



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

**Oilseeds
in China**

December 2015



MARKET SUMMARY*

- China was the world’s third-largest importer of agri-food and seafood products in 2014, after the European Union and the United States, with C\$134.2 billion.
- Oilseeds was China’s number one agri-food and seafood import commodity in 2014, with C\$65.2 billion, which was an increase of 10.5% over 2013.
- In 2014, Canada was China’s fourth-largest supplier of oilseed products, after the United States, Brazil, and Argentina, providing over C\$4.1 billion.
- Soybean product imports were valued at C\$45.7 billion in 2014, which was an increase of 12.6% over 2013. The top three supplying countries were Brazil, the United States and Argentina, with Canada holding the fifth spot.
- China’s imports of canola products in 2014 decrease by 9.7% over 2013, landing at just over C\$4.0 billion. The top three supplying countries were Canada, Australia, and the United Arab Emirates.
- China’s imports of flaxseed saw a 62.2% increase in 2014 over 2013, reaching C\$197.6 million. The top three supplying countries were Canada with 97.5% market share, followed by the United States (2.2%) and Ethiopia (0.3%).

**Note: this report will specifically focus on oilseeds as defined by soybean, canola, and flax in their forms of seed, oil, and meal.*

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OILSEEDS* OVERVIEW

China's Top Ten Suppliers of Oilseeds, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	40,300.34	46,294.38	54,589.29	58,973.46	65,162.83	12.76
United States	13,037.47	13,908.70	17,126.32	16,144.38	21,338.38	13.11
Brazil	9,287.71	12,261.09	15,497.06	20,370.16	21,118.08	22.80
Argentina	5,480.38	4,930.37	4,658.73	4,649.55	4,321.72	-5.77
Canada	2,053.24	1,937.37	3,869.18	3,754.09	4,146.19	19.21
Indonesia	2,668.79	3,655.68	4,163.97	3,006.34	3,615.11	7.88
Malaysia	3,213.73	4,576.93	3,854.28	3,354.49	3,000.54	-1.70
Uruguay	650.76	817.44	1,221.66	1,479.69	1,545.67	24.14
Peru	1,045.11	1,099.36	1,011.29	903.44	945.69	-2.47
Australia	266.91	411.28	298.61	785.61	524.61	18.40
Ukraine	23.73	73.60	115.60	500.36	498.79	114.12

China's Top Ten Suppliers of Oilseeds, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United States	32.35	30.04	31.37	27.38	32.75	0.40
Brazil	23.05	26.49	28.39	34.54	32.41	9.36
Argentina	13.60	10.65	8.53	7.88	6.63	-6.97
Canada	5.09	4.18	7.09	6.37	6.36	1.27
Indonesia	6.62	7.90	7.63	5.10	5.55	-1.07
Malaysia	7.97	9.89	7.06	5.69	4.60	-3.37
Uruguay	1.61	1.77	2.24	2.51	2.37	0.76
Peru	2.59	2.37	1.85	1.53	1.45	-1.14
Australia	0.66	0.89	0.55	1.33	0.81	0.14
Ukraine	0.06	0.16	0.21	0.85	0.77	0.71

PP: Percentage Point (difference between two percentage values)

Oilseeds Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
China's imports from the world	40,300.34	46,294.38	54,589.29	58,973.46	65,162.83	12.76
China's imports from Canada	2,053.24	1,937.37	3,869.18	3,754.09	4,146.19	19.21
Supply gap	38,247.09	44,357.01	50,720.11	55,219.37	61,016.64	12.39

Source for all: Global Trade Atlas, 2015

CAGR: Compound Annual Growth Rate

*Note: For this trade section, oilseeds was defined using HS codes 12 (oilseeds), 15 (oils), and 23 (meal)



China's Top Five Oilseed Product Imports, C\$ Millions

HS Code	Description	2012	2013	2014	CAGR% 2012-14
120190	Soybeans	34,914.62	39,280.18	44,509.38	12.91
151190	Palm oil and its fractions, refined but not chemically modified	6,439.89	4,974.25	4,843.56	-13.28
120510	Canola seeds	1,955.00	2,493.39	3,068.01	25.27
120740	Sesame seeds	520.36	796.69	1,269.79	56.21
150710	Soybean oil, crude	2,265.20	1,314.14	1,196.20	-27.33

CAGR: Compound Annual Growth Rate

**China's Top Five Oilseed Product Imports
and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
120190	Soybeans	Brazil 46.11	United States 41.00	Argentina 8.3	1.15
151190	Palm oil and its fractions, refined but not chemically modified	Malaysia 54.00	Indonesia 46.00	-	N/A
120510	Canola seeds	Canada 89.19	Australia 10.81	Chile <0.01	89.19
120740	Sesame seeds	Ethiopia 34.51	Tanzania 14.13	Sudan 8.84	N/A
150710	Soybean oil, crude	Argentina 42.31	Brazil 40.90	United States 16.75	N/A

Source for both: Global Trade Atlas, 2015



POSITIONING SOYBEAN* PRODUCTS

China's Top Suppliers of Soybean Products, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	27,128.99	30,931.74	37,204.94	40,611.22	45,727.15	13.94
Brazil	9,243.99	12,185.18	15,412.56	20,252.97	21,012.00	22.79
United States	11,869.04	12,813.05	15,582.99	13,835.78	18,448.68	11.66
Argentina	5,276.00	4,818.48	4,553.26	4,523.80	4,199.81	-5.54
Uruguay	619.81	797.98	1,202.33	1,446.08	1,513.60	25.01
Canada	35.61	218.59	399.02	513.08	511.66	94.69
Russia	0.21	1.41	30.69	23.35	21.10	218.50
India	76.34	87.25	14.06	6.95	12.96	-35.81
Denmark	3.07	5.45	4.69	7.17	6.06	18.50
Taiwan	2.49	2.94	2.97	0.30	0.50	-33.13
Malaysia	-	0.06	-	-	0.45	N/C

N/C: Not Calculable

China's Top Ten Suppliers of Soybean Products, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Brazil	34.07	39.39	41.43	49.87	45.95	11.88
United States	43.75	41.42	41.88	34.07	40.35	-3.41
Argentina	19.45	15.58	12.24	11.14	9.18	-10.26
Uruguay	2.28	2.58	3.23	3.56	3.31	1.03
Canada	0.13	0.71	1.07	1.26	1.12	0.99
Russia	0.00	0.00	0.08	0.06	0.05	0.05
India	0.28	0.28	0.04	0.02	0.03	-0.25
Denmark	0.01	0.02	0.01	0.02	0.01	0.00
Taiwan	0.01	0.01	0.01	0.00	0.00	-0.01
Malaysia	0.00	0.00	0.00	0.00	0.00	0.00

PP: Percentage Point (difference between two percentage values)

Soybean Product Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
China's imports from the world	27,128.99	30,931.74	37,204.94	40,611.22	45,727.15	13.94
China's imports from Canada	35.61	218.59	399.02	513.08	511.66	94.69
Supply gap	27,093.38	30,713.15	36,805.92	40,098.14	45,215.49	13.66

Source for all: Global Trade Atlas, 2015

CAGR: Compound Annual Growth Rate

*Note: For this trade section, soybeans was defined using HS codes 1201 (soybean), 1507 (oil), and 2304 (meal)



China's Top Soybean Product Imports, C\$ Millions

HS Code	Description	2012	2013	2014	CAGR% 2012-14
1201	Soybeans, whether or not broken	34,914.68	39,280.18	44,509.38	12.91
1507	Soybean oil and its fractions, whether or not refined, but chemically modified	2,268.84	1,316.62	1,198.22	-27.33
2304	Soybean oilcake, whether or not ground or in pellet form	21.43	14.42	19.55	-4.49

CAGR: Compound Annual Growth Rate

China's Top Soybean Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
1201	Soybeans, whether or not broken	Brazil 46.11	United States 41.00	Argentina 8.30	1.15
1507	Soybean oil and its fractions, whether or not refined, but chemically modified	Argentina 42.24	Brazil 40.84	United States 16374	N/A
2304	Soybean oilcake, whether or not ground or in pellet form	India 66.30	Denmark 30.99	Taiwan 2.53	N/A

Source for both: Global Trade Atlas, 2015

CAGR: Compound Annual Growth Rate

N/A: Not Applicable



NEW SOYBEAN PRODUCT LAUNCHES

According to the Mintel Global New Product Database (GNPD), from 2010-14, there were 3,769 new soybean products launched in China. Of the total new product launches, 84% were either new products (1,643) or new variety/range extensions (1,523). Unflavoured/plain was the most popular flavour with 604 launches from 2010-2014, which accounted for 16.0% of total launches.

New Soybean Product Launches in China, January 1, 2010 to December 31, 2014, by Feature

Feature*	Yearly Launch Counts				
	2010	2011	2012	2013	2014
Yearly product launches	248	611	815	799	1296
Launch type					
New variety/range extension	70	203	308	339	603
New product	144	324	405	343	427
New packaging	29	64	81	90	213
Top five claims					
No additives/preservatives	27	76	112	148	197
Time/speed	28	78	97	95	150
Ease of use	8	37	46	71	91
GMO-Free	12	32	53	74	79
Halal	16	35	48	44	89
Subcategories					
Table sauces	59	135	133	119	120
Instant noodles	17	32	47	36	101
Meat Products	5	22	45	46	94
Sweet biscuits/cookies	11	24	31	30	86
Bean-based snacks	15	29	66	67	72
Top three flavours (including blend)					
Unflavoured/plain	34	144	134	144	148
Soy sauce	39	80	68	48	58
Beef	4	16	22	19	37
Top five package types					
Flexible	84	180	221	204	499
Flexible sachet	47	67	174	189	161
Bottle	51	118	119	109	117
Skinpack	0	0	10	61	115
Jar	20	73	124	107	113
Top three price ranges (US dollars)					
\$0.05 - \$3.98	219	481	615	551	1053
\$3.99 - \$7.92	12	59	82	84	165
\$7.93 - \$11.86	4	15	23	24	25
Top five companies					
Dingyi Foods	1	2	11	13	33
Yurun Food	0	5	8	3	14
Want Want	1	3	4	7	10
Mei Wei Xian Seasoning	1	4	8	2	9
Kinyi Jinluo Meat Product	2	3	6	8	3

Source: Mintel GNPD, 2015.

*Note: rankings are based on 2014 data and GNPD search was based solely on products that contained a form of the word "soybean."



NEW SOYBEAN PRODUCT SAMPLES



STEWED BEEF FLAVOURED INSTANT NOODLES

MasterKong Mian Ba Zhu Mian Jing Dun Niu Rou Mian (Stewed Beef Flavoured Instant Noodles) are made of selected wheat flour and processed using a scientific technique. The noodles are said to be chewy, smooth and tasty. This product retails in a pack containing five 117g units.

Company: Dingyi Foods
Brand: MasterKong Mian Ba Zhu Mian
Category: Meal and meal centres
Date Published: May 2014
Price: US\$2.01
Pack Size: 5 x 117g
Claims: Time/speed

XIAO TAO QI SOY SAUCE

Chubang/Chu Bang Xiao Tao Qi Jiang You (Xiao Tao Qi Soy Sauce) contains greater than or equal to 0.90g amino acid nitrogen per 100ml serving. This product is fortified with iron and retails in a 150ml pack.

Company: Mei Wei Xian Seasoning
Brand: Chubang/Chu Bang
Category: Sauces and seasonings
Date Published: October 2013
Price: US\$0.68
Pack Size: 150ml
Claims: Vitamin/mineral fortified



SOYBEAN MILK POWDER WITH HIGH CALCIUM AND VITAMINS

VV/Weiwei Gao Gai Duo Wei Dou Nai Fen (Soybean Milk Powder with High Calcium and Vitamins) has been repackaged. It is high in calcium and protein, and contains various vitamins and dietary fibre. This product retails in a newly designed 680g pack.

Company: Wei Wei Dairy Industry
Brand: VV/Weiwei
Category: Dairy
Date Published: November 2014
Price: US\$4.98
Pack Size: 680g
Claims: Other (functional), antioxidant, digestive (functional), bone health, brain and nervous system (functional), high protein, time/speed, ease of use.

Source for all: Mintel, GNPD, 2015



POSITIONING CANOLA* PRODUCTS

China's Top Suppliers of Canola Products, C\$ Millions

Country	2012	2013	2014	CAGR % 2012-14
World	3,623.38	4,484.33	4,047.25	5.69
Canada	3,347.08	3,088.53	3,390.37	0.64
Australia	31.38	620.97	356.57	237.08
United Arab Emirates	120.40	253.54	159.59	15.13
Netherlands	53.59	252.04	47.77	-5.59
Ukraine	0.00	0.25	21.31	N/C

N/C: Not Calculable

China's Top Suppliers of Canola Products, % Share

Country	2012	2013	2014	PP Change 2012-14
Canada	92.37	68.87	83.77	-8.60
Australia	0.87	13.85	8.81	7.94
United Arab Emirates	3.32	5.65	3.94	0.62
Netherlands	1.48	5.62	1.18	-0.30
Ukraine	0.00	0.01	0.53	0.53

PP: Percentage Point (difference between two percentage values)

Canola Product Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	3,623.38	4,484.33	4,047.25	5.69
China's imports from Canada	3,347.08	3,088.53	3,390.37	0.64
Supply gap	276.30	1395.81	656.88	54.19

Source for all: Global Trade Atlas, 2015

CAGR: Compound Annual Growth Rate

**Note: For this trade section, canola was defined using HS codes 1205 (canola), 1514(oil), 230641(meal)*

In 2014, Canada was the top canola supplier to China, providing over 80% of their imports. The majority of China's canola imports were canola seeds (76.4%), followed by canola oil (22.3%) and canola seed oilcake (1.3%). Canada's market share for canola imports to China has been up and down over the last couple of years. In 2014, Canada gained back some of the market share that they lost in 2013, which is a potentially positive sign for Chinese imports of Canadian canola going forward.



NEW CANOLA PRODUCT LAUNCHES

According to the Mintel Global New Product Database (GNPD), from 2010-14, there were just 46 new canola products launched in China. Of the total new product launches, 91.3% were either new products (26) or new variety/range extensions (16). Over the 2010-14 period, the most popular subcategory for canola products was oils with 18 products, followed by honey (4) and sweet biscuits/cookies (3). In addition, the most popular flavour was unflavoured/plain which accounted for 61% of all canola products launched over the five year period. The two most used package types from 2010-14 were bottled with 21 products and flexible (12). These two package types made up 78.2% of all product packaging. The top three companies who launched products over the 2010-14 period were Lam Soon (3), Nisshin Oillio (3) and Canbra Foods (2). However, in 2014, fifteen different companies launched canola products into the Chinese market. These companies accounted for 19 of the 46 products launched from 2010-14. From 2010-14, the top price range for canola products in China was US\$0.75 to US\$4.49.

New Canola Product Launches in China, January 1, 2010 to December 31, 2014, by Feature

Feature*	Yearly Launch Counts				
	2010	2011	2012	2013	2014
Yearly product launches	7	0	12	8	19
Launch type					
New product	5	0	7	4	10
New variety/range extension	1	0	5	3	7
New packaging	1	0	0	1	1
Top five claims					
No additives/preservatives	0	0	4	1	4
GMO-Free	1	0	3	1	4
Low/no/reduced cholesterol	1	0	3	0	4
Low/no/reduced trans fat	2	0	4	1	2
All natural product	0	0	2	0	2

Source: Mintel GNPD, 2015.

*Note: rankings are based on 2014 data and GNPD search was based solely on products that contained a form of the word "canola."

NEW CANOLA PRODUCT SAMPLES



CANOLA EXTRA VIRGIN OLIVE OIL

Knife Brand Jie Hua Zi Gan Lan You (Canola Extra Virgin Olive Oil) has been repackaged. The product now retails in a newly designed 900ml pack.

Company: Lam Soon

Brand: Knife Brand

Category: Sauces and seasonings

Date Published: August 2014

Price: US\$3.71

Pack Size: 900ml

Claims: N/A

Source: Mintel, GNPD, 2015



APPLE AND CINNAMON GRANOLA

Smarty Ping Guo Rou Gui Kao Mai Pian (Apple and Cinnamon Granola) is described as a delicious blend of wholegrain oats and cinnamon, and is sweetened with real apples. This granola contains 0g trans fat and is free from artificial sugar, artificial flavourings, cholesterol and preservatives. The product is high in energy and retails in a 320g pack.



Company: Smarty

Brand: Smarty

Category: Breakfast cereals

Date Published: April 2014

Price: US\$4.74

Pack Size: 320g

Claims: No additives/preservatives, low/no/reduced cholesterol, low/no/reduced sugar, low/no/reduced trans fat, wholegrain.



XO SAUCE

Sau Tao XO Zi Wei Jiang (XO Sauce) can be served with lo mein noodles, rice or stir-fried dishes. This product retails in a 220g pack.

Company: Sun Shun Fuk Foods

Brand: Sau Tao

Category: Sauces and seasonings

Date Published: April 2014

Price: US\$2.52

Pack Size: 220g

Claims: N/A

MARGARINE

Canola Harvest Zhi Wu Huang You (Margarine) is free from cholesterol and trans fat. This product contains a source of omega 3 and retails in a 140g pack with 20 x 7g units.

Company: Canbra Foods

Brand: Canola Harvest

Category: Dairy

Date Published: January 2012

Price: US\$3.55

Pack Size: 140g

Claims: Low/no/reduced cholesterol, low/no/reduced trans fat



Source for all: Mintel, GNPD, 2015



POSITIONING FLAX* PRODUCTS

China's Top Suppliers of Flax Products, C\$ Millions

Country	2012	2013	2014	CAGR % 2012-14
World	141.80	146.61	228.18	26.85
Canada	92.25	115.66	193.22	44.73
Turkey	1.94	-	10.23	129.83
Belgium	3.54	7.78	10.16	69.26
United States	39.51	16.62	7.02	-57.86
Ukraine	3.48	3.09	6.35	35.06

China's Top Suppliers of Flax Products, % Share

Country	2012	2013	2014	PP Change 2012-14
Canada	65.05	78.89	84.68	19.63
Turkey	1.37	0.00	4.48	3.12
Belgium	2.50	5.30	4.45	1.95
United States	27.86	11.34	3.07	-24.79
Ukraine	2.45	2.11	2.78	0.33

PP: Percentage Point (difference between two percentage values)

Flax Product Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	141.80	146.61	228.18	26.85
China's imports from Canada	92.25	115.66	193.22	44.73
Supply gap	49.56	30.95	34.96	-16.00

Source: Global Trade Atlas, 2015

CAGR: Compound Annual Growth Rate

*Note: For this trade section flax was defined using HS codes 1204 (seed), 151511 (oil crude), 151519 (oil refined), and 230620 (meal)

In 2014, Canada was the top supplier of flax products to China, providing over C\$193.0 million. Of this total, 97.5% was Canadian flaxseed. China's imports of flaxseed have been steadily increasing with a 62.2% increase in 2014 over 2013 alone. In 2014, there were only three suppliers of flaxseed to China and they were Canada, the United States and Ethiopia.



NEW FLAX PRODUCT LAUNCHES

From 2010-14, there were 71 new flax products launched in China. Of these, 84% were either new products (45) or new variety/range extensions (15). Oils was the most popular subcategory, with 41 of the 71 products falling within this segment. Almost 70% of the new products launched were of the unflavoured/plain variety and 88% of the total launches were either packaged in a bottle (40) or flexible (23) container. Over the 2010-14 period, the top companies were Jiashili Group with 8 product launches, followed by Meng Yi Sa Food (5), Joyful Organic (4), Sanmark Trade (3) and Yu Bao Goat's Milk (3). These companies only accounted for a combined 32.3% of all launches from 2010-14, indicating a very fragmented market. The most popular price range for flax products in China from 2010-14 was US\$4.08 to US\$7.92 (Mintel GNPD, 2015).

New Flax Product Launches in China, January 1, 2010 to December 31, 2014, by Feature

Feature*	Yearly Launch Counts				
	2010	2011	2012	2013	2014
Yearly product launches	17	12	9	11	22
Launch type					
New product	14	6	5	8	12
New variety/range extension	3	1	3	3	5
New packaging	0	4	1	0	3
Top five claims					
Halal	1	0	2	2	8
GMO-Free	0	1	1	2	8
No additives/preservatives	0	1	2	2	5
Organic	4	2	0	2	3
Premium	0	0	1	0	3

Source: Mintel GNPD, 2015.

*Note: rankings are based on 2014 data and GNPD search was based solely on products that contained a form of the word "flax."

NEW FLAX PRODUCT SAMPLES



FLAXSEED MAIZE OIL

Knife Brand Yu Mi Ya Ma Zi You (Flaxseed Maize Oil) has been re-launched and now has five times more omega 3 than ordinary maize oil. This non-GMO oil has a low smoke point and is free from additives. The product is now available in a newly designed 2L pack.

Company: Lam Soon

Brand: Knife Brand

Category: Sauces and seasonings

Date Published: December 2014

Price: US\$9.48

Pack Size: 2L

Claims: No additives/preservatives, brain and nervous system (functional), GMO-free

Source: Mintel, GNPD, 2015



BEEF DUMPLINGS

Meng Yi Sa Cao Yuan Wei Dao Chun Niu Rou Shui Jiao (Beef Dumplings) are made using selected quality flaxseed oil and beef from Xilingol League. The handmade dumplings are processed according to advanced production techniques and an exclusive recipe.



Company: Meng Yi Sa Food

Brand: Meng Yi Sa Cao Yuan Wei Dao

Category: Meals and meal centres

Date Published: October 2014

Price: US\$5.51

Pack Size: 720g (36 Pieces)

Claims: Halal



MULIT-GRAIN SACHIMA

Nice Choice Taiwan Dessert Wu Gu Za Liang Sha Qi Ma (Multi-Grain Sachima) is made with fresh fine grains and has a sweet taste. This product is free from artificial colourings, suitable for ovo-lacto vegetarians, and available in a 227g pack.

Company: Hurng Fur Food Factory

Brand: Nice Choice Taiwan Dessert

Category: Bakery

Date Published: April 2014

Price: US\$2.97

Pack Size: 227g

Claims: No additives/preservatives, vegetarian

Source for both: Mintel, GNPD, 2015

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in China**
<http://www.tradecommissioner.gc.ca/eng/offices-china.jsp>
- **Find a Trade Commissioner**
www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca



RESOURCES

Global Trade Atlas, 2015

Mintel, *Global New Product Database (GNPD) 2015*



Oilseeds in China

Global Analysis Report

Prepared by: Stephanie Clarke, Market Analyst

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