



Canada's Seed Industry

Contributing....

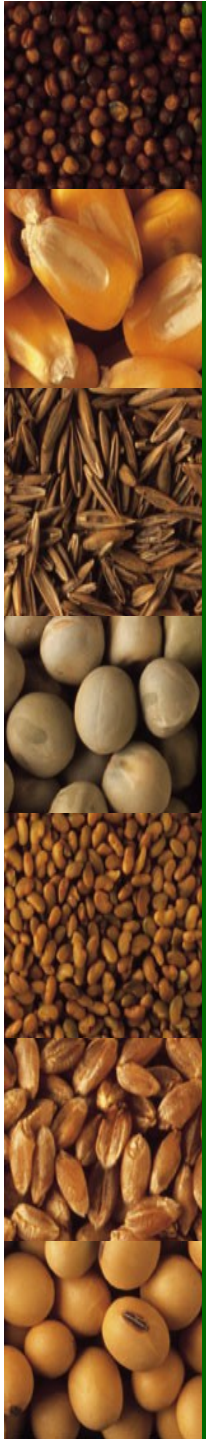
\$3.95 billion

Employing.....

14,200 Canadians

Attracting....

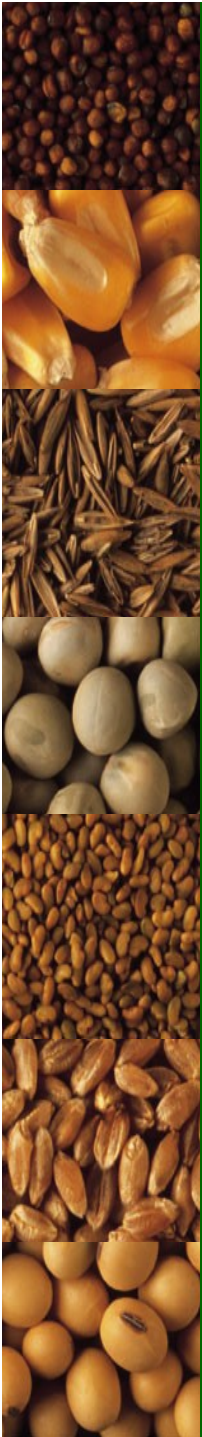
**Over \$550 million in
international
business**



Canadian Seed For the World

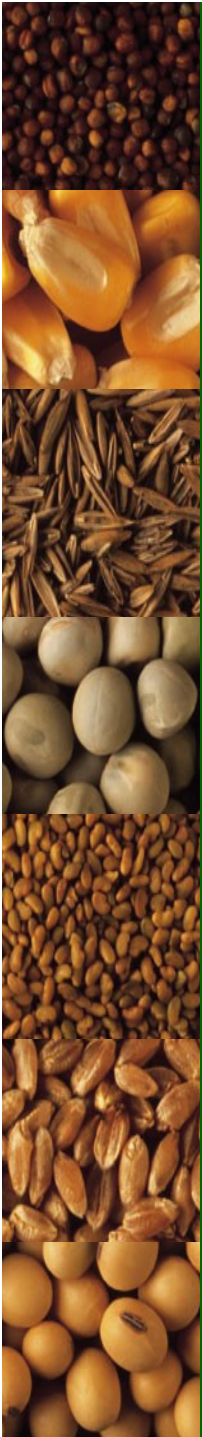
The World Comes to Canada for our Forage Seed including:

- Alfalfa
- Alsike Cover
- Birdsfoot Trefoil
- Red Cover
- Sweet Clover
- Bluegrass
- Creeping Red Fescue
- Fescue
- Orchard Grass
- Ryegrass
- Timothy
- Wheatgrass



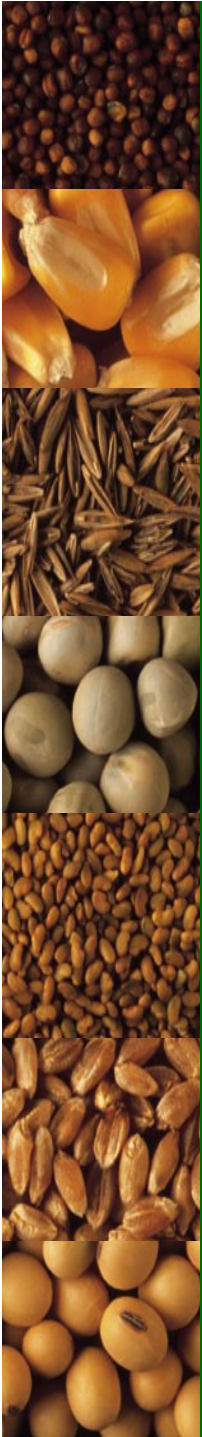
Canola – A Great Canadian Success Story

- Developed by Canadian breeders in the 1970s
 - Canada's number one export
 - Superior characteristics for
 - Nutrition
 - Industrial uses



Canadian Hybrid Seed Corn

- An excellent choice for the world's fastest expanding corn regions
- Dependable yields
- Excellent quality



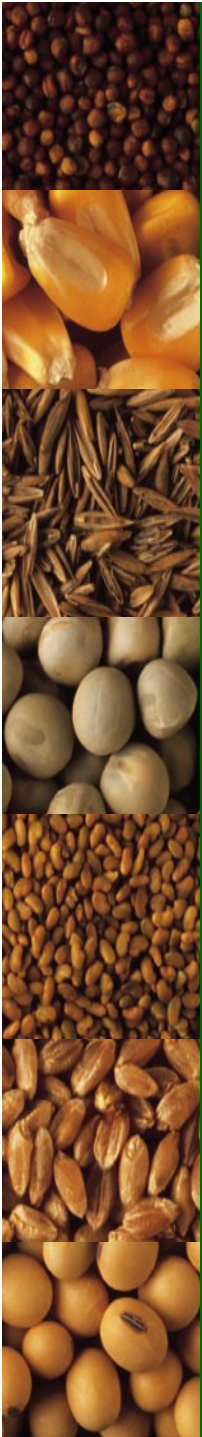


Canada is favoured with some of the world's best soils and climates for cereals including:

- Barley
- Oats
- Rye
- Triticale
- Wheat

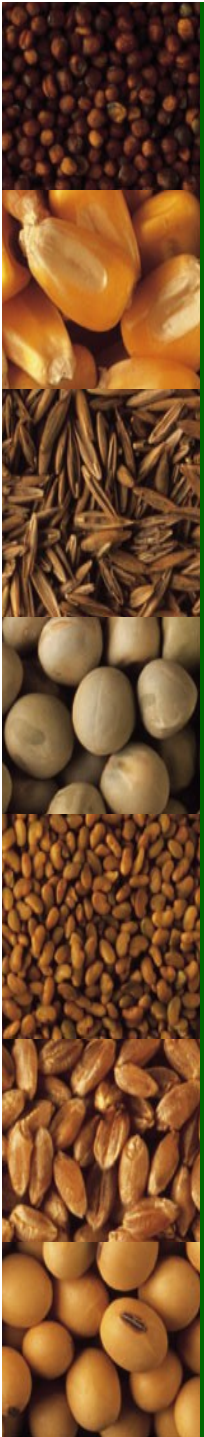
Quality Seed of Soybeans and Flax

- Canadian Breeders lead the world in incorporating state-of-the art genetics in early season soybeans
- Continual improvements in iodine value, oil content and protein content are direct results of Canadian flax breeding



Pulses and Other Crops Including:

- Chickpeas
- Fababeans
- Kidney beans
- Lentils
- Peas
- Wheat Beans
- Buckwheat
- Canary seed
- Mustard
- Millet
- Sunflowers
- Vegetable seed



Canada's Seed Industry Overview 2010

Total Number of Seed Producers	3,735
Total Acres in Seed Production	1,118,619
Total Crop Kinds Subject to Certification	79
Total Registered Varieties	2 430*
Total Bulk Storage Facilities	934
Total Approved Conditioners	643
Total Volume of Exports	186 216 tonnes
Total Volume of Imports	98,845 tonnes
Total Value of Exports	\$220.5 million
Total Value of Imports	\$316.3 million

* Corn, turf and specialty soybeans not subject to registration





Canada's Seed Industry Employment by Industry Segment **14,000 in 2008**

Industry Segment	Employment (FTEs)
Plant Breeding and Research	3 048
Seed Production	2 575
Seed Processing and Production Support	6,234
Seed Sales and Marketing	2 371
Total Employment	14 228

Source: CSTA Study

The Seed Industry's Annual Contribution to the Canadian Economy (\$millions)

\$3.95 Billion in 2008

Industry Segment	Salaries Benefits	Operating Costs	Capital Investment	Intern'l Revenue	Total
Plant Breeding, Research	195.98	100.70	32.21	32.18	361.07
Seed Production	225.79	463.55	267.13	146.63	1 103.10
Processing Production Support	365.76	864.05	272.11	8.75	1 511.69
Sales & Marketing	220.03	287.45	87.40	381.06	971.95
Total	1 007.58	1 716.75	658.85	568.62	3 951.81

Source: CSTA Study



Value of Producer Seed Purchases

Calendar Year	\$Canadian
2001	1.42 billion
2002	1.54 billion
2003	1.53 billion
2004	1.52 billion
2005	1.59 billion
2006	1.65 billion
2007	1.84 billion
2008	2.05 billion
2009	2.21 billion

Source: Statistics Canada

Value of Trade in Seed

Year	Exports \$ Cdn	Imports \$ Cdn	Balance \$ Cdn
2004/05	245.3 million	233.8 million	11.5 million
2005/06	245.6 million	210.6 million	35.0 million
2006/07	342.9 million	230.1 million	112.8 million
2007/08	388.7 million	282.8 million	105.9 million
2008/09	376.5 million	378.0 million	1.5 million
2009/10	220.6 million	316.3 million	95.7 million

Source: Agriculture and Agri-Food Canada



Top 10 Crop Types Exported, 2008 (for sowing by value)

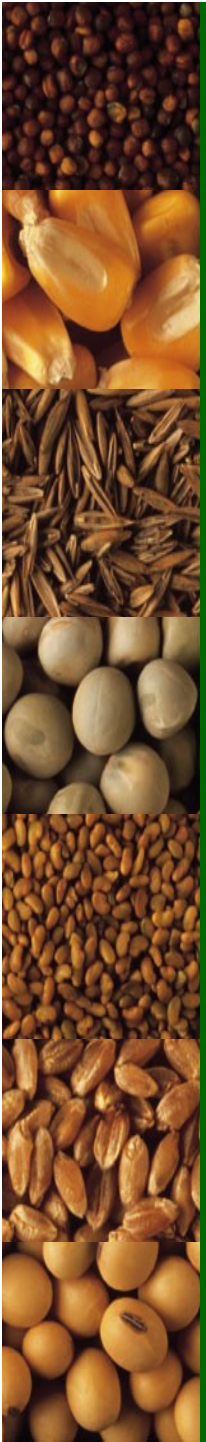
	Value (\$ Cdn)	% Total Exports
Yellow Dent Seed Corn	43.3 million	11.75
Navy/White Pea Beans	28.1 million	7.63
Creeping Red Fescue	25.5 million	6.93
Perennial Ryegrass	25.4 million	6.88
Lentil Seed	25.3 million	6.85
Bean Seeds	22.8 million	6.17
Alfalfa Seed (o/t certified)	21.9 million	5.95
Corn (o/t yellow dent)	20.9 million	5.68
Rye seed	18.2 million	4.93
Alfalfa Seed (certified)	16.6 million	4.50





**A Global Technology Leader
Private and Public Sector
Research support responsible
development**

- **Biotechnology**
- **Conventional Breeding**
- **Organics and Specialty Crops**





A World Leader in Quality

- **Science and risk based regulatory system**
 - **International Quality Standards**
 - **Superior stewardship and environmental responsibility**
- 



Canadian Seed Trade Association

*130 member companies working to foster seed
industry innovation and trade*

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