

Issue in Focus

September 2011

Removal of the Canadian Wheat Board's Single-Desk Selling Powers

Core Issue: The federal government has announced it will remove the CWB's single-desk selling powers as of August 1, 2012. This will have a significant impact on Western Canada's agri-businesses.

The Importance of Changes to the Canadian Wheat Board to Businesses

The removal of the Canadian Wheat Board's single-desk selling powers will have a significant impact on Saskatchewan's agribusinesses and farmers. Besides farmers, grain handlers will be the companies most directly impacted because the removal of the Wheat Board's allocations will allow companies to compete to receive additional market share. The institution of an open market will also increase the opportunities available to transportation companies, value-added processors, market intelligence providers, crop scientists and others. With the removal of the single-desk selling powers of the CWB, Saskatchewan has the opportunity to transition from being the country's largest producer of grain to the country's agribusiness center.

About the Canadian Wheat Board

The Canadian Wheat Board (CWB), formally established in 1935, has a monopoly on the sale of Western Canada's non-feed wheat, durum and barley both domestically and internationally. Membership was made compulsory for Western Canadian farmers in 1943 via the War Measures Act, with the purpose of aiding the war effort.¹ Compliance with the CWB for farmers in Manitoba, Saskatchewan, Alberta and the Peace River District of British Columbia is still mandatory, and selling wheat, durum and barley outside of the Wheat Board is punishable by fines and/or imprisonment. Farmers from Eastern Canada and most of British Columbia are not controlled by the Canadian Wheat Board and may market all of their grain on the open market. Ontario has had a voluntary wheat board since 2000.

Since 1999, the CWB has been operated by a 15 member Board of Directors. Ten of the Directors are elected by prairie grain farmers, four are appointed by the federal government and

¹ Saskatchewan Agricultural Hall of Fame. [Saskatchewan Agriculture: A Capsule History](http://www.sahf.ca/capsule.php). 2006. 20 August 2011 <<http://www.sahf.ca/capsule.php>>.

the fifth, the President and CEO, is selected by the Board and appointed by the federal government.²

The CWB is the largest wheat and barley marketer in the world, selling grain to over 70 countries. Annual sales revenue is in the range of \$4 billion to \$6 billion. The CWB uses price pooling to share market risks among all Western Canadian farmers.³ All sales revenue, minus the operating costs, are returned to farmers through a tiered payout system that can take up to 18 months to complete. For farmers that want more control over how and when they get paid, the CWB allows Producer Payment Options. These programs give farmers the opportunity to accept a non-pooled price for their wheat and barley at a particular point in time.⁴

The CWB has long been a contentious topic. Although major reforms in the 1990's allowed farmers to have slightly more control, Wheat Board opponents argue that its control of non-feed wheat, barley and durum, lack of transparency and arbitrary changes and restrictions limit a farmer's ability to make money.

Wheat Board advocates tend to support the CWB because it makes it easier for farmers to market their grain and the pooling of Canada's high-quality grain allows the CWB to capture additional revenue. Undoubtedly it is easier for farmers to market their grain through the CWB as the board typically (Producer Payment Options are treated differently) makes all of the marketing decisions for the farmer without any consultation.

However, the ability of the CWB to capture a premium price tends to be a subject of debate. A major study recently found that even though the CWB is "one of the largest grain sellers in the world, it still controls too little of the globe's total grain trade to have any impact on the final price."⁵ Additionally, according to the Western Wheat Growers, the prices available to farmers in the U.S. open market are often significantly greater than the returns western Canadian farmers receive under the CWB monopoly.⁶ The Western Wheat Growers assert that for the most recent crop year, the price differentials ended up costing prairie farmers about \$500 million on their 2010 spring and winter wheat production, and a further \$190 million on durum when compared to the average price available to U.S. farmers. Furthermore, this price comparison does not reflect the additional costs that western Canadian farmers face under the CWB monopoly,

² PricewaterhouseCoopers LLP. The Canadian Wheat Board: Economic Impact Analysis. June 2005. 20 August 2011 <http://www.cwb.ca/public/en/about/analysis/pdf/cwb_eia.pdf>.

³ Canadian Wheat Board. About Us: Price pooling and single-desk selling. 22 August 2011 <<http://www.cwb.ca/public/en/about/price/>>.

⁴ PricewaterhouseCoopers LLP. The Canadian Wheat Board: Economic Impact Analysis. June 2005. 20 August 2011 <http://www.cwb.ca/public/en/about/analysis/pdf/cwb_eia.pdf>.

⁵ Gunter, Lorne. "The Wheat Board's tall tales." 14 August 2009. National Post. 20 August 2011 <<http://network.nationalpost.com/np/blogs/fullcomment/archive/2009/08/14/lorne-gunter-the-wheat-board-s-tall-tales.aspx>>.

⁶ Western Canadian Wheat Growers. "Open Market outperforms the Canadian Wheat Board yet again" August 3, 2011. Western Canadian Wheat Growers. 19 September 2011. <http://www.wheatgrowers.ca/pdf/media_releases/2011/Aug-03-11_OpenMarketOutperformsCWBYetAgain.pdf>

including increased storage costs, increased interest costs (resulting from payment delays) and costs imposed by CWB delivery restrictions.

Delivery restrictions are one of the most pronounced challenges associated with the CWB.⁷ Under the current system, the CWB issues delivery quotas, which tell farmers that the Board is willing to accept a certain volume of a specified grain from each farmer at primary elevators in a defined geographic region. Quotas are based on the Board's sales commitments and the stock of grain on hand in the elevator system.⁸ Unfortunately, farmers wishing to sell more of their grain at any particular time are not able to do so.

From an economic development perspective, critics argue that the CWB's current monopoly position has stagnated, or at a minimum, curtailed economic growth in the agribusiness market given the lack of choice farmers have in how to market or add value to their own grain.

Current Situation

The federal government has announced its intention to remove the CWB's single desk for wheat and barley as of August 1, 2012, with legislation to be introduced in fall 2011. Removing the CWB's marketing monopoly will allow farmers to sell wheat, durum and barley directly to grain handlers like Viterra, Cargill, Richardson, etc. Farmers already work with these companies for the sale and marketing of their non-Board grains such as canola, lentils, oats and others.

Primary grain handling on the prairies is quite concentrated. The top three grain handling companies (Viterra, Richardson and Cargill) hold the majority of the primary storage capacity in Western Canada.⁹ The CWB retains no earnings and owns only its head office building, 3,500 railway cars and two ships operating on the St. Lawrence Seaway.¹⁰

A recent Wheat Board plebiscite, organized by the CWB, found that 62% of wheat growers and 51% of barley growers voted in favour of maintaining the board's single-desk marketing system. This result is based on a voter turnout of about 56% of eligible voters. However, the results of this non-binding plebiscite have not been widely accepted because of controversy over the ballot distribution process (some eligible grain growers did not receive a ballot while others received multiple votes). The federal government has indicated that the results of the CWB's "expensive survey" will not change its plan to remove the Board's monopoly powers.¹¹

⁷ Western Canadian Wheat Growers Association. "Reforming the Canadian Wheat Board: The Path Forward." March 2006. Knowledge Impact in Society. 17 August 2011 <http://www.kis.usask.ca/pdfs/CWB_Studies/CWB-Reform.pdf>.

⁸ Ibid.,

⁹ Fulton, Murray. "The Canadian Wheat Board in an Open Market: The Impact of Removing the Single-Desk Selling Powers." November 2006. Knowledge Impact in Society. 22 August 2011 <http://homepage.usask.ca/~mef256/Murray%20Fulton/Murray%20Fulton%20Working%20Papers/Murray%20Fulton%20Working%20Papers_files/CWB%20in%20Open%20Market.pdf>.

¹⁰ Morgan, Geoff. "Is the Canadian Wheat Board Still Relevant?" 1 June 2011. AlbertaVenture.com. 18 August 2011 <<http://albertaventure.com/2011/06/wheat-king/>>.

¹¹ Cross, Brian. "Majority favour CWB: plebiscite." 15 September 2011. The Western Producer. 20 September 2011. <<http://www.producer.com/News/Article.aspx?aid=40127>>

Potential Versions of the Canadian Wheat Board in the Future

In 2006 the federal government issued the *Report of Technical Task Force on Implementing Marketing Choice for Wheat and Barley*. The task force recommended that the Canadian Wheat Board Act be repealed and replaced with another piece of legislation.¹² However the CWB's single-desk selling powers could also be removed by opening the Canadian Wheat Board Act and remove the provisions for single-desk selling (the provisions that provide the CWB with government loan guarantees would also be removed), or the entire Canadian Wheat Board Act could be rescinded.¹³

1) Impacts of Introducing a Dual Market

A dual market is defined as an open market where some entity (e.g., a reorganized CWB) continues to offer pooled pricing while the private companies offer cash trading.

The federal government's 2006 task force acknowledged that the CWB, as it currently operates today, could not co-exist in a dual market. The task force visualized the continuation of the CWB as a small grain company, competing against grain handlers like Viterra, Richardson International and Cargill for grain.

The largest challenge associated with the CWB moving to this type of structure is the lack of an asset base. It is possible that the CWB could purchase its own elevator facilities; however this would require capital and a willing seller, both of which might be difficult to find in sufficient quantity.¹⁴ The Canadian government has indicated that it would consider giving the CWB short-term capital to help it adjust to an open market. Additionally, the government is considering a request by the CWB for regulated access to private grain handlers, but the details surrounding both of these options are still sparse.¹⁵

Without access to its own asset base such as grain elevators and port facilities, the CWB could potentially operate in a manner similar to Ontario. Eastern Canada currently operates under a dual market system. The Ontario Wheat Producers' Marketing Board (OWPMB) had its single desk selling powers removed in 2000. The transition was gradual and it was not until 2003 that it became a pure open market. Since then the OWPMB has continued to operate. In 2010 the OWPMB merged with the interests of the Ontario Corn Producers' Association and the Ontario Soybean Growers to form Grain Farmers of Ontario, the province's largest farm commodity group. According to the Grain Farmers of Ontario, "the dual marketing system has proven to be a great success for Ontario wheat producers and has led to increased acreage and profitability in

¹² Fulton, Murray. "The Canadian Wheat Board in an Open Market: The Impact of Removing the Single-Desk Selling Powers." November 2006. Knowledge Impact in Society. 22 August 2011 <http://homepage.usask.ca/~mef256/Murray%20Fulton/Murray%20Fulton%20Working%20Papers/Murray%20Fulton%20Working%20Papers_files/CWB%20in%20Open%20Market.pdf>.

¹³ Ibid.,

¹⁴ Ibid.,

¹⁵ Nickel, Rod. "Government to look at regulating access to grain handlers." 8 July 2011. Yahoo News. 18 August 2011 <<http://news.yahoo.com/most-western-canada-provinces-back-end-wheat-monopoly-160508743.html>>.

Ontario. While some producers are finding success directly marketing their wheat crops, others have found value in using board programs, while many use a combination of both.”¹⁶

Under Ontario’s current system, producers of a commodity can use a marketing board to collectively market their product through a government guaranteed pooling program. The province made a variety of powers available to marketing boards. It also provides a system of accountability for using those powers.¹⁷ Ontario’s regulated marketing system for agriculture products is overseen by the Ontario Farm Products Marketing Commission, an agency of the Ontario Ministry of Agriculture and Food.¹⁸

Without its own significant asset base, the Grain Farmers of Ontario use local elevators to handle the wheat they have purchased.¹⁹ The grain handlers are able to set their own handling charge at a level that is acceptable to them and an individual farmer could potentially negotiate this rate.²⁰ Western Canada's biggest grain handlers have said they would work with the Wheat Board even in a competitive marketing system, but the CWB has expressed doubts.²¹

The survival of the CWB in an open market is anything but assured; however, the Grain Farmers of Ontario and the Prince Edward Island Grain Elevators Corporation have shown that voluntary grain pools can succeed in Canada.

2) Impacts of the Board Disappearing Altogether

The removal of the CWB’s single-desk selling powers could result in the CWB disappearing altogether. This situation was recently highlighted in Australia. The Australian Wheat Board (AWB) lost its single-desk powers in 2008, shortly after the company was purchased by Canada's Agrium Inc. Agrium then quickly sold the AWB’s grain handling/marketing business to Cargill, but kept the AWB’s retailing business. Cargill’s operation still uses the AWB name.²² While this privatization is a cause of concern for CWB supporters, it is important to note that there is one significant difference between the CWB and the AWB, the AWB had an attractive asset base and without these assets, it is less likely that the CWB will be purchased by a competitor.

¹⁶ Grain Farmers of Ontario. Wheat Marketing with GFO: Redefined Roles Offer New Opportunities . January 2010. 10 August 2011 <<http://www.ontariograinfarmer.ca/MAGAZINE.aspx?aid=79>>.

¹⁷ Ministry of Agriculture, Food and Rural Affairs. Role of the Ontario Farm Products Marketing Commission in Ontario's Regulated Marketing System. 11 July 2011. 22 August 2011 <<http://www.omafra.gov.on.ca/english/farmproducts/factsheets/role.htm>>.

¹⁸ Ibid.,

¹⁹ Grain Farmers of Ontario. "10 reasons to put your wheat in the pool May/June 2011." 2011. Ontario Grain Farmer Magazine. 18 August 2011 <<http://www.ontariograinfarmer.ca/MAGAZINE.aspx?aid=286>>.

²⁰ Ibid.,

²¹ Nickel, Rod. "Government to look at regulating access to grain handlers." 8 July 2011. Yahoo News. 18 August 2011 <<http://news.yahoo.com/most-western-canada-provinces-back-end-wheat-monopoly-160508743.html>>.

²² Morgan, Geoff. "Is the Canadian Wheat Board Still Relevant?" 1 June 2011. AlbertaVenture.com. 18 August 2011 <<http://albertaventure.com/2011/06/wheat-king/>>.

The fear of non-competitive grain handling practices is a frequent concern associated with the removal of the CWB. While this is a concern associated with any oligopoly, the government's task force recommended amendments to the Canada Grain Act that provide "authority to monitor, investigate, access necessary data, publicly report, assist in dispute resolution and quickly resolve issues, if any, of non-competitive grain handling industry behaviour."²³

Additionally, the removal of the CWB single-desk selling powers will likely impact Saskatchewan's small, farmer-owned inland terminals. Many of these mostly farmer-owned businesses were built on the basis of the CWB financing their inventory and marketing all the wheat, durum and barley that they handled. There has never been a need to finance their receivables. With the removal of the single desk, some of these companies will need to alter their business model. Likely one of three things will happen to these businesses. First, these companies may be able to obtain appropriate financing on their own. Second, they may find a new partner (joint venture or otherwise) with other firms entering the market. Thirdly, with the future role of the CWB still undecided, they may end up partnering with the CWB, perhaps with the addition of some form of government financial support, at least during a transition period.

The removal of the CWB's monopoly also brings into question the future of producer cars. The CWB has allowed the short line railways to flourish because they have been able to ensure that these companies obtain rail cars and that the two major railways handle the cars that are loaded on the short line.²⁴ There are 14 short line rail businesses operating on the prairies and 12,784 producer cars were loaded last year. The farmers that load producer cars do not have terminal facilities, therefore they will find themselves at the mercy of the grain companies with terminal capacity and currently there is little incentive for private companies to provide loaders of producer cars with access to these terminal facilities.²⁵ However, according to the federal government's 2006 task force report, "the Canada Grain Act should be strengthened if necessary to assure access to terminals for producer cars, with safeguards to protect against terminals becoming congested with unsold grain."

The removal of the CWB monopoly will also affect rail service in western Canada. At present the impact of the CWB on the railways is a source of debate, "some believe that the CWB with a monopoly and regulatory powers has been able to act as a counter-balance to the market power of railways, while others believe that the CWB adds costs and inefficiency."²⁶ The 2006 task force noted that the issue of railway competition is not limited to grain and therefore

²³ Migie, Howard, et als. "Marketing Choice - The Way Forward." 25 October 2006. Report of Technical Task Force on Implementing Marketing Choice for Wheat and Barley. 22 August 2011
<http://www.agr.gc.ca/cb/ip/pdf/final_251006_e.pdf>.

²⁴ Fulton, Murray. "The Canadian Wheat Board in an Open Market: The Impact of Removing the Single-Desk Selling Powers." November 2006. Knowledge Impact in Society. 22 August 2011
<http://homepage.usask.ca/~mef256/Murray%20Fulton/Murray%20Fulton%20Working%20Papers/Murray%20Fulton%20Working%20Papers_files/CWB%20in%20Open%20Market.pdf>.

²⁵ Ibid.,

²⁶ Migie, Howard, et als. "Marketing Choice - The Way Forward." 25 October 2006. Report of Technical Task Force on Implementing Marketing Choice for Wheat and Barley. 22 August 2011
<http://www.agr.gc.ca/cb/ip/pdf/final_251006_e.pdf>.

recommended improvements to the shipper protection provisions in the Canada Transportation Act to be undertaken separately from any changes to the CWB.

The CWB has also played a major role in keeping the Port of Churchill open. The Port of Churchill runs a short shipping season, from about mid-July to the beginning of November because of freezing. This limited schedule has failed to attract investment from Canada's larger grain traders. Since none of the large grain companies have a terminal at Churchill, under a purely competitive system they would not choose to ship grain through that port because they would not be able to earn additional handling revenue.²⁷ The CWB has been able to move grain through Churchill by reducing rail car access to grain companies that do not ship grain to that port.²⁸ The future viability of the Port of Churchill is uncertain if the single-desk selling powers of the CWB are removed.

Opportunities in a Post-Canadian Wheat Board Environment

The Canadian Wheat Board is one of two relics from a more highly regulated era and an analysis of the potential opportunities available in a post-Wheat Board era can be conducted by examining the removal of the first of these relics, the Crow Rate. The Crow Rate was a grain transportation subsidy that encouraged farmers to ship their grain elsewhere for processing by offering artificially low freight rates.

In 1995, the Crow Rate and related subsidies were eliminated, encouraging Western Canada to increase value-added processing of grains and oilseeds rather than ship grain offshore. Soon after, Western Canada began to ship increased volumes of products like beef, pork and canola oil. In fact, Saskatchewan's canola oil production has increased dramatically since 1995 and there are now four canola crushing facilities in Saskatchewan (Bunge, Nipawin; Cargill, Clavet; Louis Dreyfus Matsui, and Richardson, Yorkton). According to Statistics Canada, the value-added benefit of a crushing enterprise is equal to about \$50 per tonne. Based on the 2010 crush capacity, the Saskatchewan economy benefits by approximately \$190 million annually.²⁹

Despite the increased oilseed processing occurring in Western Canada, the development of the prairie wheat milling and barley malting industries continues to lag. This is because processors have historically indicated that they are not interested in locating their business operations in Western Canada as long as they are faced with the single desk. The removal of oats from the CWB's single-desk marketing authority in 1989 clearly showcases the enhanced opportunities available in a competitive environment. After the removal of oats there was a significant growth in oat exports to the U.S and a significant increase in oat processing capacity. Oat processing

²⁷ Fulton, Murray. "The Canadian Wheat Board in an Open Market: The Impact of Removing the Single-Desk Selling Powers." November 2006. Knowledge Impact in Society. 22 August 2011 <http://homepage.usask.ca/~mef256/Murray%20Fulton/Murray%20Fulton%20Working%20Papers/Murray%20Fulton%20Working%20Papers_files/CWB%20in%20Open%20Market.pdf>.

²⁸ Ibid.,

²⁹ Sim, Brian. "Saskatchewan's new canola crushing capital." September 2010. Ministry of Agriculture. 19 September 2011. <http://www.agriculture.gov.sk.ca/agv1008_8>

capacity in Western Canada has increased from 477 tonnes per day in 1987-88 to 2,014 tonnes per day in 2006-07.³⁰ The potential for increased local secondary processing of wheat, durum and barley is one of the key opportunities presented by the removal of single desk selling.

Global agribusinesses are already expressing interest in entering the Western Canadian market as the CWB's control of the grain handling and marketing systems fades. For example, Alberto Weisser, chief executive officer of Bunge (a large U.S. grain trader with a canola-crushing plant in Western Canada), has publicly indicated it "would be very natural" that Bunge would operate in Canada if the CWB's monopoly ends.³¹

However, the opportunities for Saskatchewan are not limited to large multinational firms starting new processing in the prairies. Farmers are an entrepreneurial group, as demonstrated by the local farm implement manufacturers, and allowing them freedom to act could cause a flurry of local activity. A great example of a missed opportunity occurred in 1999 when farmers and investors from Swift Current were not able to build a local pasta plant because the CWB would not grant them a separate pool account so that its investors could access higher domestic prices rather than pooling returns with all farmers.³² This meant incurring transportation and operating costs that were not truly applicable to their grain. Without the CWB's influence it will be attractive to build these facilities in Western Canada.

Another obvious benefit from the removal of single-desk selling will be increased competition for farmers' grain. Increased competition will drive costs out of the system as grain buyers work to become the least-cost supplier of services, translated to the highest price and best service for farmers. At the same time, grain companies will then control their own assets, deciding on a commercial basis when to buy, what price will attract the grain and when to ship. This would present an opportunity for small grain dealers and brokerage businesses as they are free to find new transportation methods and markets. Niche markets which are often ignored by larger firms because of economies of scales, would emerge, clearing the way for nimble, smaller firms to deal with smaller, specialized buyers (opportunity could include organic grain or non-typical items like canary seed, etc.).

The demand for services offered by farm business consultants is also likely to grow after the removal of the CWB as farmers will increasingly look to these marketing professionals to help them capitalize on markets. In addition to the expansion of market intelligence services, local agricultural colleges and other educational institutions may be able to capitalize on the new demand for marketing and business decision skills training among farmers.

³⁰ Agriculture and Agri-Food Canada. "Canada: Primary Processing of Grains and Oilseeds." 22 July 2006. Bi-Weekly Bulletin. 19 September 2011. <<http://dsp-psd.pwgsc.gc.ca/Collection/A27-18-19-9E.pdf>>

³¹ Waldie, Paul, "Grain firm Bunge welcomes end of Wheat Board." 19 July 2011. Globe and Mail. 17 September 2011 <<http://www.theglobeandmail.com/globe-investor/grain-firm-bunge-welcomes-end-of-wheat-board/article2102834/>>

³² National Farmers Union. "Prairie Pasta Decision the Right One for Farmers." July 30, 1999. National Farmers Union. 17 September 2011. <<http://www.nfu.ca/praipast.htm>>

Finally, with the removal of the CWB marketing monopoly, and its restricting influence on new varieties, crop genetics businesses will be free to work toward newer varieties that will produce higher yields. This freedom to pursue broader market demands will foster new investment and economic activity related to varietal development, much of it taking place in Saskatchewan, the country's largest producer of grain.

The Saskatchewan Chamber of Commerce Position

The Saskatchewan Chamber of Commerce supports the free exchange of goods and opinions in open markets, and the right to associate and make contracts to advance these. As such, the Chamber welcomes the federal government's decision to remove the CWB monopoly on non-feed wheat, barley and durum.

The Saskatchewan Chamber urges the federal government to ensure adequate time and support is available to allow the CWB, farmers and other agribusinesses to make the transition as smooth as possible. With this objective in mind, the Chamber also recommends that the federal government ensure any regulatory restrictions or supports established are as fair, transparent and small in scope as possible.

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