

November 2019

canola DIGEST

The Source for Canada's
Canola Growers

FOLLOW THE BUSHEL

What are the quality checks, transport modes, processing steps and feedback loops as canola goes from grain bin to kitchen? / Page 12

INSIDE:

Canola: Strong in a challenging global market / Page 26

Your strong, united voice in Ottawa / Page 30

FARMER PANEL: What should customers know about you? / Page 38

THE PROOF IS IN THE BIN

OPEN TO FIND OUT WHY >>



CHECK OUT OUR FULL 2020 LINEUP.

HYBRID	KEY FEATURES	YIELD % OF CHECKS	MATURITY	AGRONOMIC TRAIT
NEW InVigor L345PC	New InVigor® L345PC offers a significant jump in yield potential over InVigor L233P and features our patented Pod Shatter Reduction technology plus first generation clubroot resistance. This hybrid is suitable for all growing zones.	111.9% of the checks (InVigor 5440 and Pioneer® 45H29) in 2017/2018 WCC/RRC ¹ trials 111.4% of InVigor L233P (n=28 trials, 2018)	One day earlier than InVigor L252	Patented Pod Shatter Reduction First generation clubroot resistance ² Rated R - for Blackleg
NEW InVigor L352C	InVigor L352C offers yield potential that exceeds InVigor L252. It is suitable for all growing zones and is ideal for growers that prefer to swath.	108.6% of the checks (InVigor 5440 and Pioneer 45H29) in 2017/2018 WCC/RRC trials 104% of InVigor L252 (n=28 trials, 2018)	Half-day later than InVigor L252	First generation clubroot resistance ² Rated R - for Blackleg
NEW InVigor choice LR344PC	InVigor Choice LR344PC, the first InVigor Choice hybrid, has both the LibertyLink® technology system and TruFlex™ canola with Roundup Ready® Technology. You have the option to use Liberty® herbicide or Roundup WeatherMAX® herbicide on your canola.	104.1% of the new checks (InVigor L233P and Pioneer 45H33) in 2018 WCC/RRC trials 103.6% of InVigor L233P (n=12 trials, 2018)	Over one day earlier than InVigor L252	Patented Pod Shatter Reduction First generation clubroot resistance ² Dual herbicide trait systems: LibertyLink® technology system and TruFlex™ canola with Roundup Ready® Technology Rated R - for Blackleg
InVigor L233P	InVigor L233P was grown on more acres in Western Canada than any other canola hybrid in 2019 ³ . This early-maturing, high-yielding hybrid provides exceptional harvest flexibility for growers looking to straight cut or delay swath. Winner of 2017 and 2018 Canola 100 contest.	108.8% of checks (InVigor 5440 and Pioneer 45H29) in 2014/2015 WCC/RRC registration trials	Over three days earlier than the average of checks	Patented Pod Shatter Reduction Rated R - for Blackleg
InVigor L234PC	With both the patented Pod Shatter Reduction technology and second generation clubroot resistance, InVigor L234PC offers outstanding yield potential and strong standability similar to InVigor L233P. This hybrid is a great fit for growers in known clubroot-affected areas.	104% of the checks (InVigor 5440 and Pioneer 45H29) in 2014/2015 WCC/RRC registration trials	Three days earlier than the average of checks	Patented Pod Shatter Reduction Second generation clubroot resistance ² Rated R - for Blackleg
InVigor L255PC	InVigor L255PC is a medium-height hybrid that has separated itself from others due to its very impressive standability and performance. It is well suited for growers in mid- to long growing zones.	109% of checks (InVigor 5440 and Pioneer 45H29) in 2016 WCC/RRC registration trials	One-and-a-half days later than the average of checks	Patented Pod Shatter Reduction First generation clubroot resistance ² Rated R - for Blackleg
InVigor L241C	You can expect strong standability and high yields from this mid-maturing hybrid that's well suited to all clubroot-affected regions. InVigor L241C won the 2016 Canola 100 contest with a yield of 81.43 bu/ac.	102% of checks (InVigor 5440 and Pioneer 45H29) in 2012/2013 WCC/RRC registration trials	One day earlier than the average of checks	First generation clubroot resistance ² Rated R - for Blackleg
InVigor L252	A consistent top performer, InVigor L252 continues to offer incredible yield performance and strong standability with mid-season maturity. InVigor L252 won the 2018 third-party Canola Performance Trials (CPTs) for the sixth straight year (average of all growing zones in small plot swath trials).	110% of checks (InVigor 5440 and Pioneer 45H29) in 2011/2012 WCC/RRC registration trials	One day later than the average of checks	Rated R - for Blackleg
InVigor L230	Early-maturing InVigor L230 displays outstanding yield potential with excellent standability. This hybrid is ideal for growers who prefer an early-maturing hybrid that consistently performs.	103.9% of checks (InVigor 5440 and Pioneer 45H29) in 2014/2015 WCC/RRC registration trials	Over three days earlier than the average of checks	Rated R - for Blackleg

¹ Western Canadian Canola/Rapeseed Recommending Committee (WCC/RRC) trials.

² InVigor L345PC, InVigor L352C, InVigor Choice LR344PC, InVigor L255PC and InVigor L241C all contain the same clubroot resistance profile. InVigor L234PC contains this resistance profile plus second generation clubroot resistance to additional emerging clubroot pathotypes to help combat the evolving clubroot pathotypes.

³ 2019 BPI (Business Planning Information) Data.

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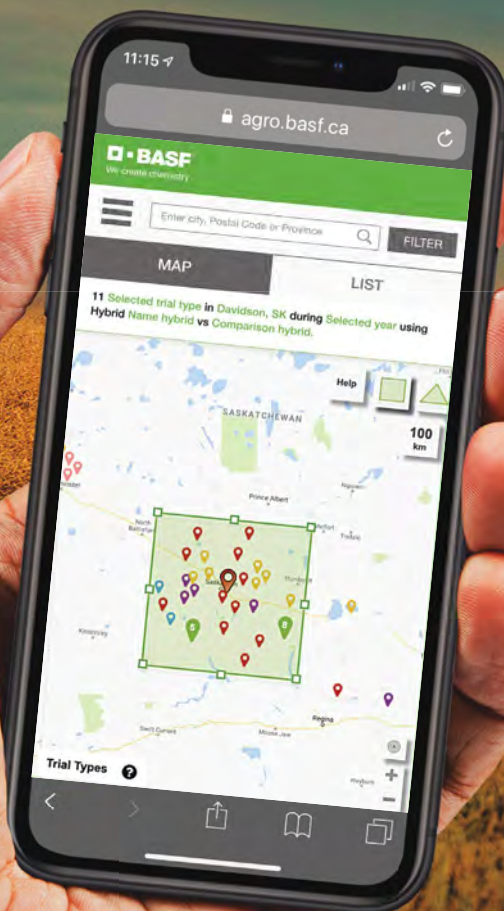
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To learn more, visit **agsolutions.ca/InVigor** or call **AgSolutions®** Customer Care at 1-877-371-BASF (2273).

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FEATURES

12



18



22

12

FOLLOW THE BUSHEL



After you deliver canola from a bin on the farm, what are the quality checks, processing steps, transportation modes and packaging requirements as each bushel winds its way to the end user? This article follows the thread from gate to plate, describing each step along the way.

18

Canola Market Snapshot 2019

The value of Canadian canola exports declined by 9.8 per cent in 2018-19, with volume of trade and market prices as factors. Despite this, exports to second wave markets, including Pakistan, Bangladesh and the European Union, increased in value.

22

Canola meal markets get more diverse

The Canola Council of Canada is spreading the word about canola meal benefits throughout the U.S., China and Southeast Asia.

26

Canola: Strong in a challenging global market

Agri benchmark shows that despite the trade conflict with China, canola seems to be performing rather well, so far, when compared to other vegetable oils. Canola has been a profitable crop in Canada and other countries, especially Ukraine and Hungary.

30

Your strong, united voice in Ottawa

Canola organizations join forces to deliver your message to government decision-makers. It's an intense and important undertaking, particularly in an election year. See the sidebar on tips to talk to your MP.

46

EU certification gives you access to a new market

When your farm is EU-certified, the canola you grow is eligible for export to Europe's important biofuel market. It's a simple and timely way to gain access to this significant market opportunity.

48

Construction begins on protein production plant in Winnipeg

Merit Functional Foods has broken ground on its 88,000 square foot pea and canola protein extraction facility. When it opens later in 2020, it will initially process approximately 20,000 tonnes of pea and canola per year.

DEPARTMENTS



Credit: Dan Orchard

34

34 Agronomy Insight

Why buy clubroot-resistant varieties?

The CCC agronomy team says clubroot-resistant (CR) varieties should be grown before the disease becomes established in your area. CR varieties used early will keep spore loads low and local, particularly if combined (and this is important) with at least a two-year break between canola crops and an absolute minimum amount of soil movement.

36 Business Management

Canola profit opportunities exist despite challenges

Three market analysts Errol Anderson, David Derwin and Jon Driedger provide tips on how to find those opportunities in a more challenging market. “To wait for that magic \$500 a tonne, you could be waiting a while,” warns Derwin.

38 Farmer panel

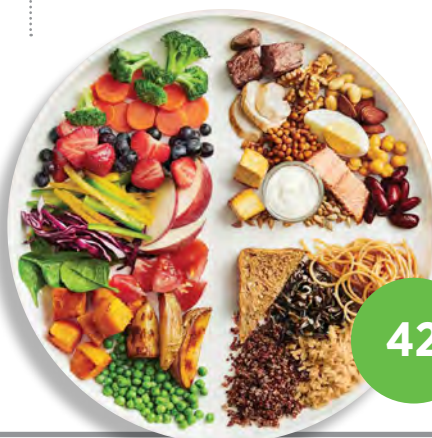
What should customers know about you?

We asked our six panelists to share something about their farm and their business philosophy they think consumers need to know.

42 Canola Eat Well

5 reasons to love Canada's new Food Guide

For starters, the new guide is easy to use. It also has fewer food groups, an emphasis on healthy fats, a consideration for plant-based protein and an evidence-based approach.



42

PROVINCIAL BULLETINS

6 | ALBERTA CANOLA

Plan to attend the Powering Your Profits event in your region this month. Alberta Canola hosts 12 events across the province from November 18–28, with a focus on marketing, business management and agronomy. Alberta Canola welcomes Tara Baycroft as “School and Agriculture Coordinator.”

8 | SaskCanola

Grower dollars invested in research leverages government funding, which greatly extends SaskCanola’s research capabilities. New disease-management projects will look at the impact of verticillium stripe on canola yield in our climate, and clubroot surveillance and pathotype monitoring in Saskatchewan.

10 | Manitoba Canola Growers

Manitoba Canola Growers describes its five focus areas: market diversification, secure export markets, protecting canola’s reputation, support for farmers, and your farm voice. Trade disruption with China highlights the need for continued work in these areas. Also, read about the “3 steps to improved food communication.”



Credit: Clint Jurke

CALENDAR

AGRI-TRADE 2019 —

November 6-8, Red Deer, Alberta
agri-trade.com

CANOLA DISCOVERY FORUM —

November 13-14, Winnipeg, Manitoba
canoladiscoveryforum.ca

ALBERTA POWERING YOUR PROFITS

TOUR — November 19-28, 12 locations
albertacanola.com/PYP

LEARN TO LEAD —

November 29-30,
Saskatoon, Saskatchewan
saskcanola.com

GRAIN GRADING WORKSHOP —

November 18, Yorkton, Saskatchewan
November 19, Moose Jaw, Saskatchewan
saskcanola.com

TOP NOTCH FARMING MEETING —

November 21,
Swift Current, Saskatchewan
saskcanola.com

CANOLA INDUSTRY MEETING & CANOLA INNOVATION DAY —

December 4 & 5
Saskatoon, Saskatchewan
saskcanola.com

CROSPHERE CONFERENCE INCL. SASKCANOLA'S ANNUAL GENERAL MEETING —

January 14-15, Saskatoon, Saskatchewan
cropsphere.com

FARMTECH 2020 —

January 28-30, Edmonton, Alberta
farmtechconference.com

ALBERTA CANOLA ANNUAL GENERAL MEETING, AT FARMTECH —

January 28, Edmonton, Alberta
albertacanola.com/agm

CROPCONNECT CONFERENCE —

February 12-13, Winnipeg, Manitoba
cropconnectconference.ca

CANADIAN CROPS CONVENTION —

March 3-5, 2020, Vancouver, B.C.
canadiancrops.ca

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Around corners



Credit: Clint Jurke

Futurist Bob Treadway encourages farmers to pay attention to people and politics and markets and technology so they can “see around the corner” for events or shifts that could dramatically change the business environment. The key, Treadway says, is to see what might be coming and have the business nimble and flexible to adapt.

Export markets change. Consumer tastes and values change. Government policies change. Crop production practices change. And with all that change comes opportunity. This issue of Canola Digest is full of information on canola market growth opportunities, including protein, meal and biofuels, and on crop marketing challenges.

Keith Fournier provides a real Treadway-esque response to the farmer panel topic in this issue. The panelists were asked to share something about their farm and their business philosophy that they think consumers should know. Fournier's response: “Different consumers have different ideas on how they want their food raised or the ingredients used. That includes plant-based protein burgers,” he says. “I have no resentment against consumers for buying food that fits their values, and I will change as demand changes if it's the right move for my business.”

Will plant-based burgers stay on fast-food menus? Who knows. But there is a new emphasis on pulses and soy protein and even canola protein for all sorts of food uses.

Lynn Weaver, in her update on Canada's new Food Guide, says the emphasis on plant-based

protein is one her top five highlights. She says the trend was already well established and will continue to move upward in Canada, the U.S. and around the world.

On the plant-based protein them, Merit Functional Foods has started construction on its pea and canola protein isolates plant in Winnipeg. Burcon NutraScience, a global technology leader in the development of plant-based proteins, is a partner in the project.

What productivity challenges are around the corner? Is clubroot around the corner? For many farmers, the canola disease is already in plain sight, a big boulder on the path. The CCC agronomy team, in its Agronomy Insights, emphasize the importance of getting ahead of this disease. “We want growers to use clubroot-resistant (CR) varieties before clubroot arrives on a field because the pathogen, once detected, will already have a leg up on any future management strategies,” they say. “CR varieties used early will keep spore loads low and local, particularly if combined (and this is important) with at least a two-year break between canola crops and an absolute minimum amount of soil movement.” There is a map (the agronomy team calls it a ‘recipe’) to navigate clubroot.

What else do you see around the corner? And are you flexible enough to make the turns required to go over or around those obstacles? I'm curious about what you're seeing. Email me at whetterj@canolacouncil.org or call 807-468-4006 and let's talk about it. ✖

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OF 106

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Powering Your Profits Tour

Join your local Alberta Canola Director for day of canola agronomy, marketing and farm management information. Each event will also feature a discussion on clubroot as well as an update on the activities and budget of the commission.

SPEAKERS INCLUDE:



CLINT JURKE



ROB STRILCHUK



GREG KOSTAL



**MURRAY
HARTMAN**



MERLE GOOD



**MIKE
JUBINVILLE**



SCOTT MEERS



**EBONY
VERBONAC**

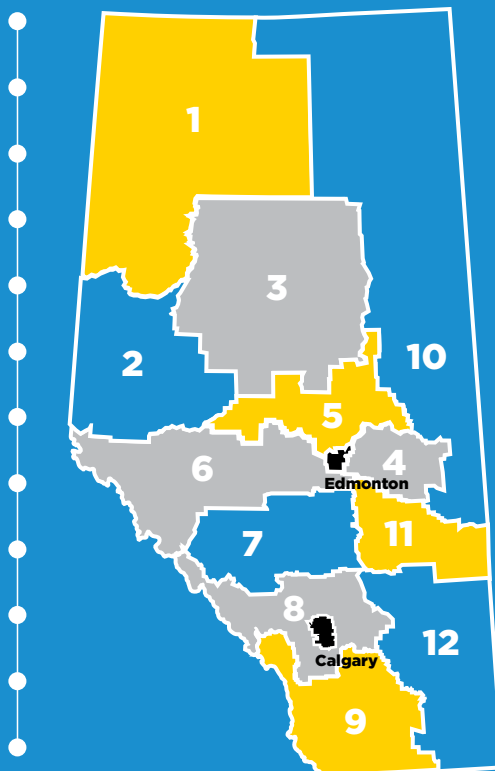


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2019 POWERING YOUR PROFITS TOUR

**SPEAKERS ON AGRONOMY, MARKETING AND MANAGEMENT
COMING TO A LOCATION NEAR YOU! 9:00AM - 3:30PM**

- REGION 1 - MANNING, AB**
Tuesday, November 26
- REGION 2 - GRANDE PRAIRIE, AB**
Thursday, November 28
- REGION 3 - HIGH PRAIRIE, AB**
Wednesday, November 27
- REGION 4 - VEGREVILLE, AB**
Wednesday, November 20
- REGION 5 - WESTLOCK, AB**
Thursday, November 21
- REGION 6 - NISKU, AB**
Thursday, November 21
- REGION 7 - LACOMBE, AB**
Tuesday, November 19
- REGION 8 - AIRDRIE, AB**
Tuesday, November 26
- REGION 9 - LETHBRIDGE, AB**
Wednesday, November 27
- REGION 10 - VERMILION, AB**
Tuesday, November 19
- REGION 11 - CAMROSE, AB**
Wednesday, November 20
- REGION 12 - DRUMHELLER, AB**
Thursday, November 28



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New website highlights Team Alberta policy positions

Team Alberta launched a new website that showcases its important role in policy advocacy on behalf of Alberta's crop farmers.

Team Alberta, which represents approximately 20,000 farmer members from four Alberta crop commissions, advances Alberta's crop sector through meetings and direct correspondence with government officials and elected representatives.

The website, teamalbertacrops.com, allows stakeholders including farmers, elected officials and government staff, to quickly locate Team Alberta positions on important topics facing Alberta's farmers and provides a point of contact.

Policy positions on the website to date include efforts to improve market access, reduce regulatory hurdles, increase competitiveness through innovation, as well as advocate for farmers in the areas of sustainability, climate change mitigation and farmers' role in the carbon cycle.



"Having Team Alberta's positions available to the public at teamalbertacrops.com provides a transparent platform for communication."

—John Guelly, Chair, Alberta Canola

Upcoming Events

FARMTECH 2020 –

JANUARY 28-30 IN EDMONTON
Join us for the 20th anniversary edition of FarmTech, Canada's premier crop production and farm management conference in Edmonton, Alberta from January 28-30, 2020. Get all the details on sessions, speakers and registration at farmtechconference.com.

ALBERTA CANOLA

ANNUAL GENERAL MEETING – JANUARY 28 IN EDMONTON

Join Alberta Canola for their annual general meeting held during FarmTech on the afternoon of Tuesday, January 28. You do not have to be registered for FarmTech to attend. Complete details at albertacanola.com/agm.

PEACE REGION CLUBROOT RESPONSE WORKSHOP –

JANUARY 7 IN GRANDE PRAIRIE

Join Alberta Canola for a day of information and discussion about clubroot featuring scientists, agronomists and farmers in Grande Prairie. Get all the details and register at albertacanola.com/crw.

Our new School and Agriculture Coordinator



Alberta Canola is pleased to welcome Tara Baycroft to our team as the School and Agriculture Coordinator. Tara is a biology and CTS human ecology teacher in the Edmonton area. She is from a mixed farm in central Alberta, has worked with Ag For Life, led the ag session for the Grad Leadership Camp with the Alberta Community Cooperative Association and has work experience with Dow AgroScience as a research assistant and Farm Credit Canada as a customer

service representative. Tara has a Bachelor of Education from the University of Alberta, majoring in biological sciences with a minor in CTS foods/fashion and a Diploma in Disability Studies and Community Leadership from MacEwan University.

As the School and Agriculture Coordinator, Tara will lead Alberta Canola's efforts in the school and youth programming and agriculture promotional activities, like our Calgary Stampede exhibit.



Researching management tools and reducing long term market access risk

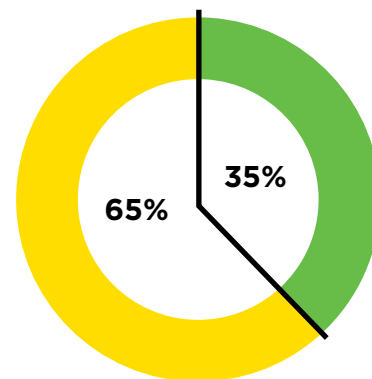
SaskCanola has partnered with Alberta Canola to lead a multi-project research initiative that will explore opportunities to strengthen grower resiliency to canola diseases. A collective investment of \$1,873,877 of grower dollars from Saskatchewan and Alberta was used to leverage \$3,457,985 government funding to initiate nine research projects on blackleg and verticillium stripe.

Several of the projects are focused on blackleg disease. Currently available fungicides have limited effect on the disease, so growers rely on new canola varieties in addition to best agronomic practices in-field to

be resilient against the constantly evolving blackleg pathogen.

The results from this research will help with the development of new varieties, better screening techniques, understanding the efficacy of seed treatments, and the interaction of other pests such as flea beetle damage on the infection rate.

Verticillium stripe is a relatively new disease to Western Canada that was included as part of this disease theme to understand whether there is an impact on canola yield in our climate and how growers can reduce any yield loss.



GROWER INVESTMENT
GOVERNMENT FUNDING



“

Our objective is to ensure farmers have access to the latest technology to manage pests in their operations, while also proving quality assurance to our global customers.

”

— Bernie McClean, SaskCanola Research Chair.

SaskCanola Invests in Team Muyres

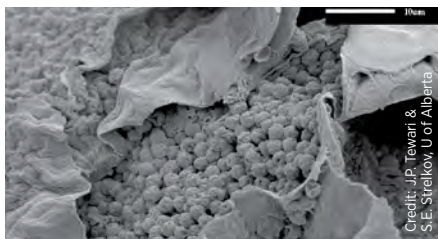
SaskCanola is a proud sponsor of the #1 Saskatchewan men's curling Team Muyres – made up of two brothers, Dallan & Kirk Muyres, and twin brothers, Dan & Kevin Marsh. Our investment aims to increase SaskCanola's profile in Saskatchewan and canola awareness across Canada as the Team's apparel proudly showcases our brand. The professional athletes have personal ties and are all very familiar with Saskatchewan agriculture. They do an amazing job as ambassadors for our industry in Canada and worldwide.



Team Muyres

Monitoring the threat of clubroot in Saskatchewan

Clubroot is a devastating disease and research into this pathogen is a continuing priority for SaskCanola. In 2018, SaskCanola contributed funding for a Canola Agronomic Research Program (CARP) project entitled Canadian Clubroot Cluster (C4) Pillar 4: Surveillance and Pathotype Monitoring. The project's primary purpose was to map the spread of clubroot in Western Canada and determine if there have been any changes to the pathogen itself.



Close up of clubroot spores inside a gall.

Some of the findings contained in the project's final report had been expected, but still proved to be quite sobering. The clubroot map continues to expand in Alberta and Manitoba, and the pathogen has now established a significant foothold in Saskatchewan. It is important to note that what is known as first generation resistance, that is, the first type of resistance bred into commercial varieties, is now breaking down in Alberta. Pathogen types that have overcome varietal resistance have been found in Manitoba as well, but none have yet been detected in Saskatchewan, so there is still an opportunity to stay ahead of this devastating disease.

SIGNIFICANT OUTCOMES OF THE CARP PROJECT ARE:

1. Maps of clubroot distribution.
2. Characterization of perhaps the largest collection of clubroot single-spore isolates (*P. brassicae*) in the world.
3. Evaluation of the performance of clubroot resistant canola cultivars, along with a description of field isolates of the pathogen regarding virulence and pathotype designation.

It is important to use two interdependent elements in the battle against clubroot: strategy and tools.

- The strategy involves reducing the movement of soil from field to field, extending rotations and eliminating alternate hosts such as wild mustard, stinkweed and volunteer canola.
- The most effective tool that farmers have is varietal resistance, but this should not be expected to shoulder the entire burden of protecting Saskatchewan fields from clubroot.

Incorporating an effective clubroot strategy and using resistant varieties wisely are the best ways to make sure Saskatchewan farmers can stay ahead of clubroot.

To view research funded by SaskCanola, visit the "Research" section at saskcanola.com

Upcoming Grower Meetings

GRAIN GRADING WORKSHOP – NOV. 18 IN YORKTON & NOV 19 IN MOOSE JAW

Learn about degrading factors in wheat, canola, & barley – plus info on grain contracts.

TOP NOTCH FARMING MEETING – NOV. 21 IN SWIFT CURRENT

Presentations on the latest canola agronomy & research findings.

CANOLA INDUSTRY MEETING & CANOLA INNOVATION DAY – DEC. 4-5 IN SASKATOON

Involved in research, production, processing, or marketing of canola? Attend sessions about genomics, soil, nutrient and pest management, and new innovations impacting canola.

CROPSPHERE CONFERENCE INCL. SASKCANOLA'S ANNUAL GENERAL MEETING – JANUARY 14-15 IN SASKATOON

- A learning & networking event built for growers by six Saskatchewan commodity groups. This 7th annual conference features sessions on agronomy, research, marketing, and farm management.
- If you grow canola in Saskatchewan, you are an investor in SaskCanola and hold voting rights. Attend our AGM on Tues, January 14th at 4:30pm for a report on SaskCanola's 2018/19 year; our Team will address any questions you may have.

REMINDER:

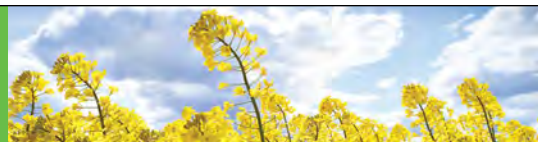
SASKCANOLA'S YEAR IN REVIEW AVAILABLE ONLINE

Take a look at the highlights from SaskCanola's 2018 – 19 year investing in research, policy, & promotion priorities to provide value to Saskatchewan's canola growers; available online at saskcanola.com in the "About SaskCanola" section.

VISIT THE "NEWS & EVENTS" SECTION AT

SASKCANOLA.COM

TO REGISTER FOR THESE UPCOMING MEETINGS.



Canola Trade Disruptions to China How Manitoba Canola Growers are Representing You

Stimulating, increasing and improving the production and marketing of canola is a part of MCGA's mandate. Through local initiatives and national partnerships, MCGA has consistently been working on five areas of focus. The recent trade disruption with China has highlighted the need for continued work and extra attention in these key areas:

MARKET DIVERSIFICATION:

Providing farmers greater choice and value for their canola is a part of MCGA's mandate. We've been working to increase the demand by asking for an increase to the biodiesel mandate and by investing in research to explore healthy food protein options from canola meal.

SECURE EXPORT MARKETS:

With 90 per cent of canola being exported around the world it is vital to maintain strong export markets. Farmers are actively represented on international trade through our membership and board representation with the Canola Council of Canada and the Canadian Canola Growers Association who are working to re-open China, maintain current markets and expand into new markets.

PROTECTING CANOLA'S REPUTATION:

Canadian farmers have a strong reputation for growing high quality canola. Recent trade disruption has called this into question. Our confidence in farmers and the food they produce remains unchanged. Through the Canola Eat Well program we are working with key food professionals who are showing their support for farmers by reassuring consumers and sharing how canola oil continues to be a quality oil they can be proud to use in their kitchens and restaurants.

SUPPORT FOR FARMERS:

Trade disruptions are not new in the agriculture industry. Farmers require strong tools and programs that allow them to continue farming successfully during times of uncertainty. We are working through various partners to improve financial support, share

mental health resources and provide production resources covering agronomics, pests, diseases, storage, marketing and more.

YOUR FARM VOICE:

The purpose of a provincial commodity group is to be a unified voice for canola farmers representing their interests at the local, provincial, national and international level. Manitoba Canola Growers are at the table working on the issues and initiatives that affect farmers in this province. It is our top priority farmers' needs are considered and that they have access to the information they want.

To learn more about the work MCGA is doing in each of these areas listed above visit canolagrowers.com/canola-trade-disruption-to-china.



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Talking About Food is Tough

If you find yourself working within Canada's enormous food system, whether you like it or not, you are a spokesperson for Canadian food. And as a spokesperson, effectively communicating about food, whether your expertise is growing it, producing it, processing it, cooking it or talking about its nutritional value, can be tough.

Everyone eats, and as a result, everyone has their own idea about the "correct" way of doing so. Food choices are exceptionally personal and can be entwined with one or many of our value and belief systems. What we eat may be related to culture, religion, geography, career or even the decade in which we were born. In a way, everyone is a food expert.

With this in mind, how do we navigate these differences so that our conversations about food become more productive?

Particularly when the topic is one that carries controversy.

These days experts and consumers alike have strong opinions about a multitude of food related topics. From pesticides, to biotechnology, to plant-based eating, it seems more often than not, we're talking past one another.

For me, years of working as a clinician in healthcare, a counsellor in the community, and as a food communicator through various media channels, has given me an enormous playing field to test my food communication skills.

While I continue to make missteps, my professional experience and ongoing research into effective communication have helped me hone my skills and develop a 3 step strategy.



Erin MacGregor is a Registered Dietitian, a Professional Home Economist, passionate Advocate and was a presenter at our 2019 Learn to Lead Event.

3 Steps to Improved Food Communication

1. GET PERSONAL.

Getting personal is about making a connection. Making a small effort to find common ground is a way to disarm.

Finding this connection can be simple. It can be as easy as sharing in small talk about where you live or what foods you both like to eat, or commiserating about Canadian winters.

To find this connection, simply show up being curious. Stow your agenda, even if you think you know what's coming, and ask questions. Be present. Simply listening and making an effort to learn about what a person believes and values, and who they trust, will give you the framework needed for step 2.

2. VALIDATE AND EMPATHIZE

"I can see where you're coming from", "I understand what you mean", This, for many, can be difficult. Particularly if you are knowledgeable or believe strongly in a topic.

By validating, you are not necessarily agreeing with what a person saying, but that their feelings are valid. All feelings are valid, because they're feelings. Not facts.

Empathizing or showing compassion opens the door for you to share your point of view.

3. RELATE YOUR TRUTH, BUT...

Facts don't persuade people. People persuade people.

If you decide to take the step and share your knowledge or point of view, it's important to present it in a way that appeals to their belief system. A convincing argument will depend on engaging a person's values, not showing them logic.

Recognize that you come with a set of values too. The most effective communicators can change minds and opinions because they are willing to change theirs too.



LEARN TO LEAD

If you are interested in talking part in our **2020 Learn to Lead**

Event please contact

Corina Lepp at
corina@canolagrowers.com.



Credit: iStock.com/ooyoo

After you deliver canola from a bin on the farm, what are the quality checks, processing steps, transportation modes and packaging requirements as each bushel winds its way to the end user? This article follows the thread from gate to plate, describing each step along the way.

FOLLOW THE BUSHEL



BY JAY WHETTER

This article describes the two common pathways for canola from the Prairies: As seed on a ship to crushers outside Canada and as oil and meal from domestic crush plants. Viterra cooperated with details on the seed side. Cargill provided the oil and meal perspective. Here are the journeys for two bushels of canola as the travel these pathways to consumers.

SEED TO JAPAN

Peter Flengeris, corporate affairs lead with Viterra in Regina, gathered the details to track canola from a Viterra primary elevator to a processing facility in Japan.

1. The primary elevator

As canola is delivered to primary elevators, representative samples of the delivery are obtained using a pneumatic truck probe. This sample is then reduced using an approved sample divider. This ensures the working sample remains representative of the original delivery. Following Canadian Grain Commission procedures, trained facility staff assess grade and dockage. Based on this assessment the canola is binned and payment issued to the producer. Composite samples of weekly canola deliveries are compiled and sent to Viterra's head office Quality Control lab for additional laboratory tests.

2. The train to Vancouver

Railcars for export grain are booked on long-term freight contracts with penalties for both shipper and carrier for non-performance. At the time trains are being loaded, Viterra is shipping to Vancouver to make sure they have the tonnage in place to load multiple ocean-going vessels that are scheduled.

Average loaded transit time to Vancouver is three to six days, depending on which part of Western Canada it

is shipped from. Railcars generally cycle in 10 to 14 days.

All Viterra facilities have trained grain inspectors on site, but final quality is assessed upon loading the vessel. Multiple quality assessments are done throughout the supply chain.

3. At the Vancouver port terminal

Trains are delivered to export terminals with all shipped information down-loaded to the terminal, including quality and attributes such as protein and moisture. The load from each railcar is assessed and segregated according to its quality specification. Grain that requires commercial cleaning goes straight from railcar to cleaner prior to going to storage. (For more details on canola handling at the Port of Vancouver, read "Port Authority" in the November 2018 Canola Digest at canoladigest.ca.)

4. Inspection steps

Quality is assessed right from grower delivery through to vessel loading. This helps to make sure supply channels can meet contract specifications for all sales. Viterra works with SGS, a private firm, or the Canadian Grain Commission on all outbound vessels as vessels are loading.

5. The ship

The party booking a vessel is known as the "charterer." Through the ocean freight market, charterers search for a vessel that meets their parameters. This includes but is not limited to type and size of vessel, suitable dates, price and reliability of vessel owners. Brokers are commonly used to help charterers find a ship and negotiate terms.

Under free-on-board (FOB) contract terms, the buyer arranges the freight.

The party booking a vessel is known as the "charterer." Through the ocean freight market, charterers search for a vessel that meets their parameters. This includes but is not limited to type and size of vessel, suitable dates, price and reliability of vessel owners. Brokers are commonly used to help charterers find a ship and negotiate terms.





Credit: Viteira Inc.

Under cost-and-freight (CFR) terms, the seller arranges it. Under usual international terms, the risk passes to the buyer once cargo is loaded onboard the vessel.

Usually shipments go to one buyer, but the ship may make delivery stops at more than one discharge port. Some shipments can be for multiple buyers.

6. Arrival in Japan

Over 90 per cent of canola that arrives in Japan is delivered from port storage to processing plants directly via belt conveyor. The remaining imported canola is delivered from storage at discharging ports to processing plants by tanker trucks with capacities of 15 to 20 tonnes. The processor Kato receives canola via trans-shipment at Kobe into small 700-tonne barge-like vessels. Okamura and other small processors take canola in 20-foot containers, not bulk cargoes.

7. The Japanese processor

Japanese crushers follow a similar process as Canadian processing. Domestic consumers have been consistently satisfied with the quality of canola oil.

2018 IMPORTED CANOLA INTO JAPAN

Arrival port	Imports from Canada (tonnes)	Imports from Australia (tonnes)	Other	Total Imports (tonnes)
Yokohama	331,636	35,831	20	367,487
Nagoya	336,587	26,453	55	363,095
Mizushima	96,798	20,823	0	117,621
Chiba	245,208	10,452	0	255,660
Shimizu	211,637	6,959	0	218,596
Kobe	466,645	58,753	19	525,417
Kashima	221,596	0	0	221,596
Yoikkaichi	97,271	18,291	0	115,562
Hakata	126,180	11,006	0	137,186
Osaka	0	6,963	0	6,963
Uno	8,145	0	0	8,145
Others	0	20	0	20
Total	2,141,703	195,551	94	2,337,348

8. Oil delivery to consumers and end users

Japan's top store brands are Nisshin Oillio and Ajinomoto (Joil), with products labelled as 'made with' Canadian or Australian canola.

Oillio and Joil are the top two dealers of canola oil into the Japanese market, with larger deliveries to food service companies done in 16-litre steel cans or trucks.

9. The meal

Canola meal is mainly used for dairy cows, swine and poultry. Canola meal is delivered via truck, without pelleting, into compound feed mills.

10. Customer feedback

Viteira evaluates customer satisfaction annually with its end users in Japan and all other countries.



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HOW →

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OIL TO THE U.S.

Cargill shares the path canola takes from its processing facility at Clavet, Saskatchewan to end users in the United States, which is Canada's largest market for canola oil and meal. Ken Stone, associate vice president and commercial manager for Cargill's Canada Oilseeds Processing division, provides input on the oil pathway. Shannon Borden, regional sales manager for Cargill Animal Nutrition, provides input on the meal pathway.

1. Canola delivery to Clavet

Cargill Clavet unloads up to 200 trucks per day, 5.5 days per week, which works out to around 5,500 acres of canola per day. Semis haul, on average, about 40 tonnes of canola. Once the canola is unloaded, the first step is grading and assessing for damage, moisture or quality issues. Then canola is processed into oil and meal.

2. Oil delivery

The Clavet processing facility will deliver crude oil or refined oil, whatever the customer wants. Crude oil leaves the Clavet processing plant in rail tanker cars for further processing. Crude oil is the result of the crushing process – it is dark coloured and not palatable. Clavet will also refine the oil through further processing to produce a light oil that is edible and neutral in taste. Refined oil goes out via rail or truck. Oil goes from Clavet direct to various well-known food companies, including companies that bottle branded oil for store shelves and popular chain restaurants.

3. Inspection steps

Quality management at Cargill includes extensive analytics and inspection to monitor processing, provide end-to-end supply chain oversight and farm-to-customer supply chain oversight.

4. Customer feedback

"We align with our customers on analytic methodology and high quality controls with regular analysis throughout the process," Stone says.

Quality management at Cargill includes extensive analytics and inspection to monitor processing, provide end-to-end supply chain oversight, and farm-to-customer supply chain oversight.

5. The meal

Cargill Animal Nutrition and the sectors of its business that touch the meal from Clavet follow these steps:

- Nutritionists define the parameters needed to meet a certain nutrient profile that each customer demands. They then formulate an overall diet to achieve that profile. Canola meal is one of many ingredients used.
- Staff in procurement and purchasing review past usages of canola meal, and collaborate with the nutritionist to procure canola meal for each Cargill Animal Nutrition production facility where diets are formulated. Procurement/purchasing staff purchase canola meal from Clavet and work with transportation to receive the meal into the mill.
- The mill manager and production team receive the meal into their plant and add it to the mixer to create the mash, pellet or premix that the on-farm client needs to feed their production animals. Much of the canola meal from Clavet is shipped by truck or rail car throughout North America and offshore.

6. Meal users

Canola meal can be used in all stages of production for swine, beef cattle and poultry and is also commonly used in fish feed.

"When used in dairy rations, canola meal can increase milk production by one litre of milk, per cow, per day," Borden says. 🌻

—Jay Whetter is the editor of *Canola Digest*.

Investing in stable and differentiated markets

In July, a combined industry/government investment of up to \$7.6 million was announced that will enable the Canola Council of Canada to demonstrate the value of canola oil and meal in the marketplace, and contribute to a stable and open trade environment. This three-year initiative includes contributions from the Government of Canada, the Canadian Canola Growers Association and core funders of the Canola Council. It includes a program aimed at building awareness and demand for canola oil and meal in emerging markets, as well as market access efforts to support stable trade. To support open markets and strong demand for canola the Canola Council will use this funding to:

- Work with technical experts to have canola's world-leading sustainability practices recognized so it can be freely used for biofuel in the U.S. and the EU.
- Build relations with customers in Asian markets and their governments so that we address regulatory differences and concerns before they become market access issues.
- Conduct in-market research about our customers so that we're strategic in how we maintain the canola brand and grow our reputation.
- Proactively work to ensure canola meets the requirements of export customers.

Efforts will be focused on established and emerging global markets including the U.S., China, Mexico, Japan, the European Union, South Korea, Vietnam and Thailand.



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The value of Canadian canola exports declined by 9.8 per cent in 2018-19, with volume of trade and market prices as factors.

CANOLA MARKET SNAPSHOT 2019

BY SAMARA HUTTON & JAY WHETTER

The total value of Canadian canola seed, oil and meal exports for crop year 2018-19 was \$10.0 billion, down from \$11.1 billion in 2017-18.

Lower volume of seed exports was a major factor in the lower value. Canadian canola seed exports declined to 9.14 million tonnes (MT) from 10.77 MT in 2017-18. Oil and meal were basically flat: Oil exports declined to 3.12 MT, down from 3.14 in 2017-18, and meal exports rose 2.3 per cent to 4.64 MT, up from 4.54 in 2017-18.

The drop in seed sales is not really a surprise, with China suspending export licences for two Canadian

companies in March and basically stopping imports of any Canadian canola seed. (Find the latest on China at canolacouncil.org.) Canola seed exports to China in 2018-19 were just over three million tonnes, compared to four million tonnes, or so, for each of the previous five years. On a positive note, the value of oil and meal exports to China went up over the past year, but at the crop year's end, the total value of Canadian canola exports to China was \$3.2 billion, down from \$3.8 billion in 2017-18.

With this, the U.S. regained its spot as the top value market for Canadian canola products, even though

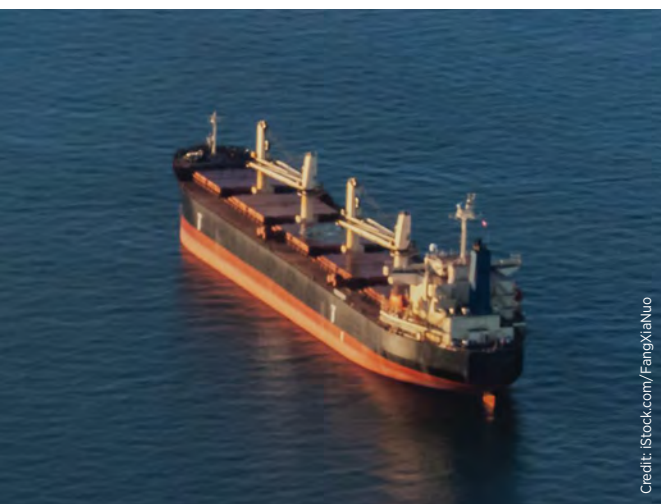
The top four markets – the U.S., China, Japan and Mexico – accounted for 86 per cent of Canadian canola product exports in 2018-19, with an increased percentage going to second wave markets.

Table 1. Total Export Value - All Canola Products

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
US	\$ 3,471,957,735	\$ 3,191,947,592	\$ 3,409,658,084	\$ 3,783,933,573	\$ 3,645,555,674	\$ 3,439,282,634
China	\$ 2,928,458,666	\$ 2,539,801,032	\$ 2,744,004,675	\$ 3,400,073,207	\$ 3,790,441,093	\$ 3,186,508,041
Japan	\$ 1,233,073,009	\$ 1,195,552,720	\$ 1,212,676,918	\$ 1,234,439,756	\$ 1,479,606,794	\$ 1,180,504,931
Mexico	\$ 781,694,186	\$ 881,751,870	\$ 804,838,712	\$ 927,923,576	\$ 887,778,115	\$ 773,501,049
Other	\$ 545,217,450	\$ 790,994,653	\$ 1,619,610,213	\$ 1,771,577,297	\$ 1,316,346,108	\$ 1,449,425,596
TOTAL	\$ 8,960,401,046	\$ 8,600,047,867	\$ 9,790,788,602	\$ 11,117,947,409	\$ 11,119,727,784	\$ 10,029,222,251

Table 2. Export Volume (Tonnes) to All Markets - Crop Year

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Seed	9,124,933	9,136,541	10,267,981	11,051,502	10,770,863	9,137,529
Oil	2,301,388	2,364,114	2,730,047	3,103,384	3,142,897	3,122,400
Meal	3,426,347	3,601,032	4,097,319	4,672,394	4,535,044	4,640,581



Credit: iStock.com/FangXiaNuo

volumes exported to the U.S. declined for each seed (down 21.4 per cent from 2017-18), oil (down 7.7 per cent), and meal (down 1.1 per cent). Value and volumes also fell for Japan and Mexico. These top four market accounted for 86 per cent of Canadian canola product exports in 2018-19 with an increased percentage going to second-wave markets. See more on second-wave markets later in the article.

The other factor in lower overall export value is price. Average export value for canola seed in 2018-19 was \$544 per tonne, down from \$564 in 2017-18. These values are derived from StatCan data and posted in the statistics section at canolacouncil.org.

Average export value for canola oil declined to \$968 per tonne, down from \$986. Export value for meal went up, ending 2018-19 with an average of \$359 per tonne, compared to \$355 in 2017-18.

Canadian canola production was 20.3 MT in 2018-19, down from the record 21.3 MT in 2017-18. StatsCan estimates the 2018-19 Canadian canola carryover stocks at 3.9 MT, which is up 55 per cent from the previous year.

GLOBAL OILSEED SITUATION

USDA Foreign Agricultural Service stats show how Canadian canola fits into the global market. In its September 2019 'Oilseeds: World Markets and Trade'

Table 3. Major Vegetable Oils: Global Production

	2015-16	2016-17	2017-18	2018-19	2019-20 (Sept. est.)
Production	(million tonnes)				
Palm	58.9	65.27	70.61	74.08	76.01
Soybean	51.56	53.81	55.18	56.03	57.25
Canola/rapeseed	27.34	27.54	28.08	27.53	27.5
Sunflowerseed	15.39	18.16	18.44	19.74	20.27
Palm Kernel	7.01	7.64	8.34	8.59	8.81
Peanut	5.42	5.7	5.9	5.8	5.93
Cottonseed	4.3	4.43	5.18	5.16	5.3
Coconut	3.31	3.39	3.66	3.67	3.58
Olive	3.13	2.48	3.26	3.09	3.36
Total	176.35	188.42	198.65	203.69	208.02

Source: USDA

Table 3 is based on data from the United States Department of Agriculture's Foreign Agricultural Service. Find them online at www.fas.usda.gov.

report, the USDA estimated global oilseed production for 2018-19 at 600.7 million tonnes. This is an all-time high. It also puts global oilseed carryover at 130.6 MT, which has trended sharply upward over the past four years. It was 93.5 MT in 2015-16, rising incrementally to the current level.

Of the 2018-19 global oilseed production, canola/rapeseed accounted for 71.9 million. Soybeans, at 362.0 million, made up more than half the global oilseed production.

Palm oil, which doesn't show up on oilseed production stats, remains the top vegetable oil on the global market. Of the 203.7 MT of vegetable oil produced in 2018-19, palm was 74.1 MT, soy was 56.0 MT and canola/rapeseed was 27.5 MT. As for five-year trends, palm and soybeans keep rising each year while canola/rapeseed has been flat. (See Table 3.)

SECOND-WAVE MARKETS FOR CANOLA

While the value of exports to the four big markets declined in 2018-19, second wave markets increased in value.

Table 4. Top 10 Canadian canola markets by value

Country	2018-19 (million \$)	2018-19 (% of total)	2017-18 (million \$)
United States	3,439	34	3,646
China	3,187	32	3,790
Japan	1,181	12	1,480
Mexico	774	8	888
Pakistan	402	4	385
European Union	309	3	206
United Arab Emirates	234	2	356
South Korea	135	1	129
Bangladesh	116	1	12
Chile	101	1	109
Total Canola Exports	10,029		11,120

(See Table 4.) Notable second wave markets in 2018-19 include:

Pakistan continued to be the most valuable second wave market for canola products in 2018-19, importing 778,000 tonnes of seed worth over \$400 million. This represents 4.0 per cent of total Canadian canola export value. Seed exports to Pakistan have fluctuated greatly throughout the last five to 10 years.

Bangladesh increased imports of canola seed from just 22,000 tonnes in 2017-18 to over 208,000 tonnes in 2018-19, making it the eighth largest seed export market this year. Seed exports to Bangladesh fluctuate greatly on an annual basis.

European Union imported \$309 million of Canadian canola in 2018-19, making it the sixth most valuable export market. This is up from \$206 million in 2017-18, driven by a rise in seed imports.

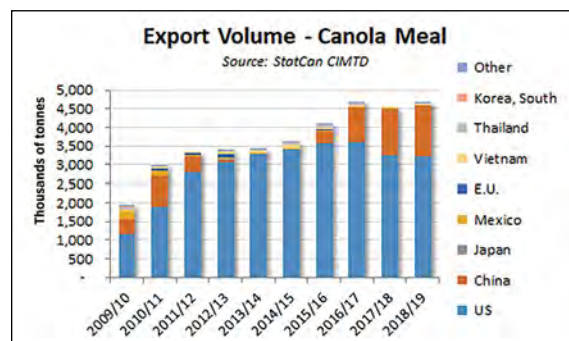
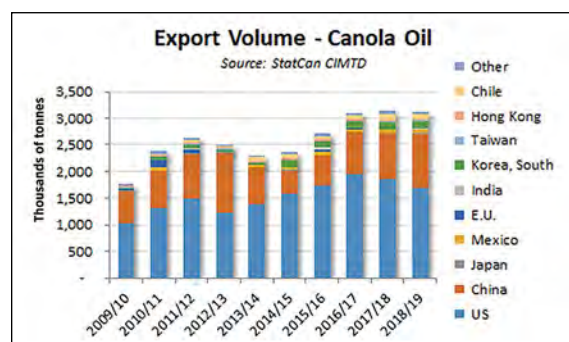
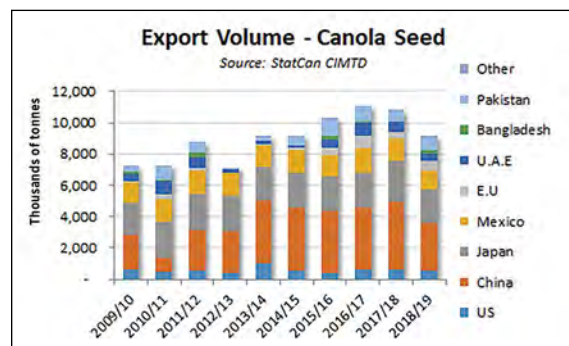
United Arab Emirates decreased seed imports to 457,000 tonnes, down 28 per cent from the year before, though it remains the seventh most valuable export market overall.

South Korea continued to increase demand for canola oil, importing 136,000 tonnes – well above the previous five-year average of 101,000 tonnes. South Korea remains the third most valuable export market for oil, and the eighth most valuable market overall, valued at \$135 million.

India resumed direct Canadian canola imports, but numbers remain relatively small – 15,000 tonnes of oil and 2,800 tonnes of seed. India does however import rapeseed/canola oil from the United Arab Emirates where Canadian canola is a significant supplier of seed for crushing.



For more canola market statistics, see “statistics” under the “Markets & Stats” tab at canolacouncil.org.



Other notables are Thailand and Vietnam, potential growth markets for canola meal. They were the three and four markets for Canadian canola meal in 2018-19, after the U.S. and China. Meal exports to Thailand were 23,000 tonnes compared to no exports in 2017-18. Meal exports to Vietnam were 22,000 tonnes compared to 7,300 tonnes in 2017-18.

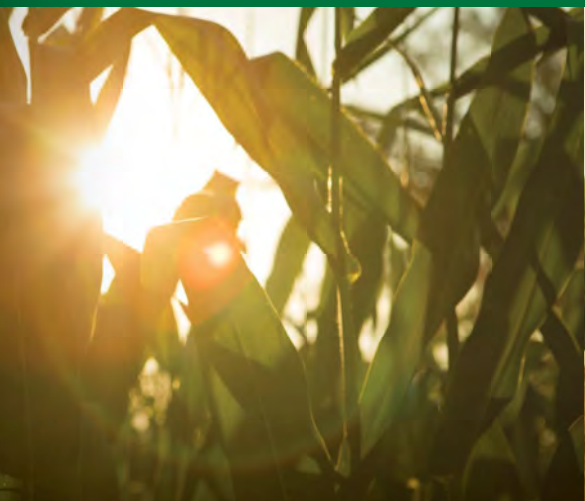
For a closing note, USDA figures show domestic consumption of canola oil in Canada at 980,000 tonnes in 2018-19 and of canola meal at 650,000 tonnes. This would make the domestic market our fourth biggest for oil and third biggest for meal.

For more canola market statistics, see “statistics” under the “Markets & Stats” tab at canolacouncil.org. 🌻

—Samara Hutton is the senior manager of corporate programs for the Canola Council of Canada. Jay Whetter is the editor of Canola Digest.



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The Canola Council of Canada is spreading the word about canola meal benefits throughout the U.S., China and Southeast Asia.

CANOLA MEAL MARKETS GET MORE DIVERSE

BY TREENA HEIN

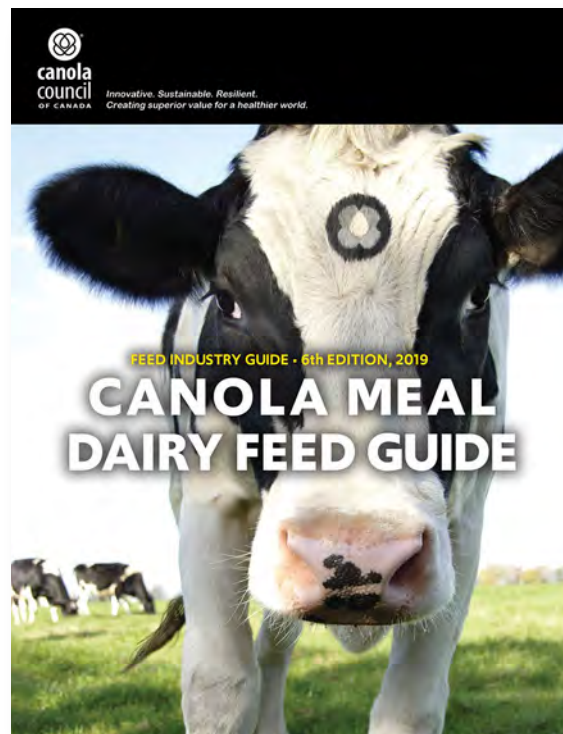
Canola meal demand continued strong through 2018-19 and is getting stronger, helped by a program that demonstrates and raises awareness of canola meal's value with animal nutritionists and feed companies. Canola Council of Canada (CCC) staff are finishing up another year of relationship building, presentations and more to expand existing markets in Asia and beyond. These activities have included market visits, along with the creation and distribution of valuable new resources.

The U.S. canola meal market, mainly for dairy cattle feed, remains Canada's largest, although it has decreased slightly over the last three years as demand has expanded elsewhere, primarily China. In early February 2019, CCC sponsored the Southwest Nutrition Conference in Arizona, which draws dairy nutritionists from California and other nearby states. Brittany Dyck, CCC senior manager for canola utilization, says the CCC booth attracted visitors looking for the newest nutrition values for Canadian canola meal.

In addition, the latest 2019 CCC Dairy Canola Meal Feed Guide was ready in June, and distributed to 550 dairy professionals at the Four State Dairy Conference in Iowa. "The new Guide captures the results of the Canola Science Cluster research program carried out over the past five years," notes Dyck, "and highlights canola meal as a superior protein source."

ASIAN MARKETS EXPANSION

China is currently the second-largest export market for Canadian canola meal, and export have increased by



50 per cent of the past three years. Canadian canola meal is most commonly used in China for aquaculture and duck production.

Dyck says that the idea of using canola meal in dairy rations in China is still quite new, mostly due to a misconception that canola meal will negatively affect milk quality. She and her colleagues will continue to address

Dairy Feed Guide

A 2019 version of the Dairy Canola Meal Feed Guide is now available on Canolamazing.com and was distributed to 550 dairy professionals at the Four State Dairy Conference in Dubuque Iowa on June 12. This conference draws attendees from Minnesota, Wisconsin, Iowa and Illinois. The new Dairy Feed Guide captures the results of the Canola Science Cluster research program carried out over the past five years. It highlights canola meal as a superior protein source compared to other available protein ingredients.

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Rising Canadian canola meal exports (tonnes) to Asia

Country	2016-17	2017-18	2018-19
United States	3,604,000	3,245,000	3,211,000
China	908,000	1,247,000	1,365,000
Mexico	30,000	20,600	14,500
Vietnam	14,000	7,300	22,000
Thailand	0	0	23,200

Efforts in Asia are helping to diversify the export market for Canadian canola meal.

this in various ways. In mid-July, the CCC's meal representative in China attended the China Dairy Expo and Conference in Tianjin, connecting with China's largest dairies, a major processor and key dairy academics and again distributing the 2019 Guide – but a Mandarin-language version. For next year and beyond, a deepening of existing CCC's Chinese dairy industry connections is planned.

In 2019, Canola meal sales to Vietnam jumped and Thailand returned as a valuable market. In Thailand, canola meal is used mostly for poultry feed and a bit of aquaculture (there is no real dairy industry there).

In March, staff from CCC, Canadian Canola Growers Association and the Trade

Commission Service-Embassy of Canada were in Thailand and Vietnam, highlighting the nutritional value of canola meal for use in feeding various livestock species.

Activities in Thailand focused around meetings with feed companies, particularly with CP Group, the largest feed company in Thailand with reach into other Asian countries. Additional engagement with CP Group has occurred through the summer with a potential visit by CP traders to Canada this November. Meetings were also held with academics from the local Kasetsart University to begin discussions on how canola meal is perceived and utilized within the animal nutrition community.

In Vietnam, among other activities, CCC hosted a seminar in

Ho Chi Minh City. In a survey after the seminar, two-thirds of attendees agreed that what they learned in the presentation will change how they'll use canola meal in their livestock and aquaculture rations.

"We always do similar surveys and it's gratifying to know that we are changing perceptions of canola meal for the better," says Dyck. "There is often a view that canola meal has a level of glucosinolate similar to that of rapeseed meal, so nutritionists in these countries might be using five per cent canola meal in a pig diet for example, and we show them data where pigs perform very well at 20 per cent. For the dairy industry in Vietnam, we highlighted data showing the boosted milk production that always results from feeding dairy cattle Canadian canola meal."

Dyck notes that because traditional rapeseed meal is readily available as a feed ingredient in Asia, nutritionists need to feel confident that they are sourcing canola meal. It's very helpful however that Canada does not export any rapeseed meal and therefore, all Canadian canola meal is guaranteed to be just that, and to provide all the benefits shown in research studies. SaskCanola is currently funding research to develop a free tool that will be used by feed mills to differentiate in real-time between canola meal and rapeseed meal. This tool will be distributed as soon as it's ready. ✿

"We always do similar surveys and it's gratifying to know that we are changing perceptions of canola meal for the better."

—Brittany Dyck, on surveys done at the end of canola meal presentations.

—Treena Hein is an award-winning science writer and educational resource consultant.

Charles Qin (left), who works for the Canola Council of Canada on canola meal promotion in Asia, meets with Liu Guanglei of Shanghai Bright Holstein and gives him a copy of the Feed Guide.

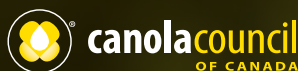




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Comparisons by *agri benchmark* show that despite the trade conflict with China, canola seems to be performing rather well, so far, when compared to other vegetable oils. Furthermore, the relative price of canola versus wheat also favours canola. Consequently, canola has been a rather profitable crop for Canadian producers as well as for many others around the globe – especially in Ukraine and Hungary.

CANOLA: STRONG IN A CHALLENGING GLOBAL MARKET

BY YELTO ZIMMER

Canadian canola producers are facing a rough time because of the trade conflict with China – a good reason to have a closer look at competitors. Of course, immediate competition is with other big and emerging canola producers such as Australia, the EU or Ukraine. But at the same time, canola oil is competing against soybean, sunflower and palm oils.

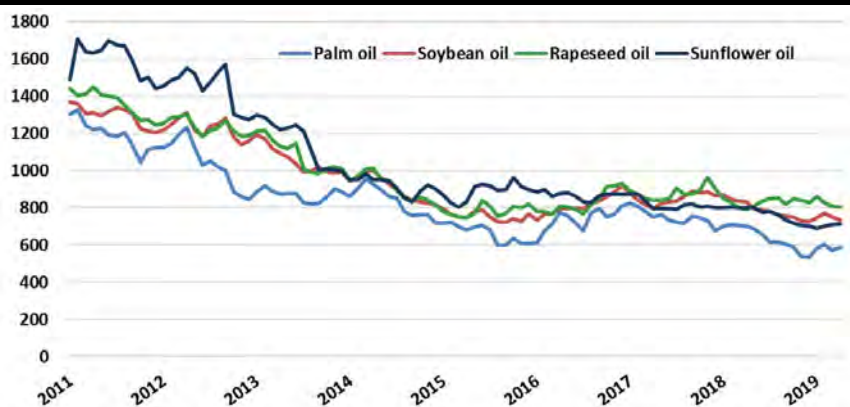
As shown in Figure 1, prices for these top four vegetable oils have been basically flat since 2015, but substantially lower than they were in 2011. However, most remarkably, canola oil is doing slightly better than the other oils (see green rapeseed oil line in chart). In fact, for about the past year, canola oil has traded at a premium over all other products by approximately US\$50 per tonne. In former years, sunflower oil tended to be the priciest product.

This relatively strong development of canola oil prices is particularly remarkable when taking into account the Canadian-Chinese trade conflict.

When concerned about the on-farm competitiveness of canola, the evolution of its relative price matters. Figure 2 shows that the price of canola oil is trending up relative to the price of wheat. This indicates that the downward trend in wheat prices – wheat is the key rotational crop for canola producers in Canada, Europe, Australia and Ukraine – has been slightly stronger than in canola. This implies that in terms of product prices, the on-farm competitiveness of canola has improved since the early 2000s.

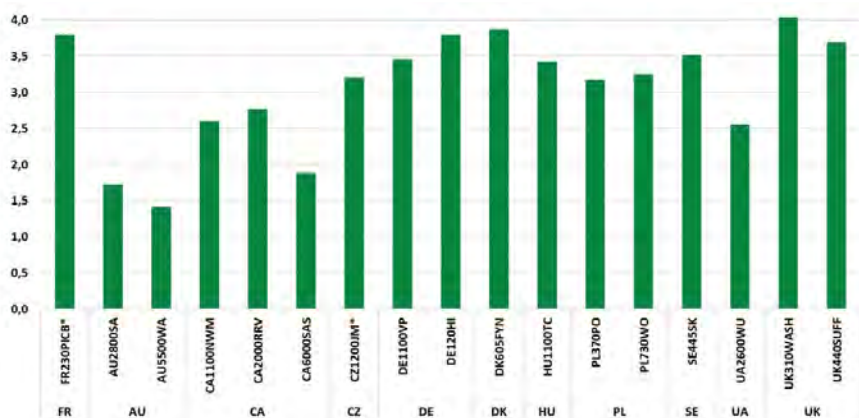
To get a better idea how these framework conditions impact actual on-farm economics for typical canola growers around the

Figure 1: Evolution of global vegetable oil markets (in US\$ per tonne)



Prices (in US\$ per tonne) for the top four vegetable oils have been basically flat since 2015, but substantially lower than they were in 2011. Canola (rapeseed) oil has a slight edge recently. Source: World Bank (2019)

Figure 2: Relative canola oil prices (canola oil/wheat price)



This graph shows the canola oil price relative to the wheat price. Points on the blue line are derived from dividing the canola oil price by the wheat price. The dotted line represents the trend value from a linear regression, showing that canola oil prices are trending up relative to wheat. Source: World Bank (2019)

world, we can analyze results from the *agri benchmark* Network of typical farms. Figure 3 gives an overview regarding canola yield levels of typical farms in Canada, Australia and various European countries. One of

the most remarkable findings: In former times, there was a yield gap between Canadian and Western European growers of about two tonnes per hectare (approximately 35 bu./ac.) or even more. Due to

significant yield canola improvement in the Prairies and lower yields in the EU, this gap has shrunk, although the typical farm in Saskatchewan did experience some unusual yield issues in 2017 and 2018. Whether or not EU farmers will continue to achieve lower levels than before remains to be seen, but given their increasing issues in having access to proper crop care products and restrictions in nitrogen application, an ongoing lower yield level is reasonable.

But, of course, yields are just one side of the coin – what about cost and revenues? Figure 4 (see next page) compares of total cost per tonne of canola with and without land cost for each farm. From this graph the following findings can be drawn:

1. Canadian farms tend to be very competitive and very profitable – though the yield issues of the Saskatchewan farm have been noted.
2. Despite the fact that Canadian canola has to be shipped for at least 1,500 km, farm gate prices are only marginally less than in Europe. This is an indication of a rather strong value chain.
3. The newcomer Ukraine is a real low-cost producer and very profitable – which is why rapeseed acreage is increasing rather strongly in Ukraine.
4. With the exception of the Hungarian farm, EU farms show higher cost of production than their international peers. Some of them struggle to cover total cost plus land cost – even when including direct payments. This is one driving factor for the canola acreage in Germany, the UK or France to decline.

Whether or not growers continue to grow canola, of course, depends on its relative performance compared with other crops. Hence, Figure 5 (see next page) demonstrates the on-farm competitiveness of canola vs. wheat. We choose “return to land” as the performance indicator. It represents the gross revenue minus total cost (excluding land cost). It has to be highlighted that, of course, wheat is not directly competing against canola.

However, because wheat is a key element of all the rotations of the typical farms in this comparison, it is used as a benchmark.

From Figure 5 it can be concluded that, for the Canadian benchmark farms – even for the one in Saskatchewan – rapeseed is a cash cow in comparison to wheat. This is also the case for many other farms around the world, although not for Germany, France, Denmark and Australia. The Australian canola-wheat comparison is a



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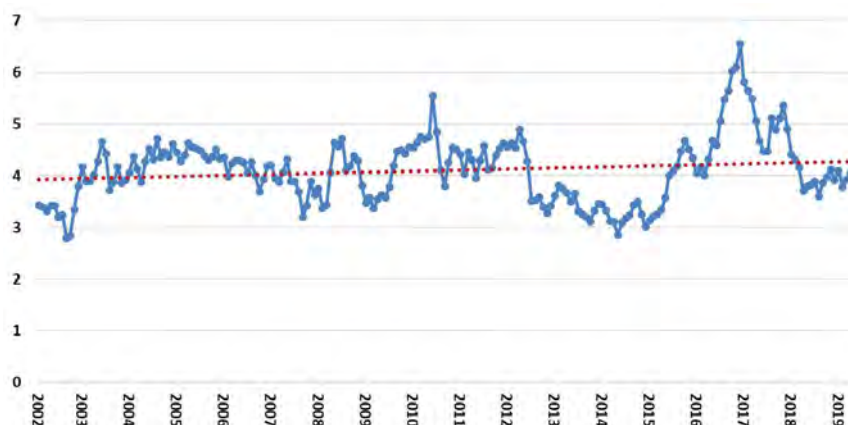
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Figure 3: Canola yields of typical farms (in t/ha)

For the farm names, the first two letters indicate the country, the numbers represent the size of the farm in hectares and the appendix shows the region in the country where the typical farm is located. FR is France, AU is Australia, CA is Canada (farms in Northwest Manitoba, Red River Valley and Saskatchewan), CZ is Czech Republic, DE is Germany, DK is Denmark, HU is Hungary, PL is Poland, SE is Sweden, UA is Ukraine and UK is United Kingdom.



surprise for a major competitor of Canada in global canola markets.

The bottom line: Despite the trade conflict with China, so far, canola seems to perform rather well when compared to other vegetable oils. Furthermore, the evolution of relative prices also favours canola. Consequently, canola has been a rather profitable crop for Canadian producers as well as for many others around the globe. In particular, newcomers in Ukraine or Hungary seem to benefit a lot from the positive framework conditions.

On the other hand, in traditional canola-producing countries, canola is under severe economic pressure. The challenge is that many EU farms have a rather limited number of alternatives – in particular when it comes to broadleaf crops, which are badly needed as a break crop for highly wheat-based rotations. Therefore, most of them will stick with canola, even if it is a less profitable crop.

The crop alternatives situation is different for many Canadian growers – they can very successfully produce other broadleaf crops such as pulses. Given the steep increase in global demand for pulses, this option might become even more important in future. agri benchmark will keep track of that development. 🌻

— Yelto Zimmer is the coordinator of agri benchmark Cash Crop, a non-profit global network of agricultural economists, coordinated by the German Thünen Institute. Its aim is to generate and disseminate reliable and usable analysis of major trends in global crop production for decision makers. For more information please visit www.agribenchmark.org.

Figure 4: Total cost, land cost and revenues in canola (in US\$ per tonne)

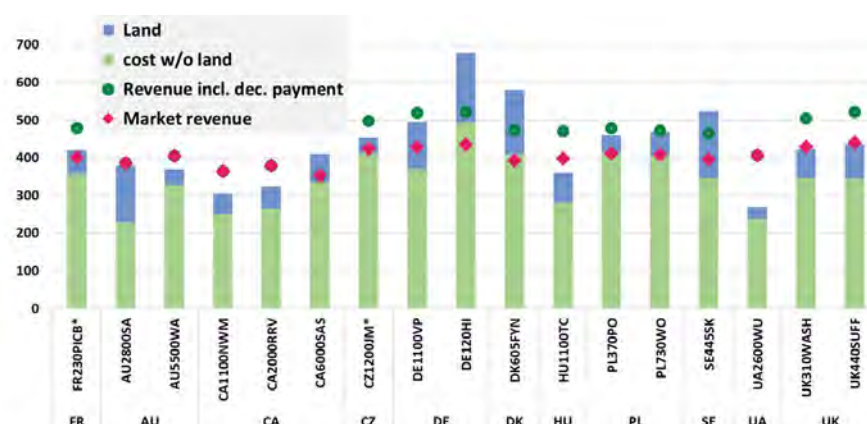


Figure 4 compares of total cost per tonne of canola with and without land cost for each farm. The red dots indicate farm gate prices in US\$ per tonne and the green dots show total revenue including decoupled payments, which are relevant only for EU farms. Source: agri benchmark (2019)

Figure 5: Return to land for canola vs. wheat (in US\$ per hectare)

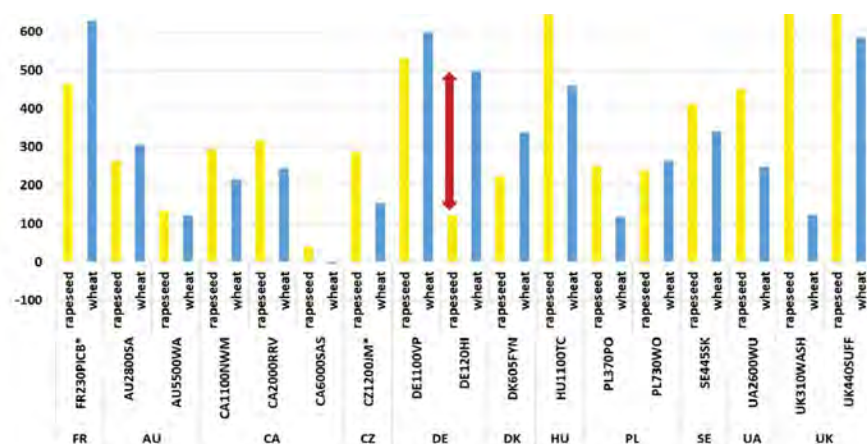


Figure 5 demonstrates the on-farm competitiveness of canola vs. wheat. "Return to land" represents the gross revenue minus total cost (excluding land cost). For most farms, particularly in Canada, canola is much more profitable than wheat. Source: agri benchmark (2019)



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YOUR STRONG, UNITED VOICE IN OTTAWA

BY GAIL GRANGER



Priorities right now

As the parliamentary cycle starts up again, CCC and CCGA are urging MPs and staff to focus on four key priorities of the industry:

REGAIN ACCESS TO CHINA AND GROW EXPORT MARKETS.

The Canadian government needs to use all available means to engage China and create a lasting agreement that supports canola exports. We also need to improve access to other markets and build stable long-term demand. One solution being proposed is a new grains and oilseeds diversification office that would work with Asian regulators and support canola's reputation as a world leader in sustainability.

INCREASE DOMESTIC BIOFUEL USING CANOLA.

Increasing the renewable content in diesel fuel to five per cent would greatly expand domestic use of canola while reducing greenhouse gases and stimulating investment.

SUPPORT PRODUCERS THROUGH UNCERTAINTY.

If exports continue to be blocked, all governments must be ready to offset falling revenues through changes to the Business Risk Management suite.

IMPROVE THE PEST MANAGEMENT REGULATORY AGENCY (PMRA).

Reform is needed so that PMRA can make robust science-based decisions and farmers can have timely access to safe and sustainable crop protection products.



The votes are in, the ballot boxes are back in storage and the federal election season has come to an end. That means a new season of change is just beginning on Parliament Hill and around Ottawa.

No matter what the outcome, every national election refreshes faces and priorities in Ottawa. Newly minted MPs and political staff will take up their posts. Cabinet ministers will be appointed. And whether a new party forms government or not, officials in departments like Agriculture and Agri-food Canada will be given renewed direction on what to do over the next four years.

Whenever change like this is afoot, it's a critical time for those representing the

canola industry in Ottawa. In the coming weeks, government relations staff of the Canola Council (CCC) and the Canadian Canola Growers Association (CCGA) will be meeting with key government players, new and old, to make sure they understand what the industry needs to succeed.

Given the broad range of backgrounds on the Hill, informing politicians isn't always an easy task. The Ottawa staff of CCC and CCGA have learned to never underestimate how little is known about the business by non-farmers, even those who are involved in ag policy decisions.

They've collected some great stories over the years, like the one about the rookie member of the House of Commons agriculture committee who asked,

20 minutes into a briefing, “So this canola... Is it like a plant?” And they will never forget the MP who voiced his wholehearted support for Canada’s “granola farmers.”

But the team has also had many heartening encounters with politicians committed to public service. Jan Dyer, who spent several years doing government relations for CCGA, notes the great respect most MPs have for the industry.

“MPs are very busy but I’ve always been impressed by how willing they are to spend their limited time with a wide variety of agriculture organizations,” says Dyer, who recently retired from CCGA for the second time.

The bottom line for Brian Innes, CCC’s vice president of public affairs, is that there’s always opportunity to inspire elected officials to care about the industry, even when they don’t know much about it or don’t have canola fields in their ridings.

“We have to remember that the average federal MP answers to more than 100,000 voters, so they’ve got lots of issues to think about,” Innes says. “Agriculture and canola may be really important to us, but without our efforts it may not even be on their radar.”

The government relations team uses an arsenal of tools to nudge canola’s priorities toward the top of the priority list. One of those tools is the latest independent study on canola’s economic impact. The study helps explain how the canola industry is creating jobs and opportunity – things that are important to all Canadians. The team also shares how the industry is a key partner in widely supported priorities like environmental stewardship.

The active, grassroots participation of growers is another important way to make canola priorities relevant in a busy environment with many competing interests. For example, as the Pest Management Regulatory Agency was reviewing neonicotinoid regulation, CCGA used a Twitter “click campaign” to help the industry send messages of concern to their MPs. Leading up to the election, another digital information campaign started a big conversation on Twitter about canola-based biofuel, helping to up the issue’s visibility at a critical time.



And when the team meets with government decision-makers, they often bring one more secret weapon – canola growers and industry representatives themselves.

“They bring a whole other level of understanding to the table,” Dyer says. “When farmers share real-life stories and explain how things work on their farms, it makes all the difference.”

She remembers the time a farmer came to a hearing on neonics with a small bag of canola seed. “He showed the committee how tiny the seeds are, and the difference between treated and untreated seed. It was really compelling.”

“Government relations work is like an iceberg. The tip of the iceberg is the high-profile work, like meetings with MPs. But 95 per cent of the effort happens beneath the surface and out of sight, and long before we get to the point of talking to politicians.”

—Jan Dyer

"Our strength is that we come to the table with the whole industry aligned on one solution that can be implemented. It's much more powerful than having a half dozen agriculture groups asking for different things."

—Brian Innes

BEHIND-THE-SCENES WORK

Underpinning all of these efforts is an incredible amount of behind-the-scenes work that continues every year, all year round. CCGA takes the lead on concerns like business risk management and transportation, while CCC leads on trade and market access issues. Issues related to biofuel, crop inputs and pesticide regulation are tackled jointly.

"Government relations work is like an iceberg," Dyer says. "The tip of the iceberg is the high-profile work, like meetings with MPs. But 95 per cent of the effort happens beneath the surface and out of sight, and long before we get to the point of talking to politicians."

As with any iceberg, the stuff happening below the surface is often what matters most.

"With so much competition for government's limited time, we've got to come with solutions in order

to have an impact," says Innes. "Our strength is that we come to the table with the whole industry aligned on one solution that can be implemented. It's much more powerful than having a half dozen agriculture groups asking for different things."

The team is continually working with the value chain and government to find solutions to the industry's challenges. They draw on a broad range of perspectives from CCC's extensive network, including the agronomy specialists who provide specialized production knowledge. Their expertise informs government advocacy on highly technical issues in a way that is unparalleled in Canadian agriculture.

CCC and the CCGA also participate in larger partnerships like the Coalition of Rail Shippers and the AgGrowth Coalition. In this way,

they help tackle the systemic issues that affect all parts of the agri-business sector.

By the time the government relations team shows up on Parliament Hill or the top floor of Agriculture and Agri-food Canada, they come not just with complaints, but with achievable solutions. They can make a compelling case for how and why issues should be resolved and benefits that can be achieved for the canola industry and the country as a whole.

"That's why we've been so successful – because we come prepared," Dyer says. "We don't need to be table-pounders because we come to the table with solutions. That's what gives us influence. That's what gets action." ✿

—Gail Granger is an agriculture freelance writer based in Winnipeg.

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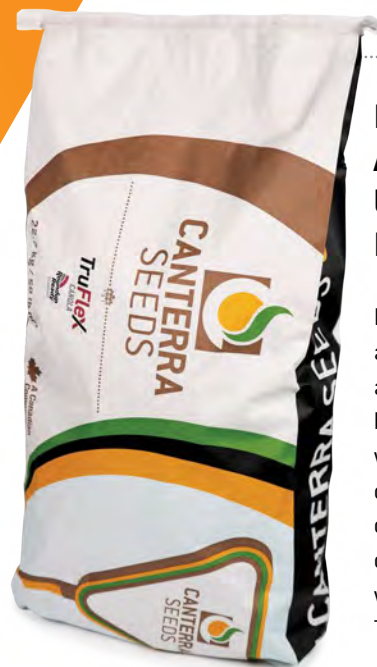
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Farmers speaking up

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FIRST AND FOREMOST, GET INVOLVED.

Attend events and engage the directors of your local grower organizations. They're the people who have been democratically elected to carry your message forward to the national level. Let them know what's on your mind so your concerns are on their radar screen.

If you want to get involved in a bigger way, look for opportunities to hone your skills in leadership and board governance. Training may be available through grower organizations in your area.

BECOME A WELL-INFORMED, CREDIBLE VOICE. Real people with real stories have a power that can't be measured. When these

experiences are backed up with data, they're even more influential.

You can stay informed about important policies and how they impact the canola industry by subscribing to the newsletters, member updates and social media feeds of CCC and CCGA.

BE READY TO MAKE YOUR PITCH.

Some growers join industry delegations that have scheduled meetings with politicians and government officials on specific issues. But at any time, a grower could find himself or herself in the same place as an MP, MLA or policymaker.

You can make the most of these interactions by thinking in advance about how you might handle them. Knowing that politicians have many demands on their time, you might only have a minute or two to raise an issue and propose a solution. You'll need to be brief and focused, and you'll want to make it real.

Here's a formula many people find useful in these situations:

- Share some meaningful information about yourself. ("My family has been farming near here for generations.")
- Briefly explain the issue and how it is affecting your farm. ("Our big problem now is... And on our farm this has meant that ...")
- Encourage continued discussion. ("Do you know much about this issue? I'd love to tell you more.")
- Thank the person for listening.

AMPLIFY THE MESSAGE. You may not be comfortable speaking up or writing letters, and that's just fine. You can still support the cause by simply retweeting the information provided by your industry organizations. Be sure to follow these social media accounts for policy news and more:

@ccga_ca, @canolacouncil,
@CanolaWatch, @SaskCanola
@AlbertaCanola, @CanolaGrowers

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WHAT CLUBROOT-RESISTANT SEED WILL YOU GROW IN 2020?

Clubroot-resistant (CR) varieties should be grown before the disease becomes established in your area. Is your area at risk? Yes. That's the safe assumption as clubroot continues to show up in new areas throughout the Prairies.

We want growers to use CR varieties before clubroot arrives on a field because the pathogen, once detected, will already have a leg up on any future management strategies. CR varieties used early will keep spore loads low and local, particularly if combined (and this is important) with at least a two-year break between canola crops and an absolute minimum amount of soil movement. See the full recipe below.

Canola growers already using CR varieties may want to pick new varieties next year, given that repeat use of the same CR source will select for pathotypes not controlled by the resistant genes in that CR source. Many fields across the Prairies had galls form on CR varieties in 2019.



Credit: Brittany Hennig

Here's how that happens: One clubroot gall produces millions to billions of resting spores and that population of spores can contain multiple *Plasmodiophora brassicae* pathotypes. However, one or two pathotypes tend to be dominant across a field, with other pathotypes present only at low levels. First generation CR varieties are resistant to the most common pathotypes across the Prairies. Natural selection can occur with repeated use of the same type of resistance, which will keep the common pathotypes from increasing but opens the door for rapid increases of some less common pathotypes that were present in the field at low levels. Over time, these less common pathotypes could become the new dominant pathotypes in the population. This is the "selection pressure" that makes natural selection work on clubroot. Through repeated use of the same resistance sources (especially in short rotations), you select for the pathotypes that can overcome the resistance used.

Watch the new "Clubroot Management" video at youtube.com/canolacouncil.

RECIPE FOR CLUBROOT MANAGEMENT

When combined, like ingredients in a recipe, the following practices will help growers to limit clubroot damage in canola, allowing for the continued success and profitability of canola production across the Prairies.

1. **Vigilantly scout** all canola fields for symptoms, even if growing a CR variety.
2. Keep a **minimum two-year break** between canola crops. This crop rotation is crucial in the stewardship of genetic resistance. With a two-year break between clubroot hosts, we see a rapid decline in living resting spores.
3. **Seed CR varieties** and understand if/when to deploy different sources of CR. As noted above, planting CR varieties before the disease arrives and gets established will give you a better chance of keeping the resting spore load at a manageable level and maintaining effective resistance. Rotation of resistance genes is important to maintain resistance efficacy.
4. **Limit soil movement and erosion.** Minimum tillage and equipment sanitation (as simple as knocking off visible dirt before leaving a field) will greatly reduce the risk of moving infested soil around. Wet soil conditions increase the amount of soil that clings to equipment.
5. **Control host weeds.** Common weeds that can host clubroot include stinkweed, shepherd's purse, flaxweed, all mustards and volunteer canola. They need to be controlled within three weeks of emergence to prevent a new batch of spores being produced.
6. **Isolate highly infested patches.** Patches that are visibly worse than the remainder of your field often have billions more spores per gram of soil than elsewhere and are often the first place where clubroot resistance breaks down. Seeding these areas down to grasses and taking them out of production for a few years will significantly reduce the risk of spread and resistance breakdown. As part of this, having separate field entrances and exits could reduce the amount of infested soil leaving the field on machinery.

STILL TIME (MAYBE) TO REGISTER FOR CANOLA DISCOVERY FORUM

Canola Discovery Forum 2019 is November 13-14 at the RBC Convention Centre in Winnipeg, Manitoba. Growers, agronomists, researchers and any other interested stakeholders are welcome to attend – if space is still available. The forum is all about consensus-building and dialogue on best practices for canola productivity and profitability. The theme this year is integrated pest management. For more information and to register, go to canoladiscoveryforum.ca. Look for forum findings in Canola Watch and an upcoming Canola Digest.



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Enhance your 2020 seed decision making with the searchable online database of grower-funded variety trials. Results from across Western Canada from the past eight years are posted, and 2019 results will be loaded once available. Go to canolaperformancetrials.ca and use the 'Search Performance Trial Results' tool at the bottom of the main page.

NOVEMBER SOIL TESTS FOR CLUBROOT

November is not too late to collect soil for a clubroot pathogen DNA test. A soil test of high risk areas can indicate the presence of the clubroot pathogen before symptoms show up in canola plants. These early-stage results give farmers a chance to put a CR variety on that field early and implement the other ingredients in the clubroot management recipe before spore levels get out of hand.

Labs need approximately two to three cups of soil for a test. Collect a composite sample taken in a "W" pattern near the major approach or entrance to the field, or other high clubroot risk areas in the field, including low areas. Sample soil from the top five to 10 cm, excluding as much surface organic matter as possible. Note however that clubroot DNA can be introduced in very small areas within a field, and soil collection may not hit those exact locations. Consider this before putting 100 per cent faith in the result.

Saskatchewan Ministry of Agriculture has two helpful factsheets "Clubroot soil sampling on the Prairies" and "Interpreting a clubroot soil test result". Look for them at saskatchewan.ca. For the list of labs that will check soil for clubroot DNA, look under the 'Identify clubroot' heading at clubroot.ca.



Get to know your Canola Council of Canada agronomy team.

Find the roster and interactive map at canolacouncil.org. Find it in the "Council staff" list under the 'What We Do' tab.

DO YOU NEED TO CHANGE BLACKLEG RESISTANCE FOR 2020?

If the weather cooperates, canola growers and agronomists may still have an opportunity to collect stubble pieces for detection and identification of the blackleg pathogen, *L. maculans*. If you had a little too much blackleg infection in canola this year, the dominant races of *L. maculans* in the field may be overcoming the current choice of blackleg resistance deployed. Labs can test infected stubble pieces to see what races are present, including older stem pieces from fields planned for canola in 2020. Growers can use this information to choose varieties with a major genes that aligns with (and provides resistance against) the most common races identified in those samples.

Even if a hybrid has a stack of major resistance genes and good support from quantitative resistance, varieties are not resistant to all races. Growing the 'best' resistant varieties over and over will select for races that can overcome this resistance. (Read more in the 'Genetic resistance' chapter at blackleg.ca.) Resistant varieties are just one tool to help manage the disease. Proper crop rotation and early identification of the disease are other important steps.



These clipped canola stems show varying levels of blackleg infection. If you had a lot of stems like this, it may be time for a longer break between canola crops and a new source of resistance next time around.

Photo Credit: Justine Cornelissen

READ CANOLA WATCH. IMPROVE YOUR PROFITABILITY

The Canola Council of Canada agronomy team, with support from the provincial canola organizations, bring you Canola Watch – a timely yield- and profit-enhancing resource. The weekly email gives you an early warning on emerging threats to production and provides timely management tips for agronomy challenges throughout the growing season. Sign up for free at canolawatch.org/signup. You can also follow @CanolaWatch on Twitter.

Canola profit opportunities exist despite challenges

Three market analysts Errol Anderson, David Derwin and Jon Driedger provide tips on how to find those opportunities in a more challenging market.

BY RICHARD KAMCHEN

Bearish commodity markets are making profitability more challenging, but not impossible, especially with some deft plays that experts advise farmers to take. The world is in a deflationary, debt-driven spiral right now, says ProMarket Communications president Errol Anderson, and the consequences haven't spared canola. But even amid global turmoil, growers aren't completely shut out of turning a profit.

If there's a need to sell grain aggressively early in the crop year to meet cash-flow needs, farmers should first consider how canola stacks up against other crops in their rotation.

"Sometimes you've got to take what the market gives you," says David Derwin, portfolio manager and investment advisor for PI Financial. If you're growing a diverse rotation, be proactive when crops other than canola are offering pricing opportunities. "Be more aggressive with those commodities when the market's bidding up the price," Derwin says. "If it's not canola, look elsewhere."

However, the fact that canola is easily marketable might make it a relatively better crop to sell early in the year, says LeftField Commodity Research analyst Jon Driedger. Special crops can go through periods of very low buyer activity, Driedger points out, while other crops, like durum, which have a tighter supply outlook than canola, might offer greater potential upside later in the year.

SELL INTO RALLIES

Take advantage of any canola price rallies instead of lingering in expectation of bigger gains, experts counsel. "To wait for that magic \$500 a tonne, you could be waiting a while," warns Derwin.

A bearish carryout and ongoing trade spat with China are old stories, but ones that Derwin says have a deeper and lasting impact that won't simply be resolved over the course of a single crop year.

Anderson adds that farmers should act quickly when they receive a basis premium text from buyers in this environment of uncertain futures. "The market's ruthless: once it's over, it's over, and it'll fall back," he says.

And for farmers affected by inclement weather and have a range of quality to sell, Anderson's rule of thumb is to move their lowest grade first if possible. "If the market goes into a recovery, the top grade will go up further; low grade will always drag," he says.

CAPTURE CARRY

Farmers willing to wait for better prices and store their canola have the opportunity of capturing the market carry – which is the premium offered by deferred futures months. "If you're going to take canola and hold it in your bin over the winter, you might as well get paid for it," says Derwin.

As an example, the difference between the nearby canola contract and the March 2020 represents the amount the market will pay farmers for simply waiting until, say, mid-February to deliver their canola, Driedger says. A farmer could potentially secure



"Options can lower both marketing and storage risks for a grower, and, due to low futures price volatility this past summer, canola put and call option premiums have been quite reasonable to purchase."

—Errol Anderson

a significantly higher price by locking in the futures value, waiting for basis levels to improve, while holding off on the delivery of their canola, Driedger explains.

OPTIONS TRADE

Storage, however, does come with risks, spoilage not being the least of them. For those wishing to stay long into the spring, Anderson recommends selling the cash (to get cash-flow into the farm while also moving canola out of the bin), and using call options.

"That way, if the market continues to go down, you're only exposed to the call option premium," says Anderson. "Say you spend \$10 a tonne: yes, it can go to zero, but it's better than having a bin full of unpriced canola."

He adds that clients who purchased November put options at \$480 to \$500 per tonne last spring were urged to exit, take the profits, and buy January puts to shield them from price downturns until Christmas. "Options can lower both marketing and storage risks for a grower, and, due to low futures price volatility this past summer, canola put and call option premiums have been quite reasonable to purchase," Anderson says.

Derwin is also pro-options. For an example, he says farmers weren't that keen to price their wheat during an earlier rally and thereby missed out on capturing better values. But using options, he says, would give them the opportunity to lock in better values without committing grain. They'll not only have flexibility to cash in if the market goes higher, but also sleep



Navigating Contracts: The delivery clause

better at night knowing they've got their downside price locked in, too.

"Options strategies in general are great to have in the toolbox," says Derwin.

GRAIN CONTRACTS

Farmers have access to a variety of contract types, and depending on the contract, can lock in a basis, select a futures price, schedule a delivery slot or set a price floor.

"There are some seasonal patterns in basis, particularly canola, and sometimes basis can fluctuate almost as much as the underlying futures price," Derwin says. "Producers may be able to capture some additional beneficial pricing by keeping a close eye on basis levels, as well as cash and futures prices."

Although contracting options can have a time and place, Driedger believes growers are typically much better off to use a hedging account to increase their marketing and price risk management flexibility, then simply focus on picking a pricing window – spot or deferred – to sell to the elevator. ✂

—Richard Kamchen is an agriculture freelance writer based in Winnipeg.

Farmers who forward contract often have good reasons to target specific delivery months – reasons such as cash flow, road bans, field work schedule and family vacation time.

"For me, I forward contract a lot of grain so I know I'll have cash flow," says Bernie McClean, who farms near Glaslyn, Saskatchewan and is a director with SaskCanola and the Canadian Canola Growers Association (CCGA).

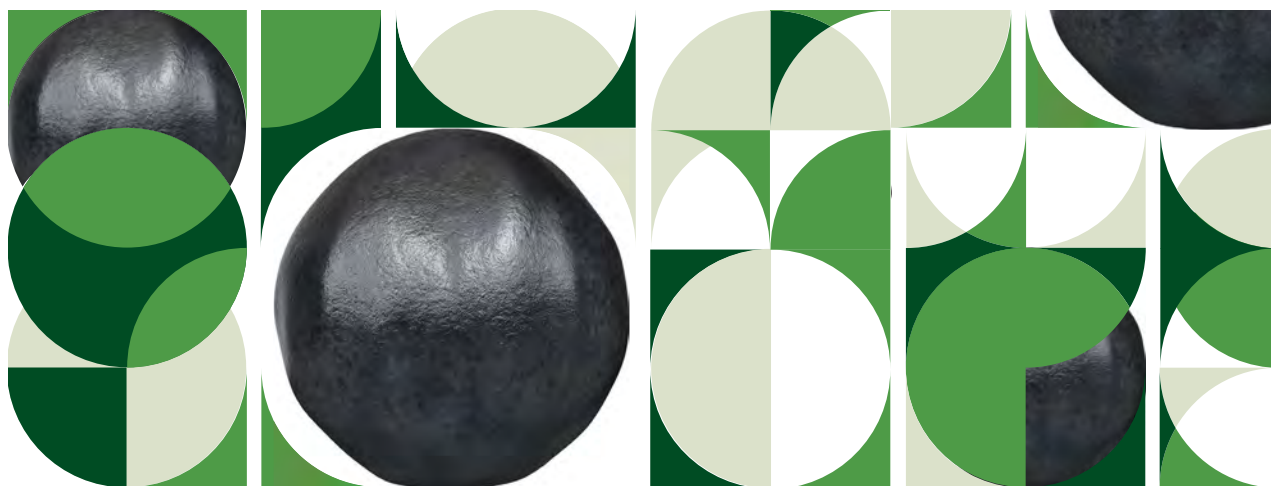
"Over the last few years, my contracts have worked out well, with most deliveries happening on schedule, but I had one case where I didn't get a call until almost three months later," he says. "It turns out the contract had a clause that said delivery could be called up to 90 days past the specified delivery date."

Janelle Whitley, policy development manager with the CCGA, regularly looks at grain contract terms and conditions. "Conditions around delivery often create the most confusion for farmers," Whitley says. "Most contracts allow the buyer to extend the initial delivery period (which is normally a month) for an extended period ranging from 30 to 180 days depending on the company. This makes it important for producers to understand their delivery obligations."

Whitley adds that there are also conditions around how grain is accepted, storage payments and appointment of alternate locations. "Our advice to farmers is to understand the terms required, and be prepared to deliver into an extended delivery period," she says.

This topic and more are covered in more detail in the CCGA's "A Practical Guide to Navigate Grain Contracts," which you can find in the "Resource Library" at www.knowyourgrade.ca. Whitley will also speak on this topic at a few farm shows over the winter.

—Jay Whetter



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What should customers know about you?

We asked our six panelists to share something about their farm and their business philosophy they think consumers need to know.



BY JAY WHETTER



LANDON FRIESEN
CRYSTAL CITY, MANITOBA

Landon Friesen wants people to know that he has nothing to hide. He has an open invite, in the form of a road sign,

to anyone who wants to ‘come for a ride’ with him in the field, to talk farming and food production. So far, one person has taken him up on the offer.

“He was an older guy, just driving by, going to visit his kids. He isn’t from a farm and had a lot of questions about production and storage,” Friesen says.

Friesen would be happy to host more people on his farm, but he’s two hours from Winnipeg. Even so, he thinks a little road-side advertising helps to engage, even in a small way.

He had a sunflower field along the highway this year and people would often stop to take pictures. “It would have been good to put up a sign by the field saying

“If we can engage one on one, that’s good. I’m not sure social media works that well. We’re often speaking to the choir.”

—Landon Friesen

where the harvested crop would go, and how a person could buy the product,” Friesen says. He might try that next year.

Friesen is on the board for Ag in the Classroom, which fits with his philosophy that face to face engagement with regular customers – young and old – is the best approach. “If we can engage one on one, that’s good,” he says. “I’m not sure social media works that well. We’re often speaking to the choir.”

In September, a contact with a local equipment company connected Friesen with Trans Canada Brewing Company in Winnipeg. They came out and bought a small batch of malting barley, and the beer made from that barley will have a picture of his farm on the can. What’s the next step? “Maybe I can sell my black beans to a Mexican restaurant in Winnipeg and they can advertise locally-sourced beans on the menu.”

Ultimately, he says consumers need to know that “we’re trying our hardest to produce safe food, and it’s a lot safer than you might think.”



Credit: iStock.com/wwing

KEITH FOURNIER LONE ROCK, SASKATCHEWAN



K eith Fournier would like consumers to know that farmers are willing to change to keep up with the

times. “Different consumers have different ideas on how they want their food raised or the ingredients used. That includes plant-based protein burgers,” he says. “I have no resentment against consumers for buying food that fits their values, and I will change as demand changes if it’s the right move for my business.”

Farmers have to pay attention to trends that could have a major influence on their long-term production practices. “I will keep going the way I’m going as long as consumers are willing to buy food the way I grow it, but I have to get away from thinking that everyone will always want what we produce,” he says. “I have to be flexible enough to accommodate consumers when their tastes and values change.”

On the flipside, Fournier also thinks consumers need to know that the farmers who are still in business are proud of the quality of they produce, and the methods used to produce it.

“In social media, there seems to be some mistrust of what we do on the farm, especially for the tools like fertilizer and pesticides,” Fournier says. “But we wouldn’t use these tools unless we saw them as lower risk for the environment and for the social health of farmers and the farming community.”

Fournier likes that McDonald’s and other companies are showcasing the farmers who supply their food. “This is about making connections with consumers who don’t know farmers anymore,” he says. “Farmers need to embrace these trends that help customers understand why we do what we do.”

“I have to be flexible enough to accommodate consumers when their tastes and values change.”

—Keith Fournier

“We’re not going to do something dangerous that impacts that quality because we also eat all the stuff we produce.”

—Anthony Eliason

Brooke Parker would like customers to appreciate that agriculture has to meet a broad range of demands when it comes to food choices and production practices. She sees a place for every type of farm. “It’s good that farms can provide the diversity of systems to satisfy all different tastes and values, but one system is not better than any other.”



BROOKE PARKER STRATHMORE, ALBERTA

B rooke Parker wants customers to know about the importance of biosecurity on farms. This is not only for live-stock operations, which have to be

very careful about people bringing in outside pathogens that could spread throughout a flock or herd. It applies to fields as well.

“Half of our farming operations are in Rocky View County, which has four confirmed cases of clubroot to date,” Parker says. So that means paying close attention to people and equipment coming in and out of fields to make sure they’re not tracking soil that could contain the pathogen.

“Clubroot is spreading at a rate of 20 miles per year, and with rotation, maintenance and canola variety trait options, we can reduce that to 10 miles per year,” she says.

She thinks customers should know about the steps farmers have to take to manage threats to their productivity and their livelihood.

Parker would also like customers to appreciate that agriculture has to meet a broad range of demands when it comes to food choices and production practices. She sees a place for every type of farm. “It’s good that farms can provide the diversity of systems to satisfy all different tastes and values,” she says. “But one system is not better than any other.”



ANTHONY ELIASON OUTLOOK, SASKATCHEWAN

T he Eliason farm still has an old red barn, which is the image people often associate with good old-fashioned

farming. “We don’t have cows in it anymore, but it’s still part of our family’s heritage,” says Anthony Eliason. “Even though farming practices have changed since that barn was built, that same heritage drives us to be better farmers and better stewards of the land.”

Eliason would like to remind consumers that farmers and their families live on the farm and eat the food they produce.

“I care about the land and I love living on the farm. I follow the rules and regulations, and do what I can to produce the healthiest food possible,” he says. “We’re not going to do something dangerous that impacts that quality because we also eat all the stuff we produce.”



JOHN SANDBORN
BENITO, MANITOBA

John Sandborn home farm is on the north slope of the Duck Mountains, which means a lot of wildlife, birds and biodiversity. He likes that and wants to preserve it.

"I have 70 acres by the lake that I left in its natural state for the birds and animals. People want to take the wood, but I won't let them," Sandborn says. "I've sown a few small fields to natural grass for bees and other native pollinators." He also feeds birds through the winter.

Sandborn has to spray his crops to protect them, but he makes sure to follow labels, and he rotates herbicide chemistry to avoid resistant weeds. He keeps his own high-clearance sprayer so he can spray at exactly the right time and only where necessary.

"I don't spray any more than I need to, and I pay attention to insect thresholds," he says. "I want to give the natural predators a chance to build up."

Sandborn would like his customers to know about his respect for the natural biodiversity on his farm. "I want to take care of the farm because it has to take care of me."

"I have 70 acres by the lake that I left in its natural state for the birds and animals. People want to take the wood, but I won't let them."

—John Sandborn



ROGER CHEVRAUX
KILLAM, ALBERTA

Roger Chevrax thinks consumers should know about the steps he takes at all stages of production to reduce his carbon footprint, reduce pesticide use and meet customer needs for quality.

Growing crops without using tillage has provided a major benefit to his soil health and carbon footprint. "I have been using zero-tillage for over 20 years," Chevrax says. "It has improved my soil organic matter and the standing stubble catches more snow." Leaving the stems standing to catch snow can improve water use efficiency, which means farmers can grow more food on the same land.

"I just bought some land adjoining my farm and took out an old fence line. The mound of dirt around the fence line was a good reminder of the soil erosion from the Dirty '30s and why reduced tillage is so important to our farms," Chevrax says. "Not only does it help the soil, but by not pulling the tillage tool over the farm two or three times a month, it saves me a lot of diesel fuel use and reduces the carbon footprint of the farm."

When it comes to spraying, Chevrax always sprays registered products at registered rates, and he's taking steps to reduce pesticide use overall.

"Throughout the summer months I receive, on a regular basis, satellite images of my fields and from that I can determine areas where the plant biomass is less than the average. From this information I create application maps that I use in my sprayer. As the sprayer passes over these areas of lower plant biomass areas, it will automatically shut off sections of the spray booms so that the fungicide is only applied to areas where the disease is most likely to be present," he says. "This reduces the amount of fungicide used on the field as a whole."

In the future, he sees more use of variable-rate and risk-sensing technology for all pesticide and fertilizer applications. As an example of risk-sensing technology, Chevrax tried the Spornado this year, a tool that tells him the level of sclerotinia spores in his field. "With this, I can determine the best time to spray or whether to spray at all." ✿

—Jay Whetter is the editor of *Canola Digest*.

"I receive satellite images of my fields, which I use to determine areas where the plant biomass is less than the average. I then create application maps that I use in my sprayer. As the sprayer passes over these areas, sections of the spray booms shut off and apply fungicide only to areas where the disease is most likely to be present."

—Roger Chevrax.

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Reasons to Love Canada's New Food Guide

For starters, the new guide is easy to use. It also has fewer food groups, an emphasis on healthy fats, a consideration for plant-based protein and an evidence-based approach.

BY LYNN WEAVER

It has been almost a year now since Health Canada released its long anticipated revised food guide. Canada's Food Guide has most certainly been the topic of much debate during my 20-plus years as a dietitian. Despite the mixed opinions, here are five key reasons why I find the new Food Guide to be the best and most practical version yet:

EASY TO USE

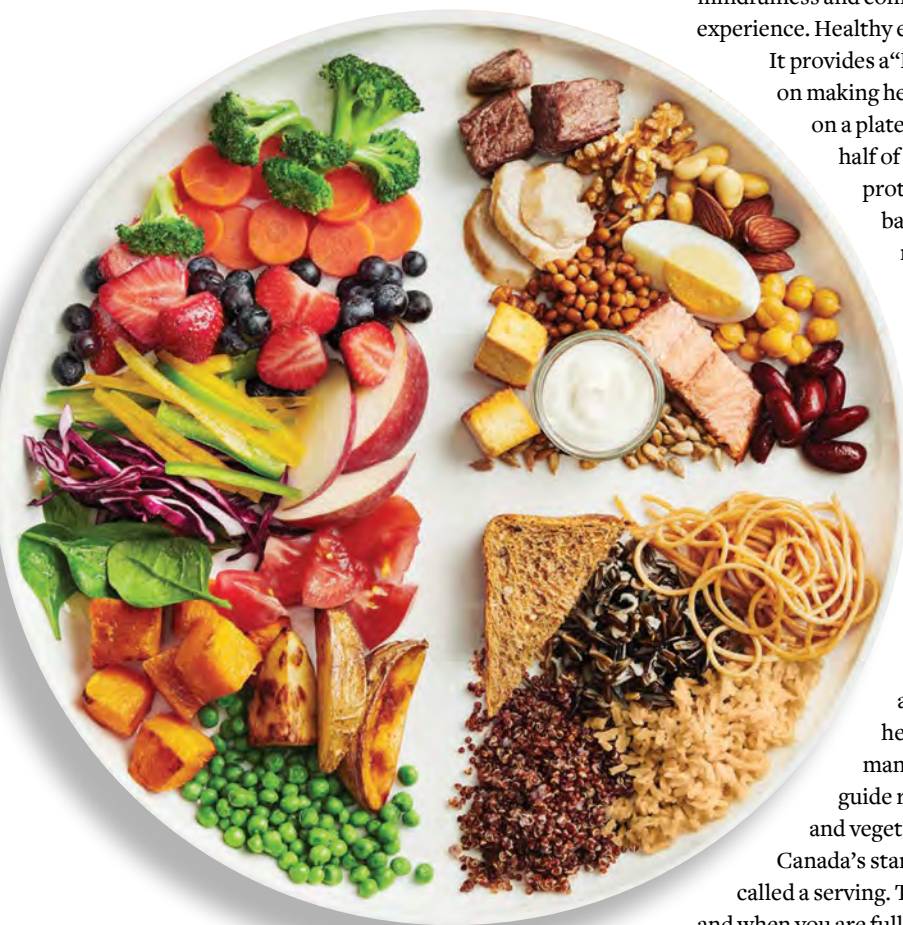
The new guide is refreshingly easy to use. The recommendations are not complicated and can be easily followed. The guide not only "prescribes" what to eat but teaches us that "how we eat" is fundamental to good health by encouraging mindfulness and connection as part of a more personalized and healthy eating experience. Healthy eating has always been more than just food.

It provides a "Food Guide Snapshot" as the key tool to guide Canadian's on making healthy choices. The photograph of real food examples on a plate is visually effective, and the message is simple – fill half of your plate with vegetables and fruits, one quarter with protein and the other quarter with whole grains for a healthy balanced meal "half-your-plate" concept has been used for many years by organizations including Diabetes Canada (diabetes.ca). The guide, for the first time, includes easy to prepare, tasty, practical recipes, easily accessed online and made mobile-friendly to encourage Canadian families to get back in the kitchen and prepare healthy meals.

FEWER FOOD GROUPS

Unlike the previous version, this guide recommends three food groups instead of four, clustering milk and alternatives and meat and alternatives into an all-encompassing protein group. Nutritionally this makes sense as milk and dairy products are great sources of protein.

Instead of single nutrients, specific portions sizes and number of servings, the guide now focuses on a healthy eating pattern and mindfulness. I can't tell you how many times I heard my clients mention that the previous guide recommended unreasonable servings of grain products and vegetables. As well, there was confusion between Health Canada's standardized serving sizes and what food manufacturers called a serving. This guide encourages you to notice when you are hungry and when you are full.



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We create chemistry

PLANT BASED FOCUS

Research has shown that diets high in red meat increase the risk of cardiovascular disease, type 2 diabetes and colorectal cancer. Alternatively, choosing protein foods that come from plants, have been associated with a lower risk of premature death from cardiovascular disease. This doesn't mean we need to become vegetarian or vegan, as the critics may lead you to believe, but it does mean that we should include plant-based proteins such as beans, peas, lentils, nuts and seeds alongside lean meats, fish, eggs, poultry and dairy.

With a focus on sustainability and evidence-based nutrition, plant-based proteins are emphasized in the 'protein' section of the plate for good reason - they are a great source of protein and a rich source of fibre. This is also an excellent opportunity to promote these highly underrated yet versatile and affordable protein foods into our diet. As you know, Canada is one of the top producers of pulse crops which should be showcased and better incorporated into our diet.

HEALTHY FATS

The guide states that "the type of fat you eat is more important for health than the total amount of fat you eat". This is a welcome addition to help Canadians recognize that reducing saturated fat intake (versus overall fat intake) is the key priority for lowering the risk of heart disease.

To make heart healthy choices, the guide asks us to choose foods that contain mostly unsaturated fats such as nuts, seeds, vegetable oils, fatty fish, avocado and soft margarines, instead of foods that are rich in saturated fat such as high fat dairy, fatty and processed meats, coconut milk and deep-fried foods.

When preparing food, the guide recommends using oils such as canola, olive, corn, flax, sunflower and soybean, and staying away from coconut oil, hard margarine, butter and lard.

EVIDENCE-BASED

Health Canada used only the best available evidence to translate the science on food and health into the healthy eating guidelines. Only high-quality scientific reports on food and health from respected authorities, including systematic reviews on over 100 food related topics and 400 convincing conclusions, were used. In addition, Health Canada considered the results of two rounds of public consultation on the revision of the Food Guide, so despite what some critics report, the public was invited to provide input. It is for this reason that the new Food Guide has been lauded by many nutrition experts (including myself) for only using the latest unbiased nutrition research.

Canada's
food guide

Eat well. Live well.

Eat a variety of healthy foods each day

Have plenty
of vegetables
and fruits

Eat protein
foods

Make water
your drink
of choice

Choose
whole grain
foods

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Canada

Canada

The plant-based focus doesn't mean we need to become vegetarian or vegan, as the critics may lead you to believe, but it does mean that we should include plant-based proteins such as beans, peas, lentils, nuts and seeds alongside lean meats, fish, eggs, poultry and dairy.



Credit: iStock.com/
ALEXIMAGE

WHY DOES THE FOOD GUIDE MATTER?

The Food Guide describes a pattern of healthy eating for individuals and sets a standard for nutritional programs across the country, such as schools, hospitals, daycares and long-term care facilities. But the question remains: Does the Food Guide really make a difference to the eating habits of the average Canadian? For the average person that does want to learn how to eat better but not sure where or how to start, it does help and is appreciated for being easy to use, practical and based on the latest evidence.

It is my hope that for the many Canadians that struggle with poverty, food insecurity and nutrition literacy, that policy makers will use the guide to help reduce this burden. Every Canadian needs food literacy and basic cooking skills. If we all want Canadians live healthier lives, we all need to be on board by embracing the new Food Guide. 🌻

—Lynn Weaver, Registered Dietitian, is the Canola Promotion Manager for SaskCanola. Lynn shares the health benefits of canola oil in Ontario on behalf of Canola Eat Well. For more information, visit canolaeatwell.com.

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EU certification gives you access to a new market

When your farm is EU-certified, the canola you grow is eligible for export to Europe's important biofuel market. It's a simple and timely way to gain access to this significant market opportunity.

BY GAIL GRANGER

As Alexander Graham Bell once famously said, "When one door closes, another opens."

Doors have been closing in the China market this past year, and the Canadian canola industry has been working hard to open new ones in other promising markets. One of these opportunities is the European Union's biofuel sector.

While the EU imports less canola than China, it's an important part of the puzzle as the industry finds ways to diversify markets. Right now, sales potential in the EU is surging, driven by the lowest domestic rapeseed production in more than a decade. In fact, Canadian grain companies predict a three-fold increase in canola exports to the EU in the coming year alone.

Canadian canola is already a qualified feedstock for use in EU biofuels thanks to the Canola Council of Canada's past efforts, but exporters and growers need to be certified if they choose to take advantage of this significant opportunity. This certification is necessary to meet the EU's biofuel requirements, which are outlined in the Renewable Energy Directive (RED).

Most farms in Western Canada already meet the requirements for EU-certification, but not all have gone through the certification process.

In fact, the number of farms certified for the market might be the biggest limitation on how much canola will be exported to the EU this year.

"We really need the growers to become certified," says Chad Molesky, Merchandising Manager for Viterra, one of the export companies registering growers. "If they don't, we won't have the volumes for export to this market."

Fortunately, the certification process at the farm level is quick and easy, thanks to past groundwork by the Canola Council. Grain handlers provide growers with a short questionnaire (paper or online) that takes just a few minutes to complete. Once certified, a farm's canola is eligible for a market that is expected to import substantially more seed from Canada this year. And there is no cost to the farmer for certification.

To help growers decide whether this program is right for their farms, the Canola Council has prepared new information materials, including a webinar recorded in August. See the sidebar for more on questions asked and answered during the webinar, and links for more information. ✿

—Gail Granger is an agriculture freelance writer based in Winnipeg.

The webinar panel

Chad Molesky, merchandising manager for Viterra, speaking on behalf of all participating exporters.

Norbert Schmitz, managing director of International Sustainability and Carbon Certification (ISCC), an approved certification scheme for the Canadian canola industry.

Doyle Wiebe, Saskatchewan grower and director with SaskCanola and the Canadian Canola Growers Association. His farm has been certified since 2017.

Here's an overview of what was asked and answered during the 45-minute session. The complete webinar is available for playback on the Canola Council website.

Why would a grower want to do this?

Certification makes a grower's canola eligible for a significant market that provides diversification options to growers and exporters. Keeping canola flowing to export markets helps keep demand strong, which in turn encourages good prices at the farm gate.

Growers like Wiebe also see advantages for certification beyond the EU market, as other big food industry players like General Mills, Unilever and Walmart move to various kinds of assurance programs. "As a student of the marketplace, I've always wanted to open all the doors that are possible," he says.

In addition, certification is a way of getting credit for good practices already in place. Certification tells consumers that Canadian farmers have one of the most sustainable production systems in the world.

How do I sign up?

All it takes is a quick visit to a participating elevator. You complete a short questionnaire to verify that your farm complies with the requirements, and then you're instantly certified. Once certified, you renew the application each year.

Is there a cost to be certified?

None whatsoever.

What are my responsibilities?

By signing up for certification, you agree to keep good records showing that your practices meet the requirements. You also agree to participate in an on-farm assessment, should your farm be one of the operations selected at random.



"As a student of the marketplace, I've always wanted to open all the doors that are possible."

—Doyle Wiebe, whose farm has been EU certified since 2017. Wiebe sees advantages for certification beyond the EU market, as other big food industry players like General Mills, Unilever and Walmart move to various kinds of assurance programs.



Listen to the recording of the August webinar. Go to canolacouncil.org/EUcertified.

What happens if I'm chosen for an assessment?

Not every grower is assessed; a small number of farms are chosen at random each year. But if you are certified, you must be ready for an assessment. That means having important documents organized and readily available. An Assessment-Ready Checklist is posted on canolacouncil.org/EUcertified to provide high-level information to growers about the requirements. For questions or additional information, participating grain handlers remain your best source of information.

An assessor will visit your farm to assess your internal documents and inspect your operations, including growing areas and storage facilities. The assessor may also interview people associated with your farm, like employees and stakeholders.

"Most of our farmers who have been through an on-farm assessment have said, 'Gee, that was certainly easier than I thought it would be,'" says Molesky.

What happens if there is an issue with the assessment?

If the assessor finds some kind of deficiency, the grower is given an opportunity to correct it. If the deficiency isn't addressed within a specified time, the farm gives up the right to participate in this export opportunity.

Is there any reason I might not be eligible?

Most Western Canadian farms will meet the certification requirements without any change to their practices.

One reason a farm might not comply is recent land conversion. Canola sold into the EU must be grown on land that has been in cultivation since at least January 2008. If cropland has been converted from forest, wetlands, peat lands or some sort of protected area after that date, it may not meet EU standards for sustainability. Any questions on meeting this requirement should be discussed with your local grain handler.

Which exporters are participating?

The first three companies registering growers for EU-certification are Viterra, G3 and Cargill. By the time this article is published, other grain handlers may also have programs. Check the Canola Council website at canolacouncil.org/EUcertified for a list of all participating companies.

How can I learn more?

Each company has its own distinct program, so it's best to contact a participating grain elevator in your area for details.

On the Canola Council website, you'll find links to grain handler contacts as well as more information about the EU's Renewable Energy Directive (RED), an Assessment-Ready Checklist and a recording of the August webinar. Just go to canolacouncil.org/EUcertified. 🌻

Merit Functional Foods has broken ground on its 88,000 square foot pea and canola protein extraction facility in the Northwest area of Winnipeg. When operational later in 2020, the extraction facility operated is expected to initially process approximately 20,000 tonnes of pea and canola annually.

CONSTRUCTION BEGINS ON PROTEIN PRODUCTION PLANT IN WINNIPEG

Merit Functional Foods has started construction of its \$80 million 88,000 square foot canola and pea protein production facility near the airport in Winnipeg.

Burcon NutraScience Corporation, a Canadian company and global technology leader in the development of plant-based proteins, is a partner in the project. Burcon has been working for years on canola protein isolates, and the Merit Foods facility will produce its branded proteins Supertein, containing the amino acid napin, and Puratein, containing the amino acid cruciferin. It will also produce Burcon's branded pea protein isolates.

The 'flex production plant' is planned to start on peas, processing approximately 20,000 tonnes of yellow field peas per year beginning fourth quarter 2020.

Tara Kozlowich, vice president of marketing for Merit, says the facility will have the ability to "flex" between multiple plant proteins. "There is currently a significant demand for pea protein. Canola, we believe could very well be the next big thing."

Johann Tergesen, Burcon's president and chief executive officer, explains the benefits of having their own production facility: "Having the capacity to produce both our unique pea proteins, as well as our canola proteins, in our own production facility is a key pillar of our differentiation strategy. We look forward to offering our pea and canola protein products to customers and consumers in Canada, North America and worldwide."

To describe the size of the global market for plant protein isolates, Kozlowich cites a couple of studies on the outlook for plant-based protein and meat alternatives.

She says the investment firm UBS projects sales of plant-based protein and meat alternatives to increase from \$4.6 billion in 2018 to \$85 billion in 2030. "The Swiss company

said its 2030 estimate could be a conservative if innovation and consumer awareness drive more consumption," she says.

Her second projection is from Markets and Markets, a marketing research company: "The plant-based protein market is estimated to account for a value of US\$18.5 billion in 2019 and is projected to grow at a compound annual growth rate (CAGR) of 14.0 per cent from 2019, to reach a value of US\$40.6 billion by 2025."

The Markets and Markets projection added that plant-based proteins are used in beverages, dairy alternatives, meat alternatives, protein bars, nutrition supplements, processed meat, poultry and seafood, bakery, food, and sports nutrition products "to enhance their nutritional and functional properties, such as texturing, emulsifying, solubility, stabilizing and binding."

Kozlowich says Merit will work both directly with farmers and with grain companies to acquire peas and canola for processing. 🌱



Merit Functional Foods has broken ground on its 88,000 square foot pea and canola protein extraction facility in the Northwest area of Winnipeg. When operational later in 2020, the extraction facility operated is expected to initially process approximately 20,000 tonnes of pea and canola annually.

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