FAO AGRICULTURE AND TRADE POLICY

BACKGROUND NOTE

CANADA

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1. Agricultural Sector Performance

Agriculture contributes roughly 2% to the total GDP of Canada and employs approximately 2% of the total employment. Since 1995, agricultural products have had a growing importance in total exports, as shown in the rising percentage of food exports in total merchandise exports.

Table 1: Macroeconomic and Characteristics of Agricultural Sector

Indicator	1995	2010
Total Population (millions)	29.4	34.1
Rural Population (% of Total Population)	22	19
Share of Agriculture Sector in GDP (%)	3	2*
Agricultural Land (share of total land area)	7.5	7.4**
Employment in Agriculture (% of total employment)	4	2*
Food exports (% of merchandise exports)	7.7	10.5
Food imports (% of merchandise imports)	5.7	7.4

Source: WDI, 2012. *Latest year for available data was 2008.**2009

Canada is a major producer of wheat, rapeseed, maize, soybeans, barley, and dairy products. The total value of agricultural products have almost doubled since 1995, with a value reaching C$38.8 billion in 2010. However, in terms of monetary value, cattle meat and pig meat are considered important commodities, which account for the largest share of the total output value of agricultural products.

Table 2: Value of Agricultural Production for Main Products (US$ million)

Commodity	1995	2010
Total output value	19,170	38,756
Cattle Meat	3,433	4,322
Pig Meat	2,178	3,762
Rapeseed	1,724	3,293
Wheat	3,129	3,014
Cow Milk	2,471	2,572
Indigenous Chicken Meat	1,004	1,437
Soybeans	514	1,074

Source: FAOSTAT, 2012.

Canada is a net exporter of agriculture and agri-food goods and one of the leading exporters of wheat, coarse grains, oilseeds, pork, and beef. Canada is typically among the top three largest wheat exporters in world, along with the United States and Australia. Since 1995, the total export value of agricultural products has more than doubled, and reached C$34.7 billion in 2010. More than half of Canada's agricultural exports are sent to the United States.

Table 3: Exports of Main Agricultural Products by Value (US$ million and thousands tons)

Commodity	Unit	1995	2010
Wheat	US$ million 1000 tons	2,952 16,960	4,535 18,394
Rapeseed	US$ million 1000 tons	1,038 3,416	3,300 7,471
Rapeseed Oil	US$ million 1000 tons	292 434	2,124 2,233
Pork	US$ million 1000 tons	424 167	1,888 689
Soybeans	US$ million 1000 tons	167 654	1,368 2,776
Food Prepared nes	US$ million 1000 tons	241 214	1,250 422
Meat of Cattle, Boneless	US$ million 1000 tons	169 75	1,080 325
Total Value of Agriculture Product Exports, US$ million		12,789	34,703

Source: FAOSTAT, 2012.

Canada's main agricultural import products consist of prepared foods and specialty products, such as wine, chocolate, and beverages (both alcoholic and non-alcoholic). The value of imports reached C$27.2 billion in 2010, and almost tripled in value from 1995.

Table 4: Imports of Main Agricultural Products by Value (US$ million and thousands tons)

Commodity	Unit	1995	2010
Food Prepared nes	US$ million 1000 tons	476 263	1,906 662
Wine	US$ million 1000 tons	324 148	1,699 350
Chocolate	US$ million 1000 tons	224 82	757 164
Sugar Raw Centrifugal	US$ million 1000 tons	258 920	718 963
Beverage Dist. Alcoholic	US$ million 1000 tons	190 24	665 42
Cattle Boneless	US$ million 1000 tons	465 172	620 127
Beer of Barley	US$ million 1000 tons	64 86	610 341
Beverage Non-Alcoholic	US$ million 1000 tons	79 104	571 524
Total Value of Agriculture Product Imports, US$ million		9,080	27,180

Source: FAOSTAT, 2012.

2. Main Features of Canada's Agricultural and Trade Policy

In order to meet WTO commitments, Canada was tasked with reforming its agricultural and trade policy in a way that both maintains its competitiveness and protects national agricultural objectives to build a prosperous agriculture sector. Canadian agriculture policy is coordinated under the shared responsibility of both the federal and provincial governments through agreements to effectively implement national programs and address regional issues. The wave of Canada's agricultural support was marked by the implementation of the Framework Agreement of Agricultural and Agri-Food Policy for the Twenty-First Century in 2002. Canada's agricultural policy framework has largely been focused on becoming a world leader in food safety, innovation, and environmentally sustainable production. Government-funded support was delivered to agricultural producers through business risk management programs, such as farm income support programs, as well as environmental programs, food safety, innovation and renewal programs.[1]

In 2008, the current five-year Federal, Provincial and Territorial agricultural policy, called the Growing Forward Framework, was introduced to promote a prosperous, competitive and innovative agriculture, agri-food, and agri-based products industry that contributes to food safety, environmental protection and the overall health of it citizens. The Growing Forward Framework Agreement is structured into three parts: Policy Architecture and General Framework Provisions; Non-Business Risk Management (BRM) Funding and Initiatives (Food Safety, Environment, Science and Innovation and Renewal programs); and BRM. The BRM initiative represents the main programs that provide domestic support to producers, which includes supply management system[2].

The Growing Forward framework allows flexibility for provinces and territories to design and implement other non-BRM programs that better address local priorities to achieve Canada's national agricultural objectives. Provinces have the ability to also determine the level of resources and different program areas of BRM support that are applicable, so regional priorities can be addressed.

As the current Growing Forward Framework will expire 31 March, 2013, the next five-year Growing Forward 2 policy framework has been agreed upon by federal, provincial, and territorial Ministers of Agriculture. The future agricultural policy is expected to build on previous frameworks toward a renewed focus on competitiveness and sustainability, while emphasizing the importance of innovation and marketing to the sectors future success. The new agreement establishes a budget of C$3 billion for the Framework, which will continue to deliver the BRM programs[3].

[1] Agriculture and Agri-Food Canada, 2005.
[2] Agriculture and Agri-Food Canada, 2012a.
[3] Agriculture and Agri-Food Canada, 2012b.

2.1 Domestic Agricultural Programs

The central support policy instruments for agriculture are represented in a group of business risk management programs (BRM) in the Growing Forward framework. The BRM programs include five main program areas. Canada's supply management system is the first BRM program, which is designed to control imports through tariffs and import tariff quotas, implement pricing policy, and provide production management for the supply managed commodities. The additional core BRM programs aim to provide support to producers to reduce income or production losses caused by low commodity prices, increased production costs, reduced production, or natural disasters. These BRM programs include: AgriStability, which is a stabilization program for income losses; AgriInvest, which subsidizes farm savings; AgriInsurance insures against production losses from natural perils; and AgriRecovery is a rapid response program for natural disaster and provides ad hoc assistance[3].

The majority of the Canadian government's assistance to agricultural producers is provided through market price support measures under the supply management system. The specific commodities under supply management include a variety of dairy products as well as poultry meat, eggs, and other related products. Supply managed commodities are governed by the national marketing plan, which is its own federal, provincial and territorial agreement. This indicates the level of importance these commodities serve to national interests. Supply management system implements an array of protective measure to control imports of products and several by-products, stabilize producer prices, and production management quotas.

The Canadian government uses a few key guarantee programs under the Agricultural Marketing Programs Act (AMPA). The Price Pooling Program is a price guarantee program that protects producers and marketing agencies against unanticipated declines in the market price of a specific product. The Federal government agrees with a marketing agency, such as a producer or processor association, and provides a price guarantee. The price guarantee is set at a percentage of the expected wholesale price of a product. Such a scheme allows the marketing agency to use the price guarantee as security in obtaining credit, and allows the agency to provide producers with cash flow through an initial payment for products delivered. When the wholesale price drops below the price guarantee, the program allows for a payment of the difference by the government, in the form of a product specific subsidy[4]. According to the WTO (2011), in 2010 the total guarantee amount was approximately C$55.2 million for roughly 18,000 producers. The Canadian government has claimed no government expenditures have been incurred under the Price Pooling Program since 1997[5].

The Advance Payments Program is another complementary initiative to the BRM programs and under the AMPA. It provides crop and livestock producers with easier access to credit through

[3] Agriculture and Agri-Food Canada, 2012a.
[4] Agriculture and Agri-Food Canada, 2010.
[5] WTO, 2011.

loan guarantees. The program under the federal government guarantees cash advances to producers of up to C$400,000 by participating producer organizations. The value of the advance is based on the value of the eligible products. The federal government ensures the advance is interest-free up to C$100,000 and repayable by the end of the production period[6]. The government guaranteed C$1.9 billion in advances in the period of 2008-2009[7].

The additional core BRM programs includes AgriStability, which is an income stabilization program that covers margin losses caused by low prices, production losses or rising input costs. The payments are delivered when producers' production margins drop more than 15% below their five-year average reference margin. The production margin is the difference between allowable production expenses and revenue. The fee to participate in the AgriStability program is C$3.80 per C$1000 of reference margin[8].

The level of compensation depends on the range of margin declines. For example, under the stabilization component margin declines ranging from 15% to 30% are compensated by 70% of the portion of the margin decline. Disaster component payments compensate for declines greater than 30% but less than 100% with a payment of 80% of the margin decline (some simplifying changes are foreseen for 2013). The maximum annual payment is C$3million per farm[9]. The program works as a risk management tool to protect producers against unforeseen market fluctuations and natural disasters.

The provinces have also designed programs to complement AgriStability, for example in Quebec. Quebec's risk management program, Farm Income Stabilization Insurance (ASRA), is designed to provide additional support beyond AgriStability to producers through price insurance schemes. The program pays producers when the average market price falls below the reference price for specific commodities[10]. ASRA payments were valued at $582.5 million in 2009 (excluding insurance premiums). The provincial government in Quebec is reported to cover two-thirds of ASRA insurance premiums[11].

AgriInvest is a government support program designed to help producers increase savings to address the occasion of small margin declines, as well as for other potential investments. The program works by rewarding producers with a matching contribution for deposits of allowable amounts of funds in an AgriInvest account. Producers can deposit funds up to 1.5% of their allowable net sales from the previous year, on which they receive a matching contribution from the government. Most agricultural commodities are included under allowable net sales (as defined in the program guidelines) except for supply managed commodities. The maximum government contribution per participant is $C22,500[12].

AgriInsurance is an insurance program for production losses due to weather or other agricultural perils, related to specific crops or commodities. Producers, provincial and federal governments

[6] Agriculture and Agri-Food Canada, 2011.
[7] WTO, 2011.
[8] WTO, 2011.
[9] Agriculture and Agri-Food Canada, 2012a.
[10] La Financière Agricole du Québec, 2012.
[11] WTO, 2011.
[12] Agriculture and Agri-Food Canada, 2011.

all share the costs of the program, with the federal government funding a portion of total premiums and administrative costs. Contracts are issued and administered by provincial or local corporations. The majority of commercial crops are eligible under the program. The AgriInsurance program coordinates with other BRM programs to ensure producers are producers are not paid twice for the same losses.

The AgriRecovery program ensures a rapid response to producers affected by a natural disaster by providing ad hoc government financial assistance. The program aims to fill in the gaps of other business management risk and disaster relief programs. Therefore, funding depends on potential payments from other existing programs.

An update of another loan guarantee program was introduced in June 2009, aiming to make credit more accessible for farmers. The Canadian Agricultural Loans Act now has a maximum loan amount of C$500,000 for land and buildings and C$350,000 for any other purpose[13]. By the end of 2010, the Canadian Agricultural Loans Act had 3,400 total loans, valued at C$183.3 million[14].

2.2 Single Commodity Programs: Grain and Dairy

Single commodity support programs are focused on two main commodity groups in Canada. Both commodity groups have state trading enterprises that traditionally have intervened in cereal and dairy markets. Wheat and barley producers in the western provinces of Canada (Manitoba, Saskatchewan, Alberta, and Peace River area of British Columbia) have been obliged to market their products through the monopolistic structure of the Canadian Wheat Board (CWB). However as of 1 August 2012[15], the producer controlled marketing monopoly has been transformed into a privately owned marketing organization. One advantage of the former CWB has been that farmers receive a partial initial payment shortly after the grain is delivered to the elevator and receive the average price of all product sales made during the year[16]. It is claimed that the former CWB has been able to provide price premiums for farmers and sell grain at a higher price than global competitors. The government provides guarantees to the new CWB for initial payments supplied to farmers during elevator delivery and guarantees for CWB's borrowing and other CWB programs[17].

The Canadian Dairy Commission (CDC) is a state trading enterprise that is responsible for the implementation of the dairy supply management system. The CDC supports the dairy industry by establishing support prices for butter and skim milk powder, managing the market sharing quota for industrial milk, and implementing tariff quotas[18]. Dairy products are generally traded freely within Canada, with the exception of a few products in some provinces. The CDC implements some protective border measures relating to butter. For example, the CDC is responsible for allocating import permits for butter tariff quotas with the requirement that imports are directed to

[13] Agriculture and Agri-Food Canada, 2012c.
[14] WTO, 2011.
[15] The Marketing Freedom for Grain Farmers Act was amended to restructure the Canadian Wheat Board. (Agriculture and Agri-Food Canada. 2012d)
[16] CWB online information.
[17] WTO, 2011.
[18] Canadian Dairy Commission, 2012.

processors[19]. Even when imports are permitted, imports have an entry point toward the middle of the value chain, rather than the end.

The CDC distributes market-sharing quota or national production targets for industrial milk throughout the provinces. The annual market-sharing quota is based on estimates of the demand for butterfat, which takes into consideration surpluses from both milk production processes: industrial and fluid milk production[20]. Expected demand includes estimates on planned exports, while also ensuring supply is sufficient for national consumption. Surpluses are exported with export subsidies. Once the maximum allowable amount of WTO export subsidies commitments are reached, then no additional permits are issued[21].

In addition, the CDC establishes support prices annually for buying and selling butter and skim powder milk under the implementation of the supply management system. Provincial marketing boards purchase raw milk production from producers and pool revenues within regional milk pools. The pooling scheme is a tool to manage financial risk, which allows producers to receive an average price based on total sales and marketing boards to apply price differentials on products to certain markets. The support prices are used as a reference by the provincial milk marketing boards and regional milk pools to set the price in each province for selling milk to domestic processors[22]. The support prices are considerably higher than world prices, currently at C$7,192/t for butter and C$6,272/t for skim milk powder[23].

2.3 *Border Measures*

Border measures contribute to a significant amount of Canada's support to producers in order to manage supply levels of commodities under the supply management system. Canada's border measures generally include a range a protective measures such as tariffs and tariff quotas. Canada's applied MFN tariffs on agricultural goods (WTO definition) averaged 22.5% in 2010, and have remained unchanged since 2006. The highest levels of protection are applied to dairy products, with a tariff rate averaging at 237.3%[24]. Such protective measures are used to shield the dairy industry from external competition, as national production of dairy products is mainly for national consumption. About 41% of the applied MFN in-quota tariffs for agricultural products are non-ad valorem, while the ad valorem equivalents range from 0.3% to 8.6%[25].

As part of Canada's WTO commitments, 21 tariff quotas are used on mostly imports of goods in the supply management system (dairy products, poultry, eggs). All imports within tariff quotas are subject to a tariff rate, which varies depending on the origin of import. The tariff may be applied with either a MFN or preferential rate. Canada does not restrict the level to which WTO tariff quotas can be filled by preferential imports. For a section of products under WTO tariff

[19] WTO, 2011.
[20] Canadian Dairy Commission, 2012.
[21] WTO, 2011.
[22] Canadian Dairy Commission, 2012.
[23] WTO, 2011.
[24] WTO, 2011.
[25] WTO, 2011.

quota commitments (mainly poultry products), Canada's preferential trade agreements established tariff quotas with in-quota volumes defined as a share of domestic production, rather than in absolute terms as is the case in Canada's WTO commitments. As a result, the levels of in-quota volumes under preferential agreements vary from year to year, and may be lower or higher than its WTO commitments[26]. Defining tariff quotas as a share of production instead of absolute terms, can be an effective tool to more precisely ensure import levels do not flood domestic markets.

Canada's main export measures are subsidies. Canada has reduction commitments on export subsidies for 11 product groups, which include grains, oilseeds and related products, dairy products, and incorporated products. In the marketing years of 2007/08-2008/09, Canada provided subsidies for four of the product groups, which are skimmed milk powder, cheese, other milk products, and incorporated products.

In order to enhance market capacity and competitiveness for Canadian agriculture, agri-food, fish, and seafood subsectors, the federal government has introduced the AgriMarketing program. The program provides matching funding to activities that range from buyer and consumer research, gathering market intelligence, developing marketing tools, to promotional campaigns[27].

3 Measuring Support to Agriculture

Since 1995, the level of support to the agricultural sector has fluctuated. The monetary value of agricultural support has slightly increased, however the percentage of Producer Support Estimates (PSE) has decreased over the years. The percentage of PSE of the OECD declined to 14% in 2011, from 19% in 1995, and from 39% in 1987. This indicates that agricultural producers have become less dependent on government support programs over the long-term. However in the short term, the level of support rebounded in 2009, from a period of high support from 2000-2006, reaching C$7.7 billion. This is mainly due to Canada providing price support to its supply managed commodities, when world market prices decline, which leads to increased support[28]. Canada's nominal protection coefficient was about 1.12 in 2009, which indicates Canadian agricultural producers received average prices about 12% higher than world prices.

Market price support accounts for the majority of PSE, reaching C$4.1 billion of the PSE's C$6.9 billion in 2011. Market price support measures mainly include tariffs, production quotas, and support prices, particularly in the dairy sector.

Canada's earlier progress in decreasing commodity specific support has fluctuated in recent years. Milk and dairy products have the highest single commodity transfers among the main commodities produced in Canada. In 2011, the single commodity transfer for milk was valued at C$2.6 billion and decreased to 43% of gross farm receipts, from 55% in 2010, and 57% in 2009. The high level of transfers to the dairy sector reflects the importance of the Canadian dairy industry to national consumption, and likely the low international competitiveness of the dairy

[26] WTO, 2011.
[27] Agriculture and Agri-Food Canada, 2012a.
[28] WTO, 2011.

industry. Canadian dairy farmers' income support is provided through tariff quotas, prohibitive out-of quota tariffs, support prices (for butter and skimmed milk powder), production quotas (for milk), and export subsidies.

Table 5: Producer Support Estimates and Single Commodity Transfers

	1995	2000	2005	2011
Producer Support Estimate (PSE) (CAD million)	5,583	6,390	7,671	6,937
Market Price Support	2260	3,214	3,301	4,106
Total Support Estimate (TSE)	7,728	8,465	10,735	10,039
PSE (as % of gross farm receipts)	19	19	21	14
Single Commodity Transfers (SCT) (CAD million)				
Milk	1,923	2,669	2,446	2,567
SCT (as % of gross farm receipts)	48	63	49	43
Wheat	45	109	60	207
SCT (as % of gross farm receipts)	1	3	2	4
Rapeseed	49	36	58	273
SCT (as % of gross farm receipts)	2	2	2	4

Source: OECD Producer and Consumer Database, 2012.

Canada is a major exporter of wheat. Government assistance to wheat has generally been low. However in recent years the single commodity transfers for wheat have increased. In 2011, the single commodity transfers reached C$207 million from C$60 million in 2005. This increase in the single commodity transfer for wheat reflects exclusively an increase in AgriInsurance indemnities.

Total federal and provincial government expenditures to agriculture and agri-food sector reached C$7.3 billion in 2009/10. Program payments accounted for roughly two-thirds of the total expenditures. The major program categories were income support and stabilization, crop insurance and production insurance, and financial insurance. Provincial tax expenditures used for tax exemptions and refunds are also a significant form of support. Producers in Quebec, Nova Scotia, and Newfoundland and Labrador have received the highest level of financial assistance in relation to the size of their agriculture and agri-food GDP[29].

4. Recent Policy Developments

4.1 Recent Policy Developments in the Amber and Green Box Support

According to the latest WTO notification, some of the major domestic agricultural programs fall within the Amber Box as defined by the WTO Agreement on Agriculture. In product specific support, the main measures include direct payments under Quebec's Farm Income Stabilization Insurance (ASRA) for grains and beef. The supply management system provides product specific support in the form of market price support. Market price support measures include the support price scheme for butter and skim milk powder. Non-product specific AMS measures generally include Canada's main domestic support programs under BRM. The BRM programs that account

[29] WTO, 2011.

for the majority of funding include AgriInsurance, AgriStability, AgriInvest, and Advance Payments Program.[30]

The Green Box measures that are exempt from reduction commitments include largely general services. These general services include a range of programs that focus on research, inspection services, extension and advisory services, and marketing. Other important support programs in the Green Box include environmental programs, and the crop disaster component of AgriStability[31]. Canada has reported nil decoupled income support in recent years, which indicates none of its direct payments meet the criteria for such classification[32].

4.2 Enhance Trade and Export Potential

In recent years, the Canadian government has strengthened efforts to identify markets where Canadian agricultural products can build new trade partnerships. In 2009, the government formed the Market Access Secretariat to coordinate government initiatives with industry, provinces, and territories, to aggressively and strategically pursue new and existing markets for Canadian agriculture and agri-food products. The Secretariat is composed of a variety of stakeholders in trade and agriculture, such as Agriculture and Agri-food Canada, Canadian Food Inspection Agency, and Department of Foreign Affairs and International Trade[39].

Canada has further strengthened its trade relationship with new partners, in addition to the major international free trade agreement, NAFTA. In 2009, Canada entered into a free trade agreement with the European Free Trade Association and bilateral agreements on agriculture with its member countries (Iceland, Norway and Switzerland, also covering Liechtenstein). Also in 2009, Canada launched negotiations with the European Union, to introduce a Comprehensive Economic and Trade Agreement (CETA). The EU is Canada’s second largest trading partner after the United States. This initiative represents Canada’s most significant trade initiative since the implementation of NAFTA in 1994. In recent years, free trade agreements have also been agreed upon with Peru (2009), Jordan (2009), Panama (2010), Colombia (2011) and Honduras (2011)[33].

Canada also has ongoing negotiations for free trade agreements with Central American countries such as El Salvador, Guatemala, Honduras, and Nicaragua (since 2001), Korea (launched in 2005), CARICOM (Caribbean countries launched in 2007), Dominican Republic (since 2007), Singapore (since 2001), Ukraine (since 2010, India (since 2010), Morocco (since 2011), and Japan (2012). Canada has engaged in exploratory discussions with MERCOSUR (South American countries), Turkey and Thailand, and has joined the Trans-Pacific Partnership negotiations[34].

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[30] WTO, 2012.
[31] WTO, 2012.
[32] The criteria for decoupled payments are listed in paragraph 6 of Annex 2 of the Agreement on Agriculture
[39] Agriculture and Agri-Food Canada, 2012e; OECD, 2011.
[33] Foreign Affairs and International Trade Canada, 2012; OECD, 2011.
[34] Foreign Affairs and International Trade Canada, 2012.

5 Concluding Remarks

Canada's domestic and trade policy provides an example of balancing competiveness in global market integration with supporting sectors of the agricultural industry that are of vital importance to national economic prosperity. Canada's agricultural policy framework uses four innovative programs to manage the major risks in agriculture. By setting up support schemes that respond to unexpected disasters and production losses, the Canadian government is able to minimize the impact of risk factors to better secure the prosperity of their agricultural future.

An important category of domestic support programs are the market price support measures that protect producers of certain commodities (dairy, poultry, eggs) through the supply management system. Federal and provincial authorities maintain a system relying on a multitude of domestic and border instruments to support producers and shield them from international competition. Although the transfers to the commodity producers involved are not charged to governments and taxpayers, sizeable costs can accrue to domestic consumers.

Canada's domestic support, as measured through the Current Total Aggregate Measurement of Support (AMS) and consisting of both market price support and budgetary payments, is well within its WTO commitment level of C$4,301 million[35]. Canada's most recent WTO notification showed the Current Total AMS at C$1,683.9 million in 2008 and C$1,395.1 million in 2009, which are both significantly below the commitment level. Although Canada faces challenges to its import protection for important agricultural products as it continues to build future trade alliances, the implications for the measurement of domestic support and the future Current Total AMS may be only minor. This follows from the fact that the measurement of WTO domestic support relies on domestic parameters only and not on border measures.

[35] WTO, 2012.

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