

Canada's Seed Sector

Contributing Billions to Our
Economy





A Key Economic Driver

- Canada's vibrant seed sector:
 - Fuels our economy
 - Creates jobs for knowledge workers
 - Provides innovations to meet challenges facing agriculture
- A new study examined economic contribution of Canada's seed sector including:
 - Plant Breeding
 - Production
 - Processing and Production Support
 - Marketing and Distribution



Fuelling our Economy

- In 2007, the Canadian seed sector contributed **\$3.95 billion** to the Canadian economy

Salary & benefits	\$ 1.01 billion
Operating costs	\$ 1.72 billion
Investment in capital goods	\$ 658.8 million
Sales outside Canada	\$ 568.6 million

Creating Jobs

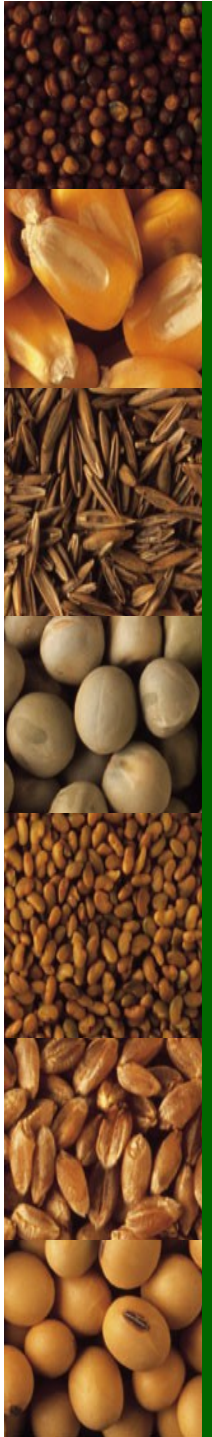
- Employed **14,228** Canadians in 2007
 - A large number located in small regional centres & rural communities
 - More than 3,000 highly-skilled staff in plant breeding

Plant Breeding	3,048
Production	2,575
Processing & Production Support	6,234
Marketing & Distribution	2,371

Attracting International Sales

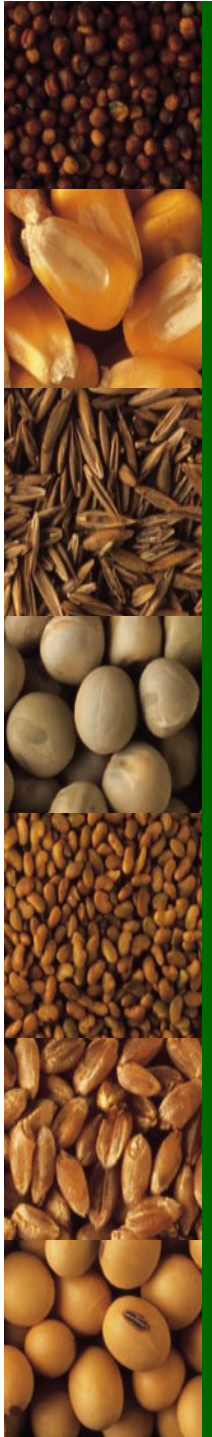
- Over **\$569 million** back to the Canadian economy from international sales

Plant Breeding & Research	\$ 32.2 million
Seed Production	\$146.6 million
Seed Processing & Production Support	\$ 8.8 million
Marketing & Distribution	\$381.1 million



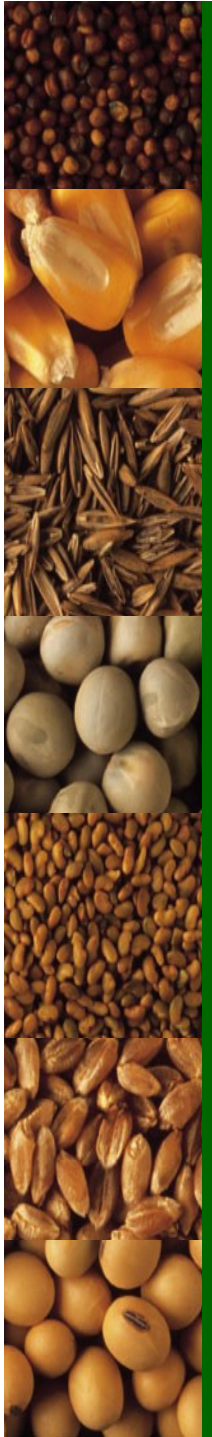
Investment in Innovation

- In 2007, plant breeding & research contributed **\$361 million** to the economy
- Production of new varieties for sale in Canada was a primary driver
- Seed industry innovation:
 - Higher yields
 - Drought tolerance
 - Improved nitrogen use efficiency
 - Improved disease & pest resistance



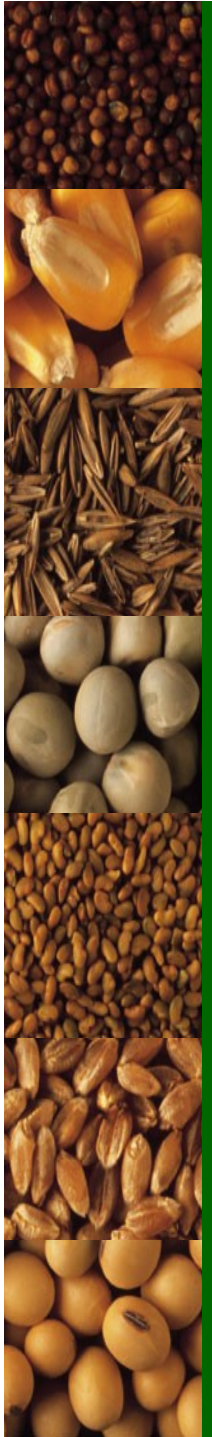
Research & Plant Breeding

- Traditional plant breeding employs 3 times as many scientists as biotechnology
- Almost 3 full time technicians for every scientist
- Consumption of goods & services over \$160,000 per scientist
- Capital investment over \$51,000 per scientist
- Sales outside Canada \$163,000 per plant breeder



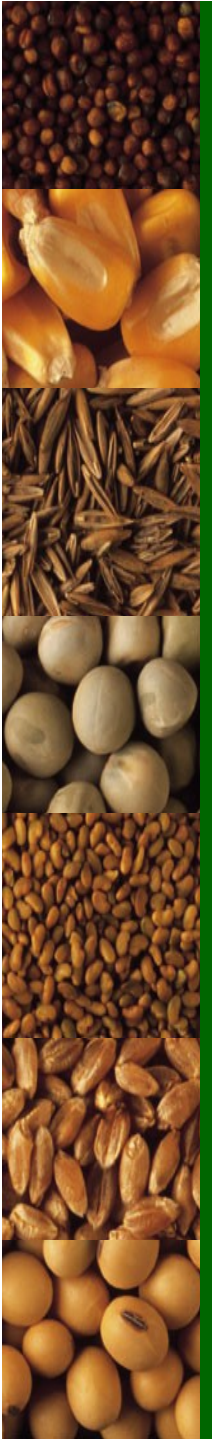
Seed Production

- 1.2 acres commodity production for every acre pedigreed production
- 30% of pedigreed acres contracted to companies
- Consumes goods and services at about \$180,000 per producer
- Capital investment over \$103,000 per producer
- Generates over \$56,000 per producer in international sales



Processing & Production Support

- Over 2.8 million tonnes processed
- Consumes goods and services at \$146,000 per employee
- Capital investment almost \$44,000 per employee
- Generates over \$1,400 per employee in international sales



Seed Marketing & Distribution

- Consumes goods and services at over \$121,000 per employee
- Capital investments almost \$37,000 per employee
- Generates well over \$160,000 per employee in international sales



Summary

- Canada's seed sector is a key economic driver:
 - Contributing \$3.95 billion in economic activity
 - Employing over 14,000 Canadians
 - Attracting over \$569 million in international sales
- Plant breeding & research contributed \$361 million
 - An environment conducive to continued investment in leading-edge science for both traditional plant breeding and biotechnology is essential



Thank You

Questions?