being the U.S. Smaller quantities of processed products are also exported.

Seagrams Americas operates a whiskey distillery in Gimli, Manitoba and uses domestic corn and imported corn from the U.S.

Oilseeds

The area seeded to oilseeds almost doubled between 1990 and 1994, but declined in both 1995 and 1996. After dramatic growth once again in the latter part of the decade, the seeded area for 2000 declined 7% to 1.13 Mha due primarily to depressed prices and burdensome stocks. **Flaxseed** has been a relatively important crop since the 1940s, but flaxseed production is relatively small compared to **canola**. Large global supplies of edible oils have put downward pressure on canola oil prices, and domestic crushing has slowed down. For 2000-2001 canola usage is expected to increase, but not to the levels experienced in 1997-1998 and 1998-1999. Small amounts of **soybeans** are also grown in Manitoba, and the area seeded has been increasing throughout the 1990s.

Canola is processed at one main crushing facility, Canamera in Altona, Manitoba. Canamera also operates a second plant in Harrowby, Saskatchewan. Due to its proximity to the U.S. border, some canola is imported and crushed at the Altona facility. Exports of unprocessed canola

MANITOBA: GRAINS AND OILSEEDS FARM SUPPLY AND DISPOSITION

Grain and Crop Year	Area Harvested 000 ha	Yield t/ha	Productionthousand metric tonnes	Total Supply	Marketings	Seed	Feed, Waste and Dockage	Total Disposition	Carry-out Stocks
All Wheat									
1998-1999	1,307	2.46	3,220	3,275	2,752	133	300	3,185	90
1999-2000f	1,273	2.48	3,158	3,248	2,735	138	285	3,158	90
2000-2001f	1,547	2.38	3,681	3,771	3,275	138	273	3,686	85
Barley									
1998-1999	502	3.25	1,631	1,881	466	40	1,125	1,631	250
1999-2000f	405	3.00	1,215	1,465	300	55	960	1,315	150
2000-2001f	481	3.30	1,586	1,736	375	45	1,116	1,536	200
Oats									
1998-1999	364	2.83	1,030	1,100	633	29	288	950	150
1999-2000f	295	2.89	854	1,004	671	33	200	904	100
2000-2001f	338	2.80	947	1,047	680	30	210	920	127
Canola									
1998-1999	1,105	1.63	1,803	1,813	1,580	8	146	1,733	80
1999-2000f	996	1.72	1,708	1,788	1,200	8	130	1,338	450
2000-2001f	942	1.70	1,600	2,051	1,375	10	145	1,530	521
Flax									
1998-1999	275	1.31	361	361	300	10	25	336	25
1999-2000f	202	1.34	272	297	175	10	27	212	85
2000-2001f	173	1.47	254	339	200	10	31	241	98

f: forecast, Agriculture and Agri-Food Canada, July 2000

Source: Statistics Canada "Farm Supply and Disposition in Canada" (Major Grains), May 2000

seed, canola oil and canola meal are significant, with the seed typically moving through the west coast, and the canola oil and canola meal being exported to the U.S. There is a growing amount of specialized canola being produced to meet the needs of customers, such as high-erucic rapeseed produced in Manitoba for customers in the U.S.

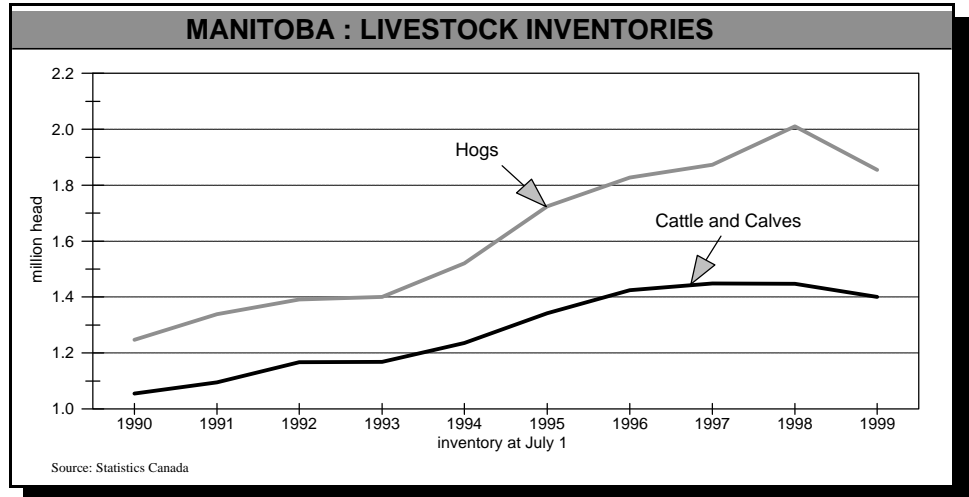
For flax, domestic uses include limited crushing for oil, and grinding for the inclusion of flax in baked goods. Exports of flax typically go to Europe, for inclusion in a number of products from bread to linoleum and paint. Flax straw is also processed by two companies in Winkler, Manitoba, Ecusta Fibres Ltd. and Schweitzer-Mauduit Canada Ltd., who export their product to the U.S. for further processing into paper products.

Special Crops

Manitoba is also a major producer of **dry peas, sunflower seeds, dry white pea beans, coloured beans, canary seed, lentils, buckwheat, and mustard seed**. In the last decade area seeded to special crops has slowly increased to a record of 238,600 ha in 1998 before dropping to 193,400 ha in 1999, mainly due to the wet conditions that existed during seeding in south-western Manitoba. Production grew 71.8%, from 243,600 t in 1990-1991 to a record 418,400 t in 1998-1999 before dropping to 323,500 t in 1999-2000. For 2000, area seeded increased 41.4% to 273,400 ha due to substantial increases in the area seeded to dry beans, dry peas, canary seed, lentils, buckwheat, and sunflower seed, while production is expected to reach a record 455,900 t.

Typically producers deliver special crops to handling facilities where foreign material is removed and the seed cleaned and graded to export standard. Some special crops such as sunflower seed and canary seed, are used domestically in birdseed mixtures.

Manitoba's dry beans are cleaned locally and used for processing into products such as soups and pork and beans, or exported.



Manitoba produces mainly confectionary sunflower seeds, which are mostly used as whole seed for snack food or dehulled for use in baking. Most of the oilseed sunflower seeds, are used for birdseed. The remainder of the oilseed sunflower seeds are exported for crushing into oil and meal.

Dry peas are used for two main purposes, food and feed. Many companies clean, split and bag peas destined for human consumption. As well, there are a number of companies that include peas in their processed food products. One of Canada's two plants that use fractionation technology for processing peas into protein, starch and fibre fractions is located in Manitoba. While some of these products are used by domestic processors as ingredients in their food products, the majority are exported to Europe, and the U.S. Peas are also used in livestock feed, particularly hog rations.

LIVESTOCK PRODUCTION

Cattle

In 1998, about 31% of the farms in Manitoba were classified as cattle farms. Manitoba is Canada's third largest cattle producer, following Alberta and Saskatchewan. In Canada beef cattle production has been in a cyclical contraction since 1997, following the longest expansion phase in history. This pattern is mirrored in Manitoba, where beef cattle inventories increased by 37% between 1990 and 1997, and then fell 3% by 1999. In total, cattle inventories increased by 33% in the 1990s to 1.4 million head (mln hd) as of July 1, 1999. The number of beef cattle in Manitoba is expected to expand as

producers look for viable diversification options. Beef cattle fit well as a complement to grains and oilseeds, as cattle serve as an excellent value-added alternative to exporting grains and oilseeds out of the province. In 1999, farm cash receipts for cattle and calves totaled \$448.7 million, or 15.2% of all receipts.

There are limited processing facilities in Manitoba and as such, most of Manitoba's cattle are sold as slaughter cattle to the U.S. or are shipped as feeder cattle and calves to other provinces for further feeding. In 1999, live cattle exports at \$173.5 million, made up 7.4% of Manitoba's total agri-food exports, making it the third most important commodity, behind wheat and canola.

Hogs

In 1998, 3.9% of farms were classified as hog farms. Manitoba is Canada's third largest hog producing province, after Quebec and Ontario. There has been strong growth in this sector with hog inventories increasing 61% between 1990 and 1998. As of July 1, 1999, hog inventories had decreased by 8% from a year earlier, for a total number of 1.86 mln hd. Despite a decline in the total number of hogs due to increased weanling exports, local hog producers continued to expand their breeding stock by 6% to a record 253,000. In 1999, farm cash receipts for hogs totaled \$481.7 million, or 16.3% of all receipts.

Growth in hog production is being encouraged through the expansion of the local processing industry. In September 1999, Maple Leaf Foods

opened a hog processing facility in Brandon, Manitoba with a slaughter capacity of 4.6 million hogs. As well, in late 1999, J.M. Schneider Inc. announced plans to increase the slaughter capacity of its hog processing plant in Winnipeg from 0.9 mln hd to 4.6 mln hd by 2003. In 2000, total production of hogs is expected to exceed 5 million hogs, while 10 million hogs will be required annually to meet the anticipated demand from Maple Leaf and J.M. Schneider. Further production expansion will occur in Manitoba, while hogs will also be brought in from Alberta, Saskatchewan, Ontario and potentially the U.S. to be processed. As a result of an increase in domestic slaughter capacity, exports of slaughter hogs from Manitoba are expected to decline in 2000 and 2001.

The Manitoba government is building on existing livestock industry regulations and programs through the *Livestock Stewardship Initiative* to protect the environment and to ensure the future of the province's livestock industry. On March 3, 2000, the provincial government announced several immediate actions for environmental monitoring, land use planning, and quality assurance to ensure that industry growth does not occur at the expense of the environment. Through consultation with the public, the provincial government intends to develop a plan for growth that is both viable and sustainable.

Other

Manitoba's equine industry is the third largest in Canada, and is comprised of Canada's largest herd of mares used for pregnant mare's urine (PMU), pleasure horses, and racehorses. Ayert Organics Ltd., the sole purchaser and processor of PMU in North America, is located in Brandon and has allowed Manitoba to develop a viable equine industry over the last 33 years. The PMU industry contributes about \$35-45 million in farm cash receipts annually.

There is also significant production of sheep, goats, honey and beeswax, bison, deer, elk, fur farms, ostriches, wild boar, emus, pheasants, llamas, and rabbits.

Supply Managed Commodities

About 3.1% of the farms in Manitoba were classified as **dairy** farms in 1997, and 1.5% were **poultry** and **egg**, as compared to the Canadian equivalents of 8.8% and 1.8%. Supply managed production is typically concentrated in more populated areas, due to the nature of the products. The prairies appear to have advantages for most supply-managed commodities, attributable primarily to lower feed costs.

When compared to farm cash receipts, dairy farms contributed 5.2% of total Manitoba farm cash receipts in 1999, hens and chickens 1.9%, and eggs for consumption 1.6%. In 1999, dairy receipts accounted for \$152.3 million, a 28.9% increase over 1991. Poultry receipts have increased 44.4% in the same time period, while egg receipts decreased 0.9%.

Dairy products are processed at three fluid milk plants, 11 industrial plants, and three prepackaging plants. The majority of Manitoba's chickens are slaughtered at two primary plants. Turkeys, geese and ducks are also commercially produced in Manitoba. While eggs produced for human consumption fall under the quota system of Supply Management, there has been an expansion of egg production under the "Grow for Processing Program", where eggs are supplied to processors, who have had increasing requirements.

Food Processing

The food and beverage manufacturing sector accounted for \$2.6 billion or 25.1% of the total manufacturing output for Manitoba in 1999. Since 1990 the value of food and beverage shipments has grown 58.6%. This sector is the largest manufacturing sector in Manitoba, exceeding transportation, fabricated and primary metal products, and machinery sectors. The largest food and beverage sub-sectors are meat (25.4%), flour, cereal food and feed (15.9%), dairy products (12.0%), beverages (7.9%), and poultry (5.1%). The U.S. is Manitoba's primary export market, receiving 72.5% of all consumer agri-food products in 1999. Smaller amounts are also exported to Japan, Australia, Mexico, and over 100 other countries.

Outlook

The end of the WGTA made it less profitable to produce grain for export and stimulated value-added processing of grain on the prairies. Currently, due to depressed prices for grains and oilseeds, producers are looking for low input cost solutions for their income in the short-term. As such, more wheat and barley was seeded this year, and the amount of oilseeds has decreased.

In the future, new and improved domestic uses of grains, oilseeds, and special crops will see more value-added production taking place in Manitoba, such as can be seen in the growing hog industry. Livestock production is aided by excellent supplies of feedgrains, and protein supplements for the feed industry are in ample supply from local processors and producers. As well, dried distillers grain, canola meal and feed peas are all available to feed formulators from the province's distillers, canola crushers and pulse crop growers.

With an aim to diversify, Manitoba's producers are also seeking new crops and new markets, such as functional foods and nutraceuticals. For Manitoba's food and beverage manufacturing sector, advantages available include primary inputs, energy, labour and management.

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