



CANADIAN OILSEED PROCESSORS ASSOCIATION

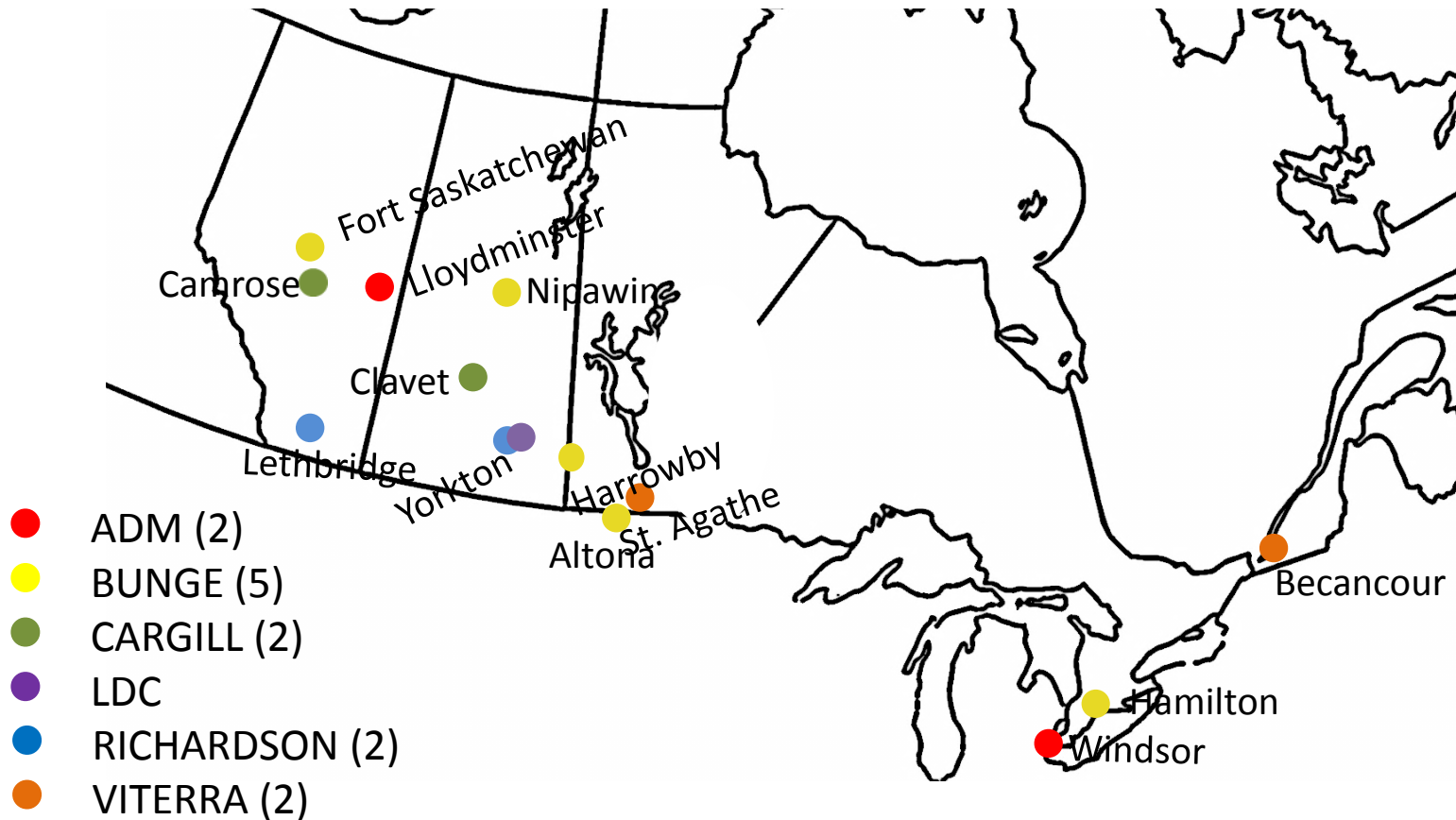
Overview of Canada's Oilseed Processing Sector

September 2017



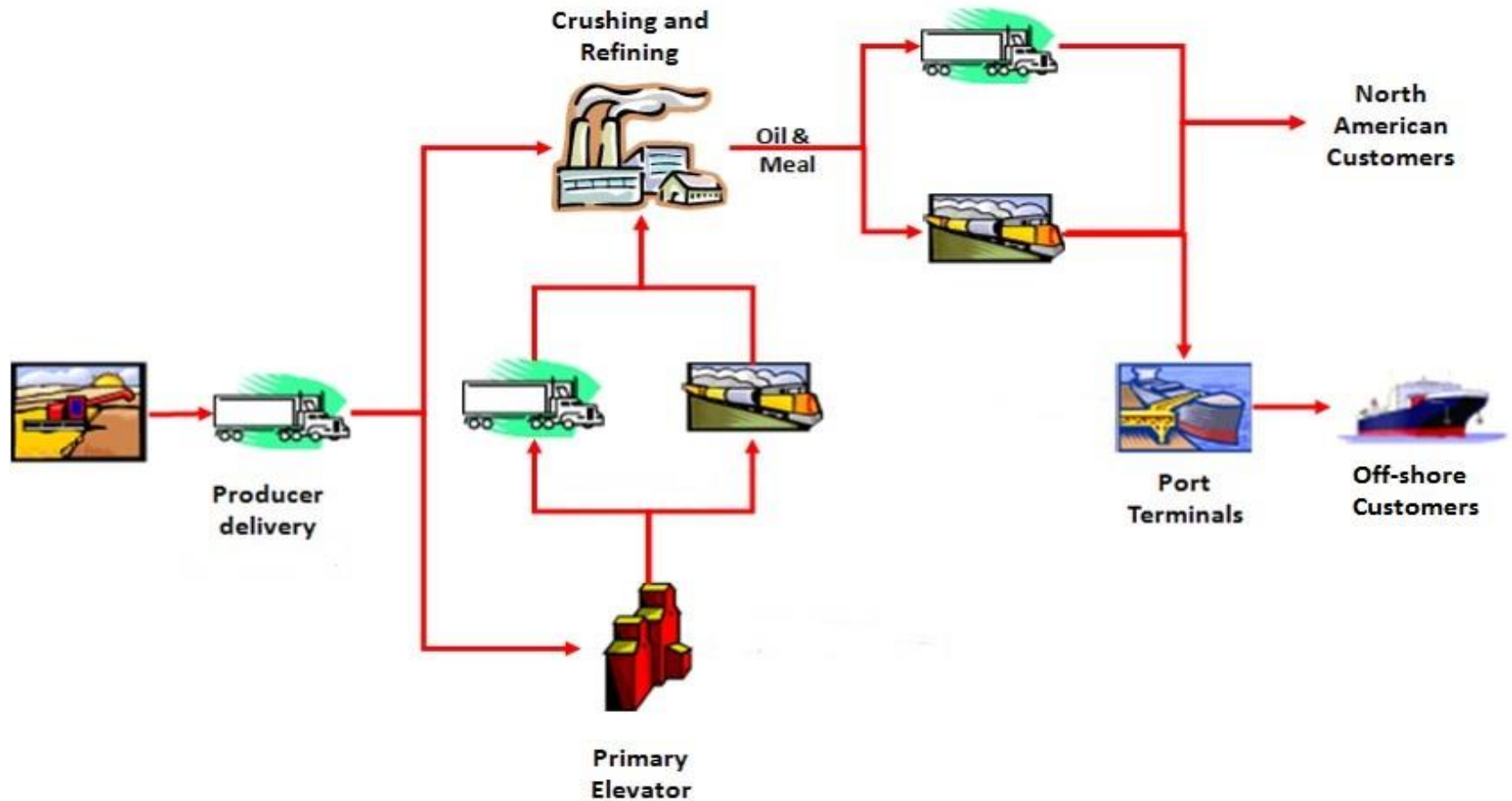
Canadian Oilseed Processors Association

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

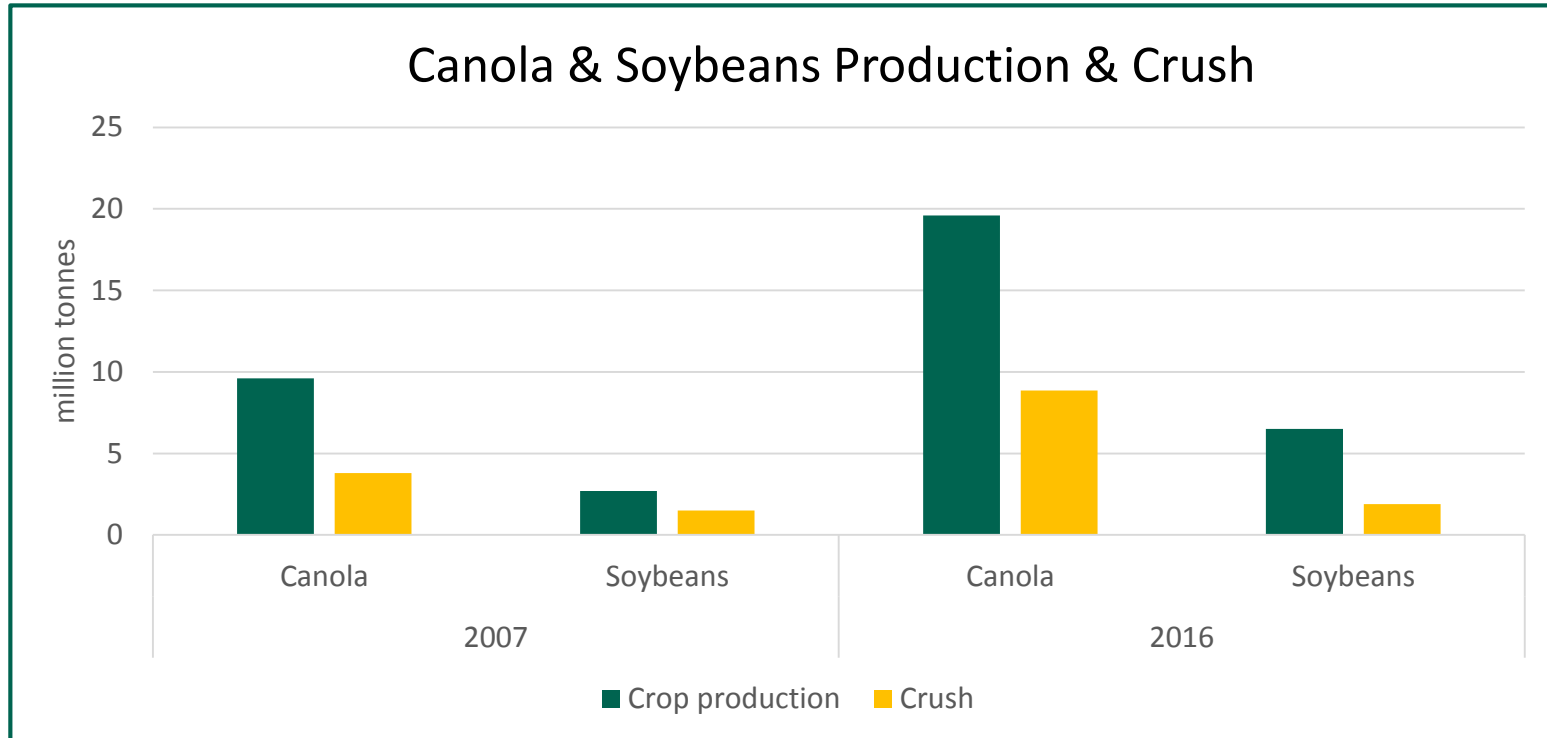


There are 14 crush facilities owned by 6 companies in Canada; the western plants crush canola and the eastern plants crush canola and soybeans

Our Value Chain

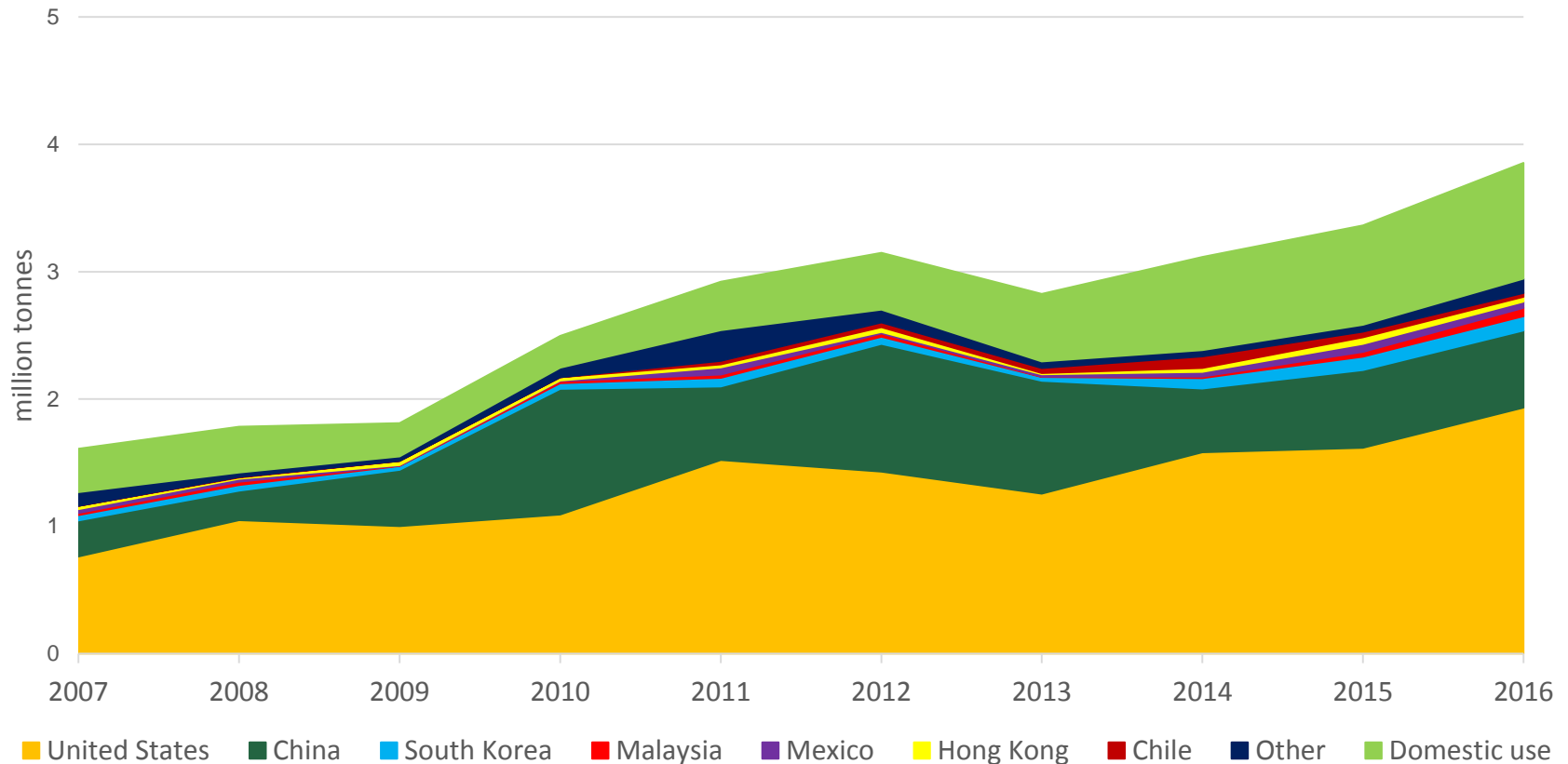


Size and Growth of the Oilseed Processing Industry



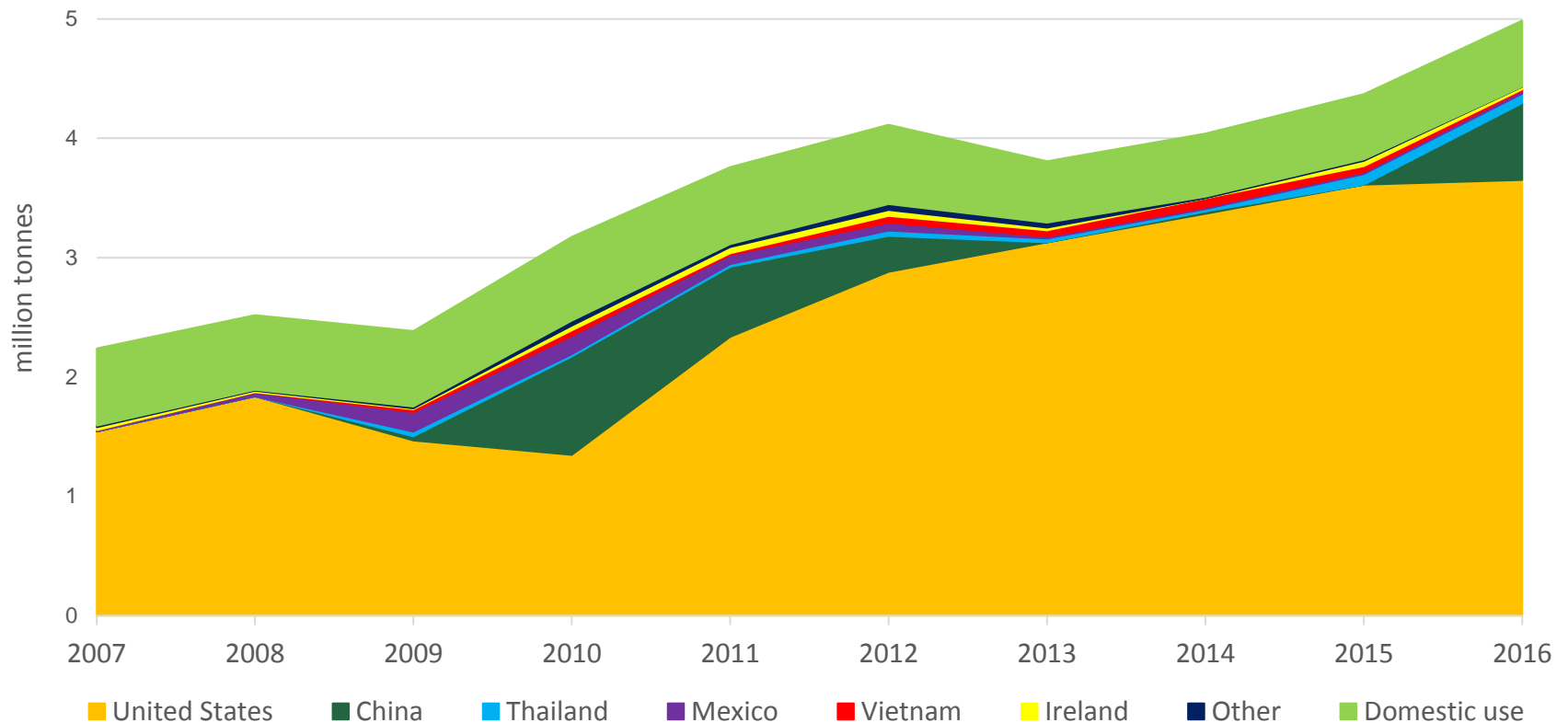
- Over the 10 year period 2007 to 2016, canola and soybean production more than doubled
- Canola crushings rose by 135%, while soybean crushings rose by 28%
- In 2016, 45% of Canada's canola crop and 29% of soybeans were processed domestically

Domestic Canola Oil Consumption & Exports



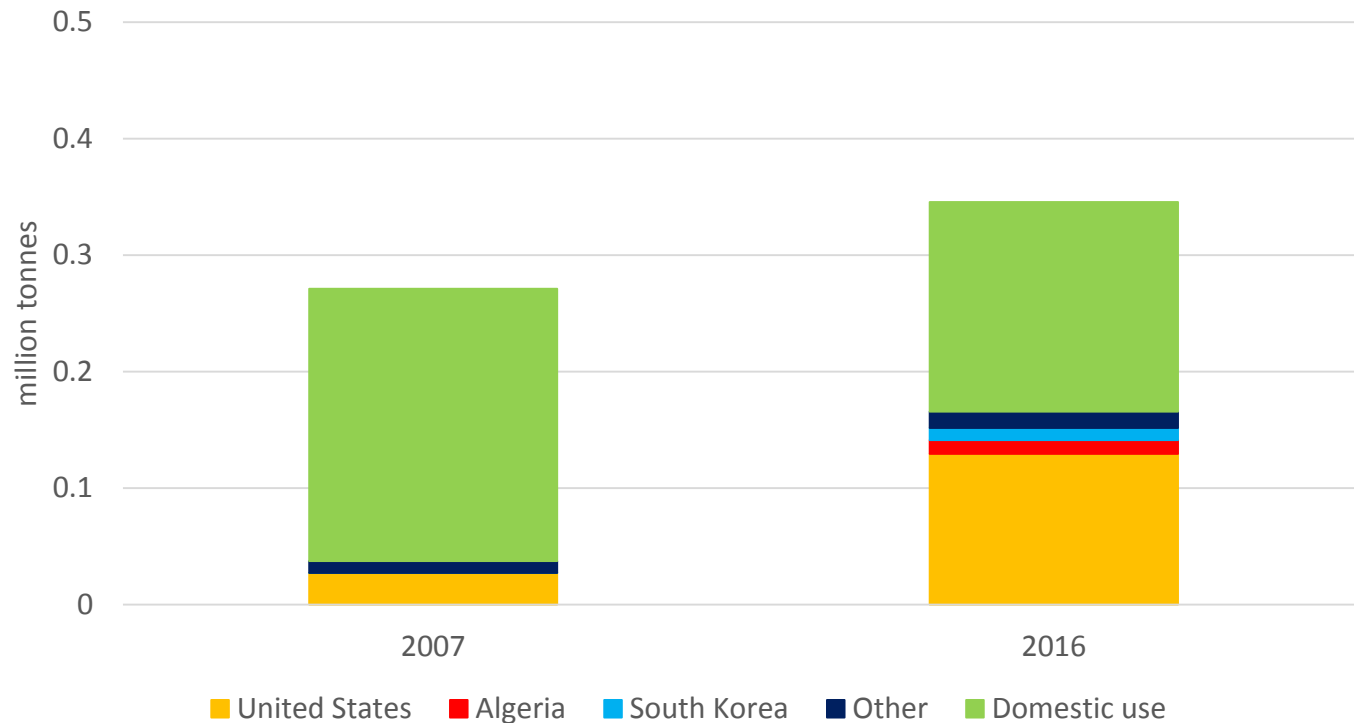
In 2016, 24% or 900 thousand tonnes of canola oil were used domestically and 76% or 2.9 million tonnes were exported; US accounted for 66% of total exports, China 21%, South Korea 4% and Malaysia and Mexico 2% each

Domestic Canola Meal Consumption & Exports



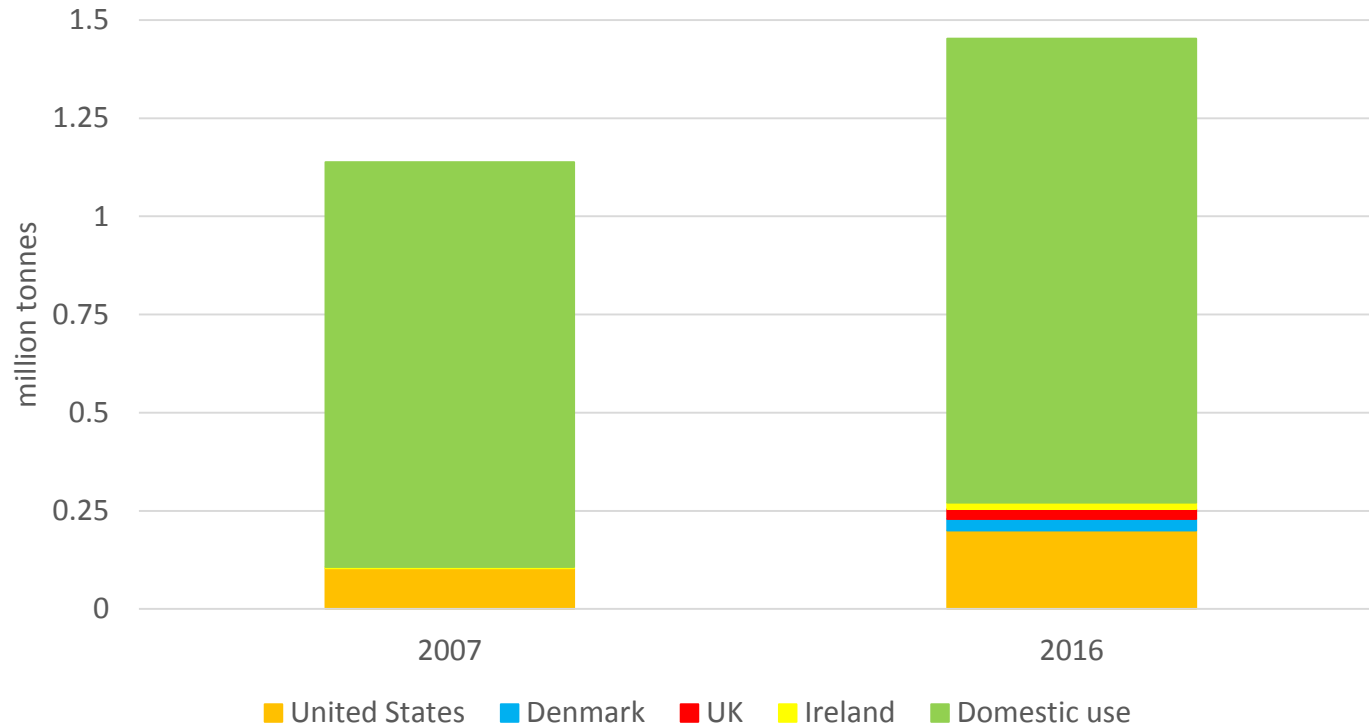
In 2016, 11% or 550 thousand tonnes of canola meal were used domestically and 89% or 4.4 million tonnes were exported; US accounted for 82% of total exports, China 14%, Thailand 2% and Mexico 1%

Domestic Soybean Oil Consumption & Exports



In 2016, 52% or 180 thousand tonnes of soy oil were used domestically and 48% or 170 thousand tonnes were exported; US accounted for 78% of total exports, Algeria 7% and South Korea 6%

Domestic Soybean Meal Consumption & Exports



In 2016, 81% or 1.2 million tonnes of soy meal were used domestically and 19% or 270 thousand tonnes were exported; US accounted for 74% of total exports, Ireland 6%, Denmark 11 % and UK 9%

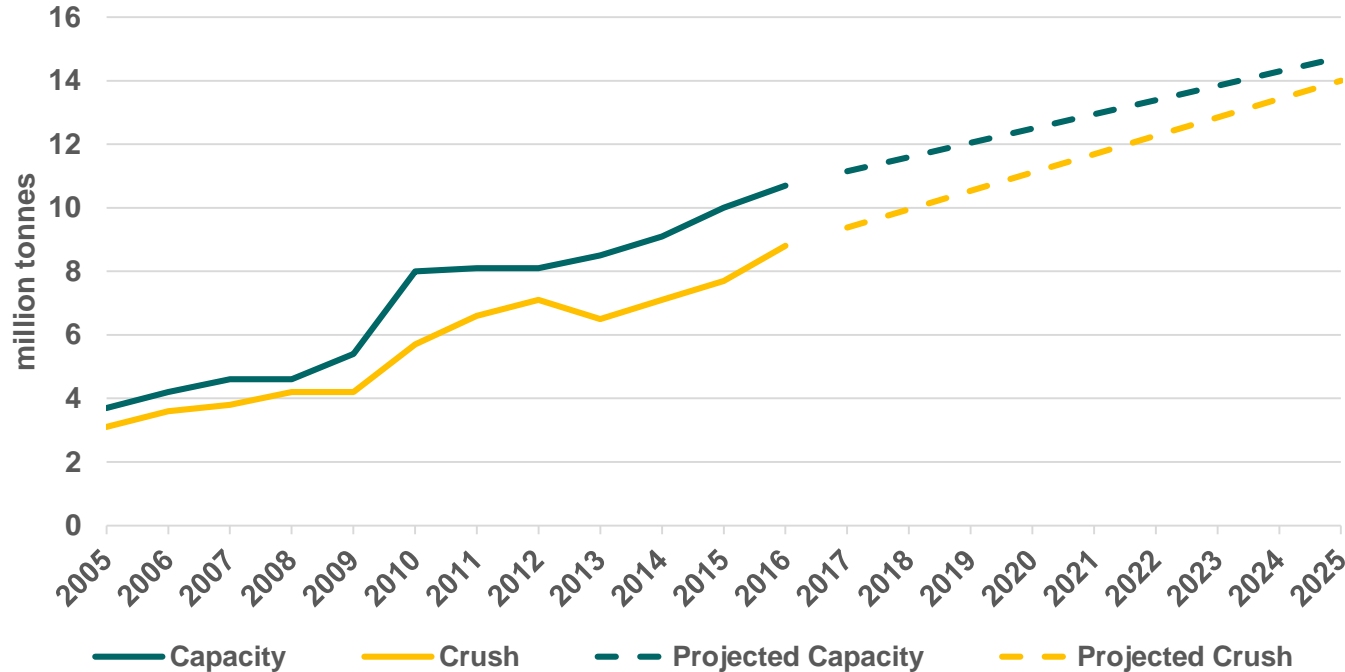
Value-added of the Industry

- It is estimated that processing canola and soybeans in Canada is now responsible for \$7.8 billion in economic activity every year, a threefold increase from a decade ago.
- 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; crush capacity has more than doubled, reaching a new high of 10.7 million tonnes for canola and 3.2 million tonnes for soybeans in 2016.

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.

Canola Crush & Crush Capacities: Historical and Forecast



Canada's Canola Processing Industry

The Future

"Keep it Coming"

	Target 2006	Target 2013	Actual 2016	Projected 2025*
Production	9.1	18.0	19.6	26.0
Seed Exported	5.2	8.5	10.5	12.0
Processing (domestic crush)	3.7	7.5	8.8	14.0
Canola Oil Production	1.55	3.3	3.9	6.3
Canola Meal Production	2.15	4.2	5.0	7.7

Values expressed in million tonnes

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

Canada's Soybean Processing Industry

The Future

	Actual 2007	Actual 2016	Projected 2027*
Production	2.69	6.46	13.0
Seed Exported	1.88	4.42	10.5
Processing (domestic crush)	1.46	1.87	2.5
Soybean Oil	0.27	0.35	0.5
Soybean Meal	1.14	1.45	1.9

Values expressed in million tonnes

*Source: Soy Canada