

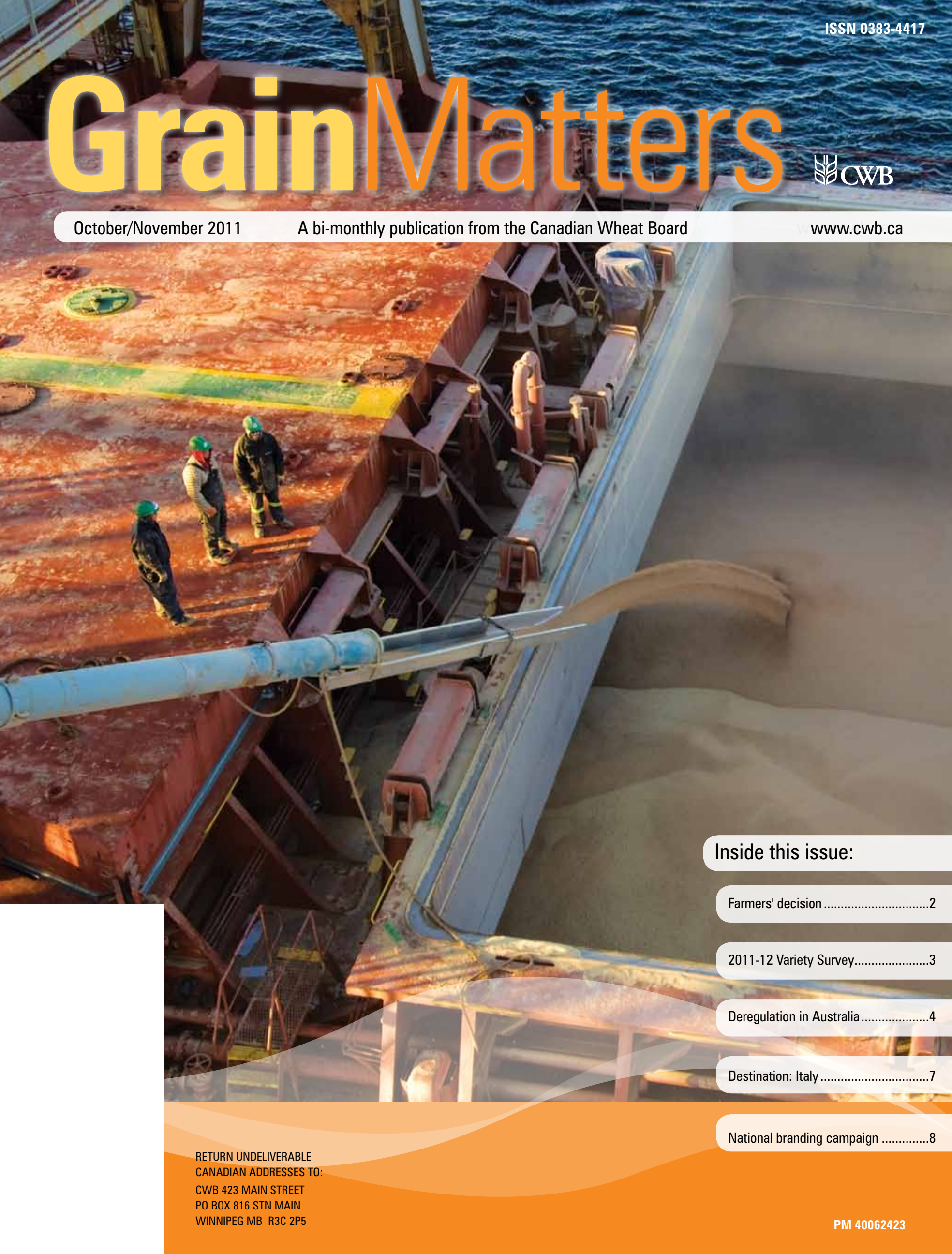
GrainMatters



October/November 2011

A bi-monthly publication from the Canadian Wheat Board

www.cwb.ca



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RETURN UNDELIVERABLE
CANADIAN ADDRESSES TO:
CWB 423 MAIN STREET
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Farmers have spoken – and the government refuses to listen



Allen Oberg
Chair, CWB
board of directors

Across Canada, producers vote to create, eliminate or maintain marketing structures. But not on the Prairies. Here in Western Canada, we are treated like second-class citizens. We are told what's good for us; we cannot decide on our own.

In Quebec, wheat producers voted for a single desk, and they put one in place in 2005. In Ontario, farmers voted to eliminate their single desk, and they moved to a voluntary pool system. In both cases, farmers made the call.

When farmers speak on the Prairies, however, the Minister of Agriculture refuses to listen. He simply refuses to

acknowledge the majority of farmers – 62 per cent for wheat and 51 per cent for barley – who want to keep the single desk. Maybe I shouldn't be surprised – back in 2008 Minister Ritz ridiculed the majority of farmers who acknowledge the value of the CWB, calling us the "tin foil hat and decoder ring crowd."

Minister Ritz says he is committed to choice and letting farmers decide how to market their crops. Yet he gives wholehearted support to supply management. I'm not the first to notice the utter hypocrisy in this stance.

Implicit in this notion of individual marketing, however, is that there will be a choice, that there will be a dual market. As I've said all along, the CWB is the single desk. You can replace the organization with a small grain company after Aug. 1, 2012, but this successor will not remotely resemble the CWB of today – nor will it provide anywhere near the value to farmers that the CWB provides. There will be no dual market. If the government gets its way, there will be an open market. Period. Anything called the "CWB" will not be the CWB.

You cannot take a company with no elevators, no terminals and no money, and expect it to compete successfully against multi-billion-dollar multinationals. It's apparent to me that this government wants the CWB gone completely. They want any successor organization to fail – and they want to pin the blame for this failure on the CWB itself. As at least one commentator has noted, it's a clear case of murder – but the government wants you to think it's suicide.

I can think of no other reason why the government has dodged our questions about the future throughout the summer and fall. We determined what a post-CWB organization would require to succeed, including start-up capital, government guarantees, and regulated access to country and port terminals. We asked the government to commit to these needs. The government wouldn't give us a clear answer. But that's the way this government operates.

As I write at deadline for publication, the government has yet to introduce its legislation, or even share a snippet of analysis – if any has been done – of the implications of this move. Time is incredibly short to enact such a monumental change. The government's working group on a transition to an open market released its report, but this thin and hasty document hardly passes for analysis. Farmers were scarcely mentioned, and no concrete solutions were provided for the myriad marketing and logistical problems that will ensue from this rush to an open market. Somehow, the "market" is supposed to work all these problems out.

We are facing the most monumental change in western Canadian agriculture in my lifetime. There should be analysis. There should be a plan. There should be respect for farmers and their business needs.

These should all be automatic, but instead of analysis, we get rhetoric. Instead of careful planning, we get bluster. Instead of respect, we get name calling.

Maybe Minister Ritz was right after all – I must be living in a fantasy world to have expected a thoughtful and reasoned approach from this government. Hand me my hat and ring.

Visit the CWB booth

Farmers are invited to come out and meet their CWB Farm Business Representative (FBR) at an upcoming agricultural trade show.

FBRs and representatives from the Farm Business Team will be available at the CWB booth at six major trade shows to answer questions about CWB programs and services:

Agri-Trade, Red Deer, Nov. 9-12

Crop Production Show, Saskatoon, Jan. 9-12

Manitoba Ag Days, Brandon, Jan. 17-19

FarmTech, Edmonton, Jan. 24-26

Ag Expo, Lethbridge, Feb. 29-March 2

Farm Progress, Regina, June 20-22



What's happening at cwb.ca



Farmers have spoken

View information on the fate of the CWB. Access plebiscite results, open letters from chair Allen Oberg, an electronic form to contact your elected officials and more. Information is available from the CWB homepage at www.cwb.ca.



CWB mobile

Test drive the CWB's mobile Web site. The site contains the key information on the full site, but is suitable for access from your smart phone. Go to m.cwb.ca or simply scan the QR code on the home page banner.



Variety Survey tool

Dig deep into the CWB variety survey using the online tool at cwb.ca/variety. Create customized graphs by class, province and year. View district results by class, and see detailed provincial breakdowns.



Calendar

The online farmer calendar is accessible in the upper right-hand section of any page on our Web site. Click the "View all" link to see a monthly calendar of important dates, including Pool Return Outlooks, sign-up deadlines and more.

CWB Variety Survey highlights adoption trends



Mike Grenier
CWB Agronomist

The 2011-12 CWB Variety Survey results reveal a continuing trend in the adoption of new varieties by farmers. The survey, conducted between June 1 and Sept. 9, 2011, asked CWB permit book holders to indicate which varieties they have seeded.

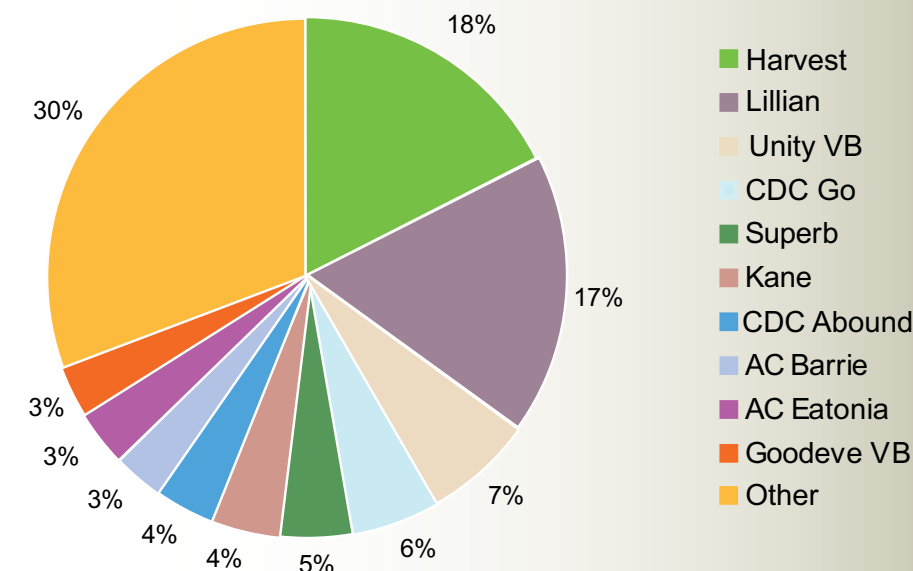
More than 5,000 farmers participated, with 58 per cent of submissions received online. Full results and online analysis tools are available at www.cwb.ca/variety.

Wheat classes across the Prairies

Canada Western Red Spring (CWRS) is by far the largest class of wheat grown on the Prairies, followed by Canada Western Amber Durum (CWAD). These two classes account for more than 90 per cent of total wheat acres.

Canada Western Red Winter (CWRW) acreage declined, but remains ranked as the third largest wheat class with under three per cent of the total acres.

CWB Variety Survey (2011-12) CWRS - Prairies



Canada Western Red Spring (CWRS)

The varieties Harvest and Lillian remain as the top two CWRS varieties, at 17.6 per cent and 17.4 per cent of seeded acres respectively. Harvest is preferred in the black soil zone and demonstrates good yield potential with improved sprouting resistance. Lillian, a solid stem variety, is preferred in the brown soil zones of southern Saskatchewan and Alberta for management of wheat stem sawfly.

The big news this year is a sharp rise in new wheat-midge-tolerant varieties. Unity VB moved into third position with over six per cent of seeded acreage. Goodeve VB, another wheat-midge-tolerant variety, climbed into the top ten with over three per cent of seeded acres. Both these varieties have good yield potential.

Increased use of newer varieties such as Kane, CDC Abound, CDC Go, Glenn, Infinity and CDC Alsask come at the expense of older ones such as AC Barrie, McKenzie and Superb. Historically, the vast majority of the class acres would be seeded with no more than three varieties. With newer varieties quickly growing in popularity, the top five varieties now account for between 50 and 60 per cent of total CWRS production. Turnover in varieties is occurring more frequently as farmers become more willing to test new products that demonstrate improved yield potential and/or agronomic characteristics.

Similar to weather patterns in 2010, wet weather caused a substantial number of acres to go unseeded. This will affect some of the observed provincial and regional variety adoption trends.

Canada Western Amber Durum (CWAD)

Strongfield is the consistent favourite among durum growers, accounting for over 65 per cent of the total durum acres. Strongfield's dominance has been driven by its strong agronomic yield performance and customer acceptance.

Newcomer CDC Verona reached fifth spot, representing five per cent of total acres. Older varieties such as AC Avonlea, AC Navigator and Kyle all show declining acres. New variety introductions include Enterprise, Eurostar and Brigade, all of which are in the early stages of introduction and market-development testing.

Barley

Acres of two-row malting barley increased slightly and remains at more than 50 per cent of total seeded barley acres for the Prairies this year. Six-row malting varieties continue to decline, and now account for less than five per cent of seeded barley acres.

Acreage devoted to feed varieties decreased slightly to 44 per cent. Hulless barley varieties continue to account for less than one per cent of barley acres.

Two-row malting barley

AC Metcalfe maintained its preferred two-row status with 54 per cent of total seeded acres, despite a slight acreage decline. CDC Copeland remains in second place with 26 per cent of acres. Newdale held steady at over five per cent, while two new varieties – CDC PolarStar and CDC Meredith – gained over five and three per cent of the acres respectively. Market development and testing of these and other newer varieties continue.

Information on variety declarations and class eligibility lists can be found on the Canadian Grain Commission's Web site at www.grainscanada.gc.ca. The Canadian Food Inspection Agency (CFIA) is responsible for registration and deregistration of varieties under the *Seeds Act*.

Variety Survey draw winners

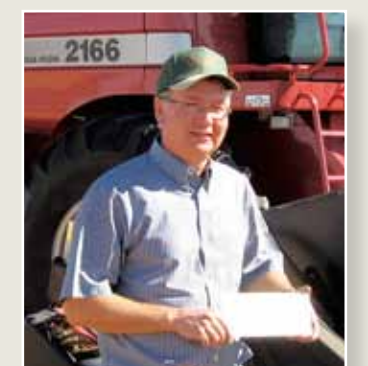
Congratulations to all the winners of the CWB's 2011-12 Variety Survey prize draw.

- Maylene Starling of Delisle, SK, won the early-bird online prize and received a WeatherFarm weather station (valued at \$1,750).
- Neil Guttormson of Naicam, SK, won a \$2,000 Secan voucher for certified seed.
- Robin Cristo of Assiniboia, SK, won a \$500 Canadian Seed Growers' Association voucher.
- Murray Janis of Glenbain, SK, won a handheld GPS.
- Louis Mencke of Fahler, AB, won a handheld weather meter.

Other early-bird prize winners were Stanley Romanchuk, of Girouxville, AB, who won a handheld GPS, and David Green of Moose Jaw, SK, who won a handheld weather meter.



Neil Guttormson, Naicam, SK



Robin Cristo, Assiniboia, SK

A summer of consultations: facing the future with eyes wide open

The CWB held unprecedented consultations with 20,000 farmers this summer, through seven public forums and a telephone town hall.

Farmers were eager for information on the CWB's future. Prior to May 2, the federal government had promised a plebiscite and public farmer consultations on the removal of the single desk. After May 2, it became clear the government would do neither.

"We have a duty to ensure that farmers are as fully informed as possible."

To give farmers a voice, the CWB announced its own plebiscite and then launched a series of public consultations to ensure farmers had the information to make an informed decision.

"The government intends to introduce legislation that will permanently remove the single-desk marketing structure for wheat and barley. As elected directors of the CWB, we have a duty to ensure that our stakeholders – the farmers of Western Canada – are as fully informed as possible, so we can all face the future with eyes wide open," CWB Chair Allen Oberg said in announcing the public meetings on July 27.

The telephone town hall, as well as public meetings in Regina, Saskatoon, Oak Bluff, Dauphin, Medicine Hat, Camrose and Falher, took place in August.

On Sept. 12, the plebiscite results were released by voting coordinator MNP. They showed 62 per cent of wheat farmers want to retain the single desk, as do 51 per cent of barley farmers.

For additional information on the plebiscite, or to call on your elected official to respect the plebiscite results, visit www.cwb.ca.

Farmers attend the first public meeting in Regina on Aug. 8 (below and right)



Hundreds crowd a meeting in Camrose on Aug. 16.



Deregulation, Australian style — Australian farmer Jock Munro says the open market is failing farmers Down Under



Jock Munro on his farm in New South Wales, Australia

The Australian Wheat Board (AWB) was deregulated over a 20-year period that culminated in complete deregulation on July 1, 2008.

Over that time, the AWB underwent a staged transformation from a grain pool to a diversified commercial company. Careful and thorough analysis of what the organization would need to survive in an open market resulted in a government transfer of more than \$600 million in capital and regulated access to storage, transportation and port services.

Since full deregulation, rapid industry consolidation has occurred. Agrium bought the AWB in August 2010, and quickly split the company into pieces. This year, Cargill's purchase of the AWB's commodity-business arm was given the green light by Australian regulators.

Jock Munro, who farms in the eastern Australian state of New South Wales, thinks deregulation has proven disastrous for farmers Down Under.

"Deregulation is a failure," Munro says. "Growers are now under unmanageable risk, we have lost our reputation

for quality, and the supply chain from farm through to port is dysfunctional."

Farmers are facing extreme price volatility and additional pricing risks under the new system, he says.

"We estimate we have lost \$4 billion as growers since the wheat industry was deregulated three years ago. Those losses are in the supply chain, there are currency losses because no one is hedging the currency, and we have lost premium markets overseas," says Munro, who runs a mixed sheep and grain operation on 5,300 acres. This year he seeded 1,400 acres to wheat, and another 840 acres to malting barley and milling oats.

"Companies are able to extract high returns out of growers because growers have no equity in the marketplace. Corporations have all the power now."

As Munro sees it, deregulation has set the Australian grain industry back decades. The resulting consolidation is simply making the biggest players even bigger.

"The loser is definitely the Australian wheat grower, and the winners are the huge companies that

control the logistics chain and are end users themselves. The industry is moving into the hands of big multinationals, which is where we were 60-70 years ago. What the Australian industry has done is gone back to where it was pre-single desk... Deregulation of our wheat industry is becoming a national embarrassment."

Munro rejected comments from Australia's trade minister, Dr. Craig Emerson, during a September visit to Saskatoon for the Cairns Group Ministerial Meeting. Emerson was quoted in an Agriculture and Agri-Food Canada press release as saying the Australian example was proving successful.



"He is an academic and his knowledge of the grains industry would be very scant indeed. I doubt whether he would have spoken to a grower since deregulation – if he ever has."

Western Canadian farmers should look at the Australian situation, he says, which offers a cautionary tale. Australian farmers have seen no advantages, he adds, despite the planning and slow pace of transformation – a pace far more reasoned than that in Western Canada, where deregulation is expected to be in place by Aug. 1, 2012. Munro advises concerned farmers to contact their elected representatives – and he advises the federal government to abandon its plans.

"I can't think of a worse thing the Canadian government could possibly do – they have a clear example in Australia of what happens when you do deregulate. Why would any government want to do that? Why would any Canadian grower want to support a situation that strips him of his marketing power and lowers his returns?"



New cheque statement – what you need to know

You will soon see a new statement with your CWB payments. This redesigned statement makes it easier to understand your payment(s) and any deductions and reimbursements (refunds).

Enhancements include:

- A cheque summary box provides a quick snapshot of your cheque net value.
- Detailed deduction and refund descriptions.
- The statement now matches your online e-Services business information.

CWB		Page 1 of 1													
423 Main Street, P.O. Box 816, Stn. Main, Winnipeg, Manitoba R3C 2P5 1-800-275-4292; Fax (204) 983-8031; www.cwb.ca		Cheque number 123456	Cheque date December 1, 2011												
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Total deductions	\$33.00														
Net value	\$4,871.00														
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2011-12 Adjustment - wheat															
	Tonnes	Rate	Amount												
2 CWRS 12.5	29.000	\$20.000	\$580.00												
2 CWRS 11.9	30.000	\$20.000	\$600.00												
Subtotal	59.000		\$1,180.00												
2010-11 Final - selected barley															
	Tonnes	Rate	Amount												
SEL CW 2 ROW	192.000	\$14.000	\$2,688.00												
Subtotal	192.000		\$2,688.00												
2010-11 Final - wheat															
	Pool return price	Tonnes	Rate												
2 CWRS 12.4	\$311.000	6.000	\$24.000												
3 CWRS 12.7	\$306.000	27.000	\$23.000												
Subtotal		33.000	\$765.00												
2011-12 FPC contract 435517															
	Contract price	Tonnes	Rate												
1 CPSW 14.5	\$245.00	5.000	\$23.000												
Subtotal	\$245.00	5.000	\$115.00												
		Total for 00-12345678	\$4,748.00												
Reimbursements for 12345678															
		Amount													
2010-11 initial over-payment		\$123.00													
2010-11 wheat and barley research - wheat		\$33.00													
	Total reimbursements		\$156.00												
Deductions for 12345678															
		Amount													
2010-11 wheat and barley research - wheat		\$33.00													
	Total deductions		\$33.00												

- The cheque summary box summarizes your statement. The top portion of the box lists all your new income by producer ID number and your total reimbursements (refunds).
- The bottom portion of the cheque summary box contains the gross value, or the total of all payments (income plus reimbursements) before deductions. Net value is the final cheque amount (the gross value minus the total deductions).
- All payments, deductions and any refunds are listed by your CWB 10-digit producer ID number and crop year. They follow a specific order: crop year, payment type, grade and protein. Statements can be several pages long depending on the number of contracts, payments, refunds, and producer ID prefixes listed. "Pool return price" is the final return for the given pool year. "Contract price" refers to the gross price.
- A bar code helps maintain quality assurance.
- Reimbursements (refunds) and deductions track such items as over-payments, cash ticket adjustments, Western Grains Research Foundation contributions and contract buy-outs.

Information-only statements such as a direct deposit, deferral or zero value statements will not have a cheque attached.
Detailed cheque statement information can be found on our Web site at www.cwb.ca/cheque or accessed in CWB e-Services at www.cwb.ca/eservices.

Destination: Italy



Pasta-mad Italy loves Canadian durum

Italians are proud to produce some of the best pasta in the world and they look to the Prairies to make sure the final product tastes great.

"Pasta made with Canadian durum has the right taste and strength, so that's why we want it," says Angelo Martinelli, president of the grain-trading and processing company Candeal Commercio. "For us, it is the best quality of grain, in terms of protein levels and colour."

That's high praise, especially when you consider that in Italy, pasta is taken so seriously that there are laws about it. Italy is the only country in the world with a law stating that dry pasta must be made from durum wheat flour or durum wheat semolina. It's all about maintaining Italy's reputation as *primo* in the pasta world.

Chris Gillen, the CWB's marketing and sales manager for the Middle East and Europe, says Italy is a crucial market for Canadian durum growers.

"True to Italian tradition, our Italian customers are looking for durum wheat that will give some strength to the pasta, so that the pasta has some texture in the mouth," Gillen says.

In 2010-11, the CWB exported more than 800 000 tonnes of durum wheat to Italy, making Prairie wheat the nation's biggest durum import.

Recently, the CWB and the Canadian International Grains Institute (CIGI) hosted an international durum program in Winnipeg. Participants came from Indonesia, Peru, Tunisia, and, of course, Italy. Michele (pronounced Mee-kay-lay) Zerbini came to Canada representing the internationally-recognized food company Barilla.

"Pasta Barilla must be always *al dente*, with high protein content, and must have the taste that people from all over the world have come to expect," says Zerbini, one of Barilla's durum buyers. "In order to guarantee this standard, we often look at Canadian durum as a reliable source of protein and high-quality gluten."

When Zerbini buys durum, he is looking for colour, protein, milling yield and gluten strength. Barilla blends Canadian and Italian durum semolina to get the desired results.

It's the same story at Molino Casillo. With five mills in Italy, Molino Casillo requires a steady flow of durum wheat to keep production flowing, says CIGI participant and Molino Casillo employee Viviana Ventura.

"We import grain from all over the world, including Canada, Mexico and Greece. Thirty to 40 per cent of the durum we mill is from Canada," Ventura says.

For Martinelli, it all comes back to the taste of the food on the plate.

"Canadian wheat, as long as the protein is there, vaults to the top because it has the best taste," he says.

Martinelli is so convinced of Canadian product superiority that his mill produces special semolina made from 100 per cent Canadian wheat. Also coming into play is the fact that he likes doing business with the CWB.

"We consider the CWB a very serious company, where things are done correctly," Martinelli says. "In 10 years, we have had no difficulties with the CWB."

Italy at a glance

Location: Southern Europe, a peninsula extending into the central Mediterranean Sea

Climate: predominantly Mediterranean, with Alpine climate in the north and a hot, dry climate in the south

Population: 61 million

Capital city: Rome, population 2.8 million

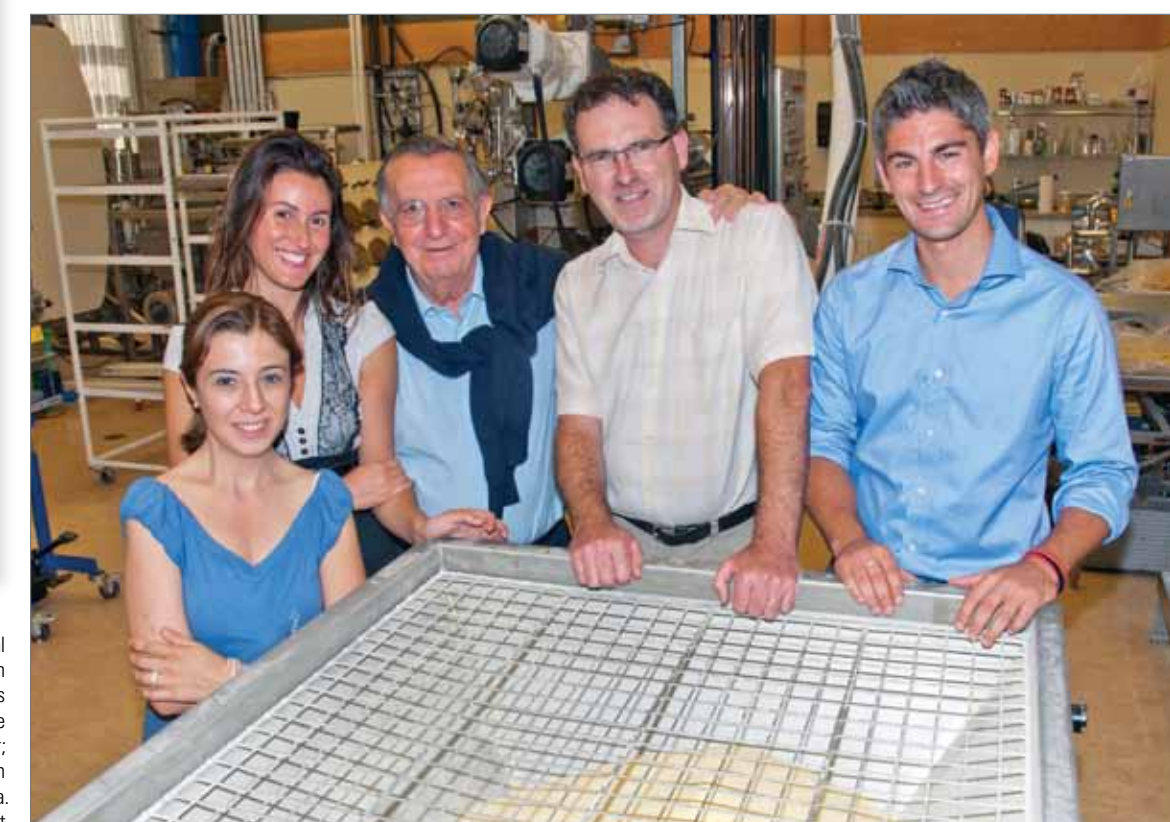
Coastline: 7,600 km

Agricultural products: fruits, vegetables, grapes, potatoes, sugar beets, soybeans, grain, olives, beef, dairy products, fish

Exports: food, engineering products, textiles and clothing, production machinery, motor vehicles, transport equipment, minerals



Canals of Venice photo: Rhea Yates



Viva Italia! Italian participants in the 13th International Durum Program, pictured in front of a bin of western Canadian durum semolina at the Canadian International Grain Institute's pasta-making facility in Winnipeg. Shown left to right are Viviana Ventura of Molino Casillo; Linda Kurshumi, interpreter; Angelo Martinelli of Candeal Commercio; Chris Gillen of the CWB and; Michele Zerbini of Barilla. Photo: Lee Huscroft

Questions farmers are asking

How do I apply for a cash advance for a 2012-13 crop?

Agriculture and Agri-Food Canada has announced that the 2012-13 Advance Payments Program for wheat and barley will be administered by the Canadian Canola Growers Association (CCGA). All 2012-13 cash advances for wheat and barley, including the pre-harvest winter wheat program now underway, will be administered by the CCGA. Visit the CCGA Web site at www.ccg.ca for information on how to apply for a 2012-13 advance.

Why is the 2012-13 Basis Price Contract (BPC) not being offered?

The CWB cannot offer Producer Payment Options (PPOs) for the 2012-13 crop year at this time, due to uncertainty over the fate of the CWB after Aug. 1, 2012.

We currently don't know what sort of company will operate in 2012-13, who will own the company, how such a company would finance its operations, how it would finance hedging of futures contracts, how it would accept deliveries, how it would move grain onto ships for export, or what sorts of programs and services would be in its mandate.

The CWB has previously announced that the 2012-13 Churchill Storage Program and the 2012-13 Wheat Storage Program will not be offered due to operational uncertainty after Aug. 1, 2012.

Sign-up for the futures portion of the 2012-13 BPC would have begun Sept. 1, 2011. No changes are planned to PPOs for the 2011-12 crop year.

What is the CWB's role in producer cars?

The CWB currently maintains the primary role in facilitating producer cars. Most importantly, the CWB sells the grain that arrives on producer cars – the grain cannot move without a sale. Producer car deliveries are generally blended to match the grade pattern and quality specs of existing sales.

The CWB also secures the supply of rail cars from CN and CP, and secures authorization for delivery from the port terminals. It maintains competitive access to ports by ensuring producer cars pay the same rate as other grain shipments.

The Canadian Grain Commission collects producer car applications and authorizes the timing of car movement, based on guidance from the CWB.

The 2010-11 crop year saw the second-highest use of producer cars in history. Farmers loaded 12,784 producer cars, just below the record of 12,934 set two years ago. Producer-car use has increased dramatically over the past 15 years as farmers invest in their own grain-loading facilities and shortline railroads, and as awareness

increases of the cost-savings. Producer car users save \$600 to \$1,600 per car in handling charges. Last year, about 97 per cent of producer cars carried wheat, durum or barley.

How do I defer my payments to 2012?

When you don't need a portion of your income in the current tax year, you can quickly defer CWB payments online or over the phone. It's important to defer early, well in advance of the payment. This is the safest way to ensure you receive your payments in your preferred tax year.

To defer a payment,

- Access e-Services to defer cheques online.
- Call 1-800-275-4292 with your PIN and ID number. A Farm Business Team member can assist you in deferring one or more cheques.

Deferral is available for farmers using direct deposit and those who receive cheques.

Your deferred cheque will be sent near your deferral date. To receive a post-dated cheque in advance of your deferral date, call 1-800-275-4292. If you change your mind about a deferral, simply call us to issue your payment.

Canadian Wheat Makes it Good

The CWB and co-branding partners are promoting both wheat and durum to Canadian consumers this fall.

Robin Hood and the CWB continue their partnership with the national *Bake Some Memories* campaign. A total of

2.5 million copies of the *Bake Some Memories* recipe booklet will be distributed to Canadian households through magazines and in-store promotions. You can find your own copy in this issue of Grain Matters.

Among the great baking recipes is a CWB-sponsored recipe for Light & Fluffy Rolls. The booklet also contains a coupon redeemable for the CWB's children's picture and puzzle book, *Agitivity*.

The CWB has been working with a number of branding partners both in Canada and around the world to establish western Canadian wheat as the world-wide "gold standard" in terms of quality. In the same way that consumers associate fine automobiles with Germany, watches with Switzerland

and wines with France, the CWB is encouraging consumers to associate premium wheat with Western Canada.

The CWB has also teamed up once again with The Old Spaghetti Factory family restaurants to celebrate World Pasta Day and recognize Prairie "spaghetti farmers", who grow the durum wheat for the world's best pasta.

This year, Canadian kids were invited to enter a World Pasta Day colouring contest at each of the 13 Old Spaghetti Factory locations across Canada. The contest ran this fall and ended on World Pasta Day, Oct. 25.

More information on both of these initiatives is online at our consumer Web site, www.prairiewheat.ca.



prairiewheat.ca

Grain Matters is a bi-monthly publication distributed free-of-charge to Prairie farmers. (Current and past issues are also available online at www.cwb.ca)
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Contact the CWB – Phone: 1-800-275-4292
e-mail: farmerservice@cwb.ca