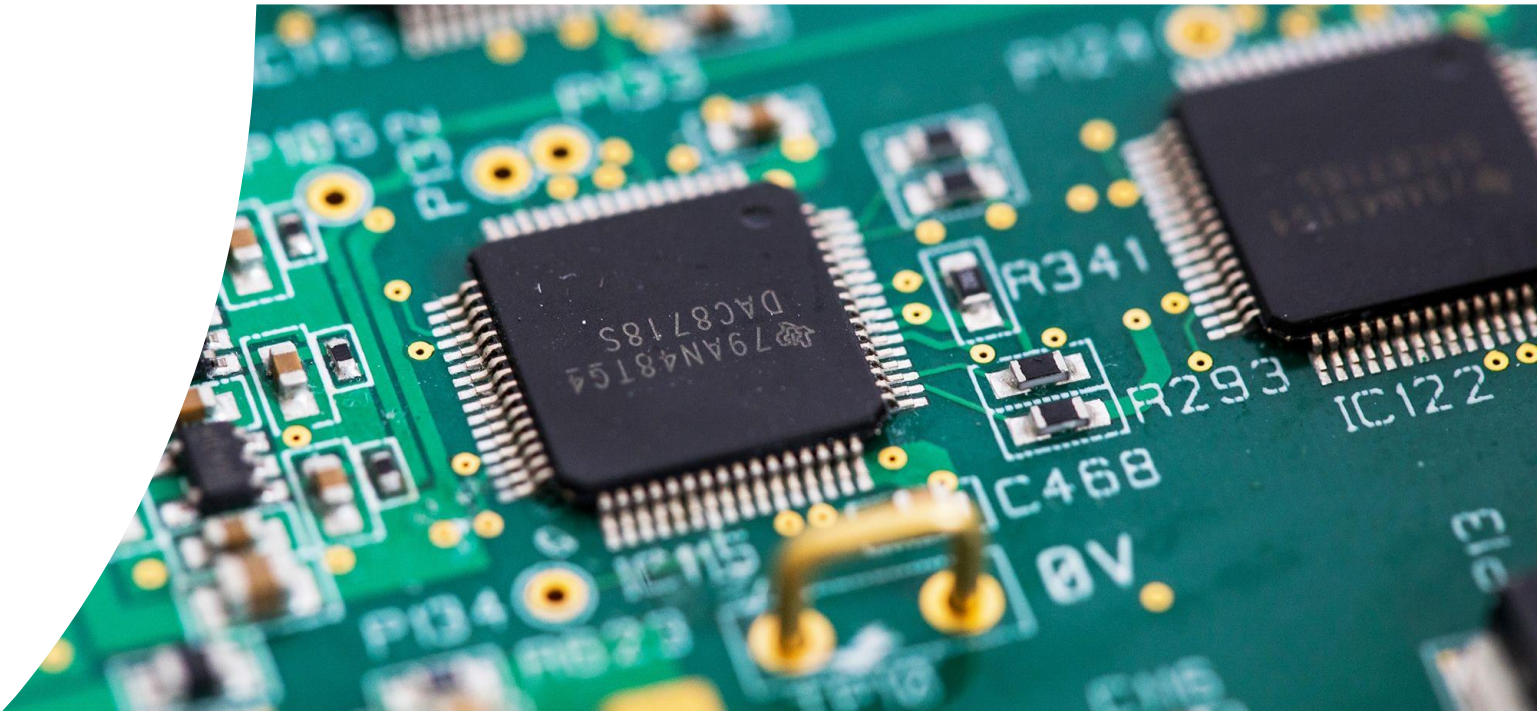


A top-down view of a circular arrangement of various seeds and grains. The seeds are densely packed and include almonds, corn kernels, wheat grains, and lentils. The colors range from light beige to dark brown. The text "It all starts with the Seed!" is overlaid in the center in a bold, black, sans-serif font.

**It all starts with the Seed!**

- *Seed is to agriculture what microchips are to technology*

- *We are one of the few areas “Silicon Valleys” of seed in the world*





# Idaho's Seed Production

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Idaho is **1 of only 5** Major Global Seed Production Regions

Other Major Global Seed Production Regions are:

- California, China, Chile & Australia



## Idaho Seed Fact:

Chile is the 3rd largest sweet corn seed production area in the world.

Many customers in Chile do not want Chile-produced seed.

They want Idaho-produced seed due to our high quality.



## Another Idaho Seed Fact:



Australia had a 50+year ban on US-produced sweet corn seed.

Australian growers and processors were fed up with the inconsistent supply and quality of their sweet corn seed. 95% of their seed was coming from Australia and New Zealand.

They petitioned the Australian government and can purchase Idaho-produced seed under the “Idaho Protocol”. Meaning, only Idaho-produced seed can be imported into Australia from the US.















# Additional Seed Production

- Turnips
- Rutabaga
- Collards
- Kale
- Triticale
- Clover
- Alfalfa
- Teff
- Lettuce
- Radish
- Mustard
- Peas
- Coriander



# THE VALUE OF IDAHO'S SEED INDUSTRY



IDAHO'S SEED INDUSTRY IS VALUED AT  
**800 MILLION**

Factors include seed production, chemicals, treatments, labor, water, research & development, and crop certifications.

According to the U of I *The Financial Condition of Idaho Agriculture: 2023* report, for every dollar invested in Idaho agriculture, it generates 1.9x in economic activity throughout the state. \$1.5 billion is reflective of the economic activity that the seed industry in Idaho generates.

**\$1.5 BILLION**  
**ECONOMIC IMPACT**

**\$500M**  
SOUTHWEST IDAHO

**\$200M**  
SOUTHEAST IDAHO

**\$100M**  
NORTH IDAHO

# IDAHO'S SEED INDUSTRY SHIPS TO EVERY CONTINENT\*

\*(EXCEPT ANTARCTICA)



# Seed is Vertically Integrated in Canyon County



**Including Hundreds of Local Vendors**



**Sales**



**Manufacturing**



**Seed Production**



**Foundation and Stock Seed**



**Research**



# Why Idaho and Why Canyon County?

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We have an Extremely Rare ability to produce seed in a high desert climate





# Why Idaho and Why Canyon County?

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We have an ample water supply/good irrigation delivery systems

We have irrigation practices that reduce potential diseases and insect pressure



IEOSA



# Why Idaho and Why Canyon County?

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We have the best farmers in the world  
producing seed crops



IEOSA

8



# Why Idaho and Why Canyon County?

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These farmers can produce seed on virtually any soil type or condition

# Management and Soil Types

**A majority of Seed Production Managers prefer a good grower on poor soils over an average grower on good soils**

# Canyon County Does Not Have a Lot of Large Fields Due To:

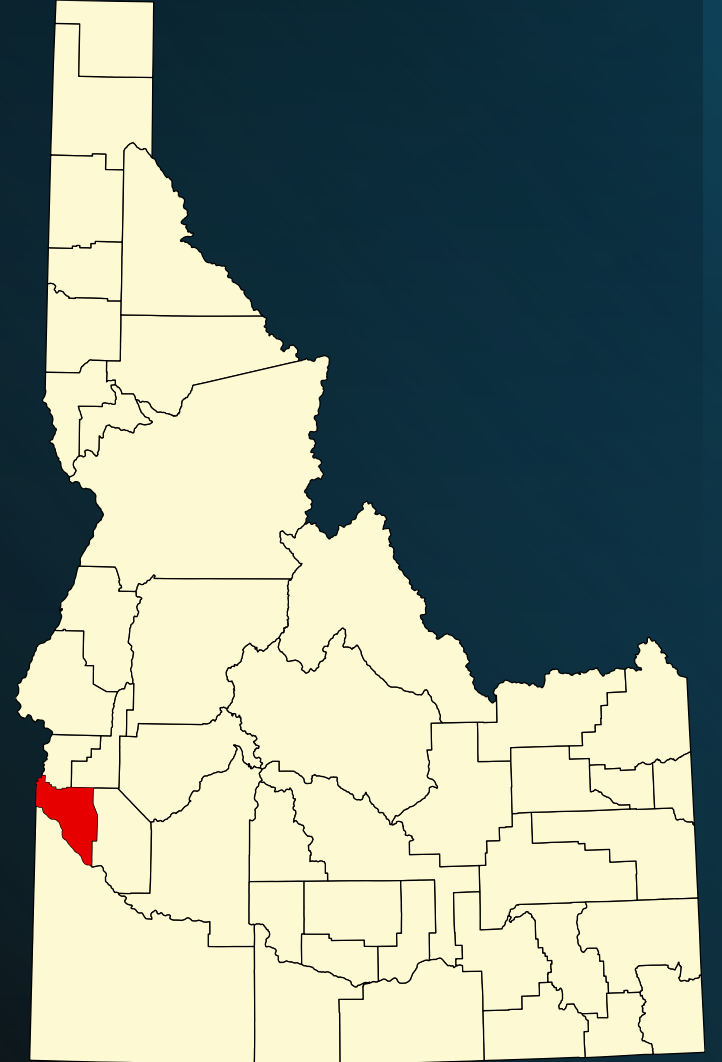
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- **Topography**
  - Most fields require leveling for gravity irrigation
  - Gravity irrigation does not like long runs resulting in smaller fields
- **Canals** (*large & small*)
- **Drains**
- **Roads**
- **Houses**



# Smaller Fields Create Greater Opportunity for Crop Diversity

- We have a wide selection of field sizes, slopes, and soil types
- This makes Canyon County ideal to support the most diverse number of crop types in the State of Idaho and one of the highest in the nation
- Many of our crops are small in size, but high in value



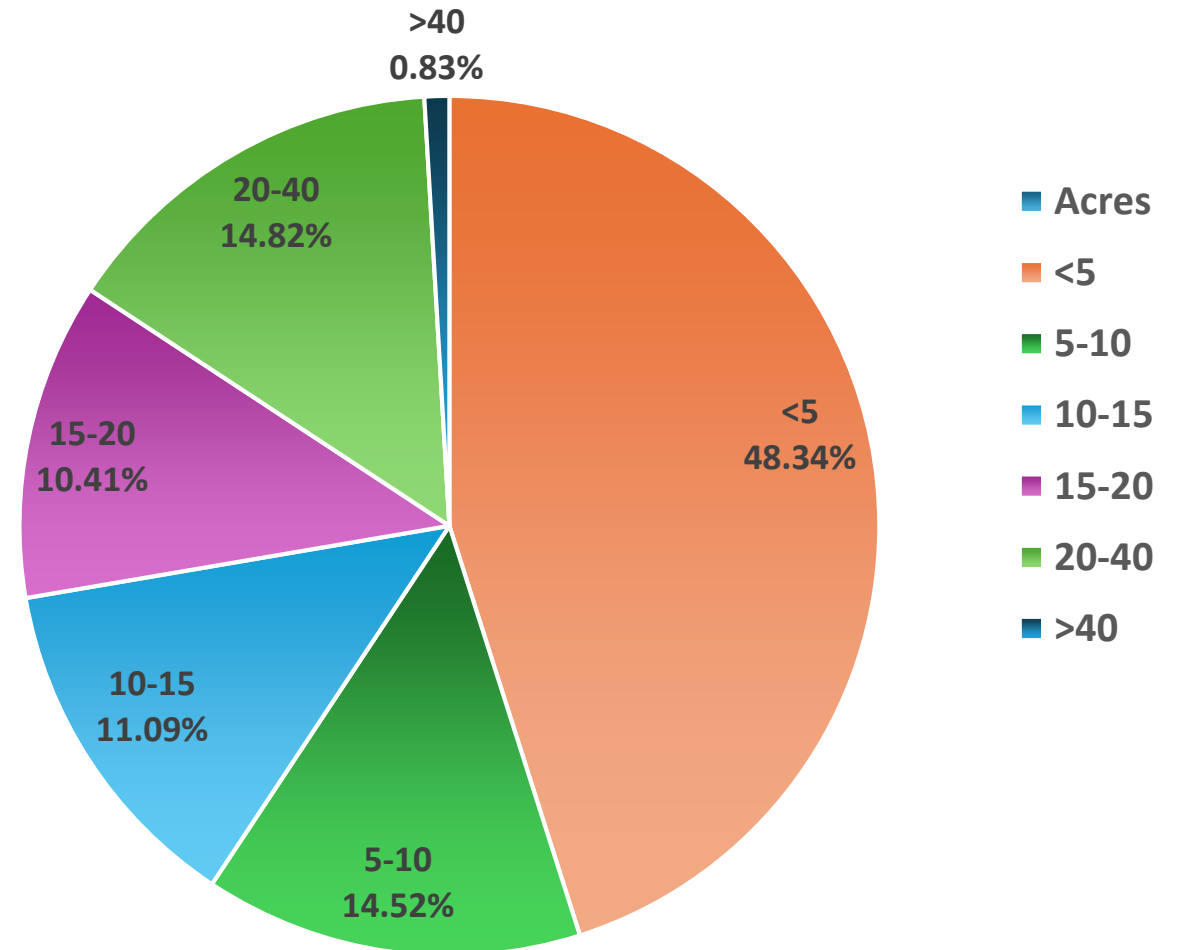
# *Subsample of Beans, Onions, Carrot, Peas, Sweet Corn and Popcorn*

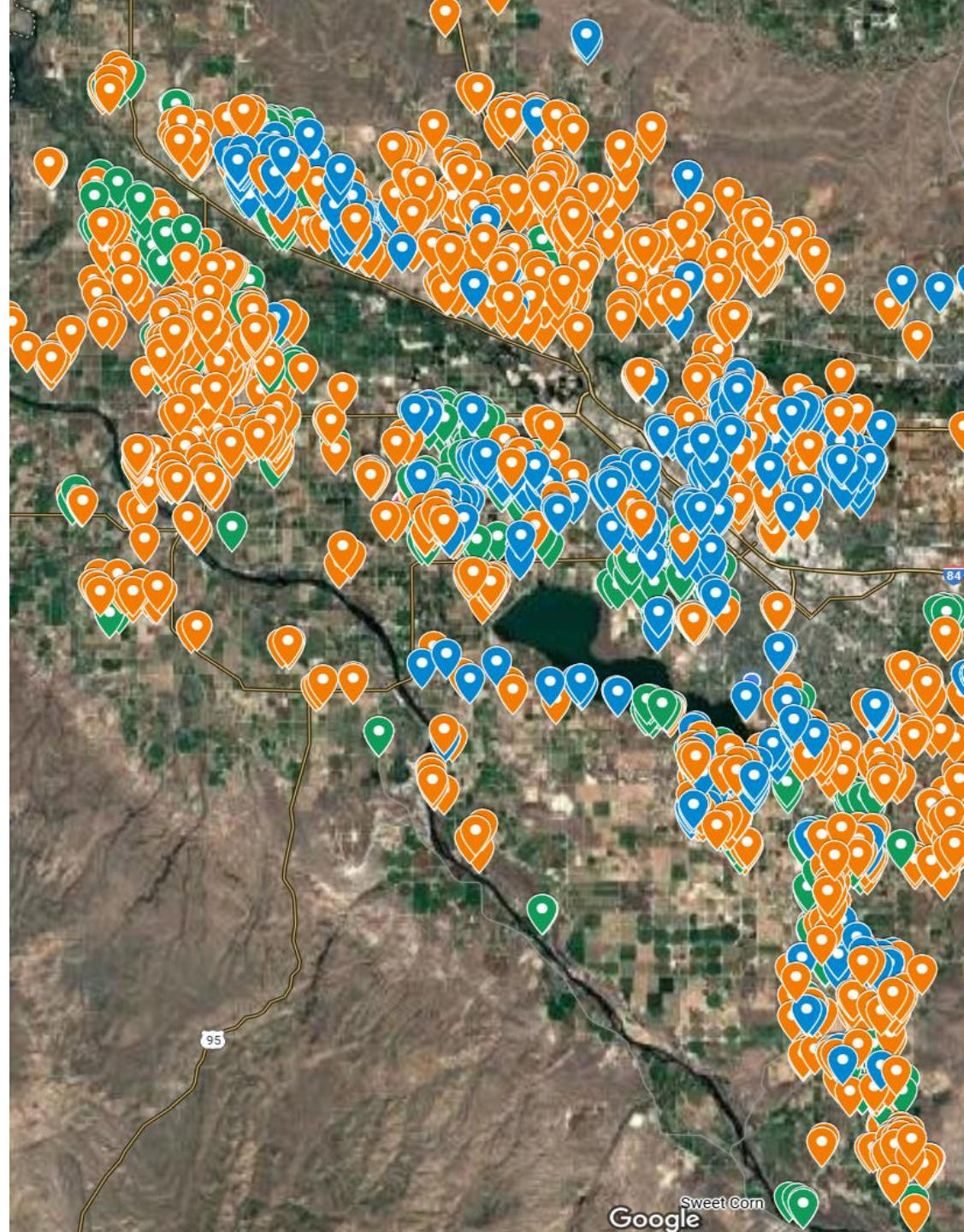
## Five Year Data 2020-2024

<5 acres	1635
5-10 acres	491
10-15 acres	375
15-20 acres	352
20-40 acres	501
>40 acres	28
Total	3382

*We pay more for smaller fields*

## Percent of Fields by Acres over 5 Years 2020-2024







# Agriculture Value in Canyon County

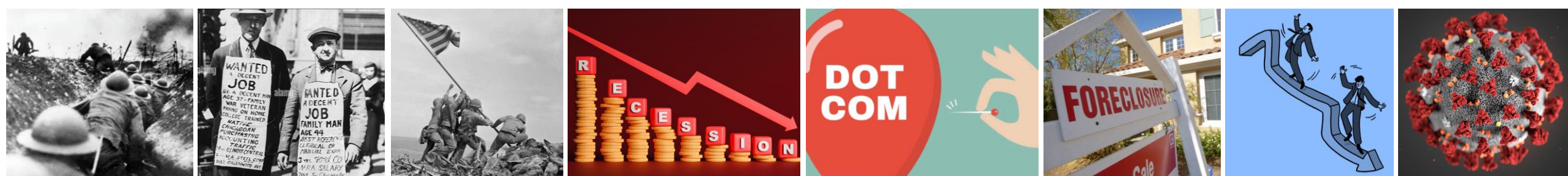
Commodity Per Acre			
Crop	Farmgate \$/acre	Manufacturing & Overhead \$/acre	Total
Sugar Beets	\$2,255.00	\$4,800.00	\$7,055.00
Mint	\$2,300.00	\$5,060.00	\$7,360.00
Corn	\$1,039.00	\$900.00	\$1,939.00
Hay	\$1,030.00	\$300.00	\$1,330.00
Wheat	\$580.00	\$215.00	\$795.00

Seed Per Acre			
Crop	Farmgate \$/acre	Manufacturing & Overhead \$/acre	Total
Sweet Corn	\$5,000.00	\$6,409.00	\$11,409.00
Onion	\$6,375.00	\$16,254.00	\$22,629.00
Beans	\$1,850.00	\$1,000.00	\$2,850.00
Lettuce	\$2,800.00	\$6,450.00	\$9,250.00
Carrot	\$5,714.00	\$7,750.00	\$13,464.00



# *Canyon County's Seed Industry has thrived WITHOUT FAIL through major historical events over the last century*

- World War I
- The Great Depression
- World War II
- Numerous Recessions
- Dot Com Bubble Burst
- Housing Market Crash
- Great Recession
- COVID-19



*The Seed Industry typically sees an uptick in sales during these types of events*



# Seed Industry Issues

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#1 - Loss of farmland

#2 - Keeping Pesticide Labels

#3 – Water Supply

#4 – Keeping our farmers and companies



**Thank You!**