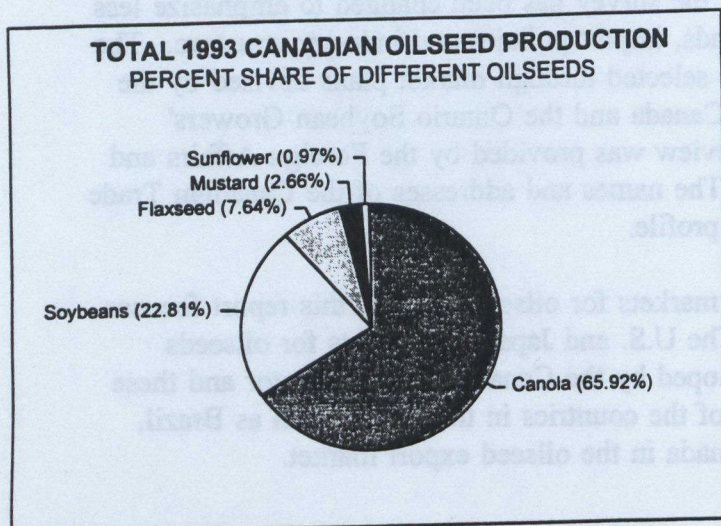


EXECUTIVE SUMMARY

Domestic Production

In 1993, Canada produced a total of 8.1 million tonnes of oilseeds. Canola and soybeans accounted for almost 90% of this production. Other oilseed crops such as flaxseed, mustardseed and sunflowerseed account for the remaining 10% of production.



Canadian Exports - Oilseeds

Roughly one-half of the total Canadian production of canola seed is exported. Exports of canola seed averaged 1.8 million tonnes over the last three crop years and are forecasted to reach 3.0 million tonnes in 1993-94. Japan has accounted for around 90% of Canada's total export sales of canola seed. In 1993-94, however, export shipments of canola seed to the E.C., United States and Mexico are forecasted to increase dramatically.

A smaller share of Canada's production of soybean seed is exported. In 1993-94, however, soybean exports are forecasted to jump to 475,000 tonnes from 189,000 tonnes in 1992-93. Over the last five years, around 17% of Canada's total production of soybean seed has been exported. United States is the major export market for soybeans used for processing soy oil and meal. Canada also exports special food-type soybeans, to countries primarily in the Pacific Rim, that use the soybeans to produce soy foods and drinks.

Almost all of Canada's production of flaxseed and mustard seed is exported to primarily Europe and United States. Most of Canada's production of sunflower seed is processed domestically. The surplus production is exported mainly to the United States and Europe.