

Wheat's Up!



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Chairman's Message

Kent Erickson, Chair | *Alberta Wheat Commission*

Have you ever grown winter wheat? If not, have you ever considered adding it to your seeding plan? For many farmers, the words "winter wheat" trigger a corresponding, "Can't seed and harvest at the same time," mindset. But what those words should actually trigger is "return on investment."

Acreage of winter wheat in Western Canada is surprisingly low, considering the returns available in the international marketplace. Winter wheat has untapped market potential because of its high yields as well as milling and baking properties that are attractive to end users. This knowledge was solidified last year by our very own "Team Canada" during the New Crop Missions.

If you participate in the Canadian Grain Commission (CGC) Harvest Sample Program, you may recall a request for winter wheat (along with CPS) samples last fall.

Winter wheat was promoted and discussed during the New Crop Missions, and the resulting market intelligence signaled that it's a crop you should strongly consider planting if you have the right agronomic conditions for it. Why? Because if you have a good crop and a strong marketing plan, you'll make money.

Alberta Wheat Commission (AWC) recently announced a significant investment of \$150,000 in 11 winter wheat-related research and development projects. Agriculture and Agri-Food Canada (AAFC) matched the combined funding from all partners involved, bringing the total funding to \$2.2 million over four years. Other funding partners include Ducks Unlimited Canada, Saskatchewan Winter Cereals

Development Commission, Winter Cereals Manitoba, Western Grains Research Foundation, Koch Fertilizer Canada ULC, Agrium Inc., and Dow AgroSciences.

Ducks Unlimited is also a major player in these projects – they'll be overseeing the work being done in cooperation with Dr. Brian Beres, the lead on these projects, at the AAFC Lethbridge Research Centre.

The purpose of our investment is to further build on the agronomic groundwork of this class, because strong agronomy ultimately leads to better yield and quality, and in-turn, better returns for farmers.

In 2014, AWC invested in a winter wheat technical specialist position at Cigi, also part of a long-term plan. The role focuses on market promotion and research and development of winter wheat. Lisa Nemeth joined Cigi's team in the fall and through this role, Cigi plans to further enhance global marketing opportunities.

The reason AWC has taken on these initiatives is because we see winter wheat as a niche market with huge growth potential. We invest in R&D when we see the value of long-term growth. We invest in market development when we see potential for higher returns. Winter wheat fits both of those categories. When something has untapped potential, you have to tap in.

Visit growwinterwheat.ca to view the Winter Wheat production manual or contact us at info@albertawheat.com to request a copy.

General Manager's Message

Tom Steve, General Manager |
Alberta Wheat Commission

Making the Open Market More Open

One of the most satisfying things about working for farmers is the opportunity to make a meaningful difference to their business.

So, when the Alberta Wheat Commission was approached by grain marketing consultants John DePape and Russ Crawford to support their vision to give farmers better access to grain prices and market information, it was an easy decision.

By now, you've probably read or heard about our project known as Price Data & Quotes or visited the test site at www.pdqinfo.ca. Through the development of PDQ, we are aiming to establish a benchmark for cash grain prices on a regional basis. This information is largely unavailable in the marketplace today – or where it does exist, is not current.

All grain company data will be collected and expressed as an average regional price, but individual company bids will not be posted. The web-based application will help you determine what the going rate is for grain in your area, while still leaving the negotiation between you and your sales rep.

Continued on page 2

You might be saying, “I already get grain prices on my smartphone.” Yes, if you’re a customer of one or more of the companies, you can access their prices. But comparing bids across different competitors can be difficult and confusing – especially in wheat, with the variables of grade and protein, and ever fluctuating discounts and premiums.

The lack of a functioning wheat futures contract in Canada adds another twist that makes it hard to calculate the actual basis. For example, most Canadian spring wheat is priced off the Minneapolis Grain Exchange which trades in US currency. Some companies show the futures price in US dollars and the cash price in Canadian currency. The foreign exchange rate, which is subject to fluctuation, is not properly factored into the equation.

Since the end of the Canadian Wheat Board (CWB) single desk, it’s become more important for farmers to be astute marketers. PDQ aims to give you the tools to do just that through a credible, objective source of information that can be used to make better and more profitable marketing decisions.

The site is targeted to be operational in the 2015-16 crop year. In the interim, we are consulting with a broad cross-section of stakeholders to gather their views on what’s missing and what they’d like to see in the final product. We invite your feedback and suggestions as we work toward greater transparency and efficiency in Canada’s grain markets.

Want to get involved with the Alberta Wheat Commission?

AWC directors and regional representatives provide strategic direction and leadership to the Commission on behalf of wheat producers in the province. If you’re looking to join our team, talk to your regional rep or director to find out more about their role. Visit <http://www.albertawheat.com/about-awc/governance/> to learn more about our election process.

Your opinion matters.

Visit albertawheat.com and follow us on Twitter [@albertawheat](https://twitter.com/albertawheat) to get involved with the conversation.



The Research Plot

Lauren Comin, Research Manager (on maternity leave),
Hannah Konschuh, Research Manager | *Alberta Wheat Commission*

Winter Wheat AgrilInnovation Program Establishes Roots

Winter wheat growers across western Canada will be pleased to learn of a new research initiative that aims to provide more tools for winter wheat production systems. On March 17 at the Lethbridge Research Centre, MP Jim Hilyer announced a federal investment of \$1 million in winter wheat-related research projects on behalf of Agriculture Minister, Gerry Ritz. The Alberta Wheat Commission, along with other industry partners, contributed \$1 million to leverage the matched funding from AAFC. Alberta Wheat Commission’s vice-chair, Kevin Auch, spoke to AWC’s \$150,000 contribution to this initiative.

“Greater Economic Returns and Enhanced Ecosystem Services through the Expansion of Winter Wheat Production in the Canadian Prairies” includes 11 agronomic research studies to be conducted across the winter wheat growing regions of Western Canada, including several in Alberta.

Producers are often faced with the decision to seed their winter crops after the recommended fall seeding window (I’m sure none of us in Alberta have forgotten the delayed 2014 harvest). One study component evaluates the agronomic and economic trade-offs of a range of planting dates, including dates beyond the recommended fall planting window. A number of studies will assess weed control in winter wheat, including management of problematic weeds such as downy brome, wild oats, and cleavers, and another component will assess the most optimal combination of resistant cultivars and fungicide treatments to control stripe rust, a common production factor for winter wheat growers.

Despite the financial and agronomic benefits of the crop, winter wheat acreage remains below its potential in Western Canada. In 2014, winter wheat production in Alberta was 272,200 metric tonnes and 1,202,900 metric tonnes – only 2-3%

of total wheat production in 2014. AWC, along with our funding partners, sees this investment as an opportunity to change that.

Dr. Brian Beres is an AAFC research scientist at Lethbridge Research Centre, and is the Principal Investigator for this initiative.

“Ultimately, our goal with this suite of studies is to remove barriers to adoption, which often include issues with stand establishment or the challenges/opportunities of in-crop agronomic practices such as nitrogen and integrated pest management,” noted Dr. Beres.

The Alberta Wheat Commission will be co-managing this project with Ducks Unlimited Canada. This project builds on work from the first Growing Forward programming iteration, Developing Innovative Agri-Products Program (DIAP).

The complete list of industry partners includes Ducks Unlimited Canada, Saskatchewan Winter Cereals Development Commission, Winter Cereals Manitoba Inc., Western Grains Research Foundation, Alberta Wheat Commission, Koch Fertilizer Services, Agrium Inc., and Dow AgroSciences.

Information on this initiative and others in AWC’s research portfolio can be found on www.albertawheat.com/research. Check back often for updates.

AWC research priorities are driven by specific industry needs and knowledge gaps. Producers are welcome to provide feedback with their on-farm challenges that could be addressed through AWC funded research by writing us at info@albertawheat.com



Left to right: D'Arcy Hilgartner (APG), Karla Bergstrom (ACPC), Linda Whitworth (ABC), Douglas Sell (APG), David Bishop (ABC), Gary Stanford (GGC), Kevin Auch (AWC), Warren Sekulic (AWC), Steve Marshman (ACPC), Raymond Blanchette (ACPC), Jeff Nielsen (ABC)

Taking Alberta's Message to Parliament Hill

Erin K. Gowriluk, Government Relations and Policy Manager | *Alberta Wheat Commission*

There is nothing like the promise of a fall election to remind us of the importance of nurturing the relationships we have with our elected officials in all political parties. The Alberta Wheat Commission (AWC) has, over the last year, worked closely with the Conservative government on a host of policy issues including transportation, plant breeders rights and crop variety registration to name a few. Through this process Alberta Wheat Commission Directors and staff have developed strong relationships with government policy makers. With a fall election on the horizon, it was decided that the Commission would work to ensure that we had strong relationships in place with parliamentarians from all three major political parties. Alberta Barley and the Alberta Wheat Commission invited the Alberta Canola Producers' Commission (ACPC) and the Alberta Pulse Growers' Commission (APG) to work with us to bring a united Alberta perspective to Ottawa.

Working with our colleagues at the Grain Growers of Canada (GGC), *Team Alberta* spent two days on The Hill meeting with key parliamentarians from all three major political parties. Together we shared our messages around rail transportation, the important role that the federal government plays in research investment and innovation in Canada and the status of trade agreements with China and the trans-pacific region.

All of the parliamentarians we met with were receptive to hearing the Alberta perspective on national policy issues. Our meetings were

only two days prior to Bill C-18 receiving Royal Assent so the timing was right for our discussion on both the need to create an environment which encourages private investment in cereals research in Canada as well as a continued commitment from the federal government to increase *total* research investment in Canada.

We thanked the federal government for their commitment to an ambitious trade agenda - signing the Canada-Korea Free Trade Agreement, and the Comprehensive Economic Trade Agreement between Canada and the European Union were big wins for Canada. Our messages to parliamentarians spoke to the fact that in order to realize the full potential for expanded growth, western grain growers need greater market access to China. China is an important and growing market for barley, canola, pulses and wheat. But there are issues with access that need to be addressed to enhance trade with China including, high tariffs and tariff rate quotas (TRQ), for example, Canadian wheat is subject to a TRQ of only 9%. We also need Canada's regulators to promote science-based decision making internationally with our trading partners to prevent and resolve non-tariff barriers such as pesticide residue limits and low level presence policies.

As part of our messages on international trade *Team Alberta* encouraged the federal government to conclude negotiations with the Trans Pacific Partnership (T.P.P.) and Japan. Collectively, the T.P.P. countries have a Gross Domestic Product (GDP) of U.S. \$21 trillion and represent over 65% of Canada's \$42 billion in

agriculture and food exports. This trade deal has the potential to move beyond its current membership and draw in additional emerging and developed economies in the Asia-Pacific region.

All four crop commissions have and will continue to be active participants in the Canada Transportation Act Review. And although the panel is due to submit their findings and recommendations to the Canada Transportation Agency in December of this year; we felt it was still important to ensure that the parliamentarians we met with understood the challenges facing western Canadian farmers. We reminded the parliamentarians we met with that trade agreements with China and the trans-pacific region represent increased market opportunity for western Canadian farmers, but without the rail capacity required to get our products to international buyers, these agreements are meaningless.

Barley, canola, pulses and wheat have all been impacted in different ways by the Order-in-Council (OIC) which instituted minimum volume requirements for Canadian Pacific and Canadian National Railways. Evidence from the weekly performance reports generated by the Ag Transport Coalition suggests that although the movement of Alberta crops destined for western ports has increased under the OIC, shipments of primarily barley and pulses headed to buyers south of the border, have suffered as a result. The one thing that all four crop commissions could agree on, is that the data being collected via the Grain Monitoring Program, and now more recently the Ag Transport Coalition needs to be used to ensure that the railways are effectively servicing *all* corridors.

The mission was successful and as a result it was suggested that Alberta's crop commissions could work together on a lobby mission to Ottawa every year. In the interim, the Alberta Wheat Commission is always looking for opportunities to develop our relationships with key policy makers in all of the major parties both at the provincial and national level.

Statistics Source: Canadian Agri-Food Trade Alliance (CAFTA)

AWC often takes a leading role in shaping policy that affects our industry, acting as a single voice for producers on issues that matter to Alberta's wheat producers. We invite producers to contribute to the discussion by writing us at info@albertawheat.com

Responsible Chemical Use and Our Export Markets

Cam Dahl, President | *Cereals Canada*

There is a growing focus in both North American and international markets on pesticide residues. Maximum Residue Limits (MRLs) are tools used by governments to ensure that food supplies remain safe. More specifically, MRLs regulate how much of any given crop protection product can be found in commodity shipments in order to be considered safe. The increased focus on residues and MRLs is not a bad thing, but it is something that farmers need to pay attention to right now, before crop protection products are purchased for the growing season, and before buyers tell you they can't sell your grain.

Canada's science-based regulatory system is the envy of much of the world. International customers have strong confidence in the safety of Canadian grains, oilseeds and special crops, contributing to our brand strength on the world stage.

In an ideal world, all of our customers would have a similar science-based system for approving new crop protection products and develop the corresponding MRL at the same time as we do. But the world is not even close to ideal.

Even when there is a comparable regulatory system in place, not all of our trading partners approve crop protection products at the same time. If a product is not approved, the MRL then defaults to zero, even if it has been shown to be safe in Canada. That means the customer can reject a commodity with any trace of the crop protection product found on it. Our ability to test for things has grown dramatically. We can now test in parts per billion or parts per

trillion. What is a part per trillion? One second in 32,000 years. That is a mind-bogglingly small number, but it's not zero. Think about how little of an unapproved product can currently cause a shipment to be rejected by an importer.

One example of an asynchronous approval between Canada and the U.S. is currently causing concern for exporters. "Manipulator" is a growth regulator for wheat that has the active ingredient "Chlormequat." Chlormequat is registered for use on wheat in Canada, all of Europe, Australia, and most other major wheat-producing countries. But it does not have adequate tolerances in the U.S. and it is unlikely that these approvals will be in place before the 2015/16 crop is exported.

Farmers cannot be expected to know every regulation in every one of our export markets. This is why the industry must work together as a whole value chain in order to protect and build upon Canada's reputation for quality. As part of this effort farmers should have a clear crop protection management plan with the following key steps:

1. Plan in advance, as much as possible, the crop protection products that you will be using;
2. Review those products with agri-retailers. Carry out the review out before using crop protection products for the first time to ensure that your choice of products are ones that are approved for use in the markets into which grain will flow;
3. Review with grain buyers to ensure that they know what crop protection products will be used and confirm that none of these products will cause concern for export or domestic customers;
4. Don't include products if they are not approved for use by potential customers; and
5. Always know and follow the label. Labels on crop protection products have been developed through Canada's science-based regulatory process. The labels ensure safe use of crop protection products and ensure that residues are not a marketing concern.

Canada's reputation for reliable, safe, high quality food is well earned. Our agricultural products come from clean air, clean water and clean land that are the envy of most of the world. Our rigorous science-based regulatory and food safety systems are second to none. Canadian farmers deliver high quality products through sustainable management practices that respect the natural environment in which we live and make the most efficient use of the resources needed for production. Preserving this hard won reputation is in everyone's best interest. The cost of losing or even damaging this reputation would be enormous.

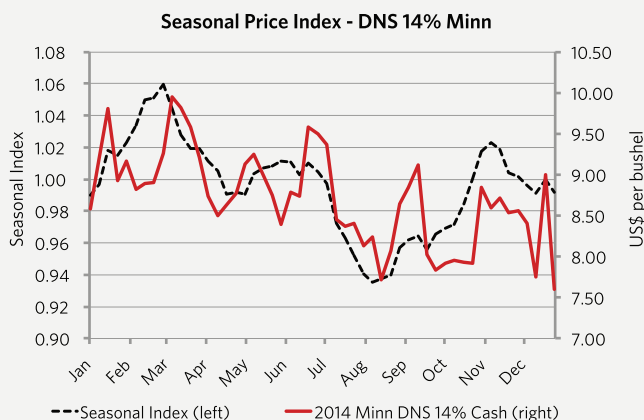
Wheat Market Waiting on 2015 Crops

Chuck Penner, Owner | *LeftField Commodity Research*

It's often been said there's a wheat crop harvested every month in some part of the world. While that's technically true, the global wheat harvest is much heavier at certain times of the year. In fact, February and March are the slowest months of the year with only India and other South Asian harvests going on. The large majority of the global wheat crop is grown in more northerly countries where the bulk of the harvest begins in May/June but really picks up steam in July and beyond.

This cycle of wheat planting and harvest causes some interesting seasonal dynamics. At the time of writing, northern hemisphere winter wheat crops are in dormancy and most of the market's focus is on the demand side of the equation. Changes in demand tend to be gradual and slow-moving, so there's usually less action and volatility in futures markets in the middle of winter. Major analysts such as the USDA and IGC tweak their global wheat S&Ds but nothing is earth-shattering. Even though there's not much going on in markets, some seasonal price behaviour is worth watching. We don't have seasonal price charts for Canadian wheat because the open market in Canada is still fairly new. Long-term price behaviour in the US is a useful reference and it shows

dark northern spring (DNS) wheat prices are soon approaching their seasonal highs, with both MGE futures and basis levels at their strongest.



Very soon however, the supply side of the wheat market will start to take over and drive the markets. As the production picture becomes clearer, the increased certainty in the outlook tends to weigh on prices. That's one reason why the seasonal index in the chart tends to move lower over the next few months. Keep in mind the seasonal price index is only a tendency, not a sure thing. Production problems at this time of year could easily cause prices to move against the normal price trend.

Winter wheat crops in the US, EU, FSU and China will be emerging from dormancy and each one raises the potential for some big market moves. It's still too early to predict which way they'll go, but there are some early indications with interesting possibilities.

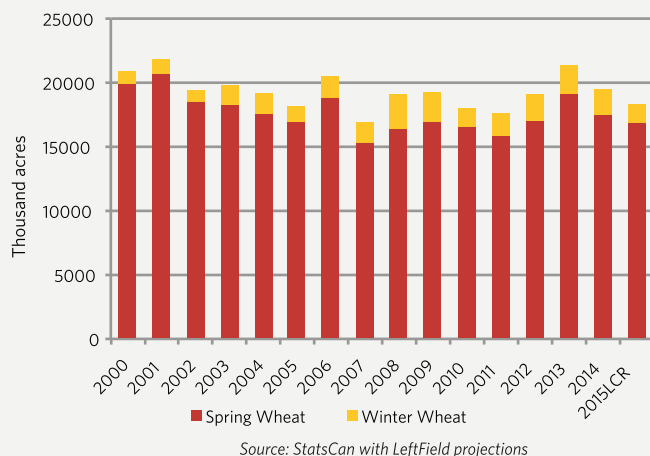
In the US, most states west of the Mississippi (mainly hard red winter wheat) have been reporting deteriorating conditions since last fall. For example in Kansas, 61% of the wheat was rated good/excellent at the end of November but that dropped to 49% at the end of December and 46% at the end of January. But it's important to caution that poor winter conditions can turn around quickly with a few well-timed rainfalls in spring. But if they don't, the market will react higher.

Most traders are already anticipating some problems with the Russian winter wheat crop and those have been factored into the market. The last reports from Russia's southern district showed 21% of the winter wheat is in poor condition. If the dry weather persists once dormancy breaks or winterkill ends up worse than expected, wheat futures could get a boost.

The other two main production regions – the EU and China – aren't facing any serious production concerns at this stage. Precipitation through the winter has been mostly average to above average and there aren't any real threats of winterkill. Unless a late freeze happens in the next few weeks, these wheat crops should perform fairly well, adding weight to wheat markets.

Winter wheat acreage is down sharply in both eastern and western Canada but that's only a small part of the Canadian picture and even less of global supplies. For 2015, we're forecasting a modest 3% increase in spring wheat acres but that's more than offset by the 33% decline in winter wheat. With average yields, Canadian wheat production would be down roughly 2% over last year.

Canadian Non-Durum Wheat Acreage

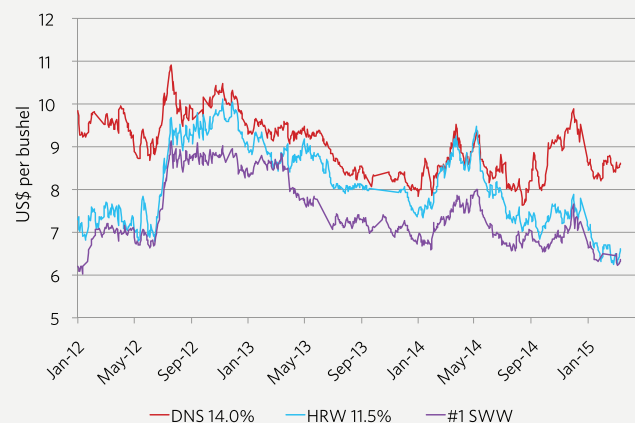


The USDA has estimated winter wheat acreage in the US is expected to be down 5% from last year, although there are some early indications spring wheat acres could be higher than last year and offset the smaller winter wheat crop. The IGC has forecast global wheat acreage for 2015/16 up 1% over the previous year, largely because of increased spring wheat acreage. The IGC is using average yields at this point to project a 2% reduction in the 2015/16 global wheat crop. Overall, analysts aren't calling for big 2015 wheat crops.

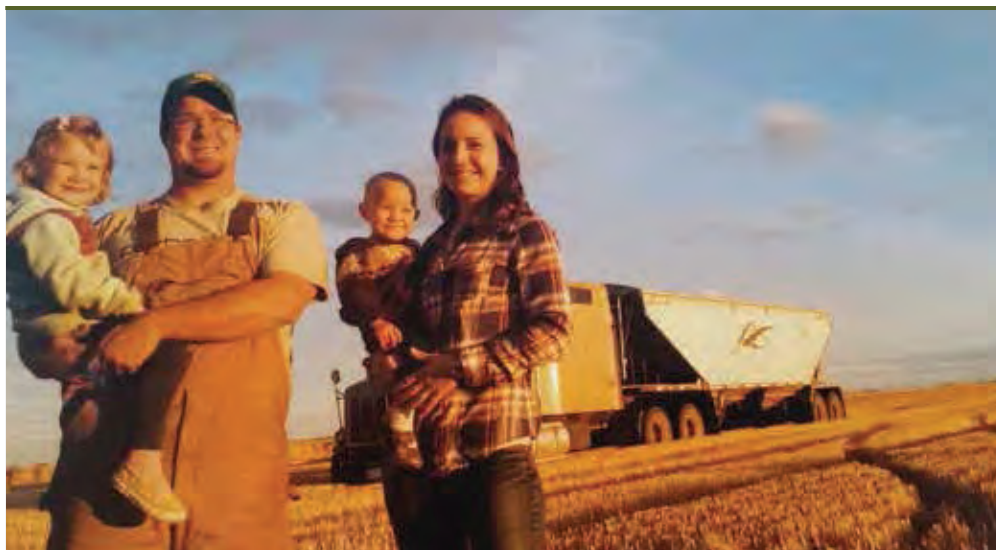
In contrast to most analysts' neutral to negative outlooks for the 2015/16 wheat market, we see a fine balance between global wheat supplies and demand. Carryover from 2014/15 is higher than the previous year but isn't excessive. This means any production problems in a key exporting country could make wheat markets much friendlier.

Of particular interest in western Canada, demand for red spring wheat has been strengthening recently as supplies of good quality DNS and HRS wheat are dwindling. Over the past couple of months, the USDA has been bumping up its US export estimates for HRS wheat while lowering forecasts for winter wheat exports. Its 2014/15 ending stocks estimates for spring wheat have been shrinking but winter wheat stocks estimates have been rising. This shifting demand picture is most noticeable at the West Coast where DNS wheat prices have returned to a more normal premium over winter wheat.

Cash Wheat Bids, Del'd Portland



The return of spring wheat to a premium market position again is positive for the CWRS outlook in 2015/16. We're already seeing old-crop spring wheat basis levels in Canada and the US showing small signs of improvement and this could carry over into next year, especially if there are any problems with the spring wheat crop. When this particular strength in CWRS wheat is added to the potential gains for the entire wheat complex, we're optimistic about 2015/16 prospects.



Farm Family Profile

Alexis Kienlen

Warren Sekulic has been a director for Region 5 for just over a year. He farms near Rycroft with his parents, John and Elsa, his wife Stefanie and their two daughters, Aubrey, and Sadie. The Sekulics farm wheat, peas and canola, and have a small pedigreed seed business, as well as a small cattle herd and acres of hay and forage.

Warren is a fourth generation farmer. His great grandfather immigrated to Canada from Croatia in 1926, and the family has farmed on the same piece of land ever since.

Warren wanted to become a director for the Alberta Wheat Commission because of the things he saw happening around him.

"With all the changes in wheat that have been going on in the last little while, with the fall of the wheat board and the different things that were coming down the pipe, I just wanted to have a say in policy and how things move forward with the wheat industry," he said.

In his farm management, he strives to be profitable and wants to grow the newest and best varieties on farm.

"Sustainability is a big thing for us. We're not the type of farmers who run out and spray right away. We really keep a close eye on the thresholds, with the idea that they're the start.

Just because you have reached the threshold, it doesn't mean that you have to go out and spray insecticide. It's the start of the calculation, not the end point," he said.

The farm is a business, but it is also a lifestyle for both Warren and his father; they are family and community oriented. Warren has been a parish council member, and is currently the chairman of his local agricultural services board as well as a volunteer firefighter.

Transportation is a big issue for producers in the Peace Country, because they are so far away from central Alberta.

"We're so far up north that there's often the feeling that we're at the end of the line and we get shortchanged. That's not necessarily the case, but that's the perception," said Warren.

As an AWC director, Warren sits on the joint environmental policy committee, as well Alberta Wheat Commission's markets committee. He is also the chair of the Alberta Wheat Commission's policy committee. Policy interests him, and builds off some of the things he learned while completing his political science degree at the University of Alberta.

Warren is currently participating in the Sustainable Crops initiative, and just returned

from a trip to Ottawa as part of a lobby initiative along with representatives from Alberta Barley, Alberta Pulse Growers and the Alberta Canola Producers Commission. During the trip, the Alberta farmers met with members of the Official Opposition as well as government officials to discuss issues of importance like transportation and market access.

"Being on the Wheat Commission is a way to affect policy. We punch above our weight to develop it. I enjoy the policy work and the reading and it's a place where I feel like I can actually influence and make a difference," he said.

Alexis Kienlen is an Edmonton based journalist and the author of three books. www.alexiskienlen.com

Find us at an event near you!

Alberta Wheat Commission participates in farm tradeshow both big and small to have one-on-one conversations with farmers about all things wheat and farming. We also get involved with consumer shows so we can do our part to educate and have conversations with folks who want to know where their food comes from and learn more about modern agriculture. Here are some of the events where you'll find Alberta Wheat Commission:

- **Aggie Days (Calgary),**
April 8th - 12th
- **Aggie Days (Lethbridge),**
April 28th - 29th
- **Calgary International Beer Festival,**
May 1st - 2nd
- **Edmonton Craft Beer Festival,**
June 5th - 6th
- **Ag-tivity in the City**
(at the Calgary Stampede),
July 3 - 12th



TELL US WHAT YOU THINK

What are cash prices for forward delivery months?

What are grade and protein spreads?

We want to know what you need when it comes to marketing data and market prices.

Anything you tell us will be used to develop the best service possible.

Sign up to receive updates as this service is developed. We'll tell you what's new on PDQ!

VISIT PDQINFO.CA TO HAVE YOUR SAY

This Alberta Wheat Commission initiative has been made possible through the AgriRisk Initiatives program under *Growing Forward 2*, a federal-provincial-territorial initiative, and is supported by FARMCo.



Photo Contest

Kids, pets and wheat

We've been lucky enough to capture some beautiful farm moments at some of our director's farms, but we know that there are some great farmer photographers out there and we want to hear from you!

Alberta Wheat Commission is holding a photo contest and we'll be giving the winner of the best photo a **Microsoft surface tablet and a one-year, prepaid subscription to Photoshop.**

The top 12 photos will be used in next year's Alberta Wheat Commission calendar.

Here's what we're looking for:

- "Farm family moments"
- "Pets in farming action!"
- "Fields of Gold"

Please email your best farm photographs to info@albertawheat.com by September 30th, 2015. Let us know in the email if you'd like to sign up for our e-newsletter!



Contact Us

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