



Agriculture and Agri-Food Canada      Agriculture et Agroalimentaire Canada

## Seed Sector Review: Participants and Process

*The primary objective of the Seed Sector Review was to conduct an industry-wide assessment and analysis of the Canadian seed sector and its regulatory environment – charting a road map for the sector's future.*

The Seed Sector Review is an industry-led, industry-wide study of the Canadian seed industry that began in mid 2003. It is the first major review of the regulatory framework governing the Canadian seed sector in 20 years. During that time, globalization, industry concentration and evolution have brought about substantive changes to how seed and agricultural commodities are produced, processed, marketed and used in Canada and around the world.

The review was spearheaded by the Canadian Seed Growers Association (CSGA), Canadian Seed Institute (CSI), Canadian Seed Trade Association (CSTA) and Grain Growers of Canada (GGC). To conduct the review, these four private-sector industry leaders (profiled below) received logistical and advisory support from the Canadian Food Inspection Agency (CFIA). The review was made possible by a contribution under Agriculture and Agri-Food Canada's Canadian Adaptation and Rural Development Fund (CARD).

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The 10-month review was led by an 18-member Seed Sector Advisory Committee who co-ordinated broad consultation with stakeholders through meetings, three domestic and one international survey, as well as consultation with international bodies such as the OECD's Seed Scheme and U.S. regulatory counterparts. Its final report provides a series of recommendations – categorized A, B and C to distinguish areas of consensus for action – as well as providing a snapshot of current trends and areas of discussion in the domestic and international markets.

Agriculture and Agri-Food Canada pegs the seed industry's contribution to the economy at \$700 million dollars a year in combined domestic and export sales. Three-quarters of that is sold on the domestic market, with the rest sold to some 70 countries around the world.

Titled *The Report of the Seed Sector Advisory Committee*, the final report of the advisory committee identifies four key results areas (see *Highlights of the Report* for details), all of which advocate a policy and regulatory environment that is more responsive to changing conditions, a collective capacity to manage change while maintaining a stable investment environment and a production sector whose decision making is well-informed in terms of risks and rewards, and well-integrated into the domestic and foreign market requirements.

One of the four key result areas deals directly with consumer acceptance and confidence, in response to rising consumer expectations regarding health, safety and quality.

The report also calls for the implementation of a multi-stakeholder permanent consultative body to move forward on the report's recommendations and facilitate future consultation on regulatory change.

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## **Partners in the Seed Sector Review:**

### **Canadian Seed Growers Association (CSGA)**

Formed in 1904, the CSGA is a private-sector association of 4,500 pedigreed seed growers and includes representation from provincial departments of agriculture and plant breeders. The CSGA is internationally recognized as the body that sets Canada's varietal purity standards. It is the sole crop pedigreering agency for most agricultural crops (excluding seed potatoes) in Canada.

### **Canadian Seed Trade Association (CSTA)**

Headquartered in the nation's capital, the CSTA represents the interests of 165 member companies engaged in all aspects of seed research, production and marketing, both domestically and internationally. As a member organization consisting of plant breeders, wholesalers, retailers and others, CSTA is committed to fostering an environment conducive to researching, developing, distributing and trading seed and associated technologies – with the goal of bettering the choices and successes of its members and their customers.

### **Canadian Seed Institute (CSI)**

The CSI is a not-for-profit organization established by Canadian seed associations in 1996 to ensure delivery of consistent, cost effective, monitoring and quality assurance programs for its 1,400 seed establishments. As such, the CSI symbol of quality has been called a "passport" to the world seed market. CSI programs increase profitability and improve visibility in domestic and export markets by providing enhanced efficiency, risk reduction and increased customer confidence. Cooperation between CSI and other standard-setting bodies, including the Canadian Food Inspection Agency and the Canadian Grain Commission (CGC), is fast becoming an integral part of Canada's seed regulatory program. The CFIA and the CGC audit and accredit the Institute.

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### **Grain Growers of Canada (GGC)**

The GGC represents grain and oilseed producer organizations across the country. Member organizations include the Alberta Barley Commission, Alberta Winter Wheat Producers Commission, Atlantic Grains Council, British Columbia Grain Producers Association, Canadian Canola Growers Association, Fédération des Producteurs de Cultures Commerciales du Québec, Manitoba Corn Growers Association, Ontario Corn Producers' Association, Ontario Soybean Growers, Ontario Wheat Producers' Marketing Board and Western Canadian Wheat Growers Association.

For more information, or to read the complete report, visit [www.seedsectorreview.com](http://www.seedsectorreview.com).

*The partner organizations in the Seed Sector Review process gratefully acknowledge the contribution of Agriculture and Agri-Food Canada's Canadian Adaptation and Rural Development fund (CARD) towards the success of this project.*