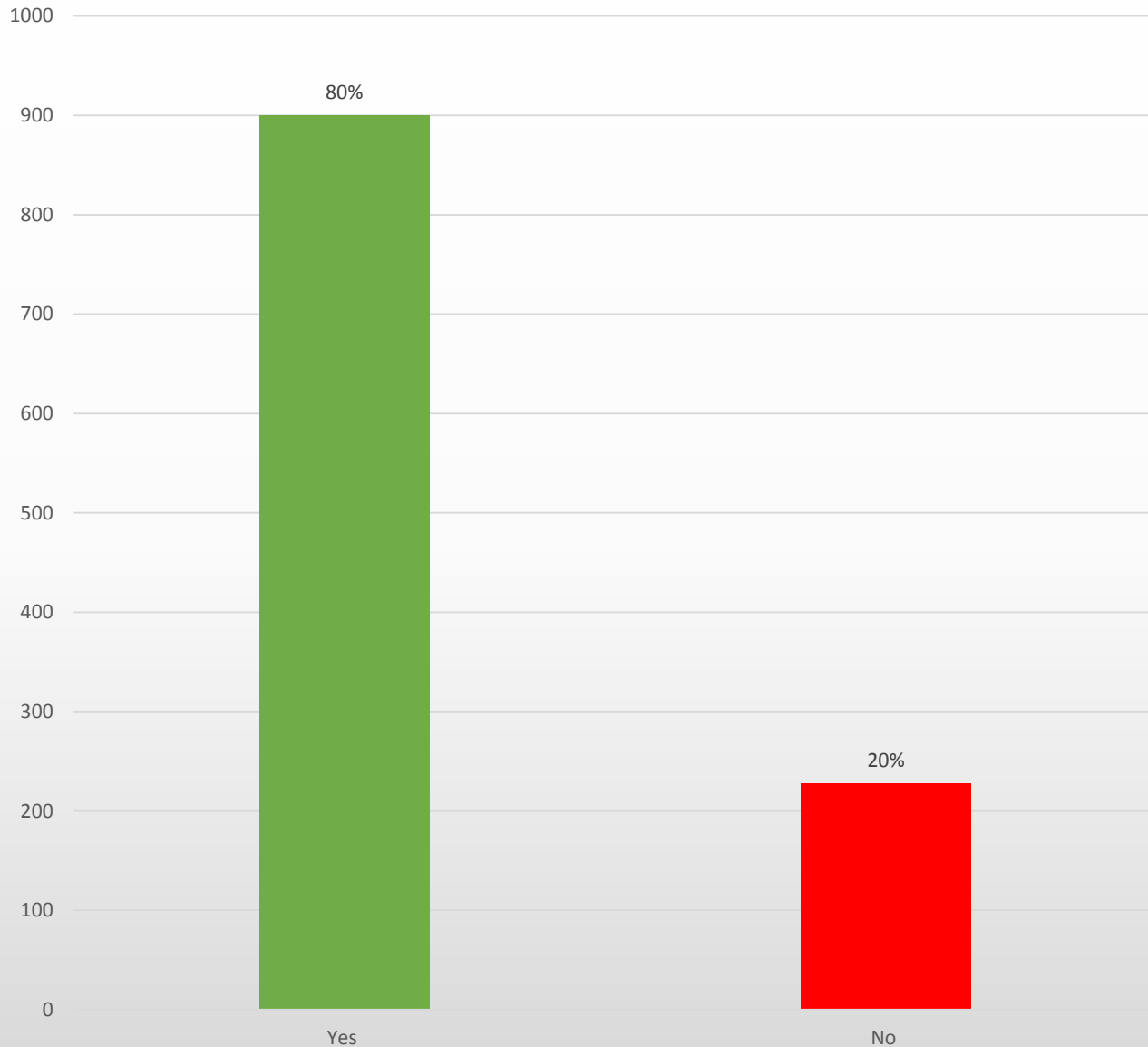


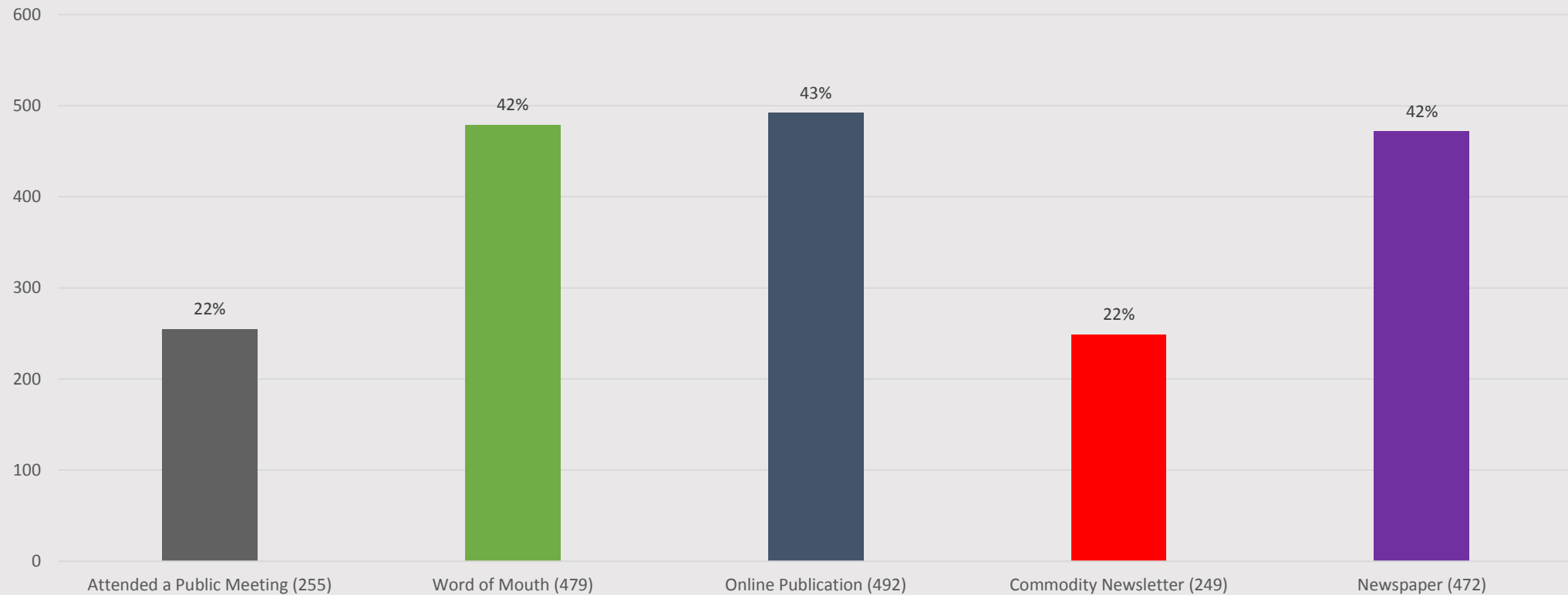
# Seed Royalty Survey Results

July 2019 - October 2019

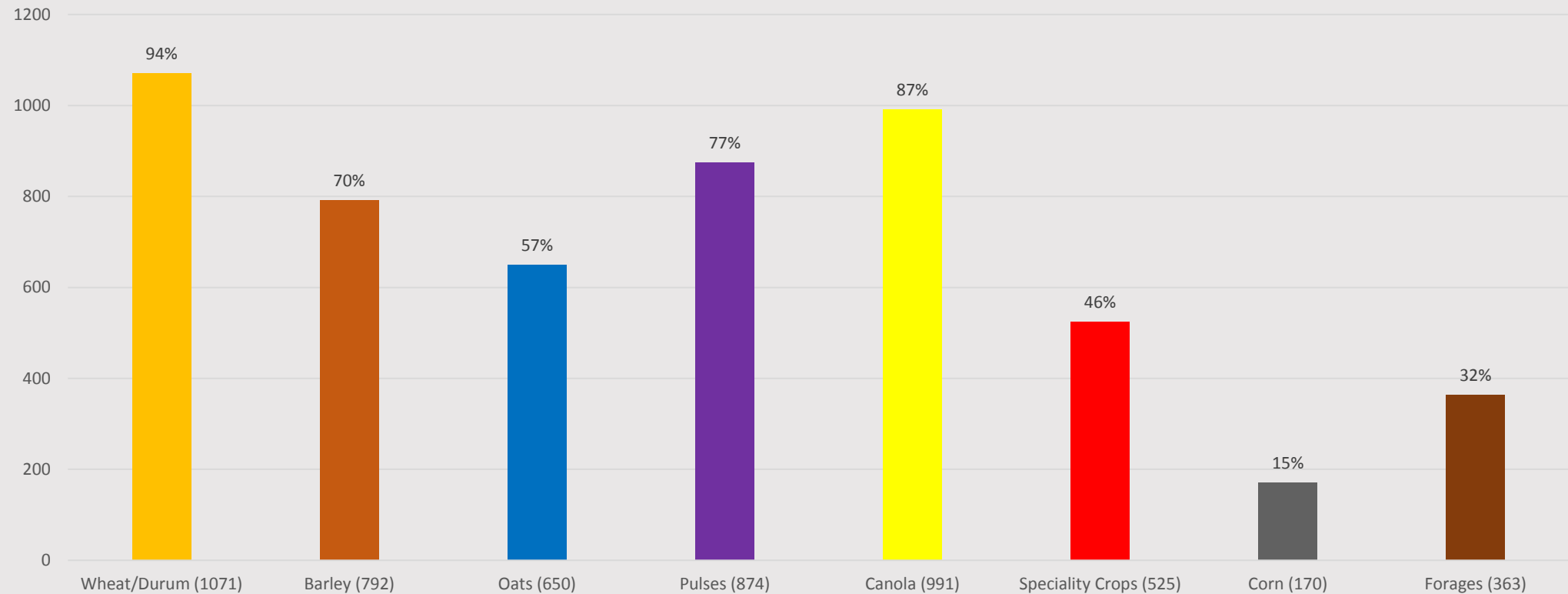


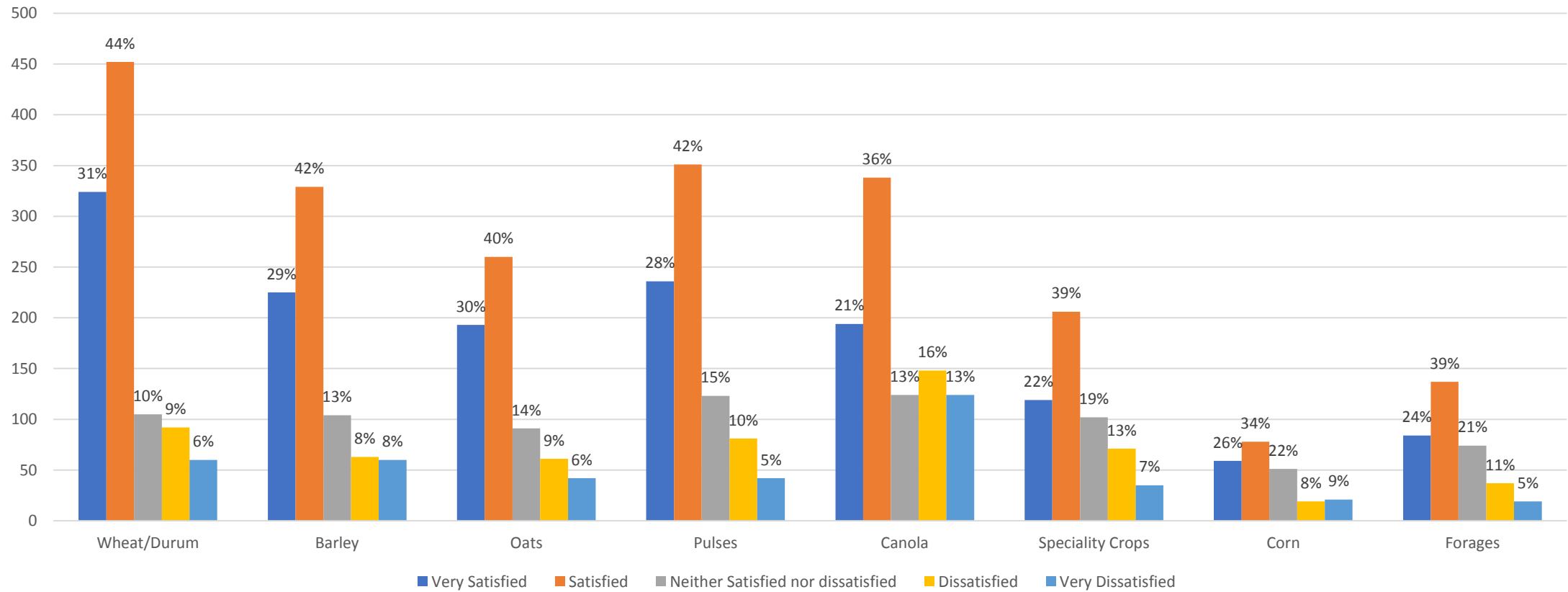
Are you familiar with the consultation on seed royalties (sometimes referred to as “Value Creation” consultations)?

# Where did you hear about the seed royalty consultations (check all that apply)?



Please indicate which crops you have grown on your farm within the last 10 years:



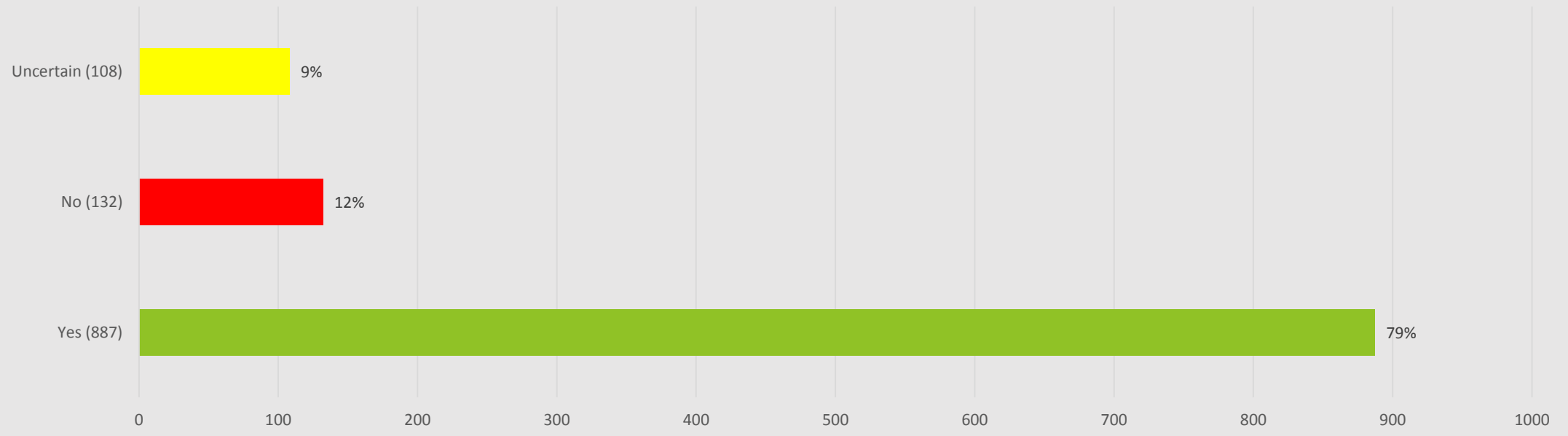


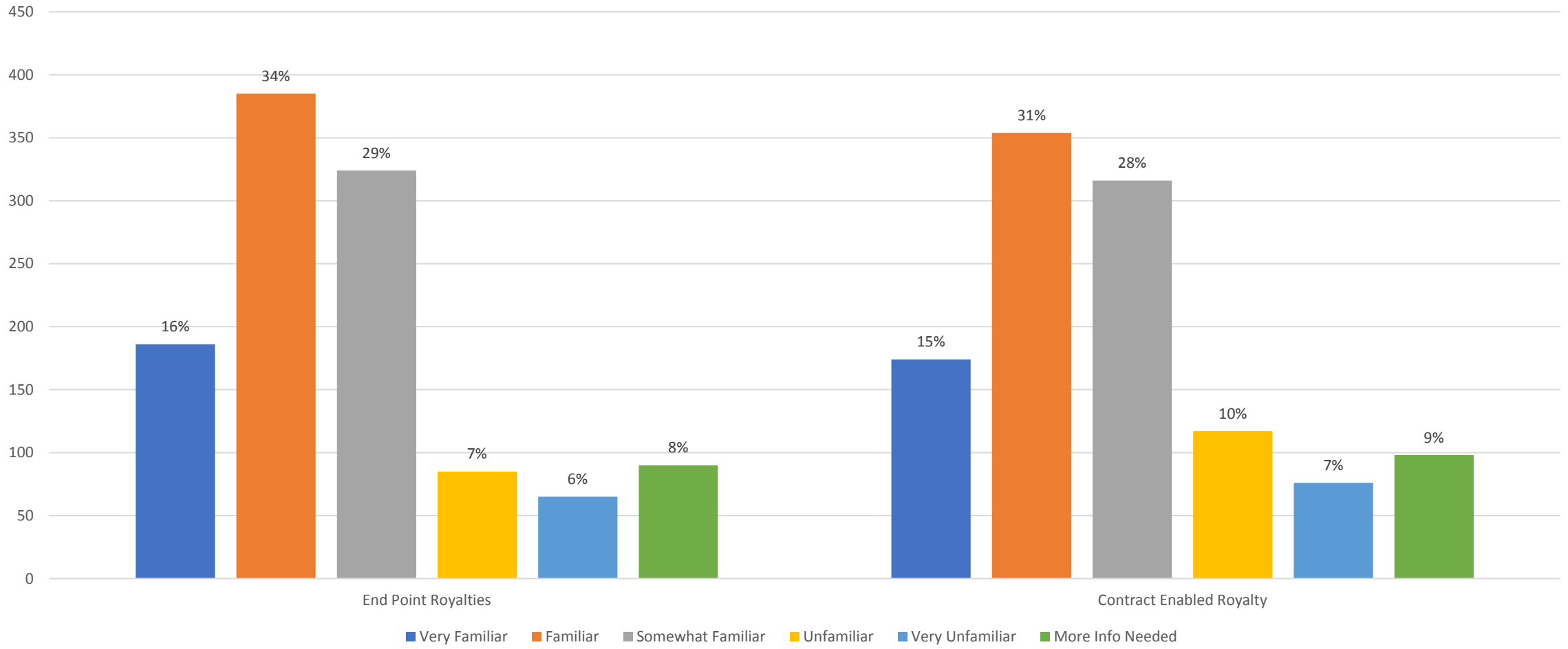
For each crop type below, please rate the extent to which you are satisfied that the existing approach to crop varietal development is able to meet the current and future needs (economic and agronomic) of producers?

	Wheat/Durum	Barley	Oats	Pulses	Canola	Specialty Crops	Corn	Forages
Very Satisfied	324 (31%)	225 (29%)	193 (30%)	236 (28%)	194 (21%)	119 (22%)	59 (26%)	84 (24%)
Satisfied	452 (44%)	329 (42%)	260 (40%)	351 (42%)	338 (36%)	206 (39%)	78 (34%)	137 (39%)
Neither Satisfied nor Dissatisfied	105 (10%)	104 (13%)	91 (14%)	123 (15%)	124 (13%)	102 (19%)	51 (22%)	74 (21%)
Dissatisfied	92 (9%)	63 (8%)	61 (9%)	81 (10%)	148 (16%)	71 (13%)	19 (8%)	37 (11%)
Very Dissatisfied	60 (6%)	60 (8%)	42 (6%)	42 (5%)	124 (13%)	35 (7%)	21 (9%)	19 (5%)
No Opinion	103	355	489	303	208	603	908	785

For each crop type below, please rate the extent to which you are satisfied that the existing approach to crop varietal development is able to meet the current and future needs (economic and agronomic) of producers?

# Are you aware of the two models under consideration?



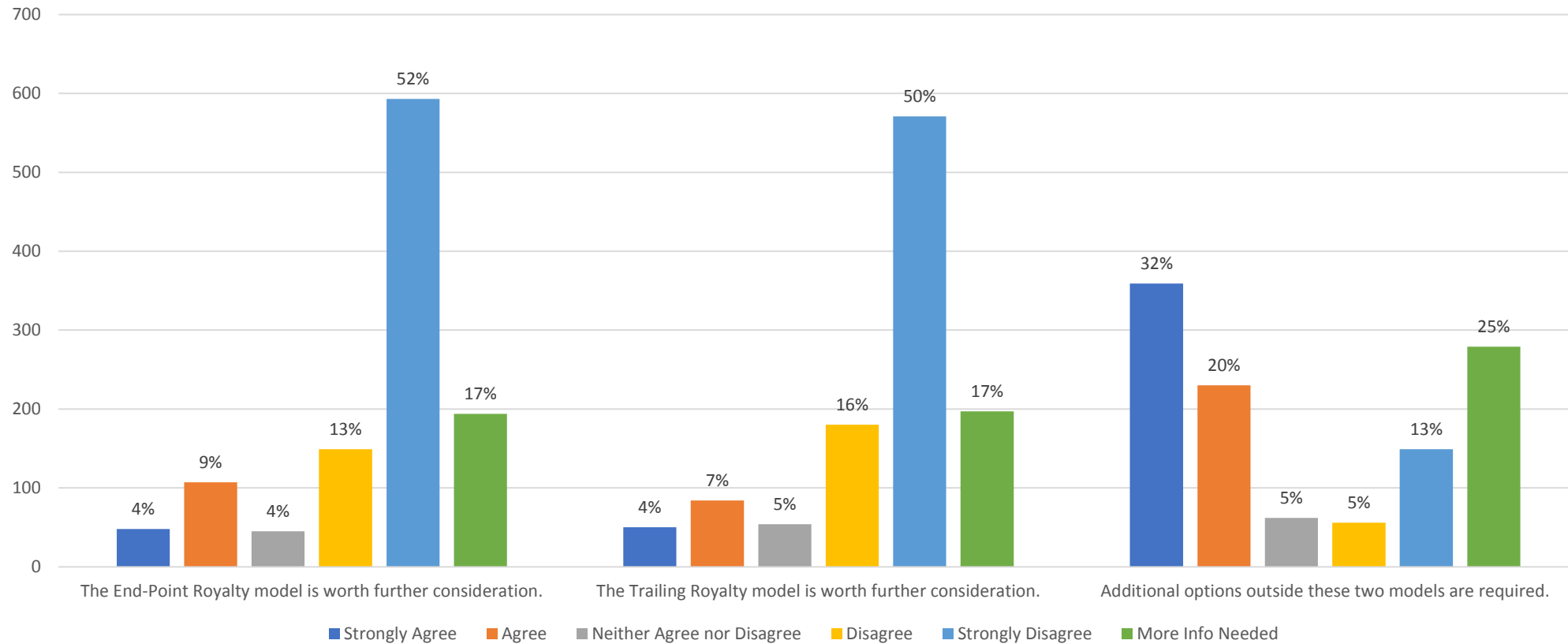


Please rate your level of familiarity with each model?



# Please rate your level of familiarity with each model?

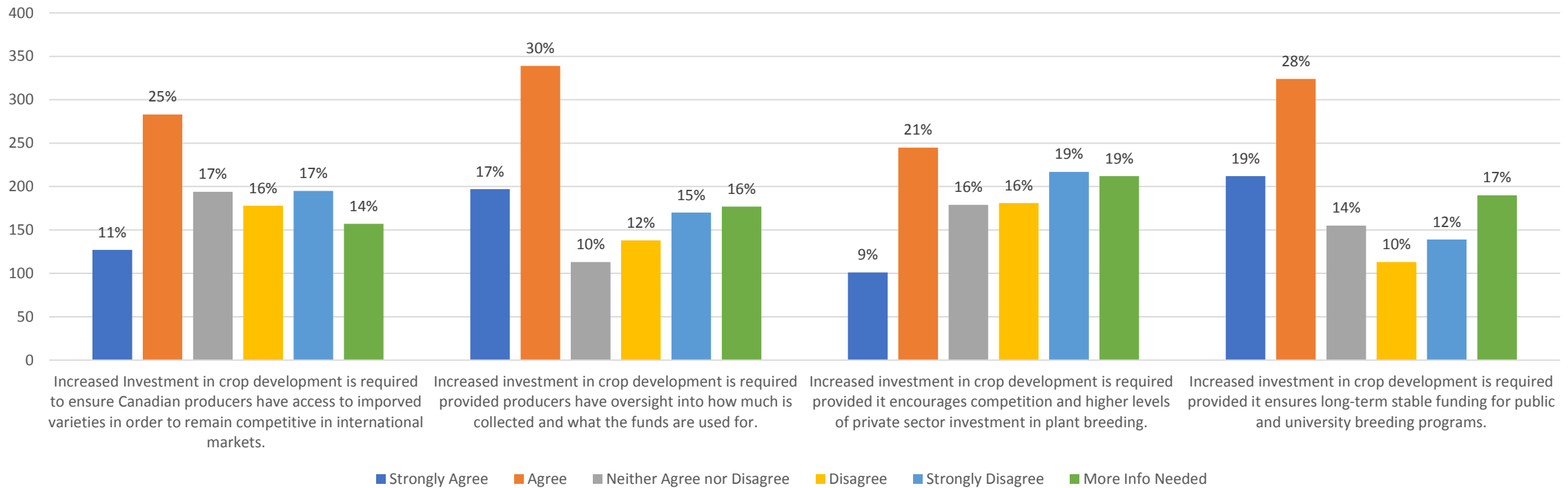
	End Point Royalties: A national non-refundable royalty is payable on all harvested materials (i.e grain). Royalties are collected at point of sale and distributed to breeders based on their respective market share, or at a rate that is specific to that variety.	Contract Enabled Royalty: Contracts between producers and variety developers are used where producers agree to conditions on farm-saved seed use (e.g., agreeing to a 'trailing' royalty on farm saved seed as part of their contractual obligation.
Very Familiar	186	174
Familiar	385	354
Somewhat Familiar	324	316
Unfamiliar	85	117
Very Unfamiliar	65	76
More Info Needed	90	98



Please indicate whether you agree or disagree with each statement. If I feel more information is needed to fully respond to the statement, please select “More Info Needed”.

	<b>The End-Point Royalty model is worth further consideration.</b>	<b>The Trailing Royalty model is worth further consideration.</b>	<b>Additional options outside these two models are required.</b>
Strongly Agree	48	50	359
Agree	107	84	230
Neither Agree nor Disagree	45	54	62
Disagree	149	180	56
Strongly Disagree	593	571	149
More Info Needed	194	197	279

Please indicate whether you agree or disagree with each statement below. If I feel more information is needed to fully respond to the statement, please select “More Info Needed”.

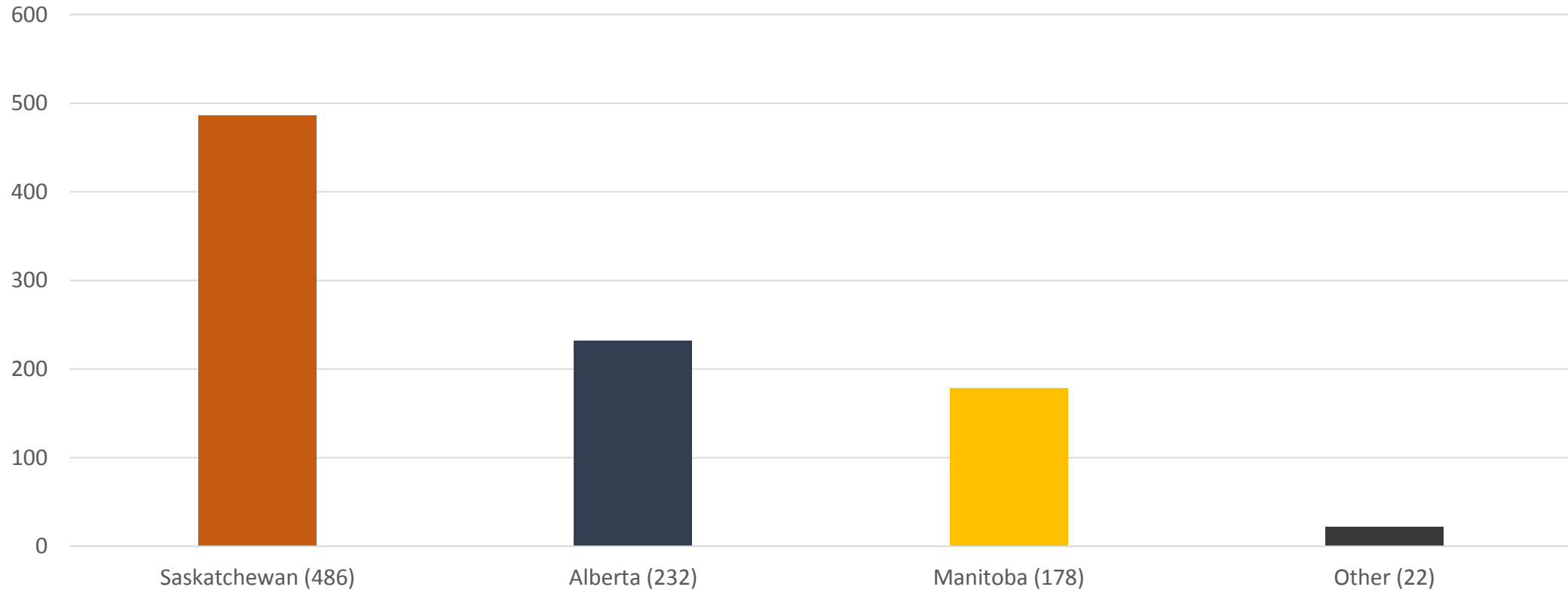


Please rate the extent to which you agree or disagree with each. If you feel more information is needed to fully respond to the question, please select the "More Info Needed"

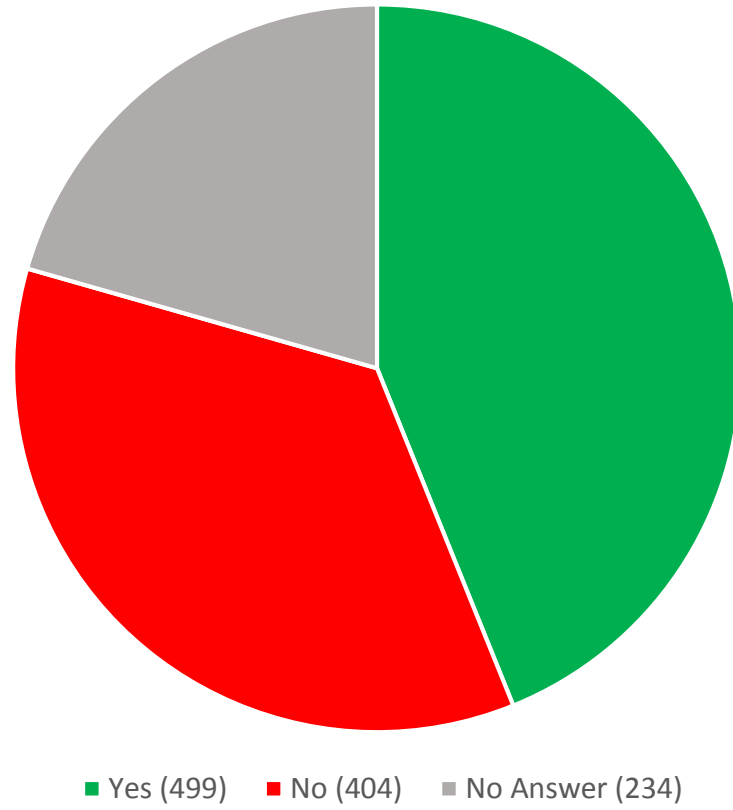
	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	More Info Needed
Increased investment in crop development is required to ensure Canadian producers have access to improved varieties in order to remain competitive in international markets.	127	283	194	178	195	157
Increased investment in crop development is required to provided producers have oversight into how much is collected and what the funds are used for.	197	339	113	138	170	177
Increased investment in crop development is required provided it encourages competition and higher levels of private sector investment in plant breeding.	191	245	179	181	217	212
Increased investment in crop development is required provided it ensures long-term stable funding for public and university breeding programs.	212	324	155	113	139	190

Please rate the extent to which you agree or disagree with each statement below. If you feel more information is needed to fully respond to the question, please select the "More Info Needed"

# What is your home province?



\* Question added after July 31<sup>st</sup>, 2019,  
therefore doesn't add to 1136



Would you like further information on this project?