



CANADIAN SEED INSTITUTE
INSTITUT CANADIEN DES SEMENCES

December 3, 2018

CSI Update – 2018-2019

Top of mind for the seed industry this fall and winter is Seed Synergy. The CSI Board is fully behind the Seed Synergy work and recently endorsed the White Paper at their November 22, 2018 Board meeting. Seed establishments and seed laboratories should feel a sense of pride knowing CSI represents the original Seed Synergy concept and CFIA's first exercise in alternate service delivery.

A year ago in December CSI was actively working with our Seed Synergy partners planning the Green Paper consultations, engaging consultants to conduct an economic impact assessment and risk analysis of our current seed system in Canada, and preparing for the first meeting of the Seed Synergy Oversight Committee – a committee which included a board member from each partner organization, whose main purpose was to monitor the Seed Synergy work, provide recommendations to the boards, and guidance to the Executive Directors.

A year has unfolded and the ideas in the Green Paper, with feedback from the entire seed industry, have evolved into a policy paper, the White Paper. What strikes me today is the incredible timing for our industry to have a policy paper speaking to the future of our industry in Canada. A rare and unique series of events is coming into alignment that will empower the seed industry to effect positive change:

- The "Barton Report" speaks to the value of agriculture to the Canadian economy and the need for the federal government to make the agricultural industry a priority;
- The *Seeds Regulations* are being opened for review and the government is keen to modernize the seed regulatory environment;
- The Seed Synergy partners' submission to the Treasury Board's consultations was well received;
- Agriculture and Agri-Food Canada has started their value creation consultations with seed industry stakeholders looking for feedback on two models, an end-point royalty system and a trailing royalty contract system;
- The seed industry partner associations are working more closely than ever and are very highly aligned.

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The road ahead for the seed organizations is not without its challenges, but by focusing on what we have in common, here's what has been accomplished to date:

- An industry-government working group has been established to address ways to improve how the government delivers novel product regulations;
- The government has launched consultations on value creation in late November with a view to possible *PBR Regulations* amendments;
- The economic impact assessment and risk analysis provided the detailed analysis the Seed Synergy partners needed to make an informed decision to support a trailing royalty model to encourage and support plant breeding innovation in Canada;
- Modernizing the seed regulatory framework is included in CFIA's regulatory plan for 2020;
- With support from the Seed Synergy partners, CSGA has completed the first phase of its revisions to Circular 6, the standards for seed crop production;
- CSGA and CSTA have made a multi-year commitment to hold joint AGMs;
- CSI and CSAAC are exploring amalgamation as a positive first step towards further amalgamation of the organizations and improved service delivery.

We've come a long way and now the final hurdle is upon us...governance. How do we organize ourselves to best serve the industry? We don't have the answers yet, but here is what I know and believe.

The stakeholders in our industry are completely dependent on each other for success - breeders, growers, retailers, analysts, processors, distributors, agronomists, equipment manufacturers, and more. From this diverse group of people, we need to find a group of champions, dreamers, visionaries, and investors to share their expertise and lead a new organization into the future. We need to draw as well on the knowledge and experience of this diverse group of people from across Canada to drive the technical and operational committees, bringing all the voices together to manage and resolve issues. We need to focus on cost-effective and impartial delivery of services that manage conflicts of interest and separate certification decisions from advocacy. And we also need to ensure we support and facilitate the varied markets and production systems, whether existing or emerging, such as identity preserved grains and oilseeds, organic products, sustainable agriculture, gluten-free certification, etc., because we have to acknowledge it's the markets that drive our industry.

The innate potential programmed into a kernel of seed is a great metaphor for where we are today. We are on the verge of realizing the incredible potential of our industry to adapt and grow if we continue to focus on our common goals.

Best regards,

Roy van Wyk
Executive Director



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