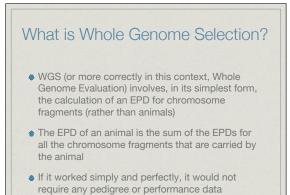
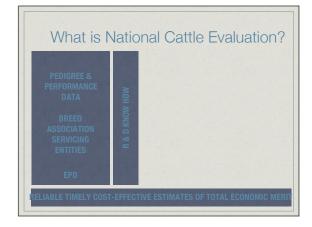
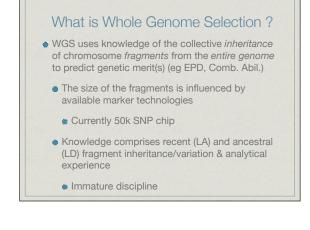


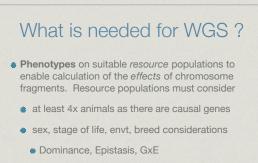
Dorian Garrick



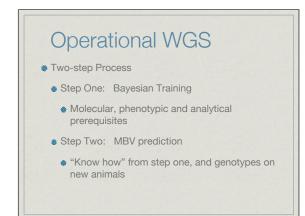




What is needed for WGS ? Molecular technology to reliably (and cost effectively) identify chromosome fragments High levels of linkage between identifiable chromosome fragments and genes contributing to variation in the trait improved by denser marker panels (eg 50k / 500k / 1m / individual sequence) influenced by recent & ancestral population structure

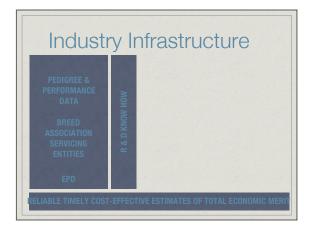


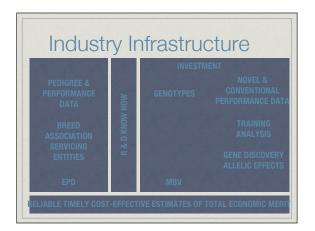
 Analytical technology to robustly estimate effects with more explanatory variables (SNPs) than data



Current Status of Bovine WGS

- Extensive research analysis being undertaken
- Correlations of MBV and EPD in range 0.5-0.7
 - 25% to 50% genetic variation can be accounted for using 50k markers
 - 50% to 75% variation not explained
 can be predicted from PA &/or PT
- Nature and scope of routine delivery in the beef industry is uncertain



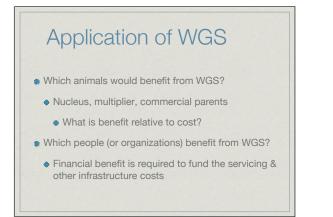


Future Status of WGS

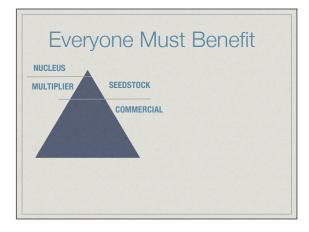
- Compared to today:
 - Denser SNP panels (if not genomic sequence)
- Heterogeneous panels according to animal "status" (i.e. more dense information on legacy sires and less dense panels on non-parents)
- Greater account of available variation
 - Less value from adding NCE
- Extension to epigenetic prediction

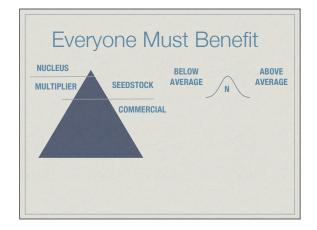
Role of Phenotypes in WGS

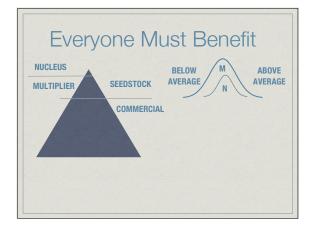
- Training (retraining)
 - Ongoing for new traits/environments
 - May need repeating (or continuous training) for epistasis
- Accounting for variation not captured by WGS
 - This will diminish if/as the predictive capability of WGS increases

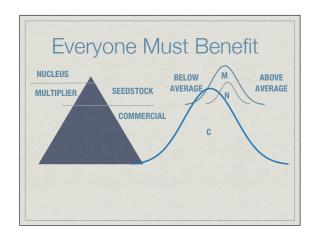


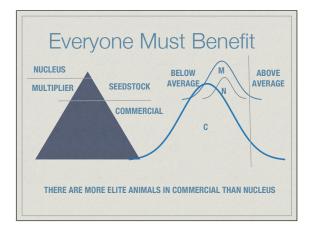


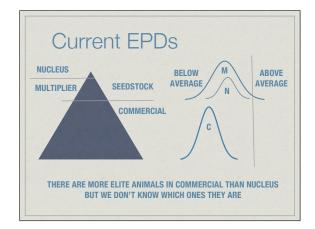












WGS

- Will empower the evaluation of prospective sires that do not currently enjoy EPDs (eg Commercial sector)
- The portfolio of WGS MBV will be more economically relevant (and futuristic) than the current portfolio of NCE EPD
- The commercial market size is greater than the seedstock (appealing to genomics companies)
- WGS will reduce demand for "average" seedstock bulls

Stakeholders in NCE

- Breed Associations
 - Bull Breeders (nucleus & multiplier)
 - Bull Buyers
- Al Companies
- EPD Servicing Entities
- Researchers interested in NCE
- Others (BIF, NBCEC, Cooperative Extension)

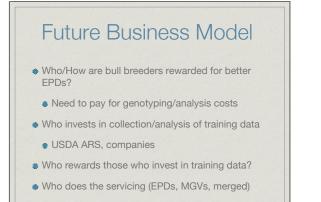
Current Business Model

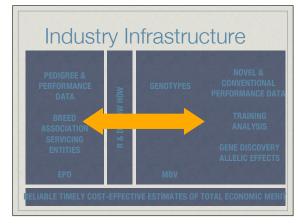
Cash

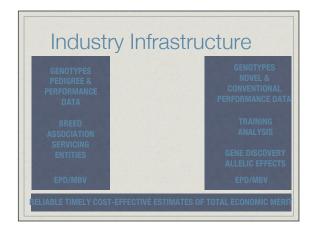
- Bull breeders collect data at own expense
- Bull breeders pay Breed Associations
- Breed Associations (partly) pay Service entity
- Non cash
 - Bull breeders "freely" contribute the IP contained in their pedigree/performance data for the collective benefit of others
 - Bull breeders receive EPDs that have benefited from collective data collection efforts of others
 - Researchers improve analyses motivated by data

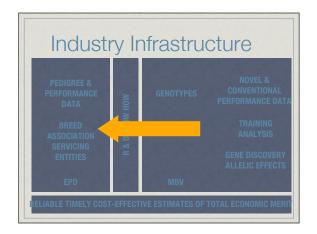
Stakeholders in WGS

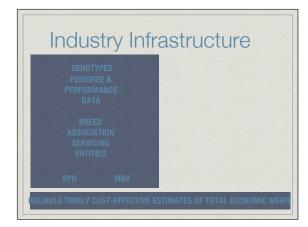
- Genotyping Companies (currently Illumina)
- Genomics Companies
 - Bovigen/Catapult/Pfizer
 - Igenity/Merial
 - MMI Genomics/Metamorphix
- Breed Associations
- Researchers/Wannabe Gene Discoverers
- Owners/Controllers of Training Data

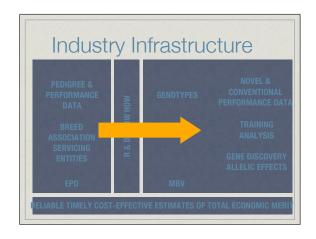


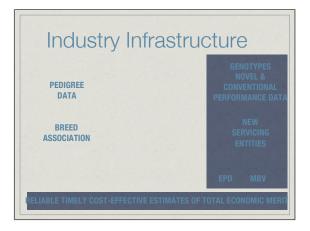












Summary

- Ultimately, the consumer/society will benefit
- In the short to medium-term, some early adopters will benefit, others may lose their shirt
- Late adopters will miss out on benefits
- The ultimate structure will be dictated by the collective action of a number of cultural, technological, economic and political factors operating in a period of many uncertainties