



LEADING GENETICS



MARKET DEVELOPMENT



C&M Seeds

- Genetics – acquisition
- Research and Evaluation
- Seed Multiplication
- Seed Processing
- Marketing & Distribution
- End Use Market Development



Sourcing Genetics from:

- Canada
- east and west US
- South America : Argentina, Brazil, Uruguay
- New Zealand
- Europe: France, Czechoslovakia, Germany, Italy



What traits do we look for?

- **Depends who you ask !**
- **Growers want yield, standability, disease resistance, straw yield (for some) etc**
- **End users want certain quality traits (which are stable over different growing environments)**



Palmerston Grain



Leading with Innovation

- Core competency that our businesses were built on
- Core business remains unchanged, but looking for opportunities to create and capture value
- Leverage knowledge from both wheat genetics and end use requirements



Hallmark Pasta



GENERATIONS
CHOICE



Hallmark Durum wheat

- Durum testing started in 1980's
 - improved logistics for local mills
 - Ontario environment not conducive to durum production
- Hallmark first tested in 1998
 - initial mill testing at 10% inclusion
 - 2008, made 100% Ontario penne pasta as demonstration to promote C&M varieties
 - 2009, first run of wholegrain pasta, unique quality traits
 - 2010, trademarked Hallmark Pasta
 - first pasta with Foodland Ontario label
 - marketing and distribution work continues



Winter Wheats

- Priesley HRWW
 - weak gluten, lower protein hard red winter
 - suitable for crackers/saltines
- CM249 SRWW
 - strong gluten soft red winter
 - suitable for crackers



Creating Opportunity

- End User – Specific deliveries that allow them to maximize value
- Growers – Specific production contracts that allow them to maximize returns
- Palmerston Grain – Merchandizing opportunities
- C&M Seeds – Certified Seed Sales



Creating Opportunity

- Different relationships with Farmers
- Different discussions with end use customers
- Paradigm shift - Different focus creates more opportunities (you look at challenges with an eye for undiscovered opportunities)



Looking Forward

- We need regulations that support innovation, not prevent it (ex. Improvement in Crop Insurance)
- We need government programs that encourage & support innovation



Innovation isn't always perfect

- What did we do before this?

