



CANADIAN OILSEED PROCESSORS ASSOCIATION

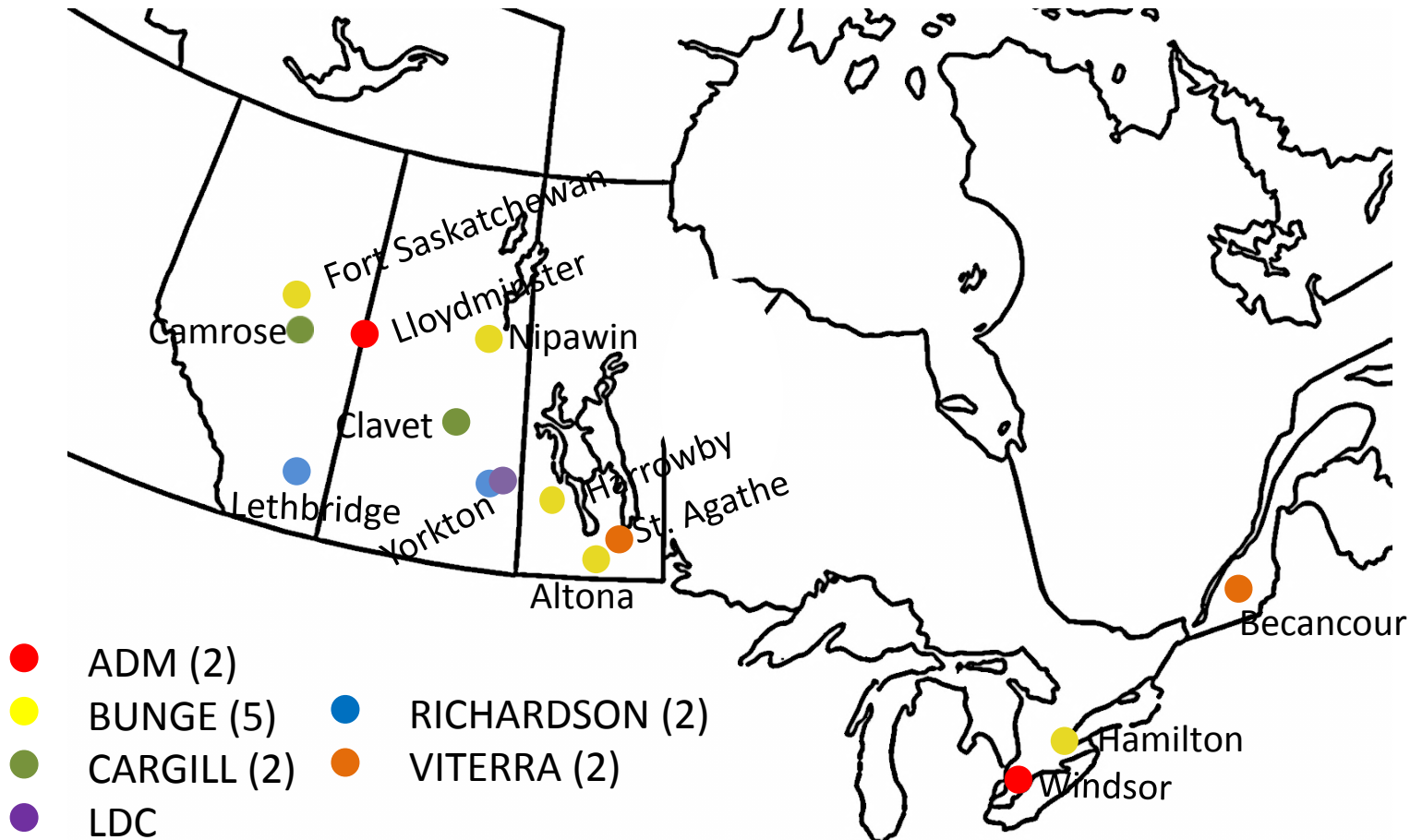
Overview of Canada's Oilseed Processing Sector

November 2016



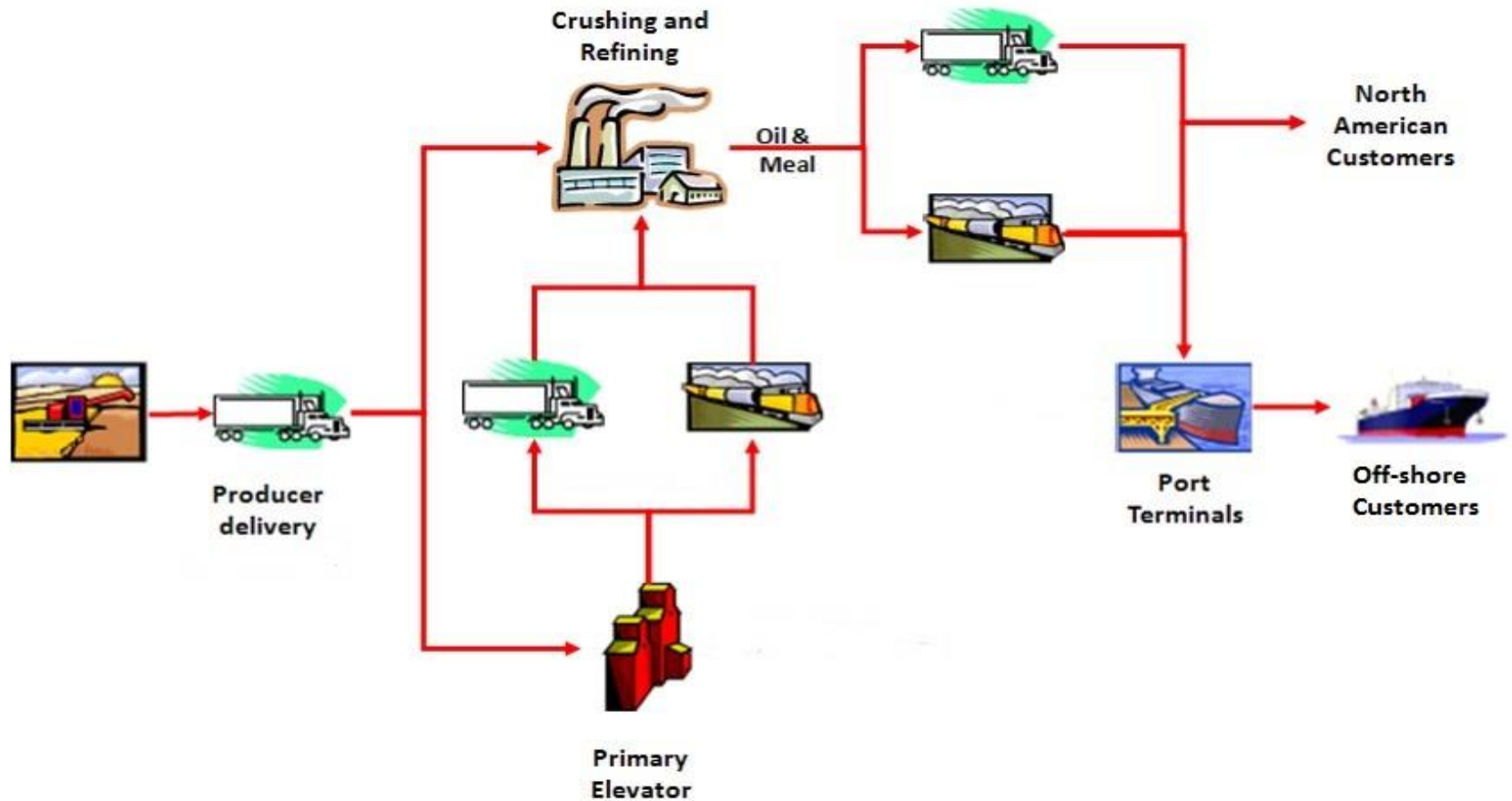
Canadian Oilseed Processors Association

COPA is a federally incorporated non-profit industry association that represents the oilseed processors in Canada.

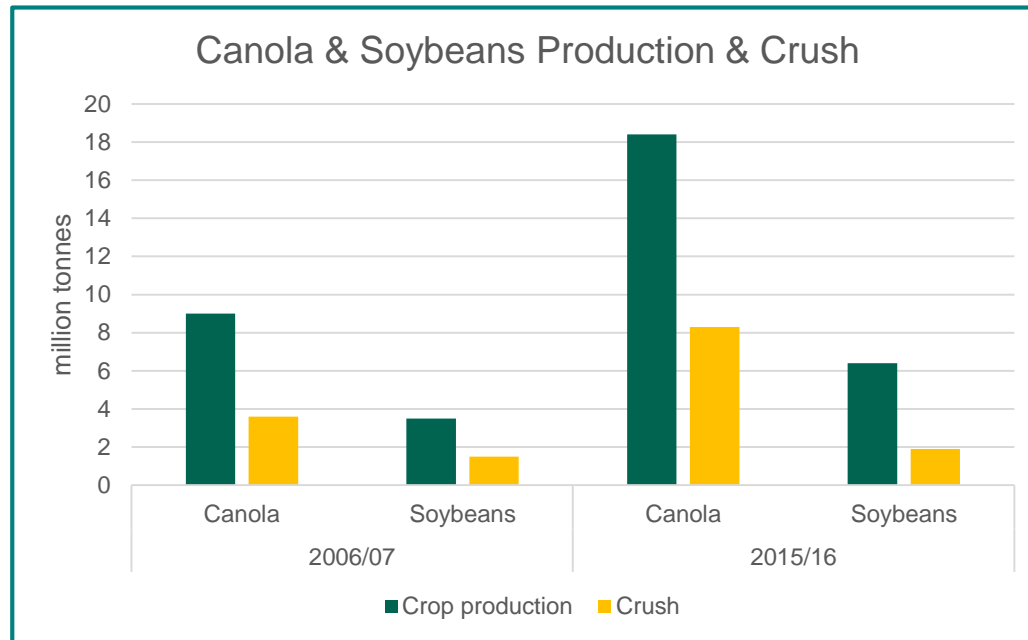


There are 14 crush facilities owned by 6 companies in Canada; the western plants crush canola and the eastern plants crush canola and soybeans

Our Value Chain

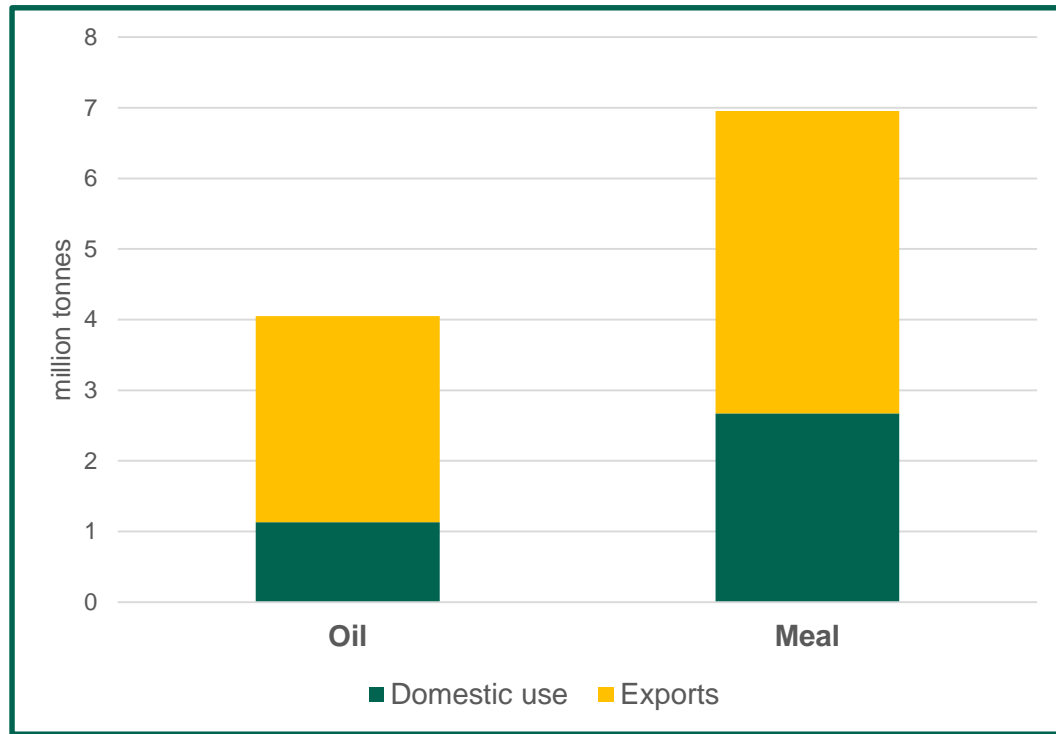


Size and Growth of the Oilseed Processing Industry



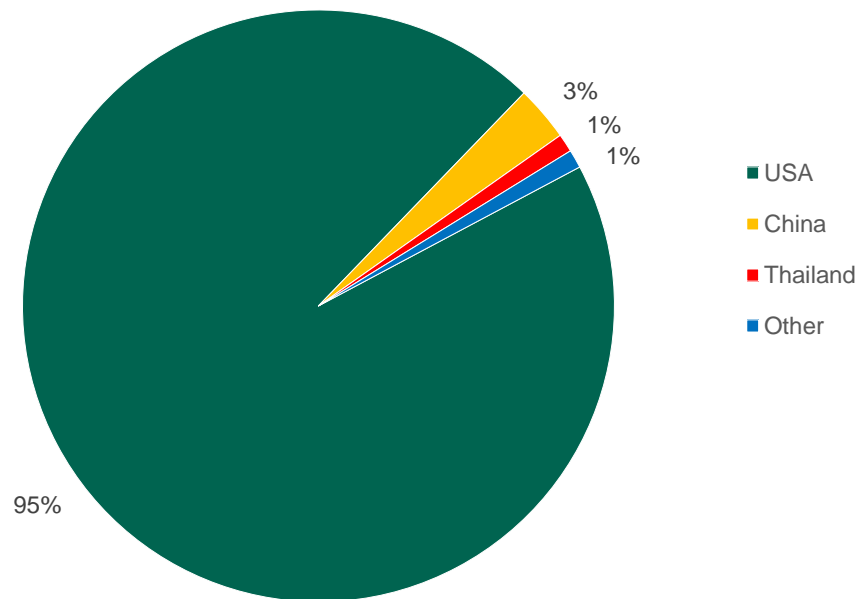
- Over the 10 year period 2006/07 to 2015/16, canola production more than doubled and soybean production increased 84%.
- Canola crushings rose by 132%, while soybean crushings rose by 27%.
- In 2015/16, 45% of Canada's canola crop and 30% of soybeans were processed.

2015/16 Disposition of Canadian Oils & Meal



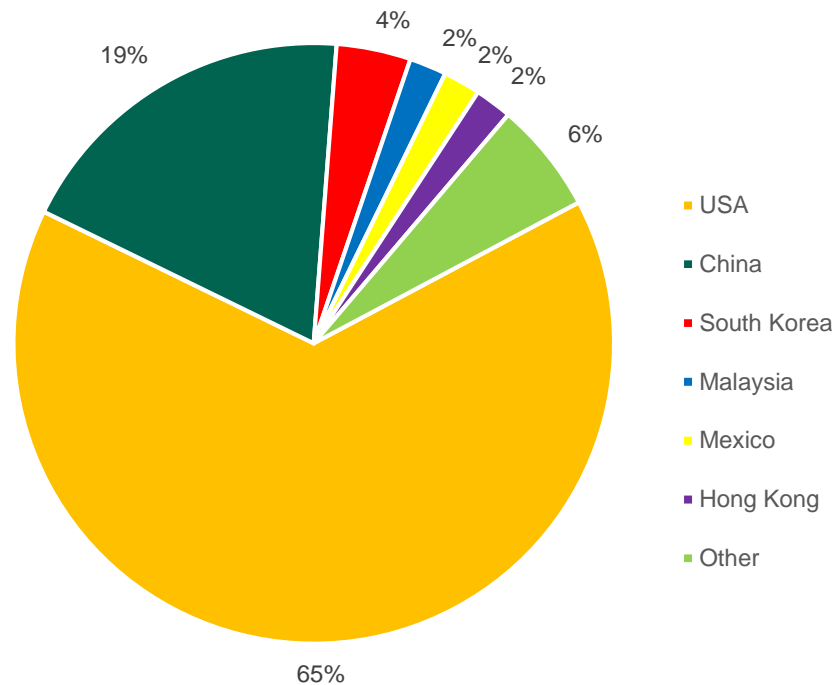
- In 2015/16, 4.0 million tonnes of canola and soy oils were produced and 6.2 million tonnes of canola and soy meals were produced.
- About 70% of the oil and meal production was exported.

2015/16 Canola & Soy Meal Exports by Country



In 2015/16, 4.3 million tonnes of canola and soy meals were exported, including 3.8 million tonnes to the USA, 300 thousand tonnes to China and 107 thousand tonnes to Thailand.

2015/16 Canola & Soy Oil Exports by Country



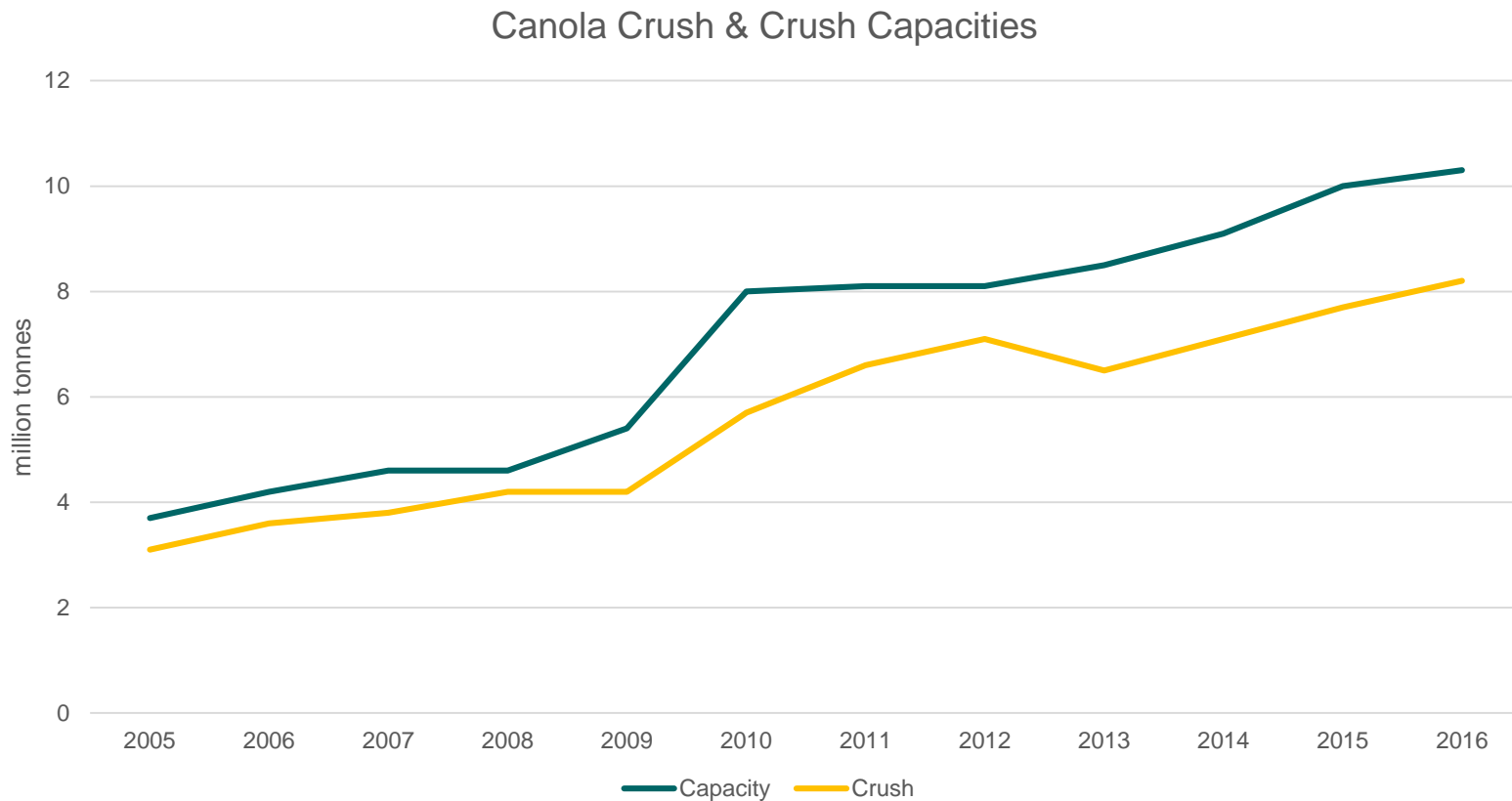
In 2015/16, 2.9 million tonnes of canola and soy oils were exported, including 1.9 million tonnes to the USA, 558 thousand tonnes to China and 104 thousand tonnes to South Korea

Value-added of the Industry

- According to a study by LMC International commissioned by the CCC, in 2013 the Canadian crushing and refining industry contributed \$1.3 billion in annual economic impacts (direct, indirect and induced impacts) to the domestic economy.
- About 10,000 Canadian jobs are directly and indirectly attributed to the crushing, refining, and delivery of canola meal and oil.
- Consistent with the significant growth of oilseed production in recent years, the processing sector has invested substantially to increase Canadian processing capacity.
- Over the last decade, approximately \$2 billion have been invested in plant construction, and crush capacity has more than doubled, reaching a new high of 10.7 million tonnes for canola.

Growth and Strategic Plan

- Since 2005 crush capacity and crush volumes have nearly tripled.
- This is indicative of the industry's commitment to add value in Canada.



Canada's Canola Processing Industry The Future

"Keep it Coming"

	2006	2011 & 2012 Ave	2013	2025*
Production	9.1	14.2	18	26
Seed Exported	5.2	8.1	8.5	12
Processing (domestic crush)	3.7	6.9	7.5	14
Canola Oil	1.55	3.0	3.3	6.3
Canola Meal	2.15	3.9	4.2	7.7

Values expressed in million metric tonnes.

**Canola Strategic Plan 2025 – Canola Council of Canada*

Canada's Soybean Processing Industry

The Future

	2005	2015	2025*
Production	3,044	6,049	12,040
Seed Exported	790	4,200	n/a
Processing (domestic crush)	1,493	1,567	n/a
Soybean Oil	261	282	n/a
Soybean Meal	1,215	1,223	n/a

Values expressed in 000's metric tonnes.

*Source: Mercantile February 2015