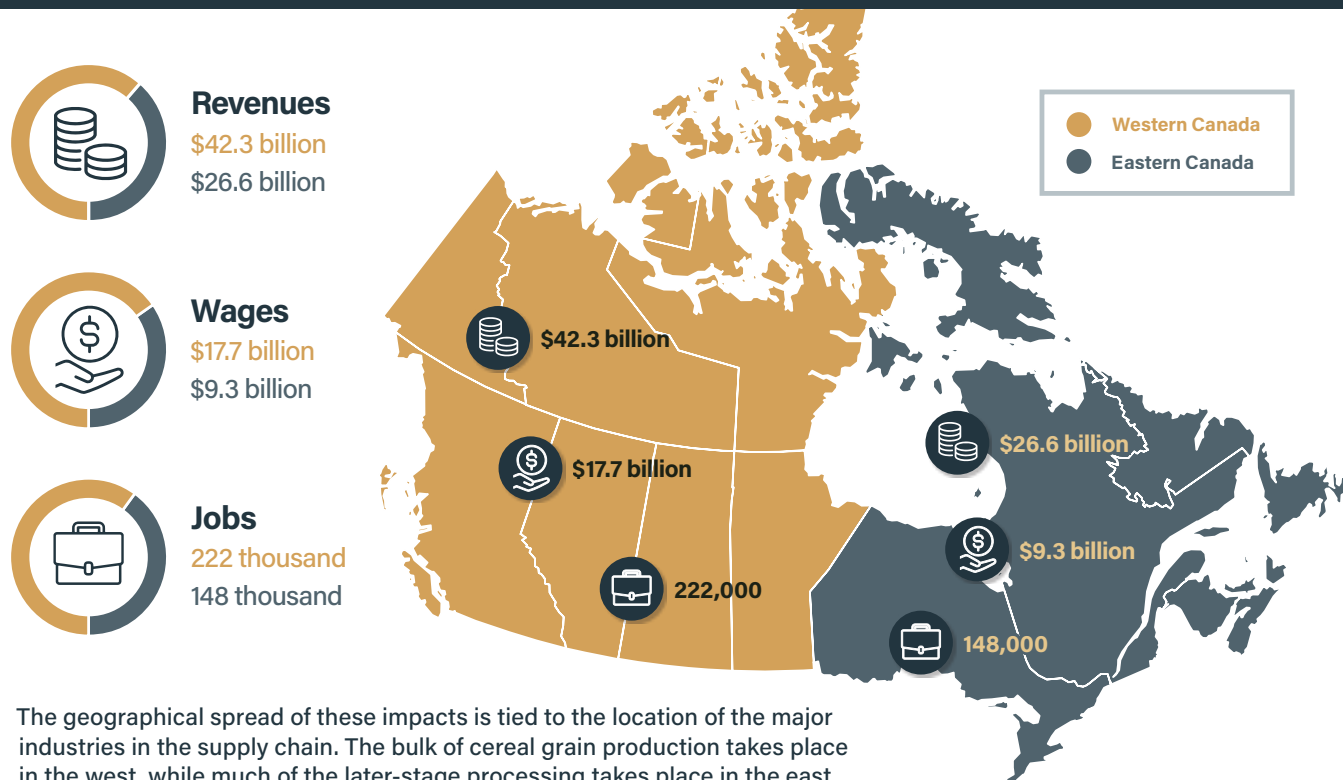


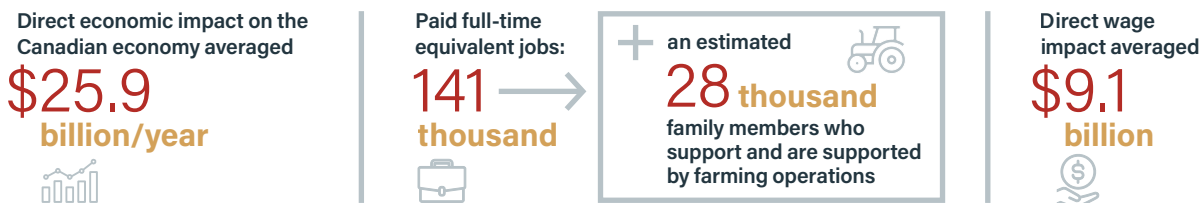
The Economic Impact of Cereal Grains on the Canadian Economy

On behalf of Cereals Canada, GlobalData undertook a study to assess the impact of domestically grown common wheat, durum wheat, barley, and oats on the Canadian economy. The study shows Canadian-grown cereals had an estimated total impact of **\$68.8 billion**, including more than **370,000** Canadian jobs, and **\$27 billion** in wages.

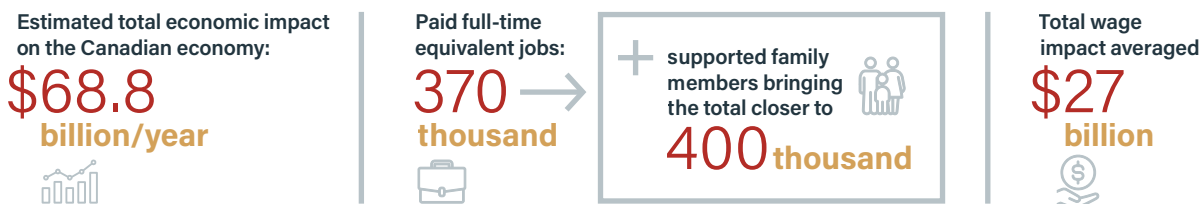


The geographical spread of these impacts is tied to the location of the major industries in the supply chain. The bulk of cereal grain production takes place in the west, while much of the later-stage processing takes place in the east.

Direct Economic Impact of Wheat, Durum, Barley, and Oats



Total Economic Impact of Wheat, Durum, Barley, and Oats



Total Economic, Employment, and Wage Impact by Province

British Columbia

Cereal grain processing accounts for 79 percent of the economic impact and 91 percent of the employment impact of the cereal grains value chain in British Columbia. This is largely driven by the wheat flour milling and processing sectors, which generate 1.84 billion dollars of economic impact and 15,400 jobs on average. Cereal grain farming accounts for an average economic impact of 104 million dollars.



Total Economic Impact
\$3.5 billion



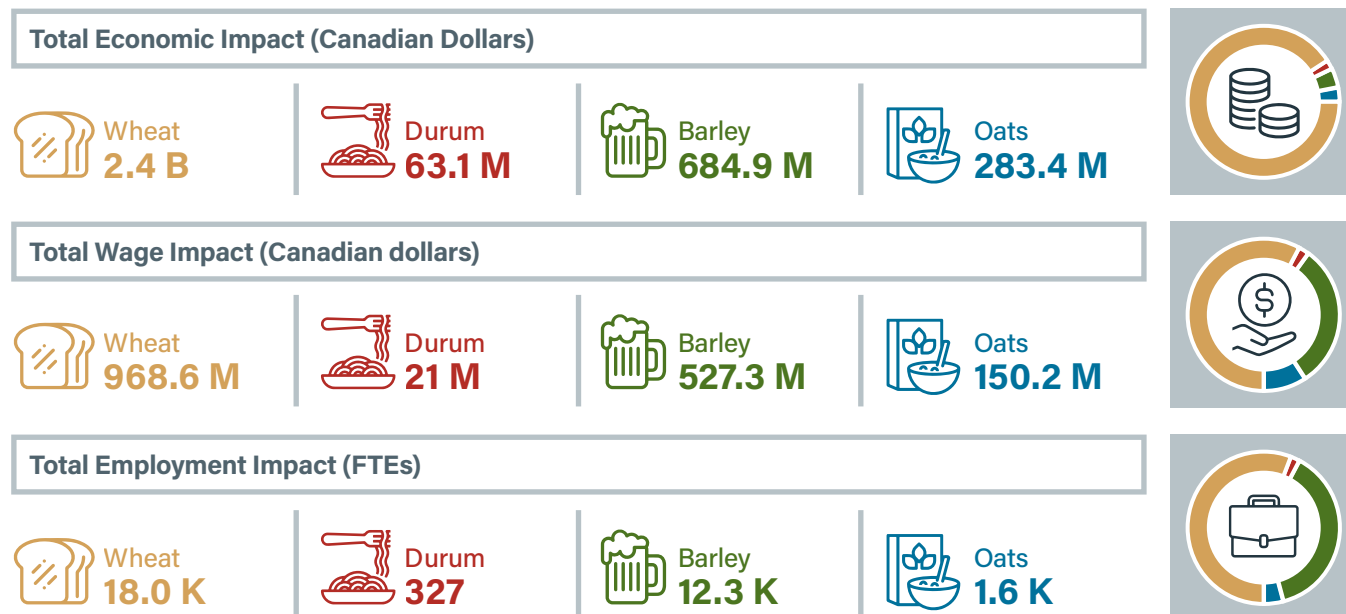
Total Employment Impact
32,146 full time jobs



Total Wage Impact
\$1.7 billion

British Columbia represents 76 percent of the economic impact generated by cereal grain port activities in Canada.

Economic, Employment, and Wage Impact by Crop



Economic, Employment, and Wage Impact by Subsector

	Economic Impact (\$)	Employment Impact (FTEs)	Wage Impact (\$)
Value-Added Activity (groups)			
Processing	2,731,500,000	29,149	1,392,800,000
Flour processing (wheat)	1,361,300,000	14,128	726,000,000
Flour milling (wheat)	479,300,000	1,262	51,400,000
Brewing	366,000,000	10,328	416,600,000
Food processing (durum/oats)	238,200,000	1,235	98,200,000
Feed milling	215,200,000	1,846	86,300,000
Malting	71,500,000	350	14,300,000
Logistics	617,800,000	2,252	177,500,000
Port activities	568,300,000	2,056	165,700,000
Product delivery	30,600,000	112	6,400,000
Crop transportation	11,500,000	53	3,300,000
Elevation	7,400,000	31	2,100,000
Farming	103,800,000	745	96,800,000
TOTAL	3,453,100,000	32,146	1,667,100,000

For more information, please contact: Leif Carlson, Director of Market Intelligence and Trade Policy lcarlson@cerealscanada.ca

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