Grow Mustand SASKATCHEWAN MUSTARD INDUSTRY NEWS

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FALL 2021

Message from the Chair by Derek Dewar



Hopefully everyone has successfully and safely completed the harvest and can move forward to deal with the outcome of a very abnormal summer.

Sask Mustard joined with 4 other commissions to share in the advertising costs for the annual candidate search. We welcome Norm Hall acclaimed to your board of directors. We look forward to working with Norm as he brings with him a number of years of board experience. With that we invite registered producers interested in working on the board to contact a current member as there is a vacancy left to fill the 6member board.

The very unusual "production challenges" of this summer have resulted in a significant lowering of mustard supplies, resulting in significant price increases of both yellow and brown mustard. Oriental prices have responded more slowly, presumably awaiting supply information. Budgeting plans for the coming 2021-2022 fiscal year are showing a positive balance. Credit goes to both Rick Mitzel our executive director for redirecting spending priorities and to your check-off dollars. Together they have placed us in a more secure financial position. Record low refund submissions from registered producers is taken as a vote of confidence in your board of directors... thank you!

The Canada Grain Act Review, held earlier this year, was seen as an important agriculture issue. We therefore made a positive submission to fully support the critical importance of the Canadian Grain Commission.

Research in regard to new varieties combined with the agronomics of seeding and fertilizer rates are and will continue to be an item for discussion during board meetings. The many attributes of mustard are reason to believe in the potential for a future increase in mustard demand.

Several of these have been outlined in the past and we continue to pursue the possibilities. Another item for discussion is the Carbon off set protocol. Mustard will be of interest as it produces a very large bio mass.

The Federal Governments CAP funding program is due for renewal in April 2023. CAP is a critical component of the mustard research program and that will be an agenda item for future meetings. Also, as the constraints of Covid-19

In This Issue...

- 2 Mustard Market Outlook
- 3 Executive Directors Report
- 4 New Variety Production
- 7 AAC Yellow 80
- 8 AAC Brown 18

continue, meetings via Zoom, will likely apply to the coming AGM in January as well as our regular board meetings.

As chairman I thank all of the capable and hardworking people within the mustard industry. Hope everyone can enjoy the fall issue of "Grow Mustard" and as usual with any concerns you may have, please contact anyone you see listed in this issue.

Seed Guide

Click here for a link to the Saskatchewan Seed Growers ' Association's 2022 Interactive Seed Guide

Market Outlook

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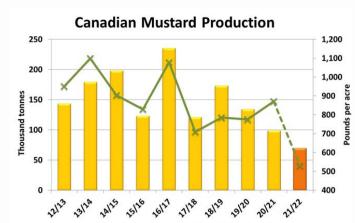
by Chuck Penner, LeftField Commodity Research

Just a few months ago, the Canadian mustard market was looking fairly healthy and well-balanced. Seeded acreage had expanded by 19% from the extreme low in 2020 and supplies were expected to recover a bit, but not enough to pressure the market. That was especially the case as the old-crop carryover from 2020/21 was very low and even a larger 2021 crop wouldn't have been enough to cause heavy supplies.

But then 2021 happened. The extreme drought and heat shriveled up the crop and the final tally is still unclear. StatsCan pegged the 2021 mustard yield at 531 lb/acre, 37% lower than the 5year average but the latest Sask Ag yield estimate is another 100 pounds lower still. Even with the more optimistic StatsCan yield, the 2021 crop would be somewhere around 70,000 tonnes, 30% less than the small 2020 crop and the lowest in at least 40 years.

According to an earlier acreage breakdown from StatsCan, the production losses would be greater for yellow mustard (down 38% from last year) than for brown (13% lower) and oriental (down 21%). Regardless of the exact numbers, it's clear there's simply not enough mustard of any type.

It's always possible there's more mustard carried over from previous years in farmers' bins but together with the extremely small 2021 crop, supplies definitely aren't enough to keep the market supplied. Our best estimate is that the 2021/22 export program could be (at the most) 65-70,000 tonnes. Just for reference, that's a bit more than half of the 5-year average export program of 115,000 tonnes.



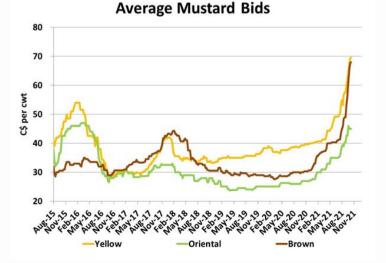
The question now is how buyers and processors will respond. The US is still Canada's largest customer and its own mustard crop was also a disaster in 2021. And just like in Canada, yellow mustard is where the largest losses will show up. Just to backfill its own lost production, imports in 2021/22 would need to rise 15-20,000 tonnes, but that's simply not available from Canada.

Some buyers in the US and elsewhere will look to other sources of supply if possible. The size of 2021 mustard crops in Russia and Ukraine aren't known yet, but mustard prices there have also been rising as global demand shifts away from Canada.

Other buyers just keep raising their bids in the hopes of shaking some mustard

loose. While some small amounts are being sold, it's clearly not enough as bids keep climbing, at least for yellow and brown mustard. For oriental mustard, it seems Canadian prices have risen enough to price it out of the market, with buyers finding other substitutes. For yellow and brown, there just aren't other options, although consumer demand could ultimately be reduced.

Figuring out how high prices can go used to be a matter of looking for the old highs as a place where demand backs off. In 2021/22, prices are now in uncharted territory and the old yardsticks are no longer helpful. Unfortunately, not a lot of mustard growers can take advantage of these "unprecedented" prices but for others, they help ease the sting of 2021.



AAC Brown 18 AAC Yellow 80 is available for 2022 at

MERCER SEEDS

Ryan Mercer – Lethbridge, AB P: 403–308–2297 <u>mercerseeds.ca</u> NUTRIEN AG SOLUTIONS Please contact your local retailer <u>nutrienagsolutions.ca/find-a-</u> <u>location</u> SUNDWALL SEEDS Baine Fritzler – Govan, SK P: 306–725–7908 sundwallseed.com OLDS PRODUCTS Walter Dyck – AB P: 403–393–8180 oldsproducts.com

Executive Directors Report

by Rick Mitzel, Executive Director



Summary of 2021

This past spring started out dry and then some areas got some timely rain which help the crop begin to develop then the heat hit in the summer. This past summer was one of the hottest on the prairies and even the somewhat drought tolerant mustard plants were impacted by the drought. This past year saw mustard acres to be similar to 2020 and the acres seeded were about 306,000 acres of which 294,000 acres were harvested. The projected yield of these acres is somewhere between 500 lbs per acre to 600 lbs per acre which is definitely down from the ten year average. The breakdown by type of mustard is approximately 190,000 acres of yellow, 90,000 of brown and 30,000 of Oriental mustard. The drop in yields has created higher prices for mustard at the farm level. That is exactly what M21 has been working on and we have seen some good results with the Hybrid Brown 18 and the composite Yellow 80. These two varieties offer growers increased yields and then more profitability per acre. In terms of Yellow 80 growers are seeing an increase in yield by 10% and with Hybrid Brown 18 growers are seeing an increase of 20%. Seed is available with the M21 distributors and they are Nutrien, Sundwall Seeds, Olds Products and Mercer Seeds and the contact information can be found later in this newsletter.

Seed Production Update

The seed production of Yellow 80 and Hybrid Brown 18 was also a bit of a challenge in 2021 as well with the heat but our seed production group, Hytech Production Ltd out of Lethbridge did a magnificent job for M21. The yields came off good and it looks like M21 will have all of the seed production that was requested by M21 distributors. The pricing has been set and there is no increase in seed cost from 2020 to 2021 for Yellow 80 and Hybrid Brown 18 and that should be good news to mustard growers.

Annual General Meeting

This years Annual General Meeting (AGM) will be held in January and with the covid concerns M21 will be offering both a virtual and a in person AGM. M21 will keep everyone updated on our progress in the AGM as we get closer to the date and we know better what is happening with the covid regulations.

New Uses for Mustard

M21 continues to look for new uses for mustard to expand the demand for mustard to keep the mustard industry strong. At M21 we have lot of key initiatives we are working on and many of these will have some key dates this winter. I will be updating this topic in our next newsletter so stay tuned.

Sask Mustard AGM

Thursday, January 13, 2022

The Sask Mustard AGM will be held virtually on Thursday, January 13th from 9:00 a.m. - 12:00 p.m. Registration is now open on the SaskCrops website.

9:00 a.m. - Call to order and Opening Remarks.
9:15 a.m. - Financial Review - Lingard + Dreger
10:00 a.m. - Presentation and approval of the budget
10:30 a.m. - Annual Report 2020 - 2021 and Proposed Activities 2021 - 2022
11:00 a.m. - Mustard Market Outlook - Chuck Penner, Leftfield Commodity Research
12:00 noon - Adjourn

VIRTUAL EVENT

Market Outlook

by Amber Wall, Wheatland Conservation Area Inc.

This growing season brought many challenges around the province, particularly in the Southwest and the Wheatland Conservation Area Research site was no exception. Harvest progressed quickly due to well below average precipitation, extreme temperatures, especially throughout June and July along with drying winds that resulted in crop yields much lower than we had hoped. However, even on a drought year, valuable treatment responses can be found.

AAC Brown 18 compared to AAC Yellow 80 mustard yield 20 а 18 h 16 14 de 12 ou/ac 10 2 0 30 bu/ac 40 bu/ac 50 bu/ac 60 bu/ac target yield CV=8% LSD=0.48 AAC Brown 18 AAC Yellow 80



AAC Yellow 80 with a target yield of 30 bu/ac (left) and 60 bu/ac (right). Swift Current (June 30, 2021).



AAC Yellow 80 with a target yield of 50 bu/ac (left) and 60 bu/ac (right). Swift Current (June 30, 2021).



AAC Brown 18 with a target yield of 40 bu/ac (left) and 30 bu/ac (right). Swift Current (June 30, 2021).



AAC Brown 18 with a target yield of 40 bu/ac (left) and 60 bu/ac (right). Swift Current (June 30, 2021).

Issues of the Grow Mustard newsletter will only be available electronically.

Don't miss an issue! Sign up at saskmustard.com and follow us on Twitter @GrowMustard.

MUSTARD IN THE FIELD

With the release of a new composite yellow mustard, AAC Yellow 80 that came to market in 2021, comes the need to develop a fertility response curve in order to optimize production and economics and minimize environmental impacts. Developed by Mustard 21, the purpose of this trial was to demonstrate the importance of proper fertility.

These results are based on one year of data collection at Swift Current. The trial was seeded May 13th using a Fabrobuilt cone seeder with Atomjet knife openers and 8.25-inch row spacing. Treatments targeted yields of 30, 40, 50 and 60 bu/ac for two varieties, AAC Yellow 80 and AAC Brown 18, by sidebanding fertilizer (NPKS) based on the Canadian Fertilizer Institute's removal rates for mustard. Fertilizer forms used included Urea, MAP, AMS, as well as ESN for half of the nitrogen requirements.

There were no major differences in emergence between varieties with plant densities ranging from 4-5 plants/ft2. AAC Brown 18 averaged 88 days to mature compared to Yellow 80 at 86 days. Target yields were not achieved as Brown mustard yields ranged from 14 to 17 bu/ac and yellow from 11 to 12 bu/ac. Further results along with economic analysis will be included in a final report.

A second mustard project that took place at Wheatland and is a part of the Strategic Field Program just completed year two of a three-year study comparing the hybrid variety AAC Brown 18 to an open pollinated brown variety, Centennial. This project was also established at Redvers, and Indian Head, SK and will have final results following the 2022 season.

Economic Analysis

Oct 7, 2021 – Government of Saskatchewan grain prices - Brown 18 (\$7.86) seeded at 6.9 lbs/ac and Yellow 80 (\$6.26) at 9 lbs/ac. Prices from Feb 17/21 Nutrien at Swift Current, 46-0-0 \$595/tonne, 44-0-0 \$745/tonne, 11-52-0 \$895/tonne, 20-0-0-24 \$440/tonne Fertilizer rates adjusted for what was in soil 11lbs N, 8 lbs P, 12 lbs S. Fertilizer cost per ac adjusted for soil test results

	AAC Brown 18	AAC Brown 18	AAC Brown 18	AAC Brown 18	AAC Yellow 80	AAC Yellow 80	AAC Yellow 80	AAC Yellow 80
Revenue Per Acre	30 bu/ac	40 bu/ac	50 bu/ac	60 bu/ac	30 bu/ac	40 bu/ac	50 bu/ac	60 bu/ac
Yield (bu/ac) (A)	15	15	17	16	11	12	11	11
Price (/bu) (B)	35	35	35	35	38.25	38.25	38.25	38.25
Gross revenue (/ac) (C)	525	525	595	560	420.75	459	420.75	420.75
Expenses Per Acre								
Variable Expenses/Acre								
Seed	54.54	54.54	54.54	54.54	56.34	56.34	56.34	56.34
Seed Treatments	0.54	0.54	0.54	0.54	0.90	0.90	0.90	0.90
Fertilizer - Nitrogen	86.07	143.66	196.12	226.34	86.07	143.66	196.12	226.34
Phosphorus	34.35	52.67	70.93	89.26	34.35	52.67	70.93	89.26
Sulfur	0.00	0.00	8.26	16.53	0.00	0.00	8.26	16.53
Plant Protection - Herbicides	42.58	42.58	42.58	42.58	42.24	42.24	42.24	42.24
Insecticides	8.12	8.12	8.12	8.12	0.00	0.00	0.00	0.00
Fungicides	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Machinery Operating - Fuel	19.03	19.03	19.03	19.03	19.03	19.03	19.03	19.03
Repair	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00
Custom Work and Hired Labour	20.30	20.30	20.30	20.30	20.30	20.30	20.30	20.30
Crop Insurance Premium	7.07	7.07	7.07	7.07	8.47	8.47	8.47	8.47
Utilities and Miscellaneous	3.23	3.23	3.23	3.23	3.23	3.23	3.23	3.23
Interest on Variable Expenses	3.43	3.43	3.43	3.43	3.44	3.44	3.44	3.44
Total Variable Expenses (D)	288.26	364.17	443.15	499.97	283.37	359.28	438.26	495.08
Other Expenses/Acre								
Building Repair	0.49	0.49	0.49	0.49	0.49	0.49	0.49	0.49
Property Taxes	3.97	3.97	3.97	3.97	3.97	3.97	3.97	3.97
Business Overhead	2.28	2.28	2.28	2.28	2.28	2.28	2.28	2.28
Machinery Depreciation	37.05	37.05	37.05	37.05	37.05	37.05	37.05	37.05
Building Depreciation	1.05	1.05	1.05	1.05	1.05	1.05	1.05	1.05
Machinery Investment	14.28	14.28	14.28	14.28	14.28	14.28	14.28	14.28
Building Investment	0.46	0.46	0.46	0.46	0.46	0.46	0.46	0.46
Land Investment	35.77	35.77	35.77	35.77	35.77	35.77	35.77	35.77
Total Other Expenses (E)	95.35	95.35	95.35	95.35	95.35	95.35	95.35	95.35
Labour and Management (F)								
Total Expenses (D+E+F)=(G)	383.61	459.52	538.50	595.32	378.72	454.63	533.61	590.43
Return Per Acre								
Return Over Variable Expenses (C-D)	236.74	160.83	151.85	60.03	137.38	99.72	-17.51	-74.33
Return Over Total Expenses (C-G)	141.39	65.48	56.50	-35.32	42.03	4.37	-112.86	-169.68
Break Even Yield (bu/ac)								
To Cover Variable Expenses	9	11	13	15	8	10	12	13
To Cover Total Expenses	11	14	16	17	10	13	14	16
Break Even Price (\$/bu)								
To Cover Variable Expenses	19	24	26	31	26	30	40	45
To Cover Total Expenses	26	31	32	37	35	38	49	54
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NEW VARIETY

BENEFITS OF AAC YELLOW 80

AAC Yellow 80 is a composite yellow mustard that will come to market in 2021. This new yellow mustard variety offers growers ease of harvest and cleaner sample.

FEATURES

Yield: AAC Yellow 80 shows a 9% increase in yield over Andante. AAC Yellow 80 offers growers a long awaited yield advance over traditional open pollenated yellow mustard varieties.

Appearance: AAC Yellow 80 shows a harvested grain sample, significantly brighter in seed color. The majority of the producers who grew demo strips in 2020 said that it was easier to harvest and noted a nicer sample than Andante.

Agronomic Data Comparison

Advanced Yield Trials 2018	Yi	eld	Seed Weight	Protein	Height	Maturity
Number of trials: 4	Kg/ha	% Check	g/1000	% whole seed	cm	days
Andante	1926	100	6.8	35.8	103	85
AAC YELLOW 80	2102	109	6.7	35.6	111	87

Mustard Adoption Trials 2019	Yi	eld	Seed Weight	Protein	Height	Maturity
Number of trials: 11	Kg/ha	% Check	g/1000	% whole seed	cm	days
Andante	1936	100	5.5	34.3	124	92
AAC YELLOW 80	2109	109	5.5	34.3	128	92

Mustard Adoption 2020	Yi	ield	Seed Weight	Protein	Height	Maturity
Number of trials: 12	Kg/ha	% Check	g/1000	% whole seed	cm	days
Andante	1915	100	5.9	34.2	118	88
AAC yellow 80	2060	108	5.8	33.6	119	88

Source: Data provided by Dr. Bifang Cheng, Research Scientist, Agriculture & Agri-Food Canada

Mustard 21 Canada Inc. Box 37026 North Park PO Saskatoon, SK S7K 8J2 T: 306.242.2121 mustard21@mustard21.com www.mustard21.com



AAC YELLOW 80

Composite Yellow Mustard



AAC Brown 18 AAC Yellow 80 is available for 2022 at

MERCER SEEDS

Ryan Mercer – Lethbridge, AB P: 403–308–2297 <u>mercerseeds.ca</u>

NUTRIEN AG SOLUTIONS Please contact your local retailer <u>nutrienagsolutions.ca/find-a-</u> location

SUNDWALL SEEDS Baine Fritzler – Govan, SK P: 306–725–7908 sundwallseed.com **OLDS PRODUCTS**

Walter Dyck – AB P: 403–393–8180 oldsproducts.com

NEW VARIETY

BENEFITS OF AAC BROWN 18

AAC Brown 18 is a hybrid brown mustard that came to market in 2019. This new hybrid variety offers growers unprecedented yields in the brown mustard market along with a strong disease package.

FEATURES

Yield: the hybrid AAC Brown 18 shows a 20% increase in yield data over check varieties.

Strong Disease Package: the hybrid AAC Brown 18 has the same blackleg resistance as Centennial Brown and AAC Brown 18 has resistance to race 2a of white rust whereas Centennial Brown does not have resistance to that race.

Replicated Yield Trials – Agronomic Data Comparison

Mustard Adoption Trials 2016	Yi	eld	Protein	Height	Maturity
Number of trials: 7	Kg/ha	% Check	% whole seed	cm	days
Centennial Brown	1841	100	29.6	133	89
AAC Brown 18	2226	121	28.8	133	90
Mustard Adoption Trials 2017	Yi	eld	Protein	Height	Maturity
Number of trials: 11	Kg/ha	% Check	% whole seed	cm	days
Centennial Brown	1692	100	29.4	133	86
AAC Brown 18	2063	122	28	138	87
Advanced Yield			1		
Trials 2017	Yi	eld	Protein	Height	Maturity
Number of trials: 4	Kg/ha	% Check	% whole seed	cm	days
Centennial Brown	1819	100	28.3	139	91
AAC Brown 18	2401	132	26.5	144	91
Mustard Adoption Trials 2020	Yi	eld	Protein	Height	Maturity
Number of trials: 13	Kg/ha	% Check	% whole seed	cm	days
Centennial Brown	2114	100	29.6	125	87
AAC Brown 18	2563	121	28.6	129	87

Source: Data provided by Dr. Bifang Cheng, Research Scientist, Agriculture & Agri-Food Canada AAC Brown 18 was not in the mustard adoption trials in 2018 and 2019

Strategic Field Program Nitrogen Study 2020	Yi	eld
Number of trials: 1 (8 treatments)	Kg/ha	% Check
Centennial Brown	1217	100
AAC Brown 18	1497	123
Strategic Field Program Seed Rate 2020	Yi	eld
Strategic Field Program Seed Rate 2020 Number of trials: 1 (5 treatments)	Yi Kg/ha	e ld % Check

AAC BROWN 18

Hybrid Brown Mustard





MUSTARD BUYERS LIST

Buyers Licensed and Bonded by the Canadian Grain Commission

All Commodities (AC) Trading Ltd.

1600 Two Mile Road Winnipeg MB R2N 4K1 Tel: 204-339-8001 E: kevin@allcommodities.ca W: allcommodities.ca

Alliance Pulse Processors Inc. O/A A G T Foods

6200 E Primrose Green Dr. Regina SK S4V 3L7 Tel: 844-248-4248 E: buying@agtfoods.com W: agtfoods.com

Besco Grain Ltd.

PO Box 1390, Carman MB R0G 0J0 Tel: 204-745-3662 E: jamie@bescograin.ca W: bescograin.ca

Broadgrain Commodities Inc.

Junction Highways 6 & 16 Dafoe SK SOA 4T0 Tel: 306-554-3030 Ext 510 E: brad.grabham@broadgrain.com W: broadgrain.com

D G Global West

250 - 4299 Canada Way Burnaby BC V5G 1H3 Tel: 601-597-5060 E: mike@dgglobal.ca W: dgglobal.ca

Diefenbaker Spice & Pulse

PO Box 69, Elbow SK S0H 1J0 Tel: 306-644-4704 E: melody@dspdirect.ca W: dspdirect.ca

E T G Commodities Inc.

6001 Goreway Drive, Unit B Mississauga, ON L4V 1V6 Tel: 1-833-384-7275 W: etgworld.com

Grain Millers Inc.

10400 Viking Drive, Suite 301 Eden Prairie MN USA 55344 Tel: 952-983-1289 E: graig.tomera@grainmillers.com W: grainmillers.com

Lyft Commodity Trading

506-318 Homer Street Vancouver, BC V6B 2V2 Tel: 604-773-5805 E: nima@lyftcommodity.com W: lyftcommodity.com

Paterson Grain

333 Main Street, 22nd Floor Winnipeg MB R3C 4E2 Tel: 204-956-2090 E: info@patersongrain.com W: patersonglobalfoods.com

Schluter & Maack Canada

PO Box 408, Pilot Butte SK S0G 3Z0 Tel: 306-771-4987 E: g.rivett@schlueter-maack.com W: schlueter-maack.com

Seaboard Special Crops Fillmore

PO Box 70, Fillmore SK S0G 1N0 Tel: 306-722-3353 Fax: 306-722-3328 E: chad.campbell@seaboardcorp.com W: seaboardcorp.com

Sunrise Foods International Inc.

200 - 306 Queen St, Saskatoon SK S7K 0M2 Tel: 306-931-4576 E: info@sunrisefoods.ca W: sunrisefoods.ca

Victoria Pulse Trading Corp.

600 – 850 West Hastings Street Vancouver BC V6C 1E1 Tel: 604-733-1094 E: tala@victoriapulse.ca W: victoriapulse.ca

Viterra Inc.

2625 Victoria Ave, Regina SK S4T 7T9 Tel: 403-382-3418 E: merchants.mustard@viterra.com W: viterra.com

Additional Buyers

Hanse Seed Corp.

550 Burrard St. PO Box 30 Vancouver BC V6C 2B5 Tel: 954-217-0964 E: jt@hanseseed.com W: hanseseed.com

Manitou Holdings Inc.

322 Crean Crescent Saskatoon SK S7J 3X2 Tel: 306-716-6216 E: tom@manitouseeds.ca W: www.manitouseeds.ca

Montana Specialty Mills LLC

PO Box 2208, Great Falls MT USA 59403 Tel: 406-761-2338 E: info@mtspecialtymills.com W: mtspecialtymills.com

Mountain States Oilseeds

PO Box 428, American Falls ID USA 83211 Tel: 208-226-2041 E: krisc@msoilseeds.com W: msoilseeds.com

Olds Products Co.

10700 - 88th Avenue Pleasant Prairie WI USA 53405 Tel: 262-947-3500 EXT 637 E: wdyck@oldsfitz.com W: oldsproducts.com

Sakai Spice (Canada) Corp.

4201 - 2nd Avenue North Lethbridge AB T1H 0C8 Tel: 403-320-9445 E: dave@sakaispice.com W: sakaispice.com



The Saskatchewan Mustard Development Commission (Sask Mustard) was established in 2003 to represent the province's mustard growers.

The Sask Mustard vision is "Investing in the future for mustard grower profitability" and the Sask Mustard mission is "Growing the mustard industry for the benefit of growers through research, communication and market development programs."

Please visit the following websites for more information:

SaskMustard.com is our industry-focused website SpreadTheMustard.com is our consumer-focused website

SPREAD THE MUSTARD.COM

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Tanya Craddock - Office Manager TLC Management Group Box 37026 North Park PO, Saskatoon, SK S7K 8J2 C: 306-975-6629 info@saskmustard.com



Mustard 21 Canada Inc. (M21) is a non-profit initiated by Sask Mustard and the Canadian Mustard Association (CMA). As the research arm of the Canadian mustard industry,

M21's objective is to enhance mustard production and value-added products. This includes breeding strategies and market access initiatives for both condiment mustard and industrial oilseed crops.

For more information, please visit Mustard21.com

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