Oat varieties for the Future
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Overview

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

Network of Seed Growers and Ag Retailers

Distributing canola, cereals and pulses
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
R&PD Program Growth

- Begin running internal screening program
- Glenn CWRS
- Triactor White Oat certified launch
- Exclusive partnership with Limagrain
- OT4001R Oat recommended for registration
- Windbreaker Pinto Bean
- Mariah and Medicine Hat Pinto Beans

Data points:
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013
- 2014

Plots:
- Total Program
- Cereals
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 30th):
    - 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?
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