



## Oat varieties for the Future

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Prairie Oat Growers Association Annual Conference

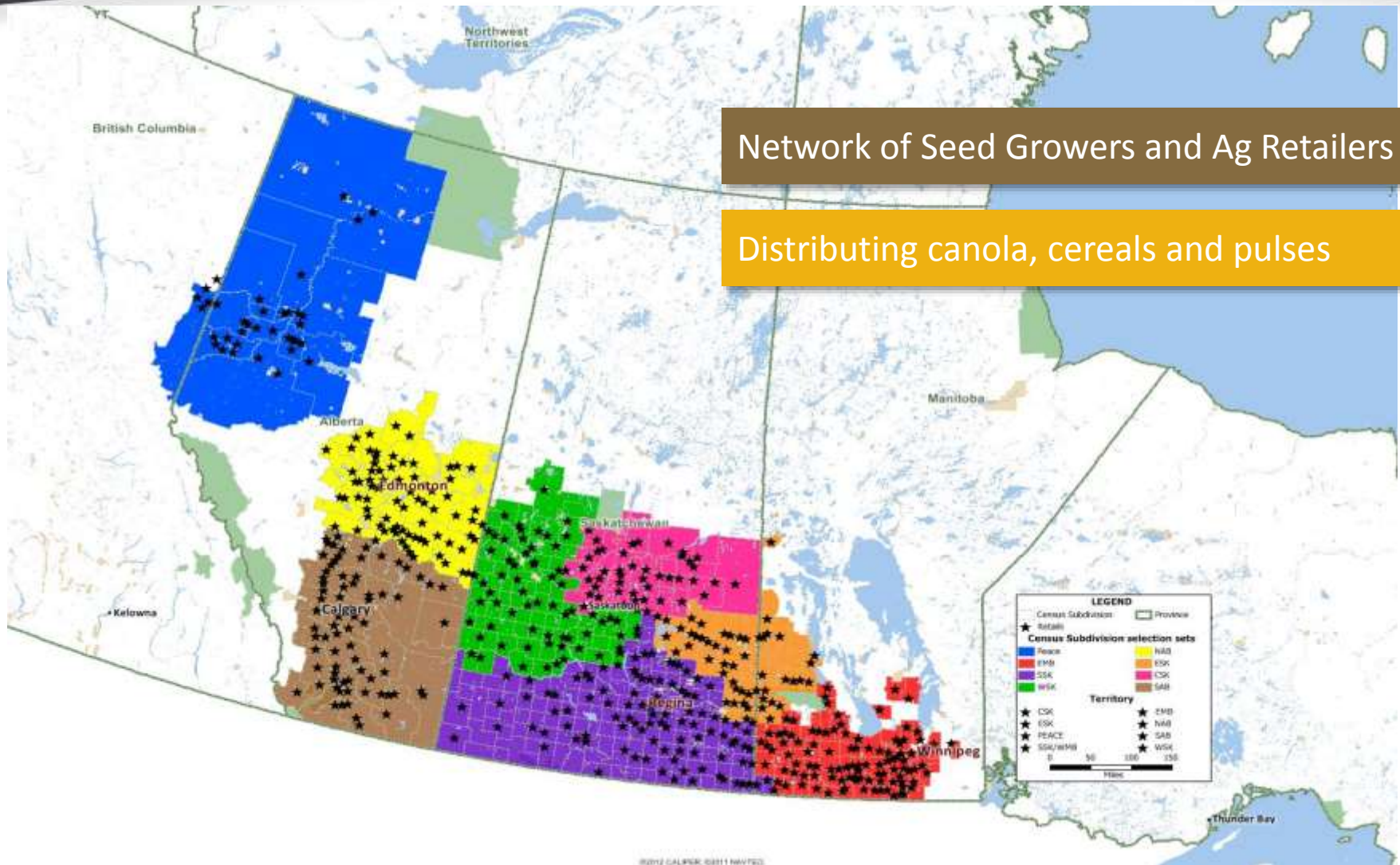
Winnipeg, December 5, 2013

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# Overview

- Research & Product Development
- Changing Landscapes
- Oats – a special crop?
- Managing Seed Production
- Different Production Models

# Distribution and Production Network







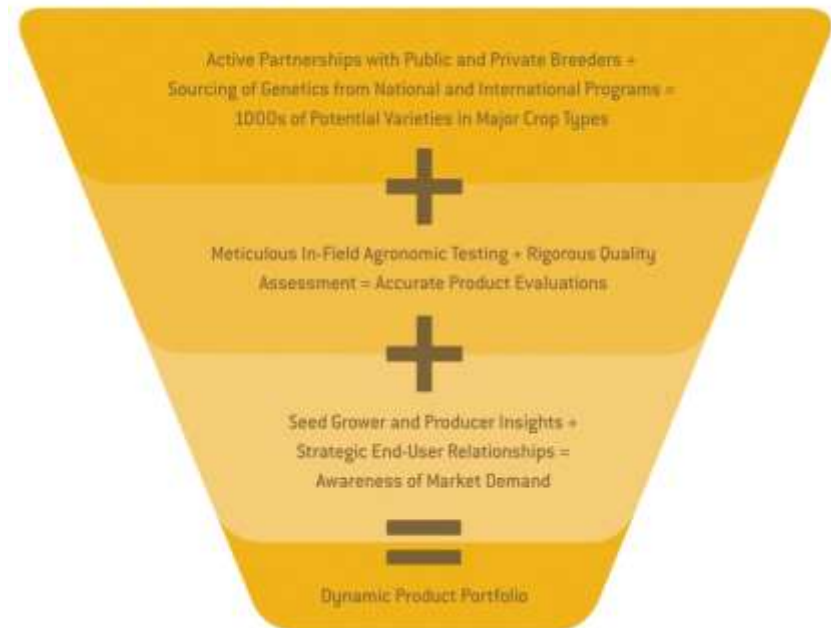
**CANTERRA  
SEEDS**

**RESEARCH &  
PRODUCT DEVELOPMENT**

# CANTERRA SEEDS R&PD Program

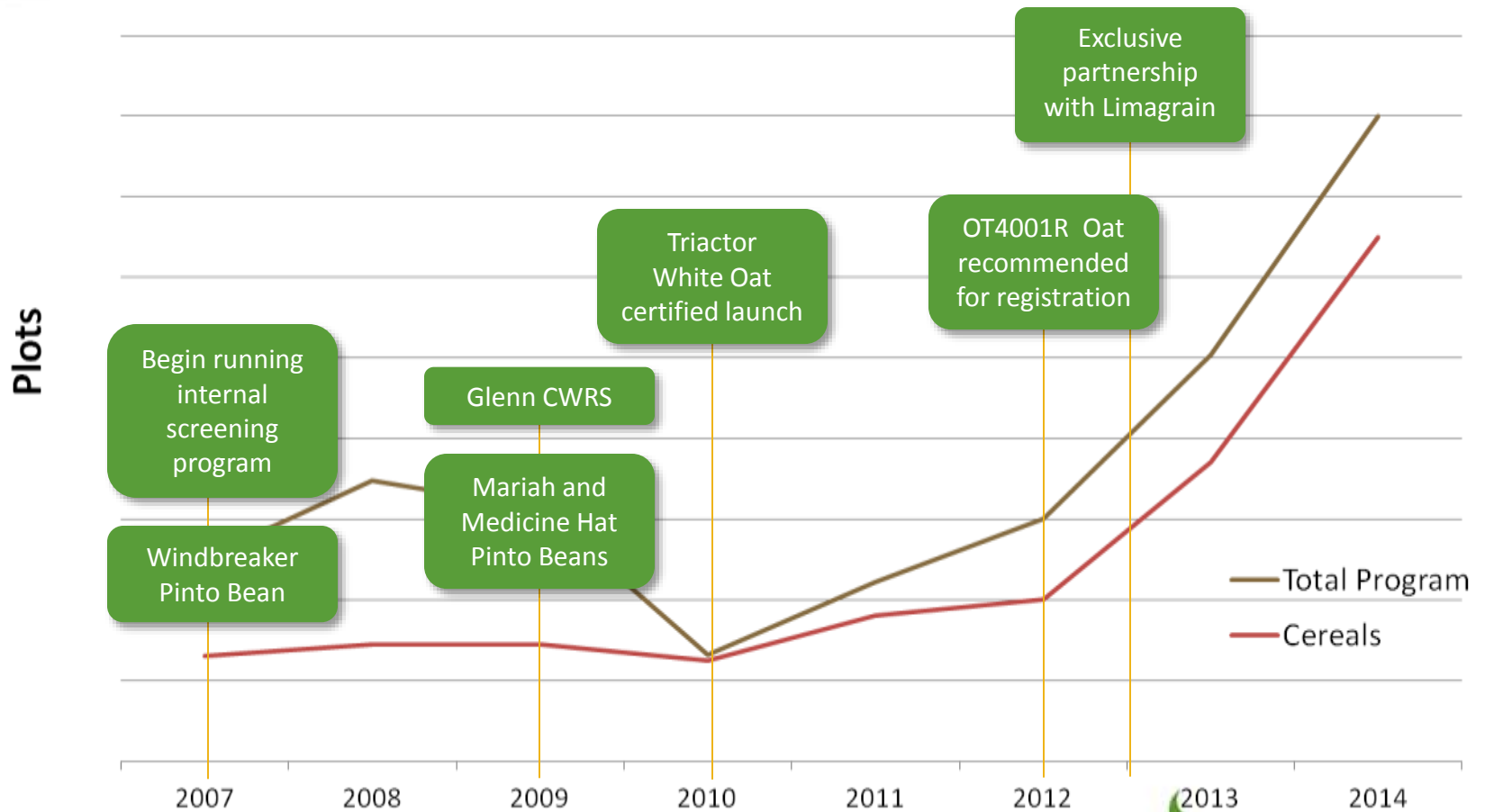
- Relationships with domestic and international breeding partners, both public and private
- Commitment to comprehensive variety development
- Research sites across Western Canada test potential varieties under local agronomic conditions
- Screening based on agronomic performance, disease package, end-use quality
- Strongest varieties promoted to portfolio

## PRODUCT PIPELINE





# R&PD Program Growth



# Changing Regulatory Landscape

- Act to Reorganize the CWB
  - Commercial landscape changes
- Seeds Act & Regulations
  - Variety registration reviews
- PBR Act & Regulations
  - UPOV '91 ratification imminent?
- Canada Grain Act & Regulations
  - Commercial landscape + variety evaluation support

# Changing Development Landscape

- Breeding programs
  - AAFC reductions
  - Private breeding programs
  - Producer involvement in breeding?
- Councils & Commissions
  - Barley Council of Canada established 2012
  - Cereals Canada incorporated fall '13
  - Involvement in breeding?



# Changes to Variety Registration

- Recommending Committees doing comprehensive reviews of Operating Procedures and criteria for variety registration in response to Letter from Minister Ritz in Feb '13
  - PRCWRT: streamlining Operating Procedures
  - PRCPSC: move to Part III?
  - WCC/RRC: further streamlining?
- Other groups discussing options e.g. CSTA, CropLife, WCWGA, CCC
- AAFC Policy Branch/CFIA/CGC ran 'Crop sector value chain stakeholder engagement'
  - Options presented for comments (comment period closed Nov 30<sup>th</sup>):
    - Current system
    - Place all crops in Part III, with option to move back to Part I or II
    - Place all crops in Part III, eliminating Parts I & II
    - No government involvement in variety registration





# Oats

- Triactor
  - Consistently high yields
  - Approved milling variety
- OT4001R (not yet named)
  - Triactor +++
    - Shorter, stronger straw
    - Greater plumps, less thins
    - Very high beta-glucan
  - Foundation seed available
  - Certified seed launch potential fall 2014
- Next variety?



TRIACTOR





OT4001R Production





# Seed Production Management

- Manage and control Breeder, Select and Foundation stock seed allocations
  - Ownership remains with seed grower shareholders
- All stock seed sales and own-use orders flow through Pedigreed Production Coordinator
- Registered seed traded between seed grower shareholders
- Certified sales made via wholesale or retail sales
- Tech fees collected at end of sales season on all transactions
  - Royalties paid to breeder
  - Margin for CANTERRA SEEDS





# Production Models

- Open Market Access
  - Full release of the variety with no specific restrictions
- Closed-Loop IP
  - Seed production managed with contracts
  - Suitable for trait specific varieties
  - Exclusive arrangement with end-user(s)

# Production Models

- Open Market Access with IP
  - Variety openly available but end-user still choose to IP (ie-Warburton wheat or Canada Malting barley or SaskCan dry beans)
  - Seed production contracts or preferred supplier agreements may be used
- Seed Production Contracts
  - Right of first refusal production contracts available
  - Some level of purchase commitment required
  - Some level of grower commitment also required

# Toll Production

- Established network of professional seed growers
  - Expertise in seed production, quality management systems, and distribution of various crop types
- Key partnerships with seed industry processors
  - Seed cleaning, treating, packaging, logistics
- Relationships with seed enhancement technology providers
  - Seed treatments, inoculants and various other value added seed enhancements





# Toll Production

- Develop joint sales and production targets
- Contract seed production with seed growers
- Regular updates on estimated seed production during growing season
- Centrally controlled quality assurance and processing
- Flexible processes based on commercialization plan
- Management fee based on production or sales volumes
  
- “Control” or “manage” all aspects of the program to improve the outcome for all stakeholders



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