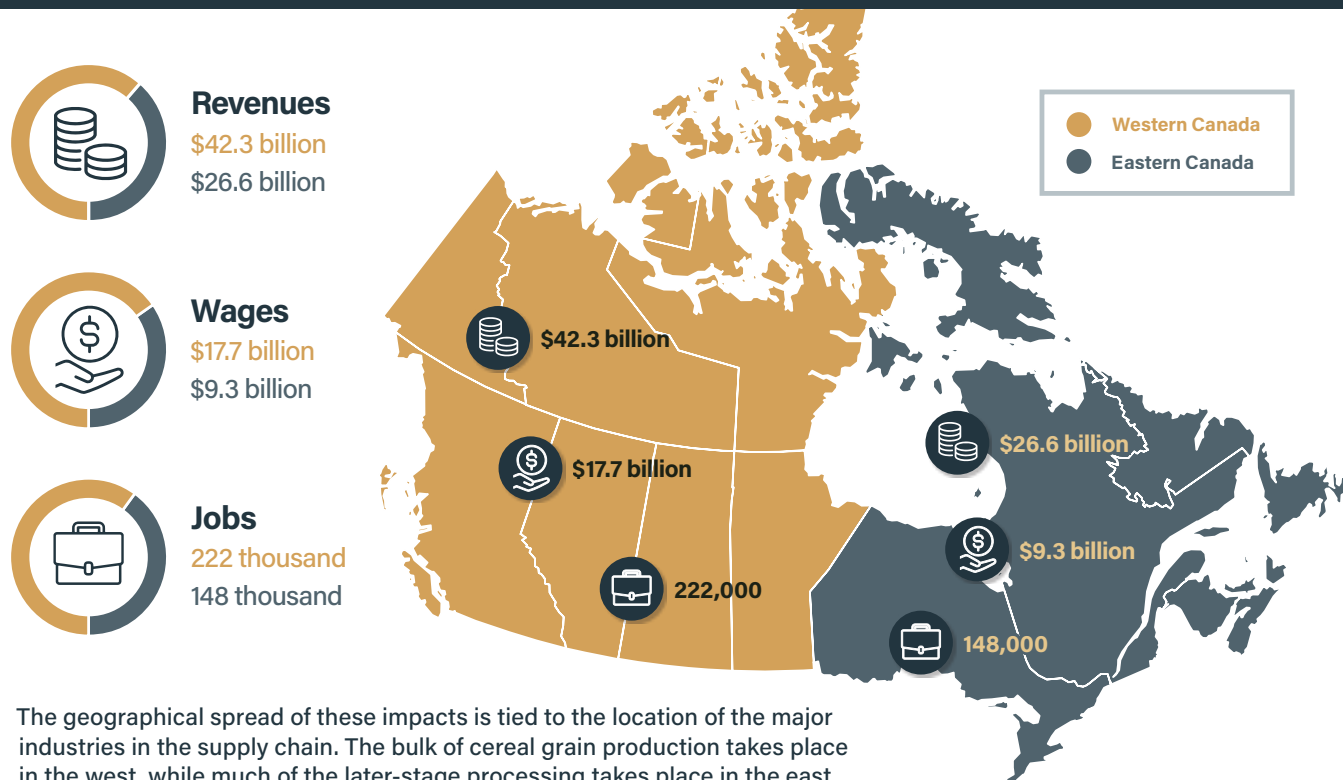


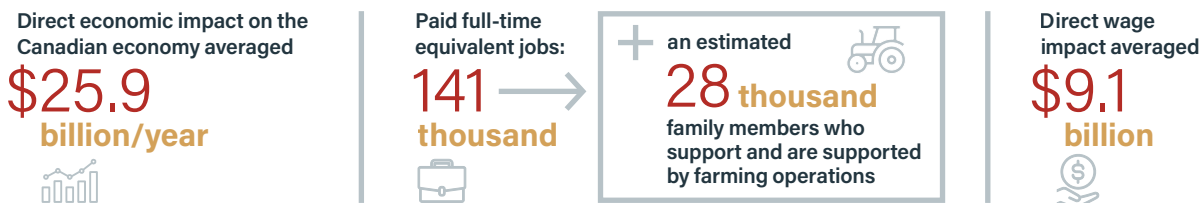
The Economic Impact of Cereal Grains on the Canadian Economy

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.

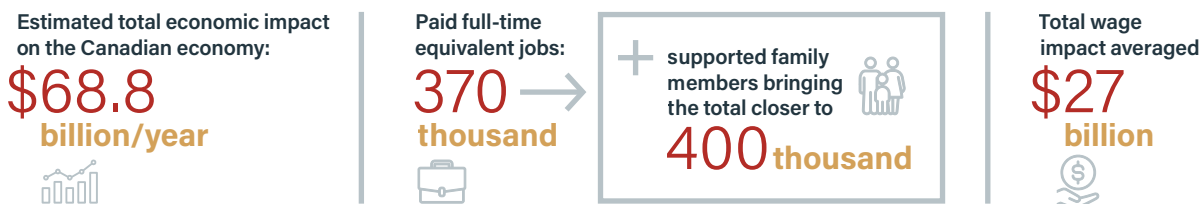


The geographical spread of these impacts is tied to the location of the major industries in the supply chain. The bulk of cereal grain production takes place in the west, while much of the later-stage processing takes place in the east.

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



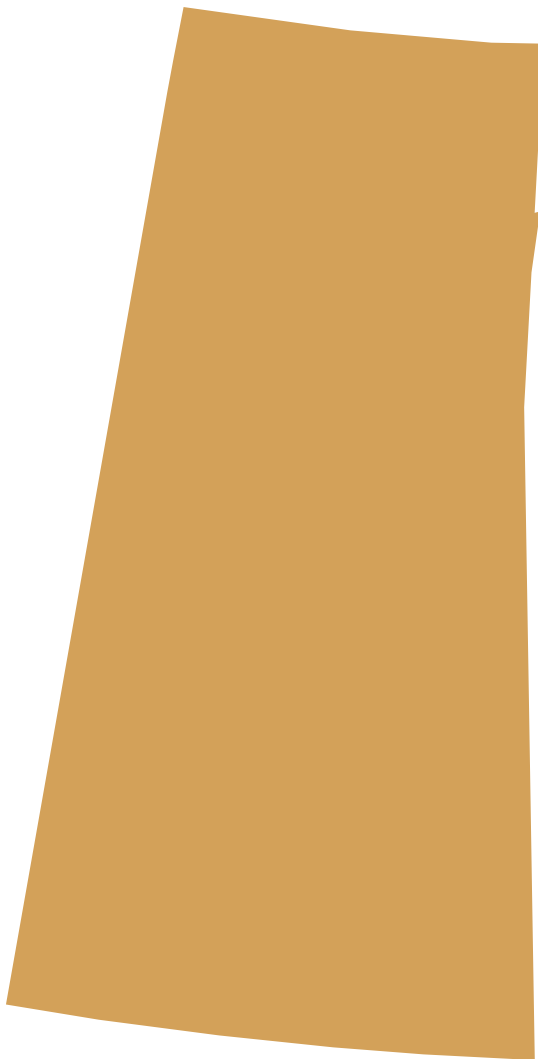
Total Economic Impact of Wheat, Durum, Barley, and Oats



Total Economic, Employment, and Wage Impact by Province

Saskatchewan

Saskatchewan is the largest producer of cereal grains in Canada and represents 45 percent of the Canadian economic impact of cereal grain farming. Farming accounts for 61 percent of the economic impact and 75 percent of the employment impact of the cereal grains value chain in Saskatchewan. On average, Saskatchewan's cereal grain farming sector generates 10.54 billion dollars of economic impact and 66,300 jobs. Cereal grain processing contributes 3.2 billion dollars in economic impact and creates 11,100 jobs.



Total Economic Impact
\$17.3 billion



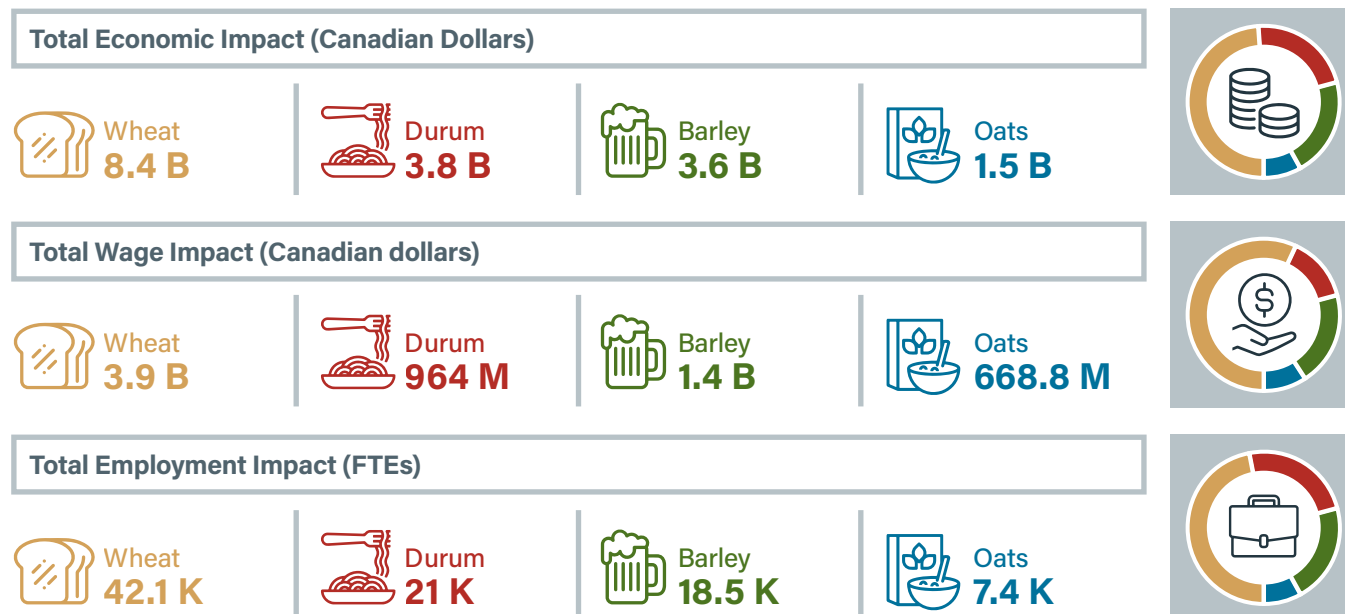
Total Employment Impact
88,851 full time jobs



Total Wage Impact
\$6.9 billion

Saskatchewan is the leading producer of durum wheat and represents 50 percent of the economic impact generated by the durum wheat sector in Canada.

Economic, Employment, and Wage Impact by Crop



Economic, Employment, and Wage Impact by Subsector

Value-Added Activity (groups)	Economic Impact (\$)	Employment Impact (FTEs)	Wage Impact (\$)
Farming	10,536,500,000	66,308	5,616,900,000
Logistics	3,613,500,000	11,437	819,500,000
Crop transportation	2,835,500,000	7,635	567,300,000
Elevation	654,300,000	3,401	226,300,000
Product delivery	123,700,000	401	25,900,000
Processing	3,198,850,000	11,107	491,890,000
Malting	819,000,000	3,121	127,200,000
Flour milling (wheat)	755,900,000	1,989	81,000,000
Feed milling	665,000,000	3,086	154,600,000
Food milling (durum/oats)	482,700,000	570	23,300,000
Other primary processing	286,550,000	754	31,090,000
Flour processing (wheat)	151,100,000	940	48,600,000
Brewing	38,600,000	647	26,100,000
TOTAL	17,348,850,000	88,851	6,928,290,000

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

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