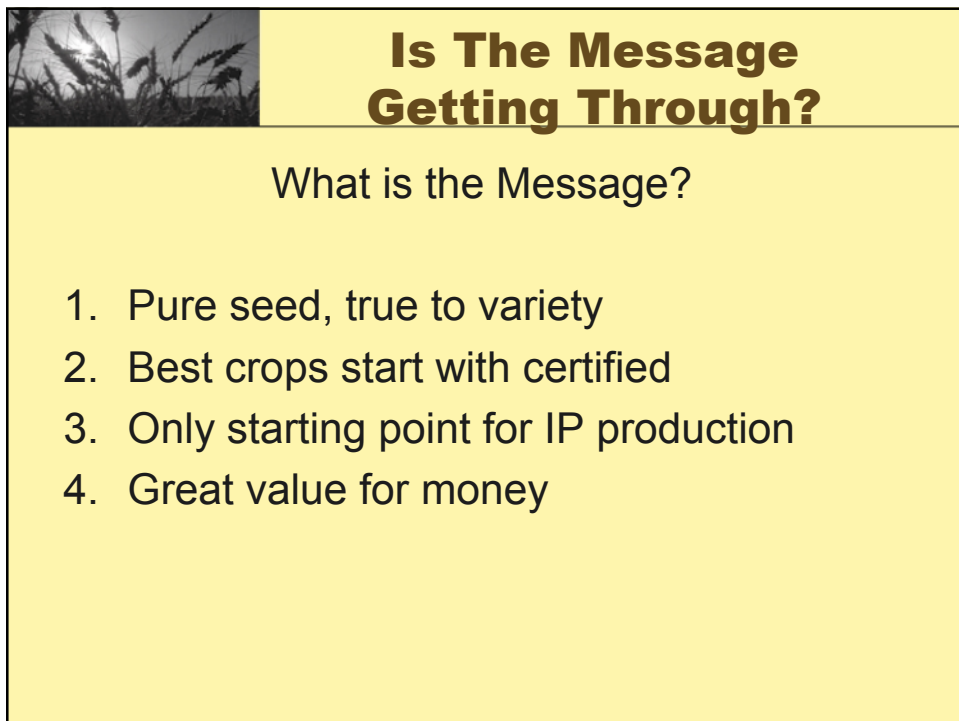


Certified Seed Use

Is The Message Getting Through?



Is The Message Getting Through?

What is the Message?

1. Pure seed, true to variety
2. Best crops start with certified
3. Only starting point for IP production
4. Great value for money



CPTA looks for answers

“ Current practices and attitudes towards certified and common seed”

- Size of the common seed market
- Usage and purchase patterns for certified and common seed
- Characteristics of certified and common seed user



Telephone Survey

- Blacksheep Strategy Inc.
- February 2004, based on 2003 use
- 800 western Canadian Producers
- Wheat, Barley, Oats, Canola, Flax, Peas
- Excluded pedigree seed growers and hobby farms.
- Sample size results in confidence level of 95%



Key Findings

1. For all crops other than canola, the benefits of using certified seed beyond “getting new varieties” are not generally apparent to a large cross-section of farmers.
2. The “benefit gap” between common and certified seed is not sufficiently wide or understood well enough for farmers to adopt certified seed more broadly.

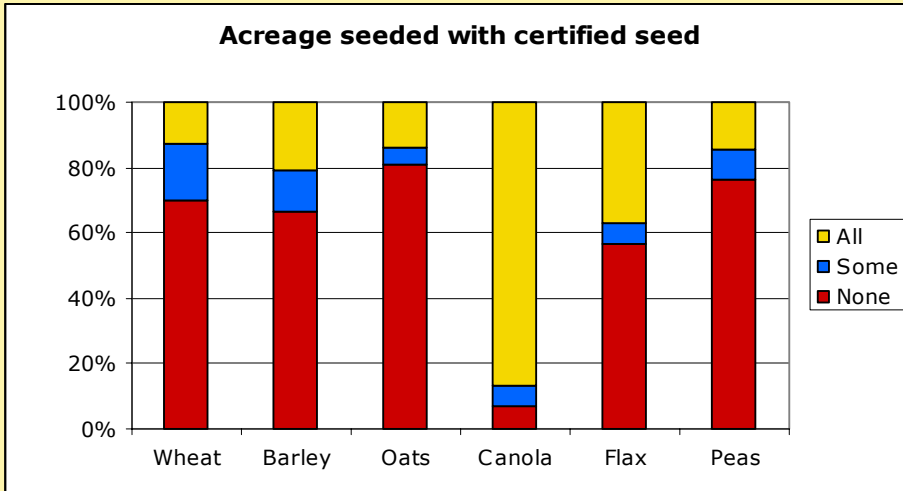


Key Findings

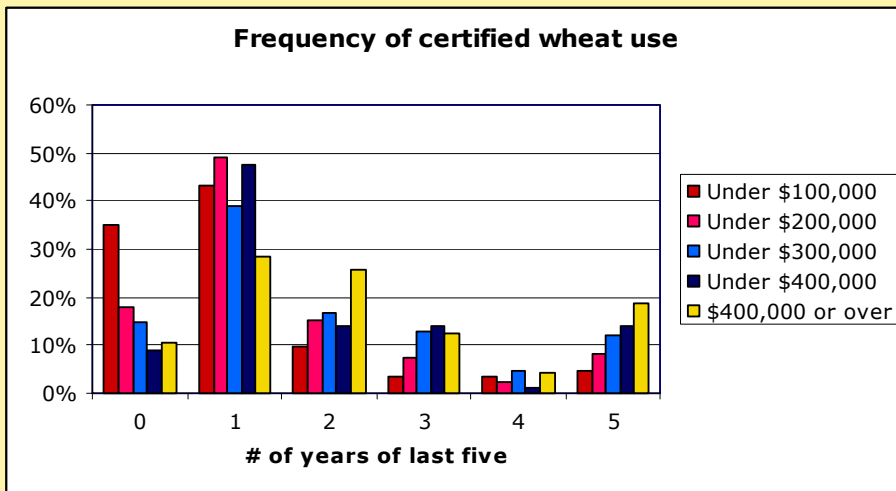
3. The quality standards of certified seed are fairly well-established in farmers’ minds but the value farmers can obtain from higher quality seed has not been established.
4. Farmers with higher incomes are more likely to have more favourable attitudes and behaviour with regards to certified seed.
5. Key indicators of the level of certified seed use are geographic and scale of farm operation



Certified Seed Usage

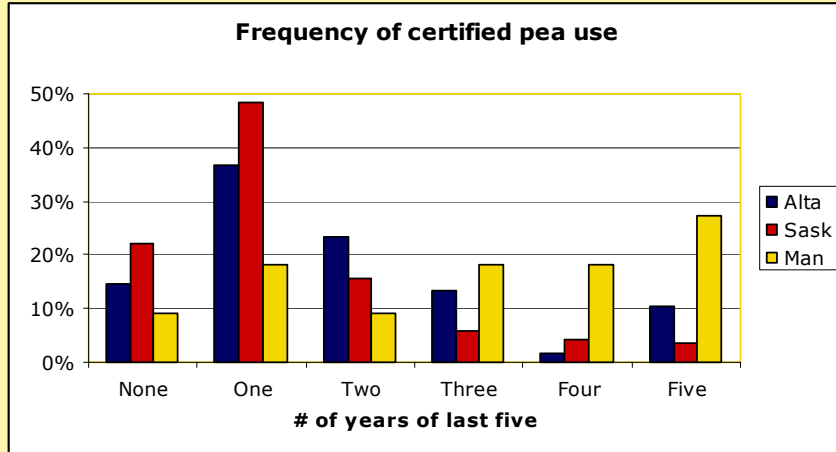


Who is Using Certified?





Where is Certified Used?



Top Reasons to Use Certified

For Wheat, Barley, Oats, Flax and Peas

1. Get New Variety
2. Common seed unavailable
3. Better quality

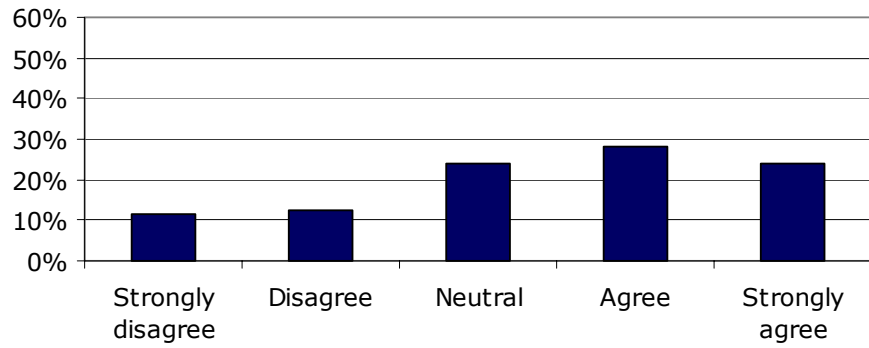
For Canola

1. Traceability, Production Contract
2. Better Quality
3. Four way Tie: New Variety, Higher Yield, Pure Seed, Always buy Certified.



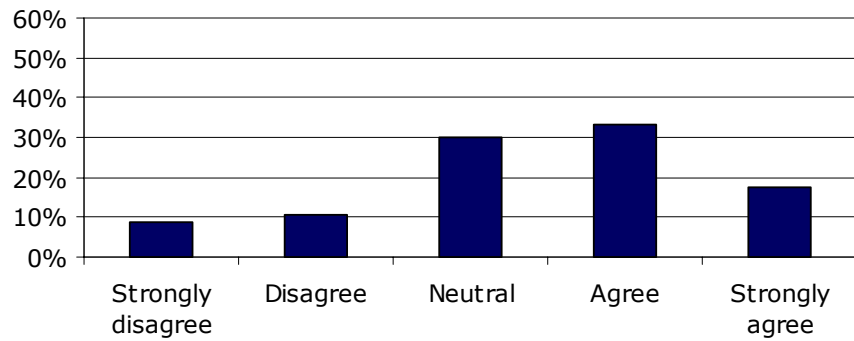
Farmer Attitudes

The only real benefit of certified seed is to get new seed varieties



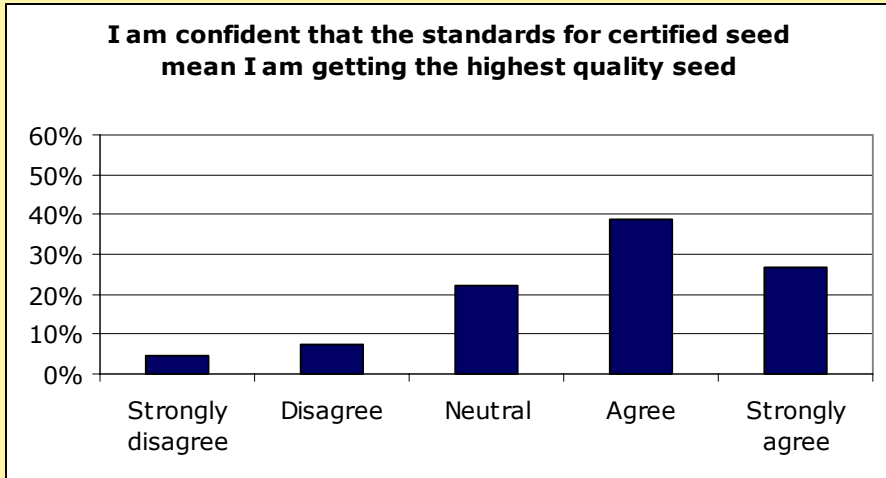
Farmer Attitudes

The quality of certified seed makes it worth paying a higher price





Farmer Attitudes



Top Reasons to Use Common

For Wheat, Barley, Oats, Flax and Peas

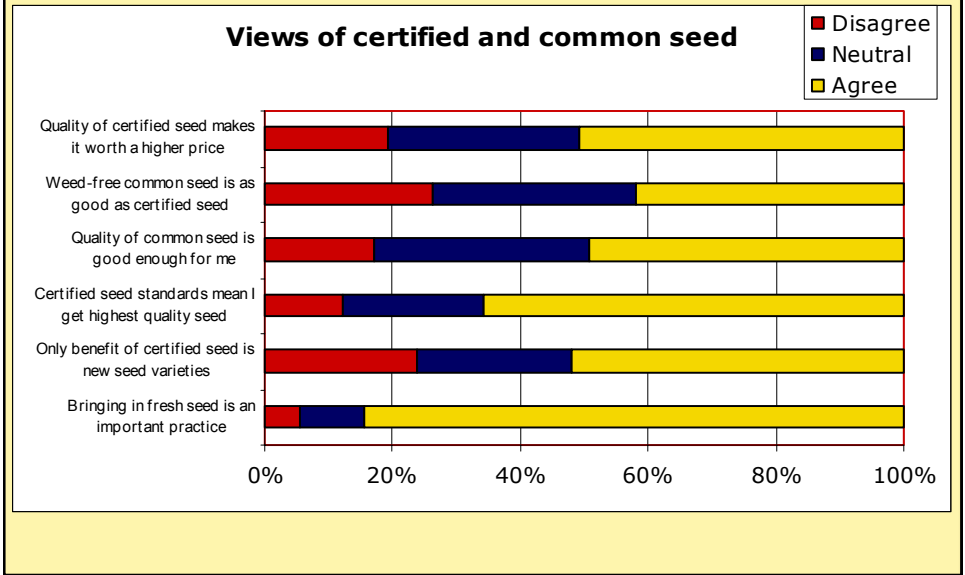
1. Cost is lower
2. Quality just as good
3. Tie: Know what I'm getting, Always use saved seed

For Canola

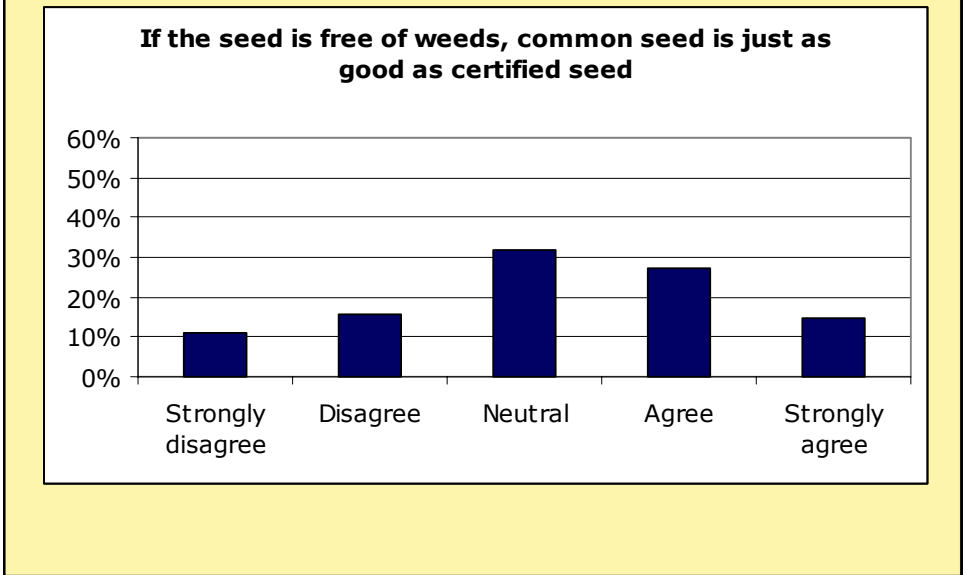
1. Cost is lower
2. Quality just as good
3. Always use saved seed.



Farmer Attitude



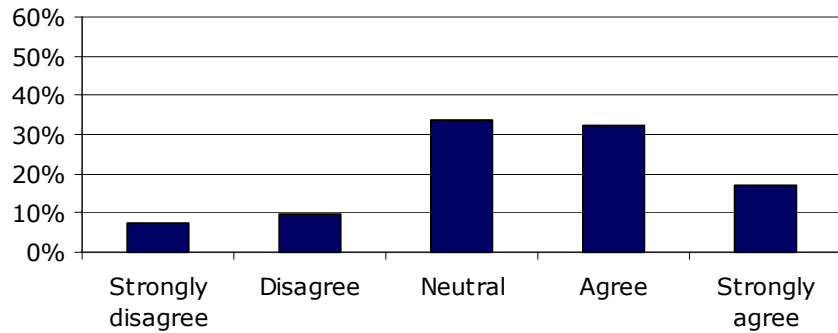
Farmer Attitude





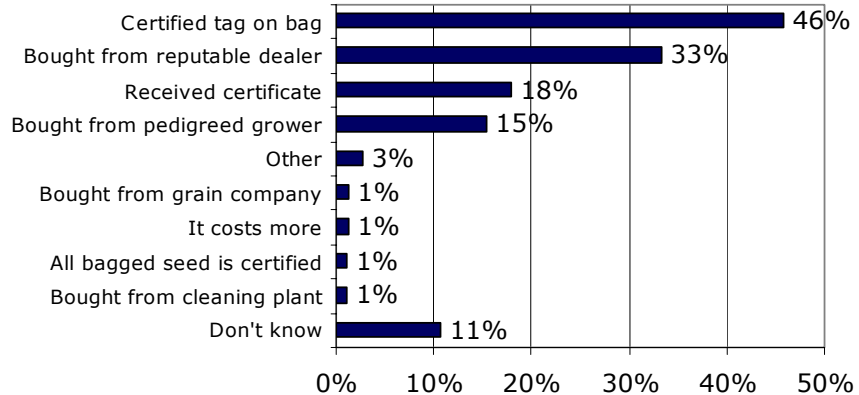
Farmer Attitude

The quality of common seed is usually good enough for me



Challenges

How do you know seed is certified?





Challenges

Significant Sales of Common Seed

Farm Saved Seed	1,768,000 tonnes
Certified Seed	348,000 tonnes
Common Seed	193,000 tonnes

Sales of Common Seed in Oats, Flax and Peas are about equal Certified sales.

55% of Common Seed sales are credited to local seed growers, grain companies and independent dealers.



Is the Message getting through?

1. *Pure seed, true to variety*

Yes, purchase certified seed to get new variety.

2. *Best crops start with certified seed*

No, 50% of farmers think weed free common seed is equal.



Is the Message getting through?

3. *Only starting point for IP production*

No. Except for canola, less 7% of farmers mention IP production as a reason to use Certified.

4. *Great value for money*

No. Almost 20% of those purchasing Certified seed did so because common seed was not available.





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