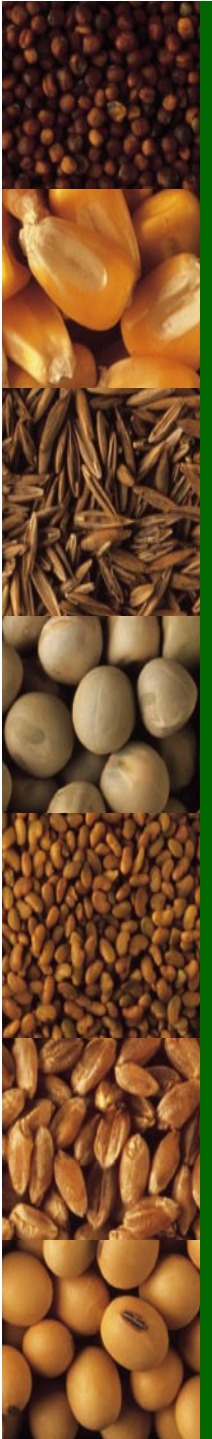




# Why Should The Barley Industry Care About Seed?

June, 2010



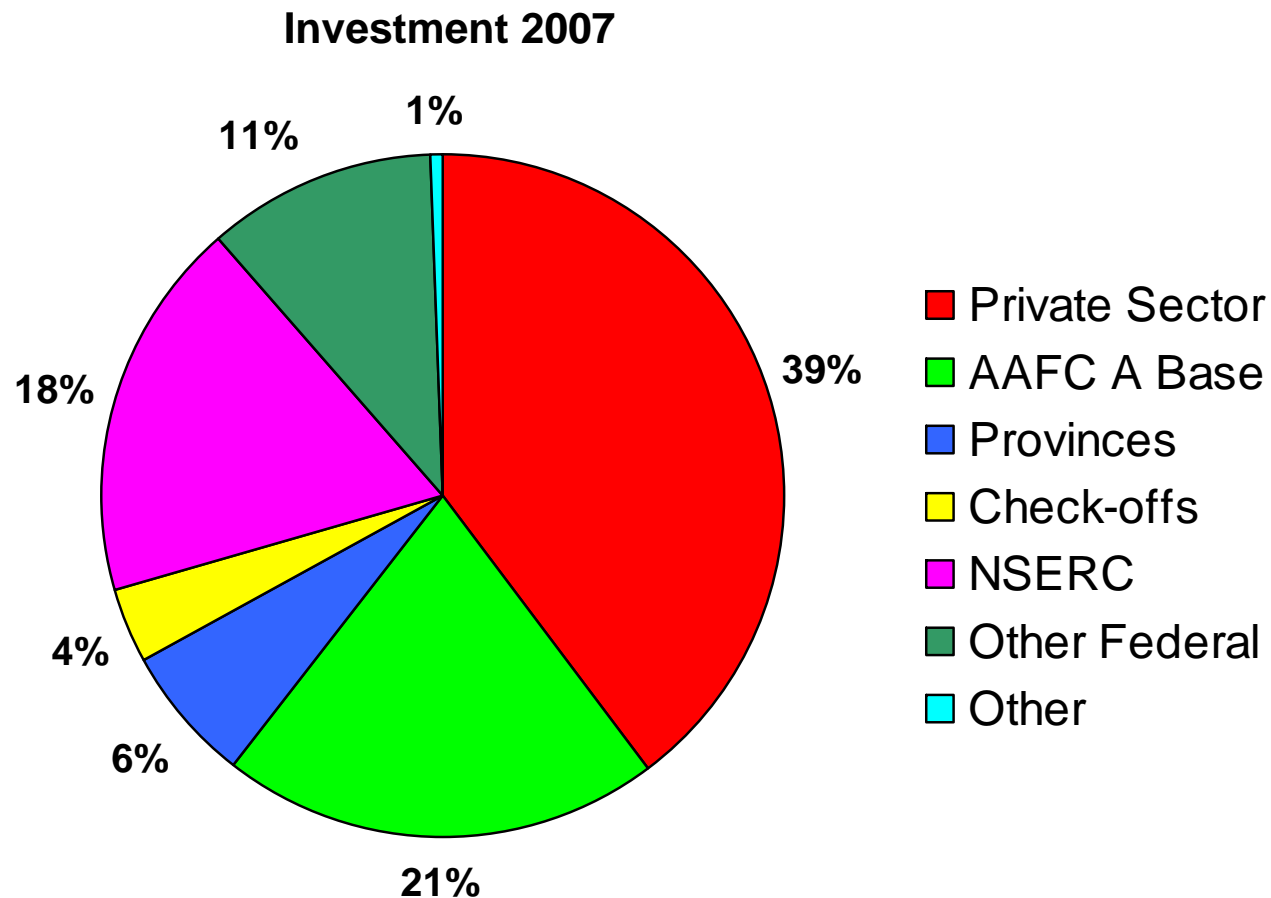
## Why should the barley industry care about seed?

*“It all starts with a seed”*

- Seed is a primary means of assuring product purity and segregation
- Seed sales are a primary means of funding new seed innovation
- New seed varieties can help solve many challenges facing barley production and processing in Canada

# Funding Innovation

In 2007, the private sector was the single largest investor in plant breeding and research





## The Seed Industry invests in innovation

- Private Sector invested \$56.7 million in research in 2007
- Close to double that – \$105.7 million by 2012
- Over 95% of that investment will be in corn, soybeans and canola

**Investment is funded through sales of certified seed**

**Cereal crops are not keeping pace with competing crops**

## Private Sector Investment is funded through sales of certified seed

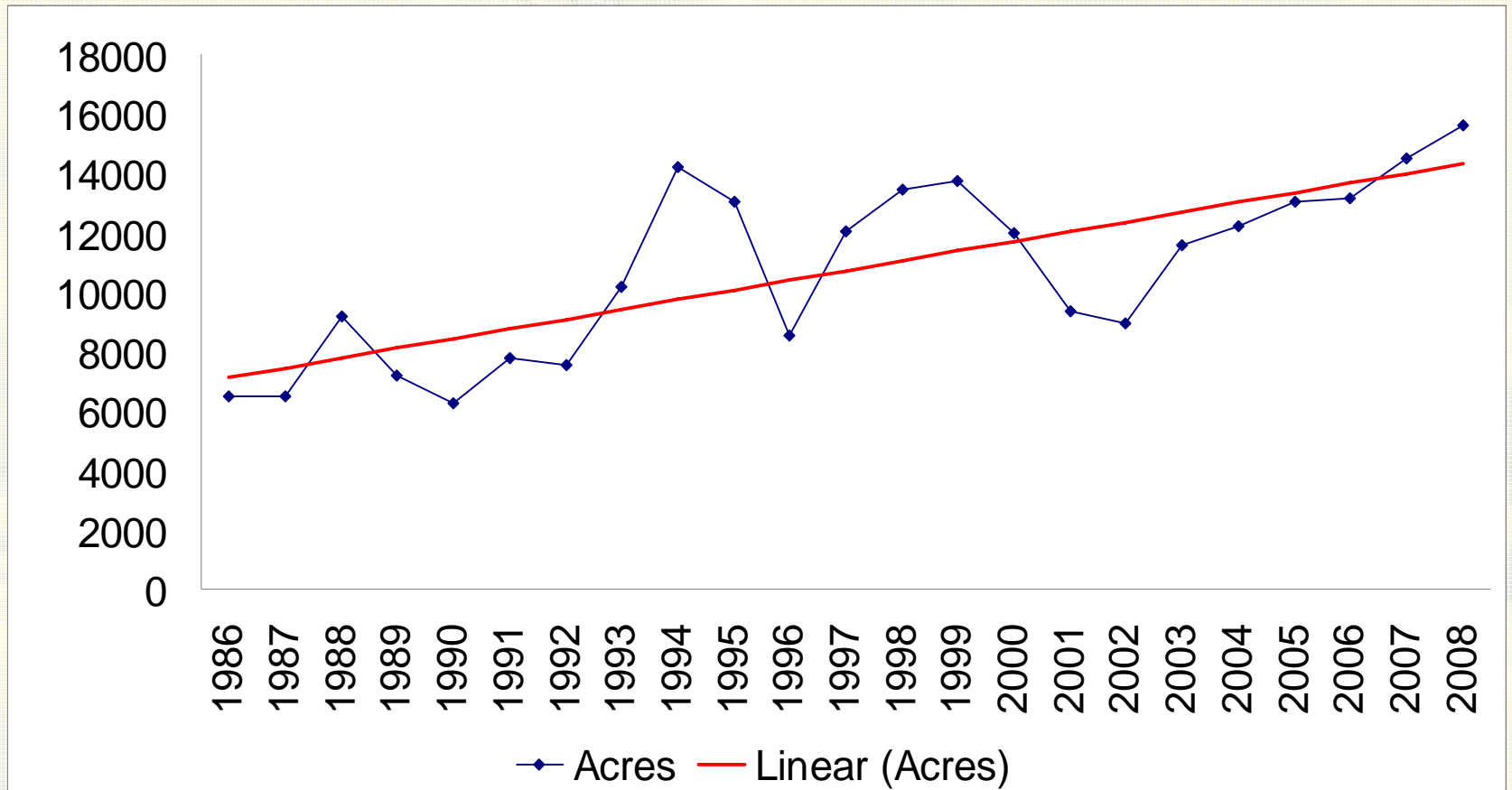
Crop	% of seed used that is certified	% CSTA member projected investment (5 years)
Canola	92%	74%
Corn	98%	12%
Soybeans	87%	10%
Cereals	18%	2%

*CSTA Investment Survey and Blacksheep Study for CPTA*

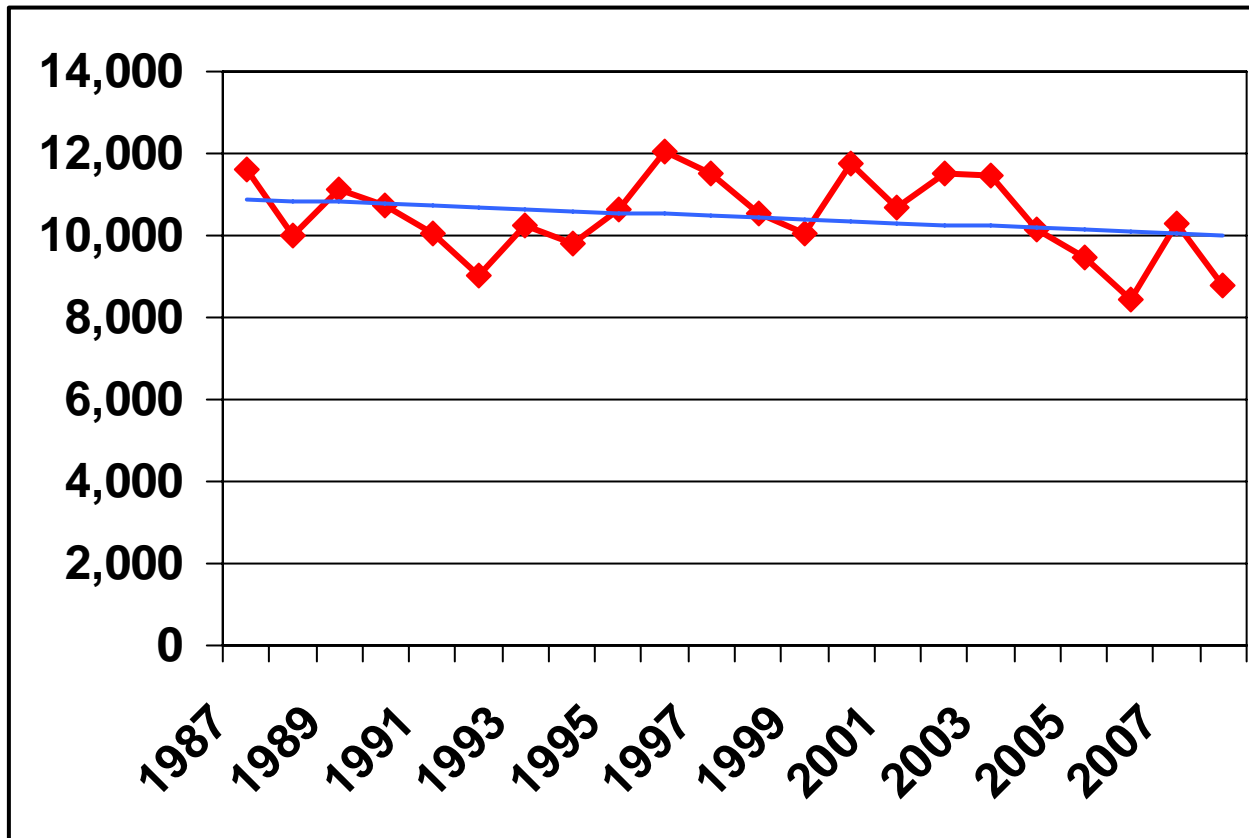
## Innovation Funded with Certified Seed Increases Choice for Farmers (and end users)

Crop	Varieties Available
Alfalfa	158
Barley	191
Canola	239
Corn	713
Lentils	25
Oats	89
Soybean	507
Wheat	213

# Canola Acres – Prairie Provinces 1986-2008



# Barley Acres, Prairie Provinces 1986-2008





## Innovation and Increased Productivity Through Certified Seed

- Without sales of certified seed:
  - funds are not generated for investment
  - innovation lags
  - yields stagnate and production falls
  - Supplies of consistent quality product are put at risk

# Innovation and Increased Productivity and Returns to Farmers

- From investment generated by sales of certified seed

## Xena Feed Barley

Yield Increase	5.6 bu/acre
Acres Seeded	1,564,500
Price	\$4.00/Bushel
Additional farm revenue	\$35,044,800

## CDC Copeland Malt Barley

10,	2.5 bu/acre
Acres Seeded	1,000,000
Price	\$4.30/Bushel
Additional farm revenue	\$10,750,000



## **Certified seed can help solve problems to keep barley production and processing competitive in Canada**

- New varieties with traits for selective processors
  - protein content and type
  - starch type and content
- Basis of a Quality Management System (brand defence)
  - foundation of highly segregated IP systems to deliver consistently high quality
  - assured variety and purity
- Innovation for disease resistance
  - fusarium

## Innovation Depends on Communication

- Seed companies depend on input from farmers and end-use customers to make decisions that affect the industry far into the future
- Seed Companies are anxious to have constructive dialogue with industry participants to determine mid to long-term priorities



## Certified Seed

- **A primary quality control tool**
  - product segregation and purity
- **A means of funding innovation**
  - keeping barley competitive
- **Solving more problems in the future**
  - Fusarium, quality, disease, pests
- **We need your help in driving innovation**
  - promotion of certified seed use by the barley industry
  - ongoing input to plant breeding priorities



## Questions for the Barley Industry

- How can we help make seed a functional part of your future quality management schemes?
- What opportunities do you see for the barley industry
- What are your primary quality (or other) concerns which might be addressed through plant breeding?



**Thank You**

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