

Building the Next Generation of Canada's Seed Sector

Canadian Seed Growers Association
Annual General Meeting

Darcy Pawlik
July 5, 2026



Why Am I Speaking Today

- Former leader of Canada's largest cereals breeding company
- Built and commercialized seed businesses
- Worked across public, private and producer organizations
- Passionate about building Canada's future
- Wheat Growers solution
- Team Canada!



Why We Are Here

- AAFC breeding program an integral part of western Canadian wheat variety development.
- Current wheat breeding system is at risk from recent and historic budget cuts, especially at the variety development and pre-market evaluation stages.
- Wheat breeding is a long-term process and decisions made today will impact agriculture decades into the future.
- Status Quo is no longer sustainable

Understanding The Economics

Can Canada continue to fund breeding exactly as we always have?

- Growing costs
- Shrinking public resources
- Growing global competition

Year	(A) ¹ Levy R&D Inv. \$Mil.	(B) ¹ Gov't R&D Inv. \$Mil.
1995	2.76	3.39
1996	3.10	3.47
1997	2.89	3.52
1998	4.21	3.57
1999	3.33	3.63
2000	3.24	3.72
2001	3.41	4.88
2002	3.55	5.02
2003	3.81	5.14
2004	3.12	5.25
2005	3.51	6.10
2006	3.78	6.22
2007	5.83	6.35
2008	6.17	6.50
2009	4.60	6.52
2010	5.40	6.43
2011	6.15	6.62
2012	5.59	6.72
2013	5.04	6.78
2014	6.13	6.91
2015	9.46	9.46
2016	10.52	10.52
2017	10.48	10.48
2018	11.73	11.73
2019	12.16	12.16
2020	13.28	13.28
2021		
2022		

Source: The Benefits and Costs of Producer and Public Investments: Wheat Varietal R&D in Western Canada 1995 to 2020

The Question We Are Really Asking

**What is the best long-term delivery model
for Canadian farmers and seed growers?**

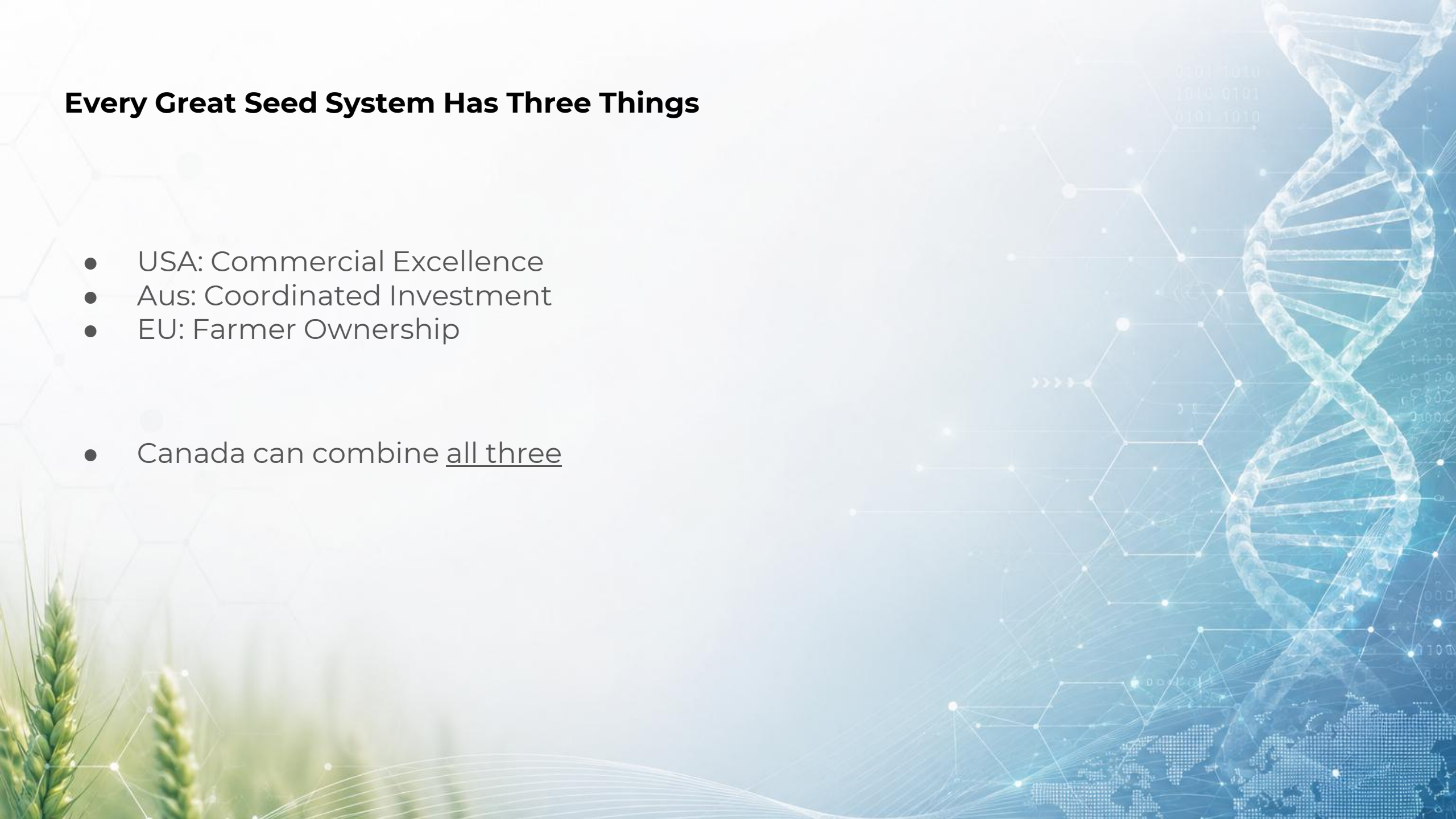


CANADA IS NOT INVENTING SOMETHING NEW, **WE ARE TRYING TO CATCH UP**



Every Great Seed System Has Three Things

- USA: Commercial Excellence
 - Aus: Coordinated Investment
 - EU: Farmer Ownership
-
- Canada can combine all three



Every Option Should Be Evaluated On Merit

- Farmer Owned Cooperative
- Farmer Controlled Non-profit
- Hybrid Public Interest
- Federated Commodity Led
- Public-Private Variations

***Building Resiliency – Stronger Seed.
Stronger Agriculture. Stronger Future.***

Farmer Ownership Works
Plus so many more



ALIGNMENT BETWEEN GLOBAL BEST PRACTICES & CSGA'S VISION

The characteristics that define the world's most successful seed organizations closely align with the future CSGA has identified.



PROVEN GLOBAL MODELS

- ✓ Farmer **ownership** and **strategic influence**
- ✓ Professional **management**
- ✓ Commercial **focus** and market **discipline**
- ✓ Long-term **investment** capital
- ✓ Continuous **reinvestment** into breeding
- ✓ Global **partnerships** and market access



WHERE THEY CONVERGE

- ✓ Farmer-owned, professionally managed organization
- ✓ Sustainable commercial funding
- ✓ Public-private research partnerships
- ✓ Long-term reinvestment into Canadian breeding
- ✓ Competitive globally while serving Canadian farmers



CSGA'S DRAFT PRINCIPLES

- ✓ **No Crop** Left Behind
- ✓ **Sustainable** funding model
- ✓ **Farmer-led** governance
- ✓ Public and private **collaboration**
- ✓ **Innovation** that improves competitiveness



PREFERRED DIRECTION

CANADIAN FARMER-OWNED COOPERATIVE

A uniquely Canadian model that combines international best practices with CSGA's priorities.

Canada: world's leading farmer-owned seed innovation company

What if!?

- Canada had the world's largest farmer-owned seed company
- Every crop benefited from shared infrastructure
- Public science focused on discovery and big ideas
- Commercialization became faster
- Canadian genetics expanded globally

Build Canada's Seed Company





—  —

TOGETHER

— **WE CAN** —

BUILD CANADA'S 

SEED COMPANY.



**FARMER
LED.**



**INNOVATING
FOR OUR
FUTURE.**



**COMPETITIVE
GLOBALLY.**



**STRONGER
TOGETHER.**



[NUCLEUS]