



CANADIAN OILSEED PROCESSORS ASSOCIATION

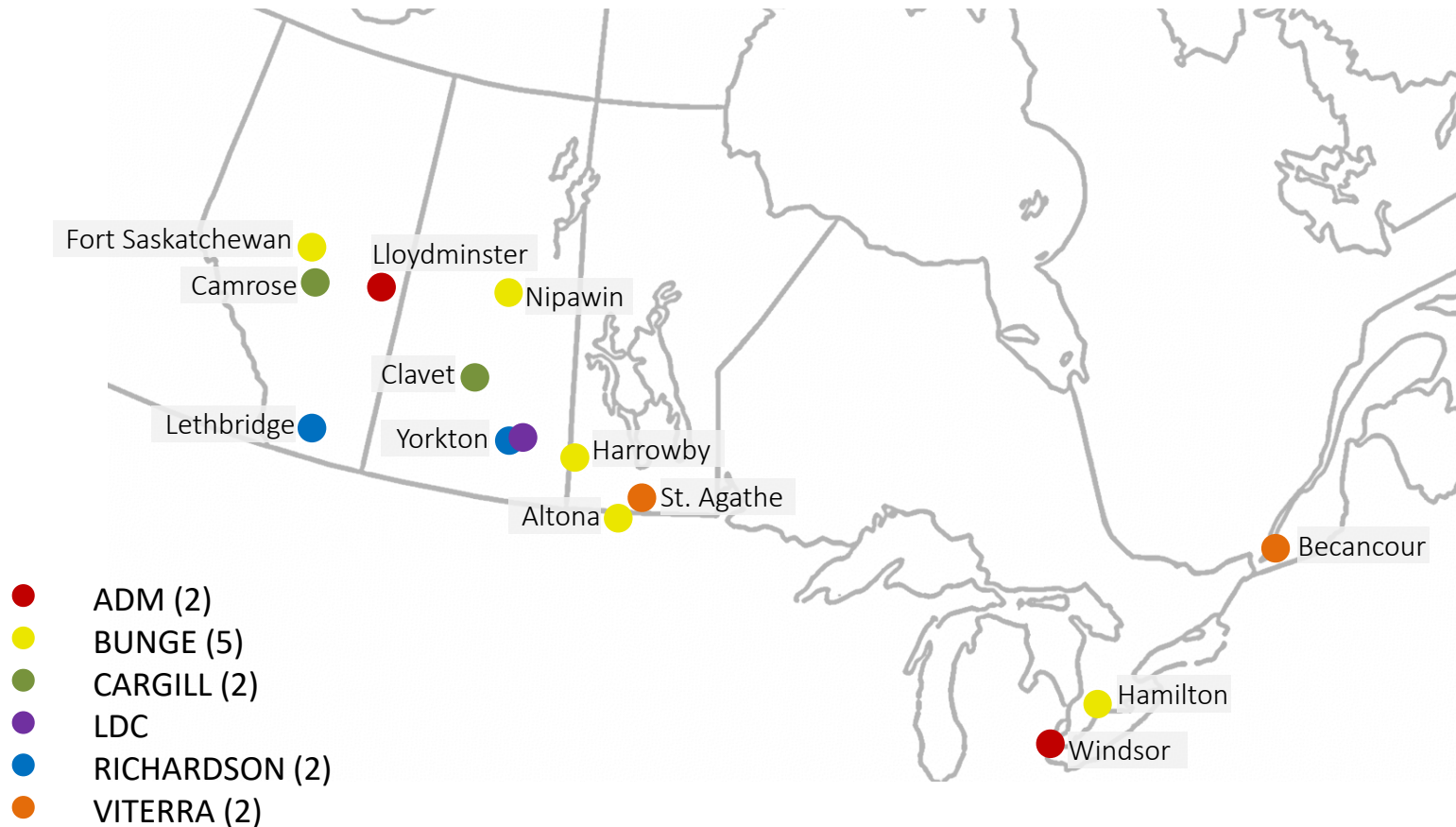
# Overview of Canada's Oilseed Processing Sector

June 2019



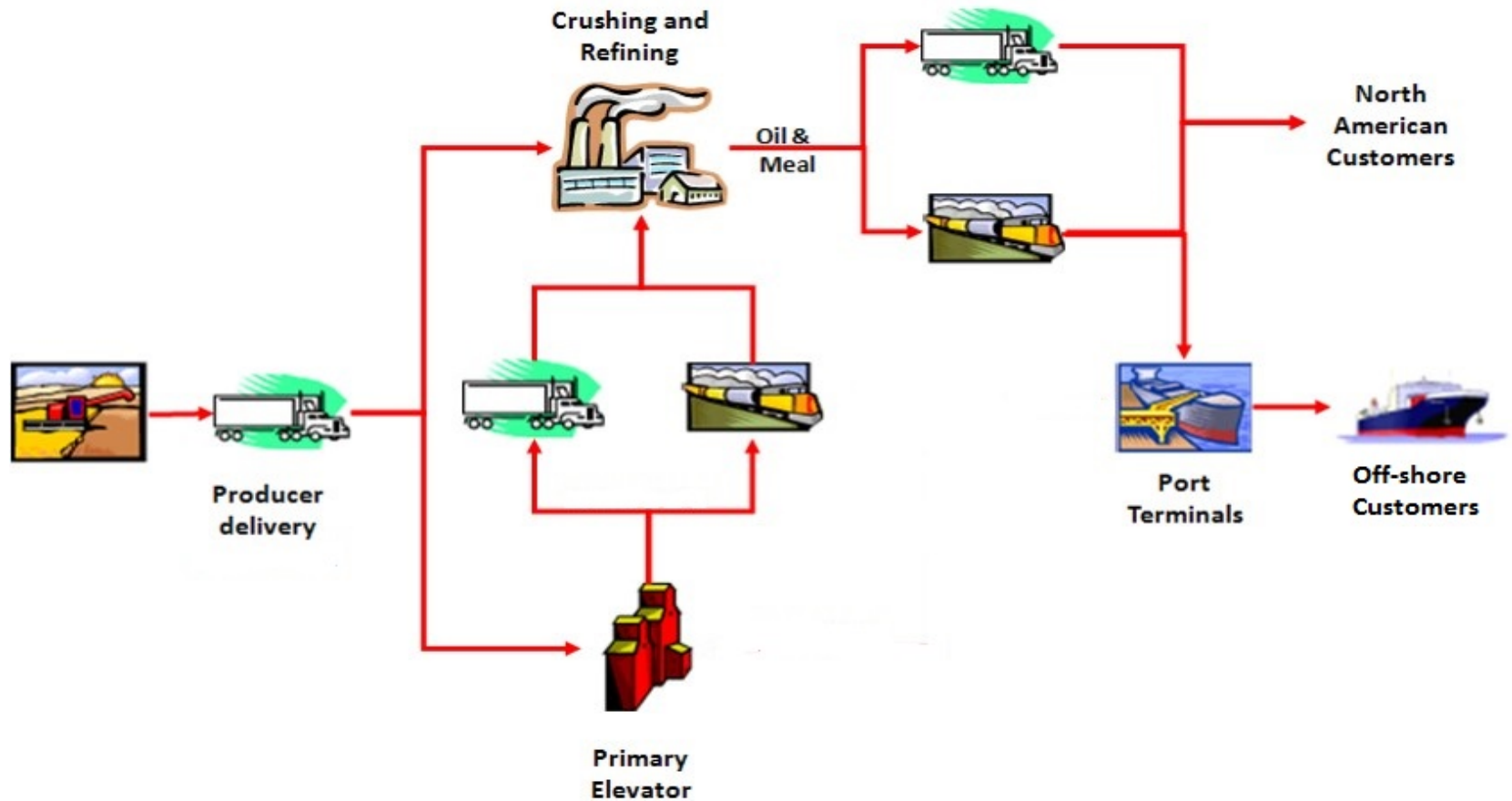
# Canadian Oilseed Processors Association

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

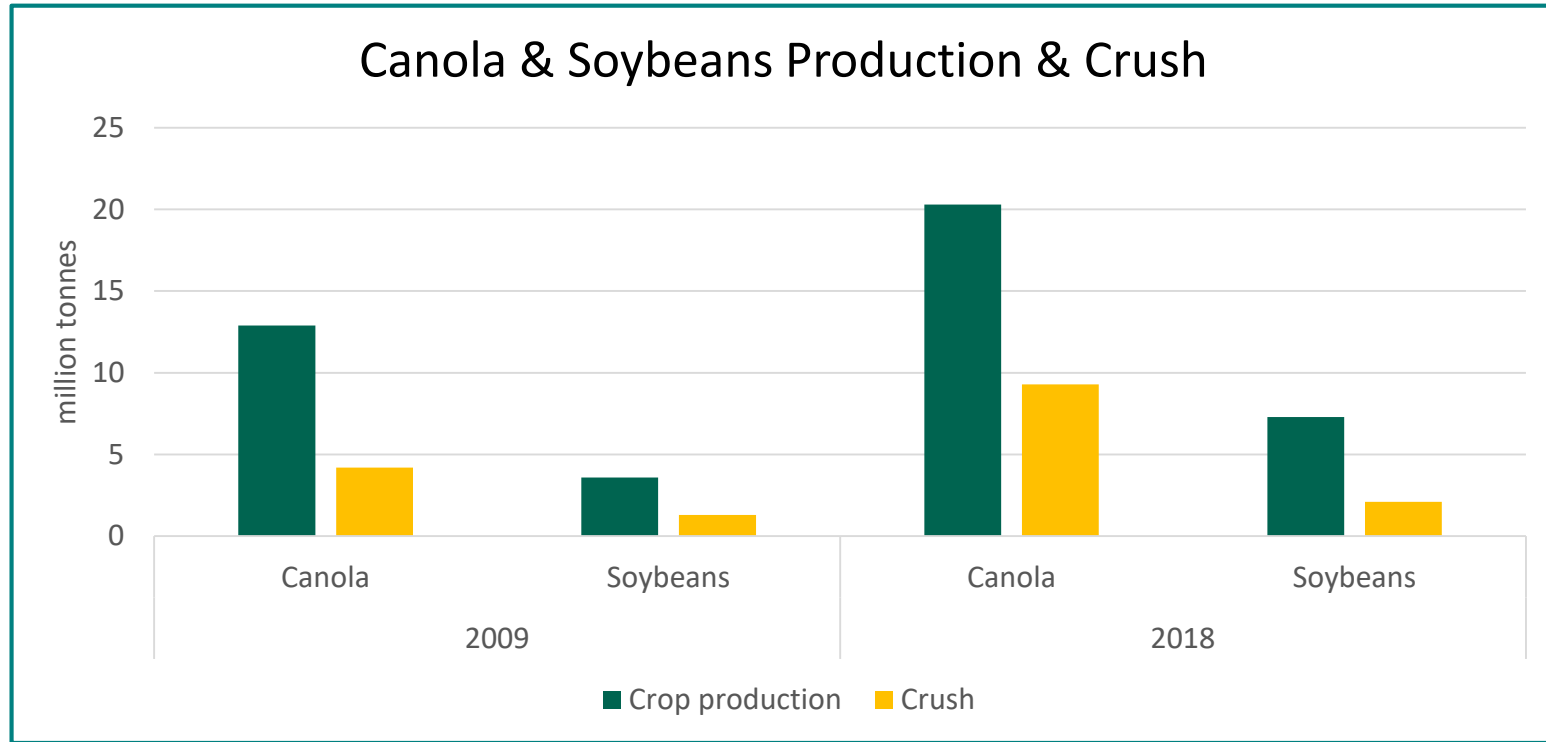


There are 14 crush facilities owned by 6 companies in Canada; the western plants crush canola and the eastern plants crush canola and soybeans

# Our Value Chain

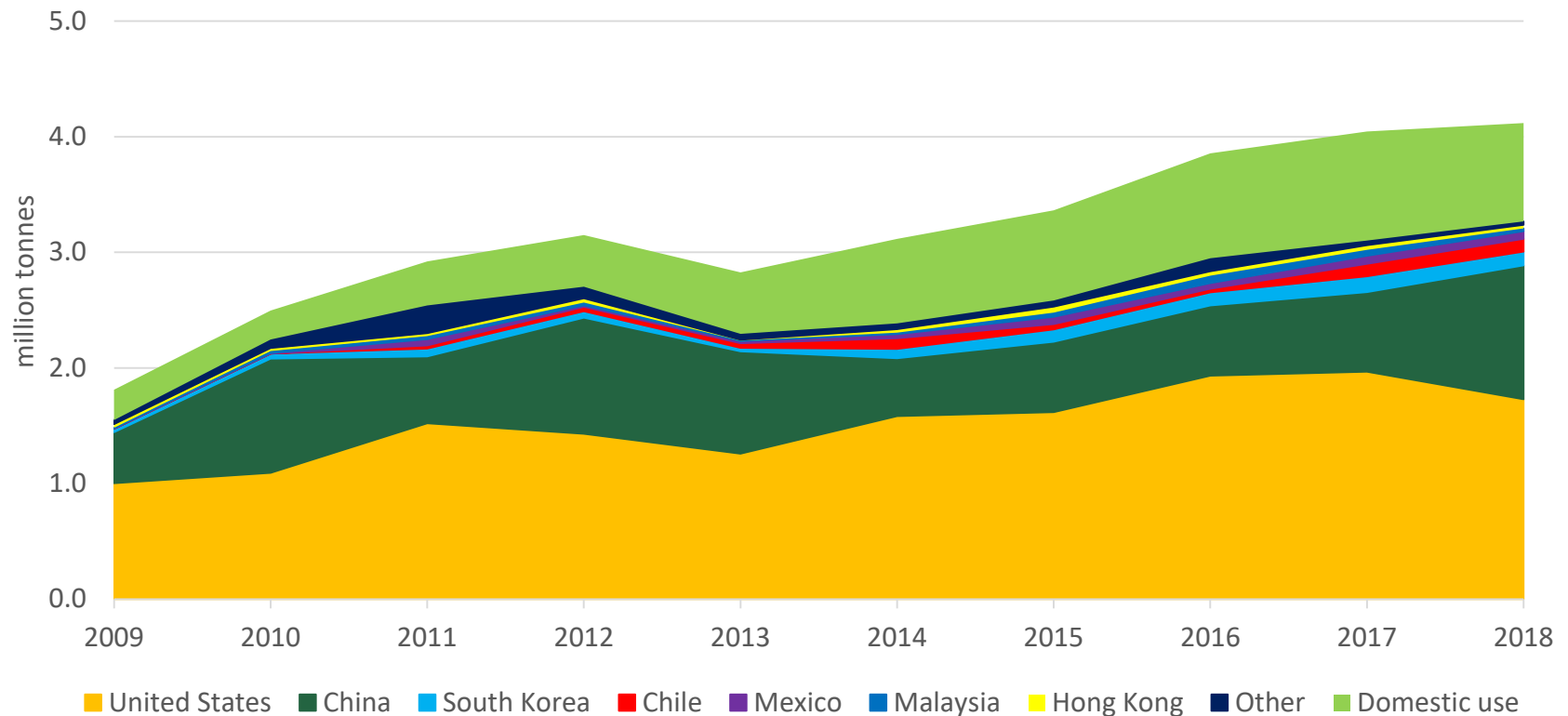


# Size and Growth of the Oilseed Processing Industry



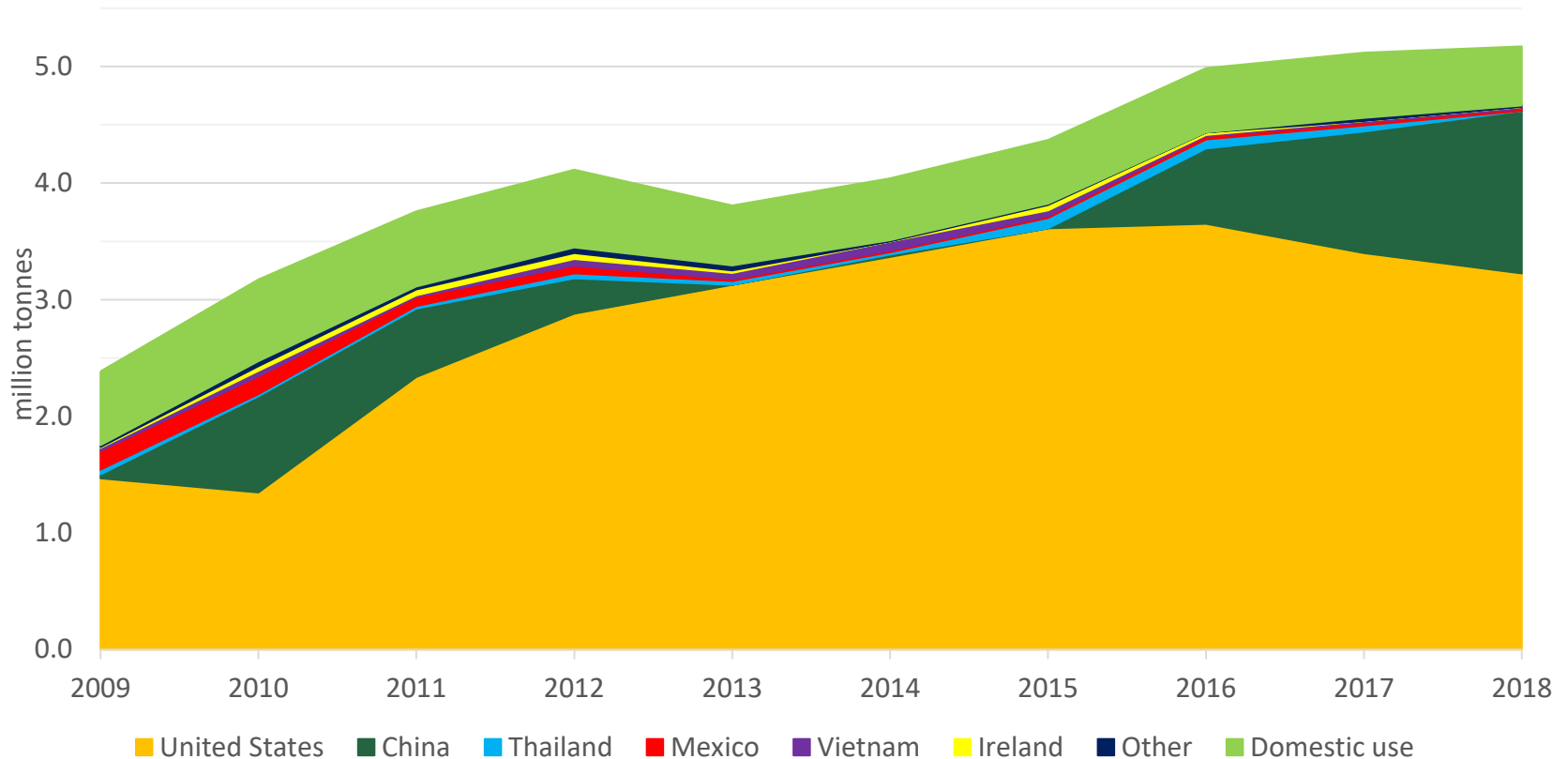
- Over the 10 year period 2009 to 2018, canola production grew by nearly 60% and soybean production more than doubled
- Canola crushings rose by 121%, while soybean crushings rose by 62%
- In 2018, 46% of Canada's canola crop and 29% of soybeans were processed domestically

# Domestic Canola Oil Consumption & Exports



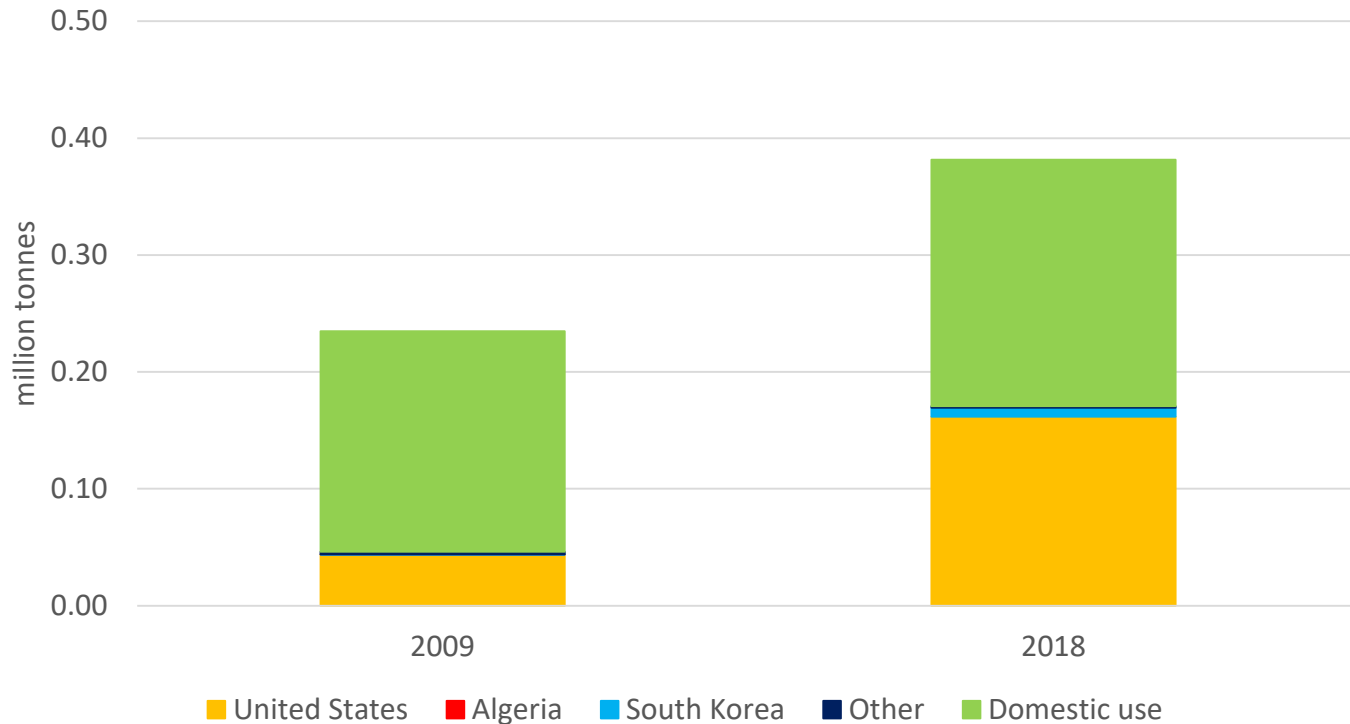
In 2018, 21% or 850 thousand tonnes of canola oil were used domestically and 79% or 3.3 million tonnes were exported; US accounted for 53% of total exports, China 35%, South Korea 4%, Chile 3%, Mexico 2%, and Malaysia 1%.

# Domestic Canola Meal Consumption & Exports



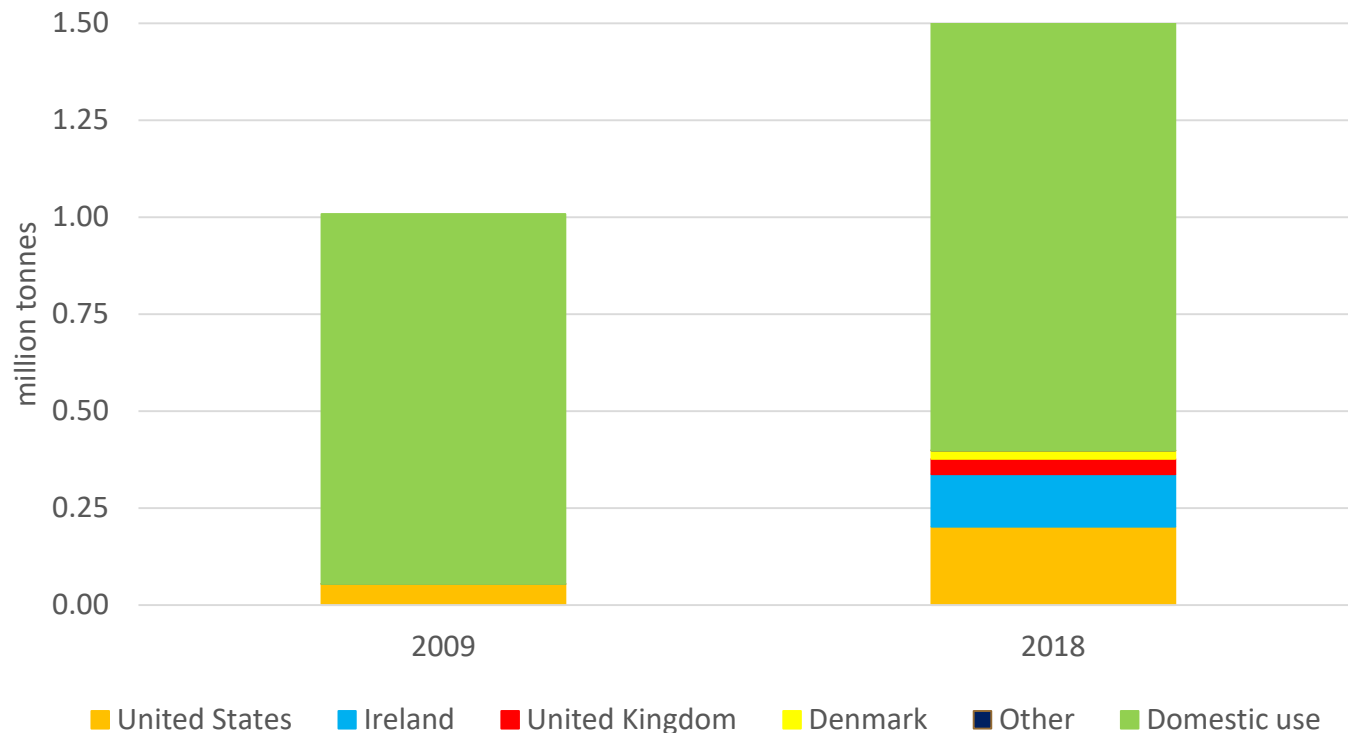
In 2018, 10% or 508 thousand tonnes of canola meal were used domestically and 90% or 4.7 million tonnes were exported; US accounted for 69% of total exports, and China 30%.

# Domestic Soybean Oil Consumption & Exports



In 2018, 55% or 211 thousand tonnes of soy oil were used domestically and 45% or 171 thousand tonnes were exported; US accounted for 95% of total exports, and South Korea 4%

# Domestic Soybean Meal Consumption & Exports



In 2018, 75% or 1.2 million tonnes of soy meal were used domestically and 25% or 398 thousand tonnes were exported; US accounted for 51% of total exports, Ireland 34%, and UK 10%



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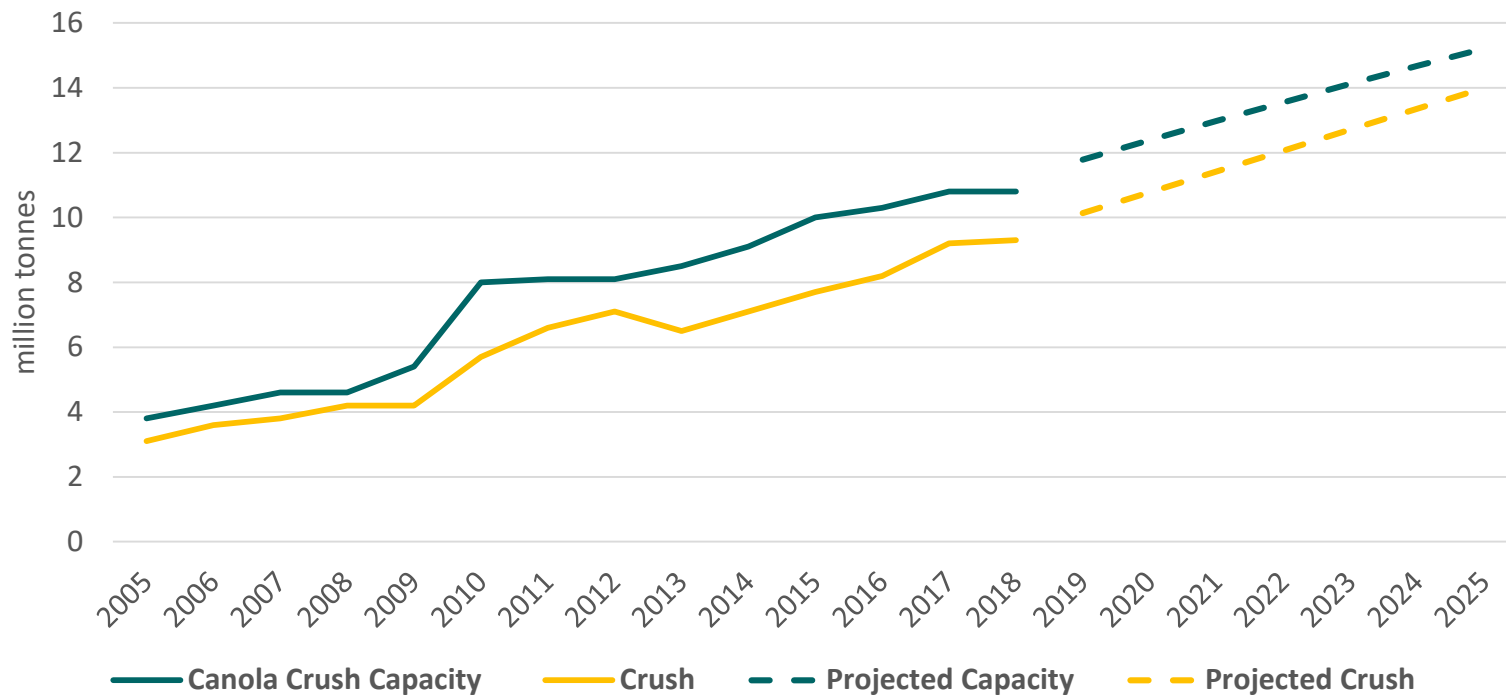
# Value-added of the Industry

- 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 10.8 million tonnes for canola and 3.2 million tonnes for soybeans in 2018.

# 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 2018	Projected 2025*
Production	9.1	18.0	20.3	26.0
Seed Exported	5.2	8.5	10.2	12.0
Processing (domestic crush)	3.7	7.5	9.3	14.0
Canola Oil Production	1.55	3.3	4.1	6.3
Canola Meal Production	2.15	4.2	5.2	7.7

Values expressed in million tonnes

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

# Canada's Soybean Processing Industry

## The Future

	Actual 2008	Actual 2018	Projected 2027*
Production	3.34	7.72	13.0
Seed Exported	1.86	5.50	10.5
Processing (domestic crush)	1.30	2.06	2.5
Soybean Oil	0.25	0.38	0.5
Soybean Meal	1.00	1.60	1.9

Values expressed in million tonnes

\*Source: Soy Canada