

The FENCE POST

Fall/Winter 2024 Issue No. 9



MANITOBA
CROP
ALLIANCE

YOU ARE NOT ALONE

*Finding strength
through the Manitoba
Farmer Wellness
Program*



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The FENCE POST

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ARE YOU INTERESTED IN SUBMITTING A RESOLUTION FOR OUR 2025 AGM?

Manitoba Crop Alliance members can submit resolutions to be considered at our annual general meeting (AGM). Resolutions to be presented at our AGM held on Feb. 13, 2025 must be received by **Jan. 6, 2025**.

Resolution guidelines, template and additional information on how to submit a resolution can be found on our website at mbcropalliance.ca/about-manitoba-crop-alliance/governance/resolution-procedures.



Advocating for you

Farmers face an increasingly complex landscape where effective advocacy is essential. At Manitoba Crop Alliance (MCA), we recognize the critical role that lobbying organizations play in advocating for our interests as farmers. We support organizations such as the Grain Growers of Canada (GGC), Cereals Canada and Keystone Agricultural Producers (KAP), which represent us at both provincial and national levels. Each group brings its unique strengths to the table, ensuring our voices are heard without duplicating efforts.

Our approach is simple: we focus on our core responsibilities while trusting these organizations to handle advocacy. This division of labour allows us to work efficiently, with occasional collaboration when our paths intersect. But what exactly do these organizations do on our behalf?

GGC is a farmer-driven association that serves as the national voice for Canadian grain farmers. They advocate on issues that impact our industry, such as market competitiveness and producer profitability, and aim to educate others on the challenges grain farmers face in today's marketplace.

Cereals Canada has made substantial contributions to our industry, yet many farmers remain unaware of their efforts. From navigating gluten strength issues to supporting market access, Cereals Canada has been instrumental in maintaining the reputable high standard of Canadian wheat. Their work with millers, bakers and international customers ensures our products remain competitive on the global stage.

The value Cereals Canada adds extends beyond technical trade missions and market access. Their technical expertise and collaboration with organizations

such as Pulse Canada, for example, have opened new opportunities for blended protein products, further expanding our market reach. By showcasing the advantages of premium Canadian wheat – even to buyers who typically opt for lower-cost alternatives – they promote and help to move our product, while maintaining its reputation for quality.

Programs such as "Combine to Customer" offer farmers a firsthand look at the intricate work done by Cereals Canada, from wheat breeding and grain grading, to updates on market access and advocacy issues within the cereals value chain. This program is invaluable in fostering understanding and engagement of the work done on your behalf by Cereals Canada. Watch for the next program coming this winter.

KAP is our province's farm policy organization. They work with governments, industry and stakeholders on issues that affect all farmers in Manitoba. Their role is like GGC's, but on a provincial level.

Our industry benefits greatly from the support and expertise of these three organizations. They provide the advocacy, market development and technical knowledge that we, as farmers, depend on to market our crops effectively. By staying connected and informed about their work, we can better appreciate the value they bring to our operations and continue to support their efforts in advancing Canadian agriculture.

Robert Misko
Chair
Manitoba Crop Alliance



Investing in infrastructure

My husband and I farm alongside our two sons. We've made investments in our farm since we purchased it from my husband's parents. Recently, my boys have expressed interest in exploring infrastructure investments and improvements, including a farm shop and an expansion of our calving barn.

Return on infrastructure investments can be difficult to quantify, whether the project in question is a farm shop or something much larger. On the other hand, how can we quantify the cost of not investing and the opportunities missed as a result?

Recently, we commissioned a study evaluating the existing crop research capacity in Manitoba. The study identified four main challenges facing research capacity, including infrastructure.

Our report indicated infrastructure has created challenges for numerous private and public researchers in Manitoba. Existing infrastructure is aging and not keeping pace with current



demand or technological advancements. The problem is exacerbated by current government funding programs, which often don't allow expenditures related to ongoing maintenance costs or "bricks and mortar" projects. As a result, inadequate infrastructure is holding us back.

Manitoba Crop Alliance (MCA) has invested in infrastructure projects, including the building where we are headquartered in Carman, MB. This was led by one of our founding organizations and their farmer-led board of directors. A vision emerged for a hub of agricultural organizations that would include the University of Manitoba's Ian N. Morrison Research Station, Manitoba Agriculture and several private companies. At the time, this vision was not

supported by some farmers. But with a business plan and fellow commodity group tenants who committed to renting space, our current home at 38 Fourth Ave. N.E. in Carman became a reality.

With a research-focused lens, MCA has also helped fund larger infrastructure projects. We committed \$100,000 to the Collaboration Zone within Assiniboine College's Prairie Innovation Centre for Sustainable Agriculture and contributed \$500,000 to the University of Manitoba for the construction of its new Prairie Crops and Soils Research Facility.

What do all these projects have in common? They produce an environment where education and agricultural programming can thrive, strengthening teaching and research programs. They support the training of highly qualified personnel and our future workforce. They leverage partnerships among stakeholders from across the industry.

These investments reflect a desire among farmers to improve, expand and modernize facilities that

could hold the key to solving the biggest challenges they face. They also solidify our commitment to investing in Manitoba-based organizations.

Agriculture is a major economic driver in Manitoba and across Canada. We need investments in the agricultural sector to ensure Manitoba and Canadian farmers remain competitive on the world stage. But how do we make sure the infrastructure that supports the industry's economic impact and global competitiveness is there when we need it?

As farmers, we must look to the future and show leadership within our industry. We can no longer ignore the infrastructure elephant in the room. Let's not leave the discussion of bricks and mortar off the table — our success as an industry depends on it. 🌱

A handwritten signature in black ink that reads "Pam de Roquigny".

Pam de Roquigny
CEO
Manitoba Crop Alliance



Congratulations to our inaugural high school bursary recipients

Manitoba Crop Alliance (MCA) is proud to support agriculture's next generation. MCA's bursary program is designed to assist with the financial needs of students pursuing education in a field that will benefit the agriculture sector.

Six graduating high school students from Manitoba have been awarded with bursaries valued at \$1,000 each. Our inaugural high school bursary recipients are:



Alara Krahn
Mather, MB



Laura Delichte
St. Alphonse, MB



Riley Jorgensen
Cromer, MB



Madisyn Robertson
Neepawa, MB



Zenith Vanstone
Miami, MB



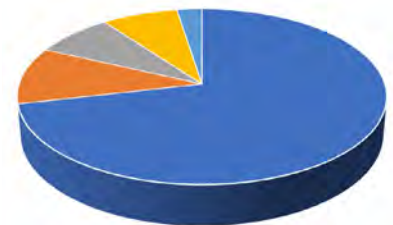
Evan Whetter
Alexander, MB

Thank you to the selection committee for evaluating the bursary applications and congratulations to the recipients!

2024-25 fiscal year budget

Annually, the Manitoba Crop Alliance (MCA) board of directors meets in June to review and approve the budget for the upcoming fiscal year. The process leading up to the board meeting involves several internal committee meetings to review and recommend budgets for each key priority area. The MCA board meeting was held on June 19, 2024, and the board approved the 2024-25 fiscal year budget.

This year, the board of directors are projecting revenues at \$11,804,329 and total expenses of \$11,426,141. A positive net balance of \$378,188 is projected. To meet fiduciary responsibility, the board will review the approved budget in December 2024 to ensure levy projections are appropriate and adjust as necessary.



- ▶ Research & Production
- ▶ General Administration
- ▶ Market Development & Access
- ▶ Communications
- ▶ Advance Payments Program (APP)



Nominations and elections

Nominations from farmer members to serve as delegates on Manitoba Crop Alliance's four crop committees started on July 1 and closed Oct. 1, 2024. For more information on the current status of the nomination and election process, visit mbcropalliance.ca/about-manitoba-crop-alliance/governance/nominations-and-elections.

Post-secondary bursary applications now open for 2024–25 school year

Manitoba Crop Alliance (MCA) offers six \$2,000 bursaries each year to assist with the financial needs of students who are enrolled in a post-secondary agricultural program within Canada.

Applicants must submit an application letter and unofficial transcript. The application letter should be maximum of one page and should include the following information: (i) their connection to or interest in agriculture, (ii) why they decided to enroll in an agriculture-related post-secondary program, and (iii) how they hope to contribute to the agriculture industry once they have graduated and are in the workforce. The application should also indicate the name of the farm in good standing with MCA the applicant is from.

The successful applicants will be featured on MCA's social media channels and in MCA publications, including The Fence Post and Heads Up.

Applications can be emailed to Madison Kostal madison@mbcropalliance.ca with the subject line "MCA Bursary Application 2024–25" on or before **Jan. 9, 2025, at 4:30 p.m. CST**. Successful applicants will be notified by **Feb. 7, 2025**.

This is an independent scholarship with a selection committee contracted outside of MCA.

To qualify for a bursary, students must:

1. Have completed a minimum of one year (two terms) of post-secondary education at the college or university level (diploma or degree) and are enrolled full-time for the 2024–25 school year in an agricultural program within Canada.
2. Have achieved a minimum cumulative grade point average (GPA) of 3.0.
3. Have an interest in wheat (spring or winter), corn, barley, flax or sunflower crops, or agriculture in general, as demonstrated in a brief, one-page letter.
4. Be from a farm that is a member in good standing with MCA (you can inquire about this at hello@mbcropalliance.ca).
5. Have not previously been awarded an MCA post-secondary bursary (past high school bursary recipients remain eligible for a post-secondary bursary).



A graphic for the Bursary Program. It features the Manitoba Crop Alliance logo in the top left. The main text reads "BURSARY PROGRAM" in large, bold, blue letters, followed by "SUPPORTING AGRICULTURE'S NEXT GENERATION." in smaller blue text. Below this, it says "For more information, email madison@mbcropalliance.ca". The background is a mix of green and blue geometric patterns. On the right side, there is a photograph of a small green seedling with two leaves growing out of a dark, textured pot, which is placed on a stack of gold coins.

Manitoba Crop Alliance

EVENTS

Visit mbcropalliance.ca to view our winter 2025 events. While you're there, sign up for our **Heads Up** e-newsletter to be the first to know about upcoming MCA events.





Five questions

with Ashley Ammeter

Whole Farm Specialist

1. Why did you choose to work in Manitoba's agriculture industry?



I grew up on a farm and **always loved science** – plants in particular. When I was planning on going into university, many people in my life suggested I consider going into agriculture. I must admit I was skeptical, but I took two intro agriculture courses at the University of Manitoba "just to see." They got me hooked! I love that agriculture combines so many interesting disciplines and that diversity all converges to be applied on the farm.

2. What do you love most about Manitoba ag?

The **passion of the people** working in ag is incredible. The industry faces many challenges, but everyone involved faces those challenges with resilience, creativity and the willingness to work hard to adapt and overcome them. It's amazing!

3. What do you think are the greatest challenges and opportunities the industry faces?

The industry is facing increasing pressure from many directions, while also needing to manage emerging threats, such as the spread of waterhemp and the increasing challenge of **herbicide-resistant weeds**. These issues are challenging, but they also open the door for new technologies. Creative farmers and researchers are seizing the opportunity to explore innovative solutions.

4. What is your favourite place in the world and why?

There's no place like home of course, but I also love **the Whiteshell**. I have so many memories of time spent there with my family.

5. What's a fun fact about yourself that people might not know or that might surprise them?

I did ballet all throughout my childhood and even continued for a while in university. **I still love ballet** and have season tickets with the Royal Winnipeg Ballet! 🎭





Farmers face unique challenges every day that can take a toll on their mental health, and these unique challenges require unique supports. Image courtesy 88 North Photography.



Like objects in your rearview mirror, mental health struggles are often closer than they appear

Keeping an eye on wellness

By Alison Inglis

Public Relations Specialist, Freelance

In the heart of rural Manitoba, where the fields stretch as far as the eye can see, Ralph – a third-generation farmer – sits alone in his barn, the weight of a year's drought heavy on his shoulders. The financial strain, endless hours worked and isolation have taken a toll, but he is not alone in this battle. Thanks to the Manitoba Farmer Wellness Program's (MFWP) free counselling service, Ralph found the support he never knew he needed.

Continued on next page

COVER STORY

Can you relate? Maybe you are working harder than ever before but are falling behind financially. Perhaps recent government policies, rising interest rates or disease threats weigh on your mind after a spring that was too wet and a growing season that was too dry.

These are challenges farmers face daily — challenges beyond our control. It can be frustrating, disheartening and maddening at times. Yet we push on, often unaware of how stress quietly strains our relationships and diminishes our well-being.

The pressures Ralph feels echo across the province and country. In fact, a University of Guelph study found that 76 per cent of farmers face moderate to high stress, with many battling thoughts of suicide. Suicidal ideation was twice as high in farmers compared to the public.

Kim Moffat, a certified crisis counsellor with more than 30 years of counselling experience, says when you don't take

“Talking about it helps. It is OK not to be OK, and it is OK to reach out. You are not alone.”

GERRY FRIESEN
“Recovering Farmer”

time to look after your own mental health and wellness, you are placing yourself at greater risk for burnout, relationship difficulties and accidents.

Moffat says she sees this play out far too often. “Taking good care of yourself will increase your effectiveness in making decisions, maintaining focus and control, and you will generally feel more positive about your life as a result.”

Gerry Friesen, also known as the

“Recovering Farmer,” found the stressors of farming overwhelming back in the 2000s when he was in the hog business. Ultimately, he was diagnosed with anxiety and depression and his recovery journey began, leading him to become a champion for mental health supports in agriculture.

“My passion for mental wellness in agriculture comes from my own experiences when I was farming,” he says. “The stressors I faced created a lot of issues, and there was a lack of help when I needed it.”

Friesen saw a professional more than once, but they knew nothing about agriculture and didn't understand the unique pressures of farming. “After what they told me, I walked out feeling like my time there was useless,” he says.

A University of Guelph study found that 76 per cent of farmers face moderate to high stress — stress that can strain relationships and diminish well-being. Images courtesy 88 North Photography.



He began talking about his mental health journey publicly in 2010. "At this time, there was a huge stigma involved, and yet every time I opened up to a new group of people about my life, people would come to me and share about their journey," he says. "I realized that farmers everywhere are going through similar situations. I was not alone."

These experiences led to his involvement in the Manitoba Farm, Rural and Northern Support Services, where he met Moffat, who had been working there for nearly 20 years.

"Over the course of working there, I would often get requests to meet with clients in person," Moffat says. "Unfortunately, the program couldn't accommodate this, so our connection with farmers were primarily over the phone and during community workshops."

When the decision was made in 2020 to relocate this service into Winnipeg, Moffat wanted to create something grassroots, farmer-informed and easy to access.

"Living rurally, we are accustomed to not having all the amenities that urban dwellers do, but I've always felt strongly that everyone should have access to timely, high-quality mental health support regardless of where you live," she says. "I grew up on a small farm and have experienced the kind of farm stress that challenged my ability to cope and my relationships with others."

Moffat and Friesen started working on a structure for a program, formed an advocacy committee and board of directors, and launched the MFWP in January 2022.

The initial service included six free, confidential counselling sessions for Manitoba farmers and their immediate family, administered by counsellors whose backgrounds were in agriculture. But before they could start taking appointments that March, they needed



The Manitoba Farmer Wellness Program was launched in 2022 in an effort to provide grassroots, accessible mental health support to farmers.

to hire more counsellors and secure funding through sponsors.

"Farmers were among the first to contribute financially, followed by a few commodity groups and industry associations," says Roberta Galbraith, vice-chair of MFWP. "Once we secured those initial sponsors, it was an easy fit for other organizations to get involved. The support from the industry has been, and continues to be, fantastic."

In March 2023, after overwhelming industry support, MFWP celebrated its first anniversary and announced the program's path forward. By January 2024, the program had expanded to offer counselling services to include farm employees. That same month, the governments of Canada and Manitoba announced an investment of \$450,000 over three years toward MFWP through the Sustainable Canadian Agricultural Partnership.

The program's steady growth and support reflects the need for this service in Manitoba.

"Since the launch, the stigma around

mental health is reducing," Friesen says. "People are more willing to talk about their mental health, and there is more uptake on the program, but we still have work to do."

In 2023, the number of farmers accessing MFWP counselling sessions doubled compared with 2022, and in the first three months of 2024, the program had already equaled the total number of sessions accessed in 2023.

"Manitoba Crop Alliance's (MCA) board and staff understand the challenges of farming and I would like to think that the MFWP resonates with them," Galbraith says. "We are incredibly thankful for organizations like MCA who have been huge supporters of the program right from the beginning."

Moffat hears a lot of positive comments from those who access the service. "Many appreciate the flexible hours for booking appointments," she says. "I do my best to accommodate early mornings, evenings and weekends when farmers might have room to slow down."

She also hears a lot of gratitude directed towards the program and the industry for providing these sessions at no cost. "The financial burden of therapy can often deter getting help. This program eliminates that barrier to access, which is essential."

MCA recognizes the importance of having free, convenient access to mental health support, which is why, for the third straight year, MCA is a Resilient Minds sponsor (\$10,000-plus) of the MFWP.

Continued on page 12

Cont. from previous page

"The counsellors involved in the MFWP are personally connected to agriculture in some way, and they understand the unique challenges people like us in agriculture face, so you can get right down to the details of your situation," says MCA director Sally Parsonage, who farms at Baldur.

"They are very responsive and have time set aside for those contacting them through the MFWP. They can meet with you virtually or in person and can help you decide the best way forward."

Farming, by nature, can be very stressful and anxiety-inducing, but farmers are notoriously independent and often reluctant to seek help. MCA hopes free access to the MFWP will encourage farmers, farm families and employees to reach out when they need support.

A recent testimonial illustrates the impact that the program has had for many in the farming community:

"The MFWP is a wonderful program. I've used this service for some time, and it has saved my family, providing care and support for me as a farmer's wife. The program offers emotional support with farming finances, difficulties with relationships through the farming seasons and a variety of other factors. The organization has benefited me greatly, and the program has al-

"The counsellors involved in the MFWP are personally connected to agriculture . . . and they understand the unique challenges. . ."

SALLY PARSONAGE
MCA Director

lowed me to access services that were needed in the moment and continue to assist me as needed. As a farming family, this program allowed me to receive the help I needed when I could not afford it elsewhere and when services elsewhere were full and would not understand the situations involved in a 'farm life.' It is an amazing organization!" — Anonymous.

Another client told Moffat he was only going to see her because his wife threatened to leave if he did not make some changes. "Following our first meeting, I felt certain he would not be booking a second," she says. "The

next day, he called to say that 'nobody ever listened to me like that, and I guess there is something to this counselling business!' He has continued to use the service and is enjoying better communication with his wife as a result."

Asking for help can be difficult. Rest assured, your story and identity will remain confidential. Only your chosen counsellor will know of your participation in the MFWP.

Nine free counselling sessions are available to farmers, immediate family members and farm employees per year through the MFWP. The counsellors understand the many challenges that come with farming and want to help you on your mental health journey.

"Talking about it helps," Friesen says. "It is OK not to be OK, and it is OK to reach out. You are not alone." 🌱

To learn more or access counselling, visit manitobafarmerwellness.ca.





Introducing our 2024–27 Strategic Plan

We are proud to present the 2024-27 Strategic Plan for Manitoba Crop Alliance (MCA). The new strategic plan was developed by our board of directors – with considerable input from crop committee delegates and MCA staff – and includes

three Big Goals we want to achieve within the plan's three-year duration. Each Big Goal also has three corresponding Step Goals, annual benchmarks that reflect our short-term direction and priorities. For more information, visit mbcropalliance.ca.

BIG GOAL #1

Innovate our communications program to increase awareness and engagement with our farmer members.

Step Goal #1

Equip MCA staff to better understand the most effective ways to engage with our farmer members.

Step Goal #2

Conduct audience research and generate ideas for engagement and awareness that can be implemented through our communications frameworks.

Step Goal #3

Identify strategic communications initiatives informed by training and research that directly address the needs of our farmers members.

BIG GOAL #2

Discover and fund ground-breaking research.

Step Goal #4

Identify key priorities for investment to build Manitoba research capacity.

Step Goal #5

Secure north/south partnerships to develop mutually beneficial research collaborations and investment opportunities.

Step Goal #6

Expand the Research on the Farm program.

BIG GOAL #3

Explore areas for bold investment that unlocks hidden potential and fuels historic progress.

Step Goal #7

Conduct a study to identify value-added opportunities in Manitoba that would open new markets for MCA commodities.

Step Goal #8

Increase support to consumer outreach initiatives that educate and inspire the next generation.

Step Goal #9

Conduct a "hopes and dreams" assessment with our partners in research and market development to highlight future opportunities for investment.

Note: Big Goals apply to the full length of the strategic plan. Step Goals are annual benchmarks that apply to year one of the plan only.

Protecting family farms from the capital gains tax increase

By Kyle Larkin

Executive Director, Grain Growers of Canada

What was intended as a measure to tax the wealthiest Canadians has instead directly targeted family farms across the country. The recent increase in the capital gains inclusion rate from one-half to two-thirds is now threatening the very survival of family-owned grain farms, introducing severe financial challenges just when they are needed the least. This tax hike risks destabilizing the future of agriculture in Canada by making it harder for young farmers to step into their parents' shoes.

In response to this looming threat, we launched the Protect Family Farms campaign, rallying support and awareness through a dedicated website, protectfamilyfarms.ca, where farmers can write a letter to their MPs about this issue. Our research shows this tax increase could result in a 30 per cent increase in taxes during succession planning — a burden that could be crippling for many farmers. Despite the government's promise of "Fairness for Every Generation" in Budget 2024, the reality for the next generation of farmers is anything but fair.

The new capital gains inclusion rate exacerbates the already steep financial challenges faced by young farmers, who are grappling with sky-high land prices. In Alberta, where the average cost per acre is \$6,900, and in Ontario, where it reaches \$19,275, the dream of taking over a family farm is becoming increasingly unattainable. With national farmland values appreciating by 11.5 per cent last year alone, this tax hike moves the goalposts even further out of reach.

Recognizing the severe implications of this tax increase, we have been at the forefront of advocating for its reversal. We've engaged directly with



Grain Growers of Canada policy and government relations manager Kinga Nolan (far left) and executive director Kyle Larkin (far right) with Winnipeg North MP Kevin Lamoureux (centre left) and Manitoba Crop Alliance director Doug Martin. Image courtesy MCA.



Deputy Prime Minister and Minister of Finance Chrystia Freeland and her office, stressing the long-term damage this policy could inflict on Canada's agricultural sector. We've also worked with the opposition, supporting MPs as they call out this tax increase on family farms.

This summer, we held our first-ever Summer Tour, where we drove from Winnipeg to Calgary, stopping at several grain farms in between to host local MPs and raise awareness on the tax increase. During the week-long tour, we held seven farm tours with eight MPs. These tours were pivotal in raising awareness among MPs of the impacts and showing them firsthand this year's crop conditions.

Our campaign has activated hundreds of grain farmers across Canada. At Ag in Motion, we distributed postcards to farmers, urging them to continue writing letters to their MPs through protectfamilyfarms.ca. We've also been directing farmers, policy-makers and the media to our website through our social media engagement. Our campaign has captured media attention, leading to interviews on several news programs, including Power and Politics, where we've been vocal about the broader implications of this tax policy.

Family farms are the backbone of Canada's economy and food security. They deserve a government that supports, not hinders, their efforts to sustain the agricultural tradition that feeds our country. By addressing these challenges together, we can ensure a viable future for Canadian agriculture, where family farms continue to thrive and feed our nation — and the world — for generations to come. 🌱

Unlocking potential

Expanding capacity for crop research in Manitoba

By Alison Inglis

Public Relations Specialist, Freelance

Manitoba is unique in its crop diversity and ecosystems, with many farmers growing a wider array of crops compared with their counterparts across the Prairies. Crop diversity is a great value to our province, Manitoba Crop Alliance (MCA) hopes to foster and sustain it for years to come.

While Manitoba's crop diversity is a strength, it also presents challenges for research — particularly, when special crops are involved. By working closely with research centres and researchers in Manitoba, MCA became aware capacity was an issue.

To address this issue, MCA initiated a capacity assessment inviting research centres and researchers to submit proposals for equipment that would help them conduct more targeted research on special crops. MCA knew equipment could be holding back many researchers, as there are limited resources to access funding for these types of purchases.

MCA then enlisted Backswath Management to conduct a study evaluating existing crop research capacity for its crop types. Through surveys and interviews with researchers, preliminary

MCA and Manitoba Pulse and Soybean Growers' total investment towards the Manitoba Diversification Centres to increase research capacity in 2024:

\$448,795

insights regarding research capacity within public and private institutions across the province were compiled in a report.

The results focused on challenges and limitations of maintaining and expanding research capacity to meet industry needs. Report findings highlighted four main challenges: equipment, infrastructure and land, funding programs, and human resources. For more details on the report findings, read the blog titled "MCA-commissioned study highlights research capacity challenges in Manitoba" at mbcropalliance.ca.

Upon completion of the capacity assessment and report, MCA selected several proposals from the Manitoba Diversification Centres, making significant investments to increase their research capacity.

"These investments are important for our research community," says MCA director Gregg Fotheringham, who farms at Reston. "Our research partners do applied research that benefits our members. It's imperative to make sure they have the appropriate equipment and resources to continue this work."

Manitoba Diversification Centres are non-profit, applied research organizations directed by local farmers and industry. There are four centres in the province: Carberry, Roblin, Arborg and Melita, covering a variety of agro-climate conditions and soil types to highlight the response of crops to different growing conditions.

The goal of the centres is to conduct applied research and demonstrations on crops, technology and best management practices. These centres offer a valuable resource for Manitoba farmers, providing a platform for applied, local research.

MCA is currently conducting trials on flax seed treatment, sunflower row spacing and plant population, and winter wheat with the diversification centres. We also collaborate annually on the Manitoba Corn Hybrid Performance Trials and Sunflower Variety Performance Trials.

MANITOBA CROP DIVERSIFICATION CENTRE (MCDC)

This specialized equipment will enable MCDC to efficiently harvest corn in research trials, ensuring precise data collection and minimizing harvest losses.

"The purchase of this small plot combine will greatly enhance our research capacity by allowing us to conduct more accurate and efficient harvesting of corn trials," says Haider Abbas, applied research specialist with Manitoba Agriculture.

"It will enable us to handle a larger number of plots, reduce the risk of cross-contamination between samples and ensure the integrity of the data collected. This advancement is crucial for the development of new corn varieties and the optimization of agronomic practices, ultimately leading to better recommendations for corn producers in Manitoba and across Canada."



MCA's investment will help MCDC purchase a small-plot combine. Image courtesy MCDC.

PARKLAND CROP DIVERSIFICATION FOUNDATION (PCDF)

"We currently use a five-row, double-disk seeder with one belt cone. As interest in intercropping grows among farmers, a seeder with an even number of rows is important for these trials," says James Frey, applied research specialist with Manitoba Agriculture.

"And with a second cone we will have more flexibility and capacity for treatments."

"Partnerships with MCA and other agriculture organizations across the province not only facilitate the acquisition of essential research tools, but they also ensure our research remains aligned with what farmers envision on their farm now and into the future."



MCA's investment will help PCDF purchase a Fabro Six-Row Seeder and a tractor. Image courtesy PCDF.

PRAIRIES EAST SUSTAINABLE AGRICULTURE INITIATIVE INC. (PESAI)

PESAI's worksite includes nearly 40 acres of land, but they manage an additional 15-20 acres and are in discussions to expand their land base in the future. New research plot equipment will allow PESAI to work between their Arborg and Beausejour sites more efficiently, ensuring they can expand their small-plot research program.

"This investment is essential for our research efforts now and as we plan future research," says Nirmal Hari, applied research specialist with Manitoba Agriculture.



MCA's investment will help PESAI purchase research plot equipment. Image courtesy PESAI.

WESTMAN AGRICULTURAL DIVERSIFICATION ORGANIZATION (WADO)

Scott Chalmers, applied research specialist with Manitoba Agriculture, says this investment will help improve current gaps at WADO. "The hydraulic soil auger will significantly improve our ability to get out and soil test," he says, adding that if soil sampling can occur earlier, this allows for earlier soil fertility recommendations. "It doubles our capacity for tasks like spraying, seeding, rotovating and mowing."

MCA's investment towards greenhouse gas (GHG) sampling tools will increase the capacity of WADO to evaluate GHG emissions in experiments. Prior to this investment, WADO has relied on borrowed equipment from Agriculture and Agri-Food Canada.



MCA's investment will help WADO purchase GHG sampling equipment, a John Deere tractor, a Multi-Bang Propane Cannon, a crossover-type vehicle and a hydraulic soil auger. Image courtesy WADO.

The research specialists at all four diversification centres expressed their excitement and enthusiasm about the potential of these investments to deliver impactful research results to farmers across Manitoba.

"The investments are very important," says MCA director Nick Matheson, who farms at Stonewall.

"The research findings and results from the diversification centres should directly benefit all Manitoba farmers. By investing in Manitoba we, in turn, can show our farmer members that we are properly spending levy dollars to their benefit."

MCA recognizes the importance of fostering strong relationships between

industry and research. Pursuing direct engagement with the Manitoba research community, MCA aims to improve communication, provide context to Manitoba farmers' research priorities and identify opportunities to collaborate with new and existing members of the Manitoba research community. 🌱

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Taking control

How the Sm1 gene made Midge Tolerant Wheat possible

By **Lori-Ann Kaminski**

Research Program Manager — Cereal Crops, MCA

S*itodiplosis mosellana* (SM), otherwise known as wheat midge, is a sneaky pest.

Adults are tiny, orange flies that don't live long. They fly at dawn and dusk, and females lay eggs on the wheat head, glumes and stem, as the plant starts to head. The larvae hatch from the eggs and move inside the glumes to start feeding on the developing wheat kernels. They keep feeding until the wheat is nearly ripe. A rainfall or a heavy dew causes the larvae to drop to the soil and form a cocoon about three to five inches below the soil surface. In spring, rainfall events signal midge to get ready for emergence. Typically, adult emergence coincides with heading of wheat in early July.

During drought and flooding events, midge cocoons can stay in their resting stage underground and wait multiple years before emerging. This way, they can synchronize with heading wheat fields and pick the ideal year to attack.

Wheat midge is a significant pest of wheat on the Canadian Prairies. They have the potential to cause crop

damage of more than \$445 million per year across the country. During the 1990s, estimated losses due to wheat midge damage exceeded \$240 million.

A significant biological control insect (*Macroglanes penetrans*) plays a major part in the Canadian wheat midge story. A parasitoid, this tiny wasp lives within the wheat midge larvae and overwinters in them. In the spring, the parasitoid larva develops to emerge instead of a wheat midge and seeks out new wheat midge eggs to parasitize. Annually, this species now controls an average of more than 30 per cent of the wheat midge across Saskatchewan. A study in the 1990s showed that the dollar value of the parasitoid to the agriculture industry over the full decade exceeded \$248.3 million (equivalent to \$422.5 million today).

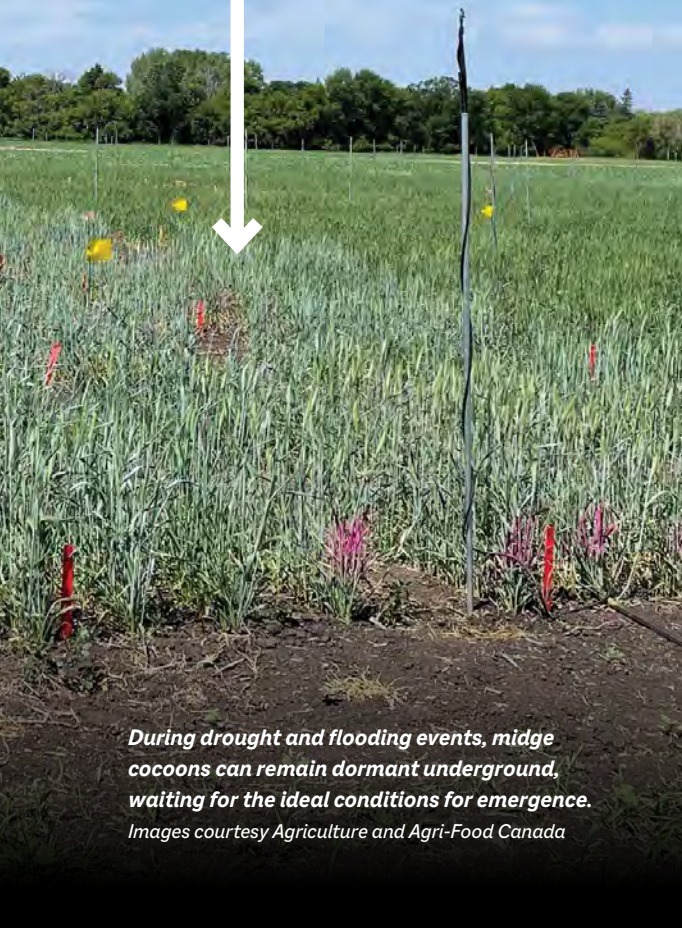
Research done at the Agriculture and Agri-Food Canada (AAFC) Cereal Research Centre in Winnipeg led to the discovery of a major resistance gene, Sm1, in wheat, which provides antibiotic resistance against wheat midge. The resistance mechanism was

Wheat midge larvae move inside the glumes of the plant and feed on the developing wheat kernels.





Wheat midge adults fly at dawn and dusk. The females lay eggs on wheat heads, glumes and stems.



During drought and flooding events, midge cocoons can remain dormant underground, waiting for the ideal conditions for emergence.

Images courtesy Agriculture and Agri-Food Canada

naturally occurring in some winter wheats, but it took 15 years to breed it into elite Canada Western Red Spring wheat lines.

The first midge-tolerant varieties were commercially grown by western Canadian grain farmers in 2010. Midge Tolerant Wheat (MTW) is sold as a varietal blend, with 90 per cent being a midge tolerant variety and the remaining 10 per cent of the mix being susceptible to wheat midge. The varietal blends provide an "interspersed refuge system" that disrupts the midge's ability to produce offspring virulent on wheat with the Sm1 gene. Even though the blends include susceptible plants (refugia), the yields of these varieties are higher than midge-susceptible varieties. The crop can sustain some small amount of damage on the susceptible plants within the blend, therefore keeping the insects from evolving and overcoming the resistance while at the same time not losing yield. We are now approaching 15 years from the commercial introduction of the Sm1 gene.

How did it last so much longer than predicted? This is done through broad industry efforts from plant breeders, government, seed growers, seed distributors and farmer groups. All these industry stakeholders are committed to maintaining the viability of MTW, replenishing the 10 per cent refuge and reminding Canadian wheat farmers and seed retailers of the importance of proper stewardship of the technology.

Through the Canadian Wheat Research Coalition, Manitoba Crop Alliance (MCA) and the other Prairie wheat commissions contribute funding to an ongoing

MTW awareness campaign targeting farmers and retailers. Additionally, Seeds Canada and seed retailers support their stakeholders with education (i.e., certification), the record system and records management. You may have seen the advertising campaign around the "No Plan B" theme but the science has not stopped there. More researchers are pursuing another angle to protect the resistance of wheat varieties.

This ongoing research builds on work done during the Canadian Agricultural Partnership AgriScience Canadian National Wheat Cluster activity, "Pyramiding oviposition deterrence and Sm1 to control wheat midge." From 2018 to 2023, Alejandro Costamagna at the University of Manitoba and many AAFC researchers identified the host plant volatile cues responsible for reduced egg laying on some wheats (i.e., oviposition deterrence, or OD) through examination of chemicals that differed between susceptible and OD wheat. This research is continuing in 2024 in a project jointly funded by MCA, the Saskatchewan Wheat Development Commission, the Western Grains Research Foundation and the Government of Saskatchewan's Agriculture Development Fund. Through this new project, "Wheat midge: Enhanced wheat resistance traits to protect the Sm1 gene," they plan to add a new mechanism of resistance that, when combined with the Sm1 gene and existing interspersed refuge of susceptible wheat, will further delay the development of virulent wheat midge. 🍀

For more information about MTW, visit midgetolerantwheat.ca.

Eye in the sky

What you need to know about drone pesticide laws in Canada

PESTICIDE LAWS IN CANADA

In Canada, herbicides, fungicides and insecticides are regulated and approved by Health Canada's Pest Management Regulatory Agency (PMRA), which administers the Pest Control Products Act.

Extensive data is required before a pesticide may be registered. Differences between traditional aerial application and drones in issues such as water volume, rates, coverage, and risk of drift mean each pesticide product requires additional research and data before approval is given for drone applications.

By Ashley Ammeter
Whole Farm Specialist, MCA

Drone technology is progressing by leaps and bounds, increasing interest in the possibility of spraying pesticides by drone. However, it is important to be aware of the legal landscape surrounding this technology and its use in Canada.

ARE THERE PESTICIDES REGISTERED FOR USE WITH DRONES?

At the time of printing, there are no pesticides registered for application by drone in agricultural crops.

The only herbicide approved for drone application is for use in non-crop areas such as industrial sites. The only other pesticides approved for drone application in Canada are microbial insecticides for mosquito larvae control.

Application of fertilizers and biostimulants or broadcast seeding by drone is permitted.

HOW DO I KNOW IF I CAN USE A DRONE TO SPRAY A PARTICULAR PESTICIDE?

Every pesticide label must have directions for use. Products that may be applied by drone will have directions for "Remotely Piloted Aircraft Systems" or "RPAS" on the label. If you don't see these words, the use of drones is not permitted – even if traditional aerial application is permitted. Off-label use of pesticides is illegal and may result in significant fines.

BOTTOM LINE:

It is currently* illegal to spray any agricultural pesticides by drone in Canada.

LICENSES AND CERTIFICATION

Drones are considered aircraft by Transport Canada. If you are flying a drone that weighs more than 250 grams, regardless of what it is being used for, the drone must be registered and you must have a drone pilot certificate.

Each province is responsible for the training and certification of pesticide applicators based on national standards. These training materials are currently in development, so in the future, applying pesticides by drone may require certification.

*At the time of publication.



Neighbourhood watch

The importance of crop surveillance programming on the Canadian Prairies

By **Ashley Ammeter and Andrew Hector**

Whole Farm Specialist & Agronomy and Extension Specialist – Cereal Crops, MCA

Each year, Manitoba farmers face insect, disease and weed pressures that threaten crop yield and quality.

Luckily, pest surveillance networks across the Canadian Prairies constantly monitor pest activity, gathering important information on potential threats to crop production. The Prairie Pest Monitoring Network, Prairie Crop Disease Monitoring Network and Prairie Weed Monitoring Network

all exist to provide farmers with the best management practices, risk assessment and pest identification tools, and most up-to-date knowledge to mitigate the detrimental effects of insects, diseases and weeds. Manitoba Crop Alliance (MCA) is a member of all three monitoring networks, along with experts from provincial governments, Agriculture and Agri-Food Canada, industry, universities and other Prairie commodity organizations.

Prairie Pest Monitoring Network (PPMN)



Each year, insect pests pose a serious threat to crop yields across the Prairies. To manage those insects, farmers and agronomists need information on the biology, distribution, natural enemies and most effective management options for a wide number of insect species. That's where the experts that make up the PPMN come in.

PPMN collaborators conduct annual monitoring surveys for insects such as wheat midge, grasshoppers, pea leaf weevil, cabbage seedpod weevil, bertha armyworm, swede midge and diamondback moth, as well as a variety of beneficial insects. The information gathered through these surveys helps farmers and agronomists to prioritize scouting efforts and can guide crop management practices the following year.

PPMN experts publish information produced by models that predict the timing of life stages of important insect pests, allowing farmers and agronomists



Image courtesy MCA.

to time their scouting activities. Wind trajectory models and a network of sentinel traps are used to predict and detect the arrival of migratory insects like diamondback moth.

The information produced by PPMN

research, as well as a wealth of other information including scouting tips, field guides and insect lifecycles, is available on the **PPMN website** and via weekly update emails throughout the growing season.

Co-Funders: Saskatchewan Agriculture, Manitoba Agriculture, Alberta Agriculture and Irrigation, Western Grains Research Foundation, Saskatchewan Pulse Growers, Manitoba Pulse and Soybean Growers, Prairie Oat Growers Association, Sask Oilseeds, Alberta Canola Producers Commission, Manitoba Canola Growers Association, Alberta Grains, Saskatchewan Wheat Development Commission, Manitoba Crop Alliance, Saskatchewan Crop Insurance Corporation, Agriculture and Agri-Food Canada, Sustainable Canadian Agricultural Partnership

Website: prairiepest.ca

Prairie Crop Disease Monitoring Network (PCDMN)



Plant diseases can have devastating effects on crops across the Canadian Prairies. The significant impact of weather and environmental factors means that monitoring efforts are critical to ensuring effective management of crop diseases. The PCDMN co-ordinates efforts to ensure farmers are equipped with the information they need to anticipate and respond to crop disease threats.

Beginning mid-May and ending in early July, the PCDMN releases weekly cereal rust risk updates. Experts assess the risk of rust to cereal crops across the

Prairies based on the presence of rust in source regions throughout the U.S., wind trajectories to carry rust spores into the Prairies, weather on the Prairies and crop growth stages. This provides an early warning system for farmers to forecast their risk and prioritize scouting and management efforts.

The PCDMN also provides timely information on many crop types related to seasonal issues. This includes tools to identify disease issues, assess risk and determine if fungicide is needed. This information is provided through recommended scouting protocols, disease information cards and scouting guides, in-season updates, and at a variety of events throughout the year.



Image courtesy Kelly Turnkington.

Co-Funders: Sustainable Canadian Agricultural Partnership, Western Grains Research Foundation, Results Driven Agriculture Research, Saskatchewan Agriculture, Prairie Oat Growers Association, SaskOilseeds, Saskatchewan Pulse Growers, Saskatchewan Wheat Development Commission, Alberta Canola Producers Commission, Alberta Innovates, Manitoba Canola Growers Association, Alberta Grains, Manitoba Crop Alliance, Agriculture and Agri-Food Canada

Website: prairiecropdisease.com

Prairie Weed Monitoring Network (PWMN)



As the newest of the Prairie crop surveillance efforts, the PWMN aims to build on the models established by the PPMN and PCDMN. Weed management is an ever-present challenge facing Prairie farmers, and emerging threats can have a major impact on farms across the region.

The PWMN co-ordinates weed monitoring activities across the Prairies, building on previous herbicide-resistance and weed-abundance surveys, and is developing tools to forecast weed population shifts and



Image courtesy MCA.

understand herbicide resistance risk. Increasing concerns regarding

herbicide-resistant weeds such as kochia and wild oats, and the spread of waterhemp across Manitoba, mean the information provided by the PWMN will help farmers and agronomists make informed management decisions in response to challenging weeds on their farms.

The newly established **PWMN website** contains a wealth of information on the presence and spread of weeds across the Prairies, the risk of herbicide resistance, and practices to manage weeds effectively. As the project moves forward, the PWMN website will continue to be updated to include even more valuable information, making it a comprehensive resource for farmers and agronomists. 🌱

Co-Funders: Manitoba Crop Alliance, Sustainable Canadian Agricultural Partnership, Western Grains Research Foundation, Alberta Canola Producers Commission, Alberta Grains, Manitoba Canola Growers Association, Manitoba Pulse and Soybean Growers, Prairie Oat Growers Association, SaskOilseeds, Saskatchewan Pulse Growers, Saskatchewan Wheat Development Commission, Integrated Crop Agronomy Cluster, Agriculture and Agri-Food Canada

Website: prairieweeds.com

Cross-border collaboration

MCA's strategic plan in action

By Katherine Stanley

Research Program Manager — Special Crops, MCA

In July, Manitoba Crop Alliance (MCA) staff headed south of the border in an effort to address Step Goal #5 from the 2024–27 strategic plan: "To secure north/south partnerships to develop mutually beneficial research collaborations and investment opportunities." North Dakota has admirable research capacity, excelling in agronomy and extension, particularly through its North Dakota State University Research and Extension Centres (NDSU RECs).

When identifying impactful north/south partnerships, corn and sunflower were selected as unique crops to benefit as research capacity for these crops is restricted in Manitoba. Manitoba has a unique ability to grow these crops, limiting collaborative efforts between Prairie provinces. However, MCA corn and sunflower members can still benefit from the long history of research and expertise in these crops — they just need to look to the United States.

The NDSU RECs were a clear highlight of the trip. The centres are well funded, organized and very busy. We visited three locations of various sizes: Langdon, Carrington and Minot. The staff toured us through corn, flax and sunflower research experiments, and we had the opportunity to see lines from the MCA confection hybrid sunflower program in Langdon.

The operations and infrastructure at NDSU RECs are prioritized and supported by the North Dakota government. Approximately 50 per cent of operational funds come directly from government, while the remainder of the operations are supported by the production and sale of foundation seed, solicited projects and grants. Like research programs in Manitoba, research capacity is challenged by finding, train-



Kristen Simons (left), research agronomist at North Dakota State University's Carrington Research and Extension Centre, shows MCA staff an irrigated sunflower disease nursery. Image courtesy MCA.



2024–27 STRATEGIC PLAN BIG GOAL #2

ing and retaining qualified staff.

During the excursion, we connected with our corn and sunflower counterparts: the North Dakota Corn Council (NDCC) and the National Sunflower Association (NSA). We met with Molly Fern, finance and research director for NDCC, and heard about challenges and concerns farmers are facing in the area, such as salinity, wind erosion, herbicide resistance and marketing challenges. We hope that by identifying similar challenges and research priorities as our peers to the south, we can leverage research projects and generated knowledge to benefit farmers in Manitoba.

A meeting with NSA executive director John Sandbakken was also impactful. These discussions focused on how MCA can collaborate with NSA to ensure Manitoba farmers can benefit from the knowledge, expertise and research on sunflower that is concen-

trated in North Dakota and neighbouring states.

The meetings with the NDCC provided insight into research priorities for North Dakota corn farmers, sparking ideas and an understanding of challenges long-term corn farmers are facing. MCA has also been invited to the NDCC Research Summit in December to hear presentations of projects that will be reviewed for funding.

Solidifying our relationship with the NSA is crucial to bringing Manitoba sunflower farmers into a well-established network of sunflower industry members, where we can share research, marketing and production plans. The NSA has formally invited our research manager for special crops to participate as a member of the research committee. MCA will participate in this research network to assist in the selection of sunflower research priorities and projects for the 2025 growing season.

Stay tuned for future updates as MCA continues to strengthen this burgeoning relationship with our North Dakota partners. 🌻

Cereals Canada behind the scenes

Restoring Canadian wheat exports to Vietnam

By Alison Inglis

Public Relations Specialist, Freelance

While countries such as China, Japan and Indonesia are the largest importers of Canadian wheat, every market is important, and it has not been smooth sailing to Vietnam over the last half decade.

In 2023, Canada exported more than \$102 million worth of wheat to Vietnam. While this is a modest value for grain trade statistics, it represents a tenfold increase from 2022 and marks the start of a reconnection between Canada and Vietnam that was years in the making.

In 2019, Vietnam implemented strict import restrictions on wheat from countries where creeping thistle was present and revised their quarantine pest list to include the plant. As a result, bulk shipments of Canadian wheat to Vietnam came to a halt.



Creeping thistle, also known as Canada thistle, is a noxious weed native to Europe, Western Asia and Northern Africa, and has spread to many parts of the world, including North America.

"In 2018, prior to the restriction, Vietnam was a 200,000-tonne-per-year market with further potential to grow," says Mark Walker, vice-president of markets and trade at Cereals Canada. "Canadian cereals are imported by over 80 different countries, all of which are critically important."

Following the restrictions on shipping bulk wheat to Vietnam, Canada's exports fell dramatically, with only 20,700 tonnes shipped in 2022.

After the COVID-19 travel restrictions

eased in 2022, Cereals Canada wanted to use the opportunity to reopen the Vietnamese market. Discussions with buyers and millers highlighted that demand for Canadian wheat remained strong. Canadian wheat is valued for its consistent quality and its ability to be blended with other wheats to improve the quality of baked products, including bread for Vietnam's traditional bánh mì sandwiches.

In fall 2022, Cereals Canada began having conversations with their contacts at Global Affairs Canada's Trade Commissioner Service, Agriculture and Agri-Food Canada's Market Access Secretariat, the Canadian Food Inspection Agency (CFIA), as well as the agriculture counsellor to the World Trade Organization (WTO) and his Canadian colleagues.

"We were making the rounds to determine how we might go about addressing the quarantine pest list, which

Fall 2022

Cereals Canada met with Government of Canada officials to re-engage on the trade barrier with Vietnam and address effects of the market closure.

February 2023

Canadian Food Inspection Agency travelled to Vietnam to discuss the issue with their government.

March 2023

Cereals Canada travelled to Vietnam to meet with private industry and mitigate concerns related to creeping thistle.

May 2023

Cereals Canada provided submissions to World Trade Organization regarding the revision of the quarantine pest list.



included creeping thistle, and what a path forward might be," Walker says.

The agriculture counsellor to the WTO gathered more insights on the issue from his Vietnamese colleagues, and through this collaboration, they found a path forward for government-to-government engagement.

The CFIA visited Vietnam in early 2023. "That engagement was important to move this issue forward," Walker says.

"It is rare for government regulators to meet with foreign private industry, so the work of the CFIA to engage with their Vietnamese counterparts was a critical connection. We work to stay in close communication with our government officials to ensure they have the information and resources necessary to engage positively on our behalf."

Shortly after, Cereals Canada travelled to Vietnam to meet with Vietnamese importers. The Canadian Trade Commissioner Service in Vietnam did a lot of legwork to help re-establish connections with the appropriate industry contacts, which was beneficial.

In these meetings, Cereals Canada spoke about the benefits of Canadian wheat, highlighting our strong on-farm production practices and explaining how the Canadian grain handling and transportation network contributes to Canada's stringent grain quality

monitoring system. Cereals Canada also discussed how post-entry control measures related to creeping thistle could mitigate the Vietnamese concerns.

"Our team of experts here at Cereals Canada led these discussions, including Krista Zuzak, director of crop protection and production," Walker says. "They helped quantify the potential or perceived risk that creeping thistle seeds could pose in Vietnam."

Cereals Canada equipped their industry contacts in Vietnam to successfully communicate with their government, not only about the importance of Canadian product, but also the safety and feasibility of effective post-entry measures that could be deployed to mitigate any risk should creeping thistle be found in a shipment. Similar presentations were given to the WTO through the Canadian agriculture counsellor.

Cereals Canada received notice in summer 2023 that Vietnam would be revising its import regulation to remove creeping thistle as a quarantine pest. In late September 2023, the list was revised, and bulk shipments of wheat to Vietnam have since fully resumed.

Once the market was reopened, from October 2023 through June 2024, Canada exported 234,258 metric tonnes of wheat to Vietnam in just nine months – including 87,000 tonnes in June alone.

"We have certainly seen a return to business as usual, if not a situation exceeding business as usual," Walker says. "Our team is very proud of the work that we were able to do to reopen the market for Canadian farmers."

This case illustrates not only the role of government-to-government engagement, but also the work done by Cereals Canada to move the needle with private industry.

"Our experience working to re-establish market access in Vietnam confirmed the reasons why we lobbied for the creation of the recently opened Indo-Pacific Agriculture and Agri-Food Office," Walker says. "It's important that our customers know how important they are and having more Canadian resources present in the region helps achieve this."

The reopening of the Vietnamese market is a significant win for Canadian and Manitoban wheat farmers, says Andrew Hector, agronomy extension specialist for cereal crops at Manitoba Crop Alliance. "This success story highlights the importance of collaboration between government, industry and farmers in maintaining market access for Canadian agricultural products." 🌱

For more information about Cereals Canada's trade advocacy activities, visit cerealscanada.ca.

August 2023

Cereals Canada received notification that the quarantine pest list would be revised and amended as of September 2023.

October 2023

Canada started exporting wheat to Vietnam.



Grain Marketing Insights

Supply outlooks for 2024/25

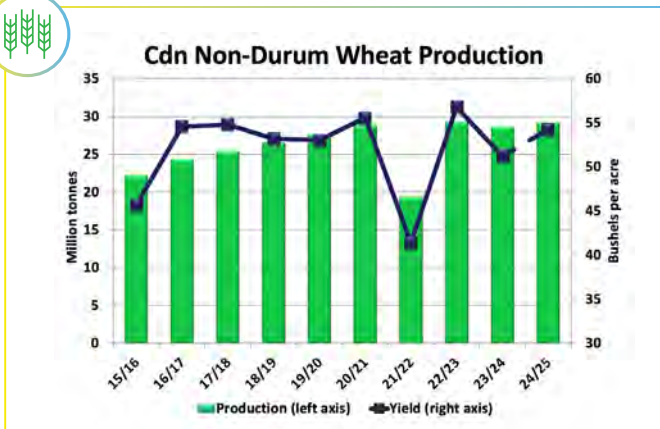
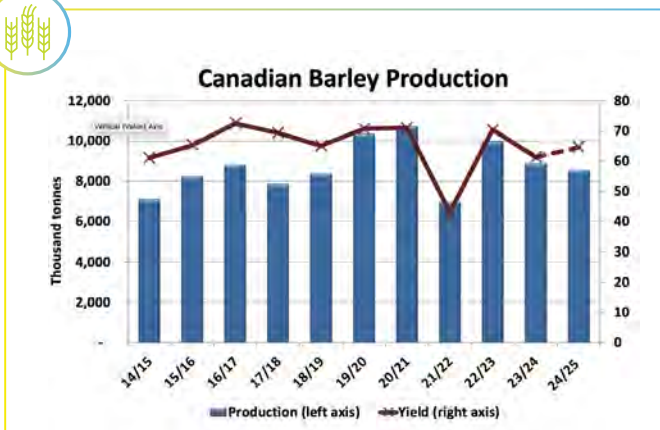
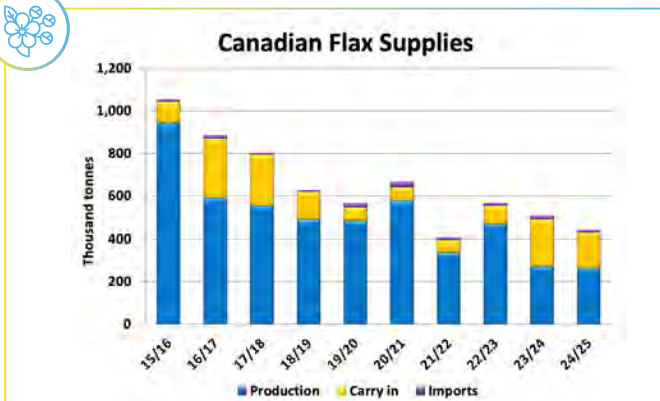
By LeftField Commodity Research

The 2024 growing season has been filled with ups and downs, with Manitoba generally faring better than the more western parts of the Prairies. Harvest results have been incredibly variable, as early expectations gave way to disappointing results for many. This lost potential has meant 2024/25 supply estimates have been toned down, with balance sheets for most crops looking light.

Smallest Canadian flax crop in decades

A relatively small flax crop wasn't a surprise this season given the 15 per cent cut in seeded area. Yields were undoubtedly hindered by the hot and dry conditions across the Prairies this summer, but are still expected to come in near the longer-term average. As a result, production would total around 262,000 tonnes, which would be the smallest crop since the mid-1970s. Healthy old-crop carryover stocks help to offset some of the production losses, putting total 2024/25 supplies at roughly 445,000 tonnes, 13 per cent lower than last year. The flax market has changed in recent years, with Canadian production having somewhat less of a price impact than it used to.

Canada has taken a backseat in the global flax trade since the emergence of Russia and Kazakhstan as dominant exporters. Production in both countries is expected to increase in 2024/25, increasing



export competition, particularly into China. However, recently implemented tariffs on Russian flax into the EU will limit movement and may open some opportunities for increased Canadian exports.

Flax acreage in the U.S. also dropped significantly this year. The U.S. has become Canada's main customer in recent years, so smaller domestic production should help export movement. Overall, there are



opportunities for improved export demand in 2024/25, but they will be limited by small supplies in Western Canada.

Smaller barley crop but demand is uncertain

Like most crops, barley has been affected by the shift to the hot and dry conditions that evolved over the summer. Early harvest reports point to poorer-than-expected yields, along with some quality issues. The 2024 Canadian barley crop is currently estimated at 8.56 million tonnes, down nearly 300,000 tonnes from last year and the smallest since 2021/22. Yield is estimated at 64 bu/acre, still above last year's crop at 61.3 bu/acre. Carryover stocks are expected to be healthy, which would result in total 2024/25 Canadian supplies staying roughly flat from last year.

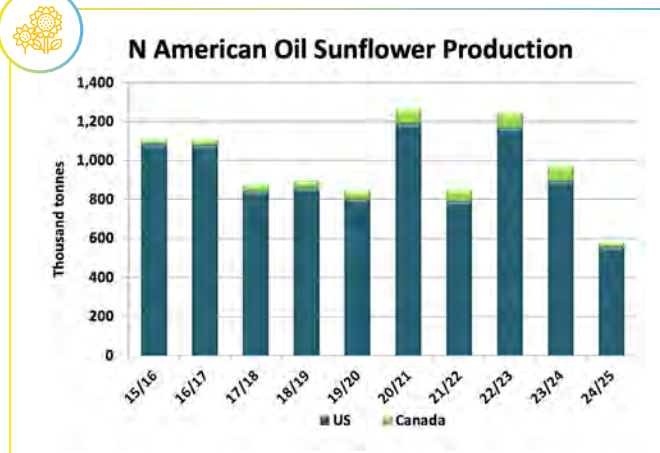
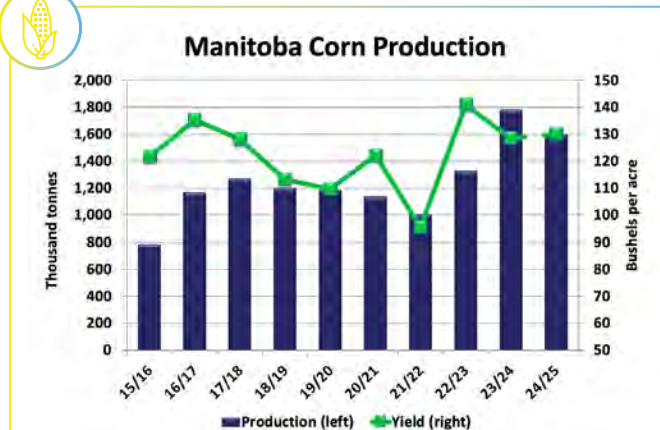
The bigger story for barley in 2024/25 may be the demand side of the equation. The early expectation of large cereal crops, and increased feed grain supplies on the Prairies, resulted in feeders booking less U.S. corn volumes so far this coming year. This will help domestic feed barley demand through fall and winter. In the export market, China continues to be the dominant customer for Canadian barley, although their reopening of trade with Australia has increased competition. While still early in the growing season, the 2024/25 Australian crop is expected to be larger than last

year, which increases their potential exports. However, Black Sea production and exports are forecast to fall year-on-year, which may balance things out.

Canadian wheat production likely higher

Western Canadian non-durum wheat yield estimates have also been coming down from the lofty expectations in early summer. Our projection for total Canadian non-durum production is 29.2 million tonnes. This would be the largest crop since 2013, just surpassing what was grown in 2020 and 2022. Very early harvest results have seen some quality challenges, although whether there are widespread concerns remains to be seen. While production may be up, the total supply will stay relatively flat compared with recent years, after record exports in 2023/24 pulled the old crop carrying down to minimal levels.

The prices farmers receive for their wheat will primarily be driven by world markets. Global wheat values have been trending lower despite production being down across the major exporting countries overall. There is speculation that total world import demand may be lower during the coming season, although buyers run the risk of getting caught being a bit too complacent if there are any supply disruptions going forward, particularly given relatively tight stocks. There have been some quality concerns in a few key exporting countries, including



Russia and France. The setup is such that Canada should see another year of strong wheat exports in 2024/25.

Corn prices reflect large U.S. yields

Canadian corn production may not be able to quite match last year's record of 15.1 million tonnes given the slightly lower plantings, but the total crop will still be large at close to 14.8 million tonnes. Manitoba also saw a dip in plantings, to just under 500,000 acres. Conditions in the province are generally quite good, although also somewhat variable, as a wet spring resulted in some acres

getting in late. This also leaves some fields vulnerable to an early frost. If weather co-operates into the final stages of the growing season, the Manitoba crop could end up at around 1.6 million tonnes, down from last year's record but otherwise the largest ever.

Local prices are driven primarily by the U.S. market, where values are being pressed lower in response to favourable growing conditions and expectations for record yields. Another large Manitoba corn crop and adequate supplies of other western Canadian feed grains likely means imports from the U.S. will be lower in 2024/25, although there will still be

steady volumes moving in through the well-established supply chains.

Historically low supplies for sunflowers

Low prices over the past year discouraged both Canadian and U.S. farmers from planting sunflowers in 2024. According to Statistics Canada, farmers north of the border planted only 58,000 acres of sunflowers, 42 per cent less than last year, but Manitoba Agricultural Services Corporation (MASC) acreage reports show an even larger 61 per cent drop and the fewest acres since 2011/12. The data from MASC also showed a shift back toward confection sunflowers, but even so, there are still 22 per cent fewer confection acres than in 2023. The Canadian market is dominated by U.S. sunflowers and plantings there are down 34 per cent for oils and 13 per cent for confections, with total sunflower area the lowest in almost 50 years.

Crop conditions in Manitoba and the Dakotas are generally favourable, but even a solid yield won't nearly overcome the drop in acreage. For now, we're using an average yield that would mean a 38 per cent drop in North American oil sunflower production and 28 per cent fewer confection sunflowers. Clearly, these supplies won't be enough to meet normal demand, especially for oil and black birdseed usage. One other note: while overseas sunflower supplies have only a limited effect on the North American market, crops in Europe and the Black Sea region are also being scaled back. 🌻

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