



# Securing the Future of Wheat in Canada

*Producers are holding the key to the  
future of wheat plant breeding.*  
Released: February 26, 2026



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The Canadian Wheat Research Coalition (CWRC) engaged Synthesis to review Canada’s wheat breeding innovation system to safeguard its ability to serve the evolving needs of Canadian farmers. The organization’s vision is that wheat is a sustainable, profitable and internationally competitive crop choice for Canadian producers. Their mission is to increase the long-term profitability and sustainability of wheat for Canadian producers through leadership in identifying, coordinating and supporting innovative research.

Since 2020, the CWRC has entered into Core Breeding Agreements with Agriculture and Agri-Food Canada (AAFC), the University of Saskatchewan Crop Development Centre, the University of Alberta and the University of Manitoba to contribute to wheat breeding programs. The latest Core Breeding Agreements saw a \$19.9-million investment from Canadian wheat farmers into the AAFC breeding program and a \$16 million investment into university breeding programs. Since 2020, the CWRC has invested \$70.5 million into AAFC and university wheat breeding programs.

AAFC represents the largest wheat breeding program in Canada. On average, 80% of all wheat fields in Canada are planted with an AAFC variety every year. AAFC wheat breeding is the backbone of western Canadian wheat production and is critical to the future of Canada’s largest field crop. Canadian cereals are Canada’s number one agricultural export with a value of \$11.5 billion annually.

However, changes to AAFC’s wheat breeding programs over the past two decades and recently announced budget cuts leave the CWRC questioning the sustainability, efficiency and effectiveness of AAFC programs moving forward. The CWRC is committed to working with AAFC to find solutions to the ongoing challenges facing wheat breeding as an invested partner.

## Understanding the Current Situation

The review of Canada’s wheat breeding innovation system has confirmed three crucial facts about Western Canada’s current wheat breeding innovation system.

1. The AAFC breeding program is an integral part of western Canadian wheat variety development.
2. The current wheat breeding system is at risk from recent and historic budget cuts, especially at the variety development and pre-market evaluation stages.
3. Wheat breeding is a long-term process and decisions made today will impact agriculture decades into the future.

Details about the process of this review can be found in [Appendix A](#).





# 1. The AAFC breeding program is an integral part of western Canadian wheat variety development.

AAFC represent the largest breeding program in Canada. On average, 80% of all wheat fields in Canada are planted with an AAFC variety every year.

Table: Percentage of Acres Planted in 2025, by developer

	CWRS	CWAD	CPS
AAFC	90%	64%	69%
CDC	7%	36%	7%
Other	3%	0%	24%
Total	100%	100%	100%

Source: [Canadian Grain Commission 2025 Insured Commercial Acres Report, 2025](#)

The top four Canadian Western Red Spring (CWRS) varieties planted in 2025 were all developed within the AAFC breeding program at Swift Current:

- AAC Brandon
- AAC Wheatland
- AAC Starbuck
- AAC Viewfield

Two of the top four Canadian Western Amber Durum (CWAD) varieties planted in 2025 were developed within the AAFC breeding program at Swift Current:

- AC Transcend
- AAC Stronghold

Other breeding programs in Canada, including university-led and private programs, are critically important to the health of the entire western Canadian wheat breeding innovation system. A strong wheat breeding innovation system requires multiple successful breeding programs. However, there is no doubt that AAFC is the biggest and most critical for Western Canada.

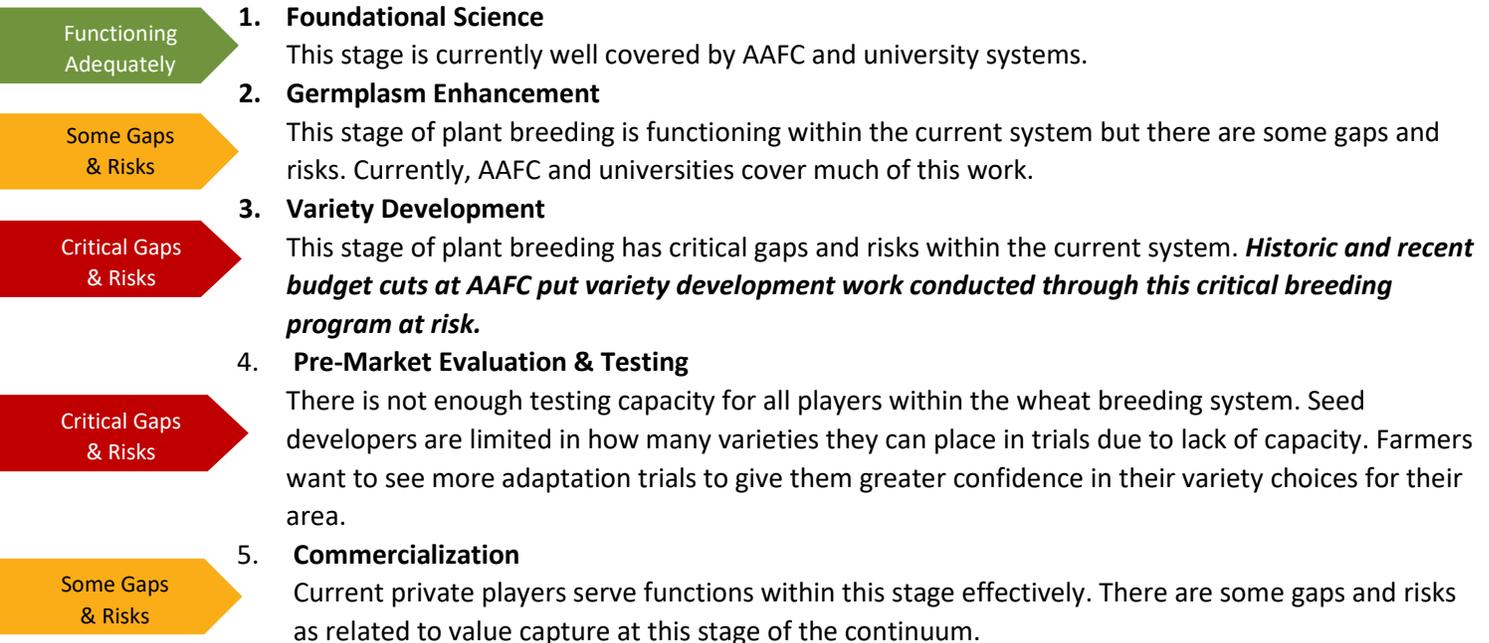


## 2. The current wheat breeding system is at risk from recent and historic budget cuts, especially at the variety development and pre-market evaluation stages.

Wheat breeding is a complex and iterative process. To effectively analyze an innovation system so complex, the CWRC has examined the Canadian system along each stage of the Plant Genetics Improvement Continuum:

1: Foundational Science	2: Germplasm Enhancement	3: Variety Development	4: Pre-Market Evaluation	5: Commercialization
<ul style="list-style-type: none"> <li>•Generating knowledge and tools to be used in germplasm enhancement</li> </ul>	<ul style="list-style-type: none"> <li>•Applying foundational science to develop and characterize germplasm</li> </ul>	<ul style="list-style-type: none"> <li>•Refining and developing commercially ready varieties</li> </ul>	<ul style="list-style-type: none"> <li>•Adaptation testing of lines for registration and commercialization</li> </ul>	<ul style="list-style-type: none"> <li>•Commercial activities related to seed production/plant multiplication.</li> </ul>

The Plant Genetics Improvement Continuum was developed by AAFC to describe the different stages of plant breeding. While there are overlaps, feedback loops and connections between all stages, it is a helpful framework to use when evaluating the health of Canada’s wheat breeding innovation system. Throughout the CWRC’s process, the evaluation revealed critical gaps in Stage 3: Variety Development and Stage 4: Pre-Market Evaluation.



Federal government investment in AAFC has been shrinking over the past 20 years, with two significant budget cuts.

- 2012 Deficit Reduction Action Plan (DRAP) saw the AAFC budget cut by 12%.
  - Resulted in the closure and/or reduction of activities at the Cereals Research Centre in Winnipeg, as well as key testing sites in Glenlea, Portage la Prairie and Regina.
  - Overall loss of 60,000 plots and reduced number of early generation breeding lines under evaluation.
- 2025 Comprehensive Expenditure Review (CER) announced an AAFC budget cut of 15% within the years 2026 to 2029, with a \$112-million cut in 2026-2027.
  - 665 jobs have been cut.
  - Closure of the Research & Development Centre at Lacombe and research farms at Scott, Indian Head and Portage la Prairie.

### 3. Wheat breeding is a long-term process and decisions made today will impact agriculture decades into the future.

Plant breeding is an inherently long-term activity. The top CWRS and CWAD varieties by acreage planted in 2025 are the result of initial breeding crosses made between 2001 and 2009. There is an average of 13 years from initial cross to commercial release. Using these averages, breeding crosses made today will be released in 2037. While advanced breeding technologies may speed up the process, breeding is still a long-term activity.

Top varieties by acres planted in 2025	Breeding Cross	Registration	Commercial Release
<b>Top CWRS Varieties</b>			
AAC Brandon	2003	2014	2017
AAC Wheatland	2008	2018	2021
AAC Starbuck	2008	2018	2021
AAC Viewfield	2007	2016	2019
<b>Top CWAD Varieties</b>			
Transcend	2001	2010	2012
CDC Defy	2009	2019	2022
AAC Stronghold	2007	2016	2020
CDC Precision	2004	2015	2017

Source: [Prairie Grain Development Committee](#)



## The Path Forward – Status Quo is Not an Option

The current wheat breeding innovation system is no longer working for Western Canada. The most important driver of western Canadian wheat plant breeding is at risk from current and historic budget cuts. Wheat breeding is a long-term process and decisions made today will impact agriculture decades into the future. Securing the future of wheat in Canada requires a reimagining of our wheat breeding innovation system.

The CWRC has a lead role to play in securing the future for wheat in Canada and is currently exploring options to transform the wheat breeding innovation system. Discussions are underway with AAFC and the CWRC is committed to engaging all stakeholders throughout this process.

Options explored will deliver on four key drivers:

- Does the option fill the critical gaps and risks in the Plant Genetics Improvement Continuum to benefit the entire wheat breeding innovation system?
- Does the option deliver superior field-ready varieties that give Canadian farmers choice in the market?
- Does the option meet farmers' needs for marketable yield, profitability and influence proportionate to their investments?
- Does the option protect the long-term investments farmers have already made in wheat breeding?

Western Canadian farmers are invested in the future of wheat breeding in Canada – \$19.9 million has been invested directly into the AAFC breeding program through the Canadian Wheat Research Coalition from 2025-2028. Since 2020, CWRC has invested \$70.5 million into western Canadian wheat breeding programs.

Farmer investment in wheat breeding has paid off. Farmers received \$33 in benefits for every dollar they invested in wheat breeding from 1995 to 2020 according to a [study from the University of Saskatchewan](#). The CWRC is determined to ensure ongoing investments into plant breeding continue to deliver benefits to western Canadian farmers.

***The future of wheat breeding in Canada is in the hands of farmers.***





## Appendix A: Review of Canada's Wheat Breeding Innovation System Process

The CWRC engaged Synthesis to review Canada's wheat breeding innovation system and analyze gaps and opportunities. From July 2025 through January 2026, Synthesis worked with the CWRC through the following process:

### Phase 1 – Context Development

Synthesis reviewed previously developed reports, analysis and summaries on wheat breeding in Canada. This review included 27 reports, research papers, consultation summaries, surveys and articles.

### Phase 2 – Stakeholder Engagement

Synthesis conducted virtual interviews with 29 stakeholders throughout September and October 2025. Stakeholders included plant breeders from all active Canadian wheat breeding programs, seed companies, seed distributors, government representatives, researchers from three universities and from AAFC, past consultants and stakeholders representing seed growers and farmers.

### Phase 3 – Wheat Breeding Workshops

Synthesis facilitated two workshops with the CWRC to review the findings and find pathways forward. The first workshop included staff representatives from the founding members of the CWRC – Alberta Grains, the Saskatchewan Wheat Development Commission and Manitoba Crop Alliance. The second workshop included staff and the CWRC board of directors, which includes farmer representatives from Alberta, Saskatchewan and Manitoba.

