



CANADIAN OILSEED PROCESSORS ASSOCIATION

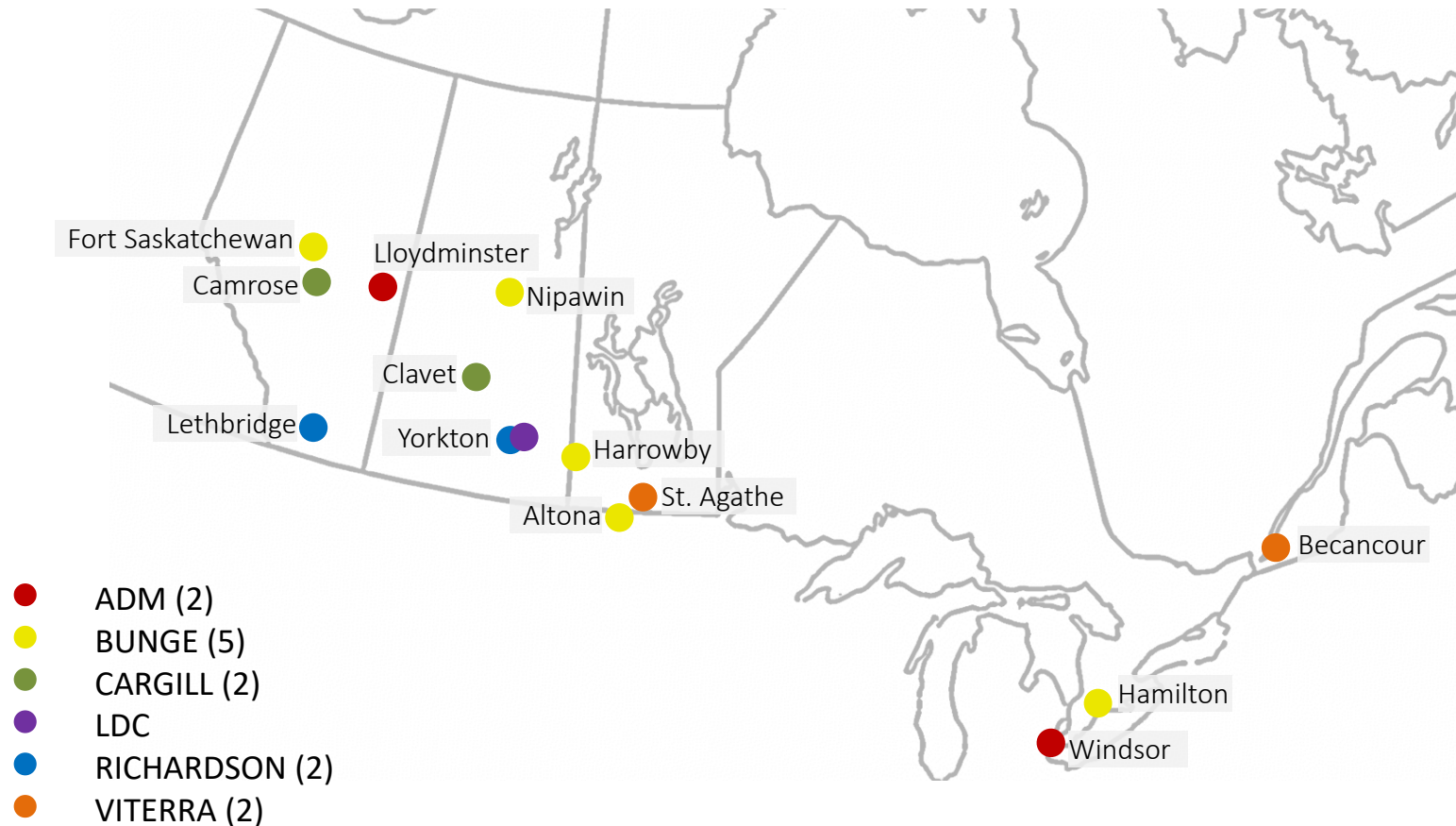
Overview of Canada's Oilseed Processing Sector

March 2021



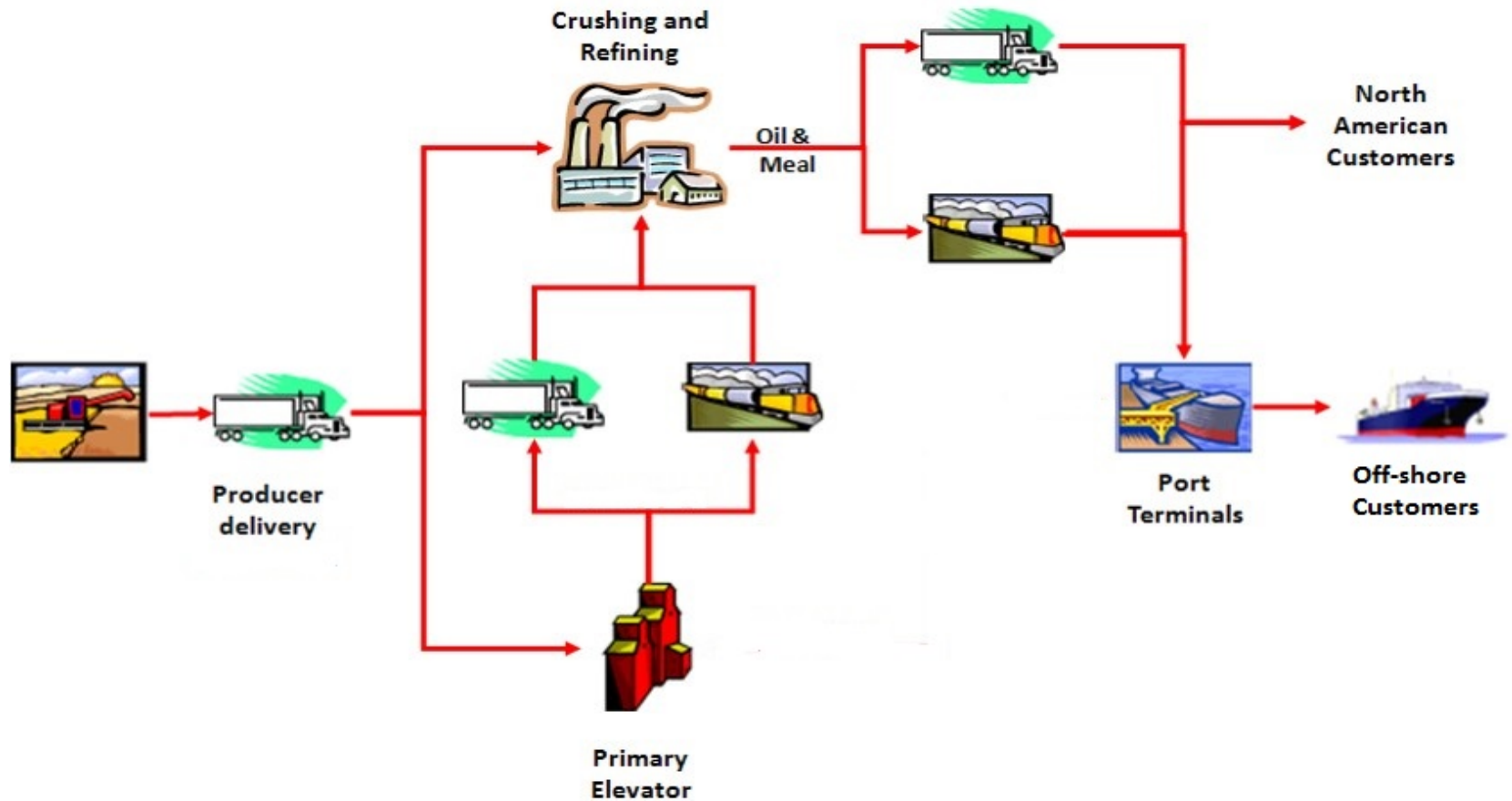
Canadian Oilseed Processors Association

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

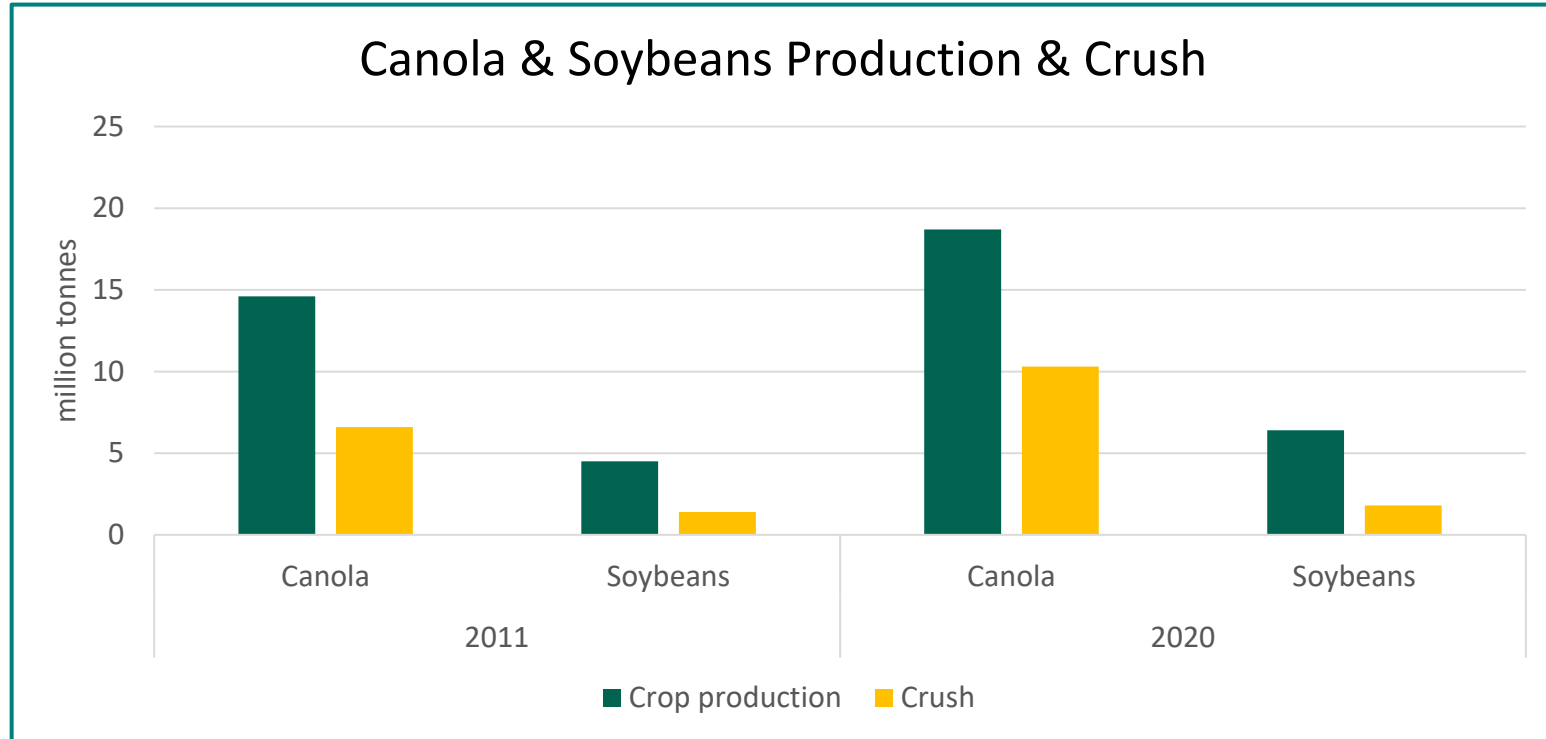


There are 14 crush facilities owned by 6 companies in Canada; the western plants crush canola and the eastern plants crush canola and soybeans

Our Value Chain

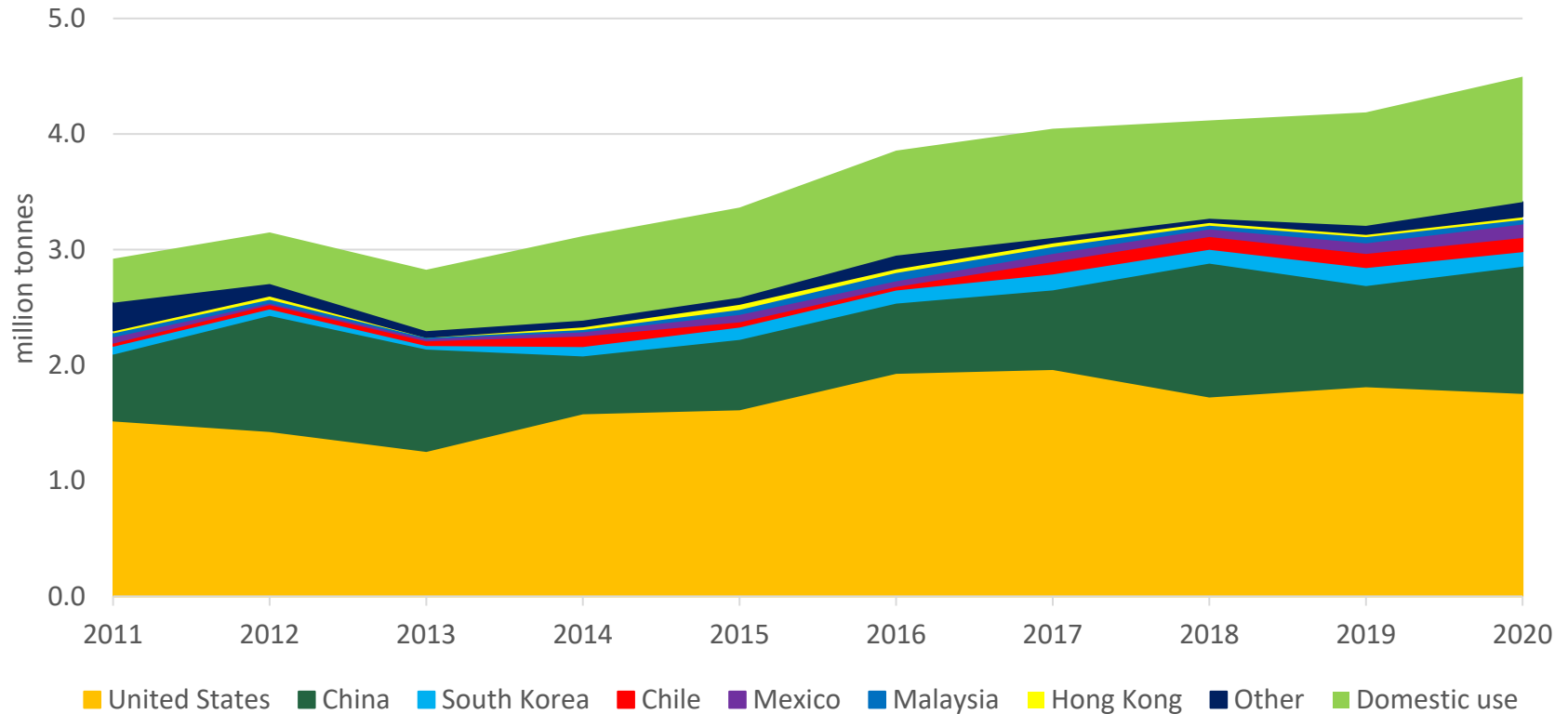


Size and Growth of the Oilseed Processing Industry



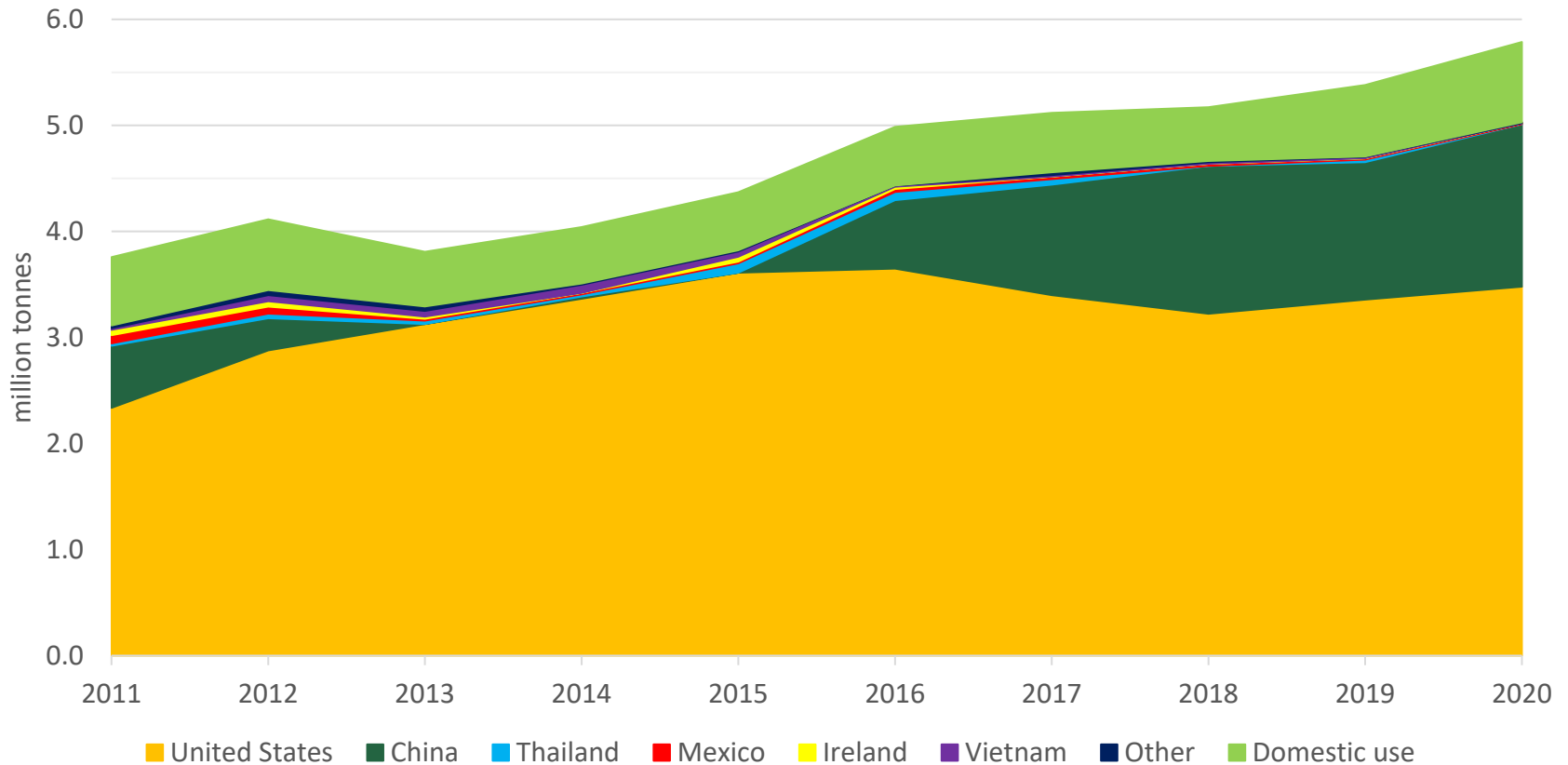
- Over the 10 year period 2011 to 2020, canola production grew by 28% and soybean production grew by 42%
- Canola crushings rose by 56%, while soybean crushings rose by 29%
- In 2020, 55% of Canada's canola crop and 28% of soybeans were processed domestically

Domestic Canola Oil Consumption & Exports



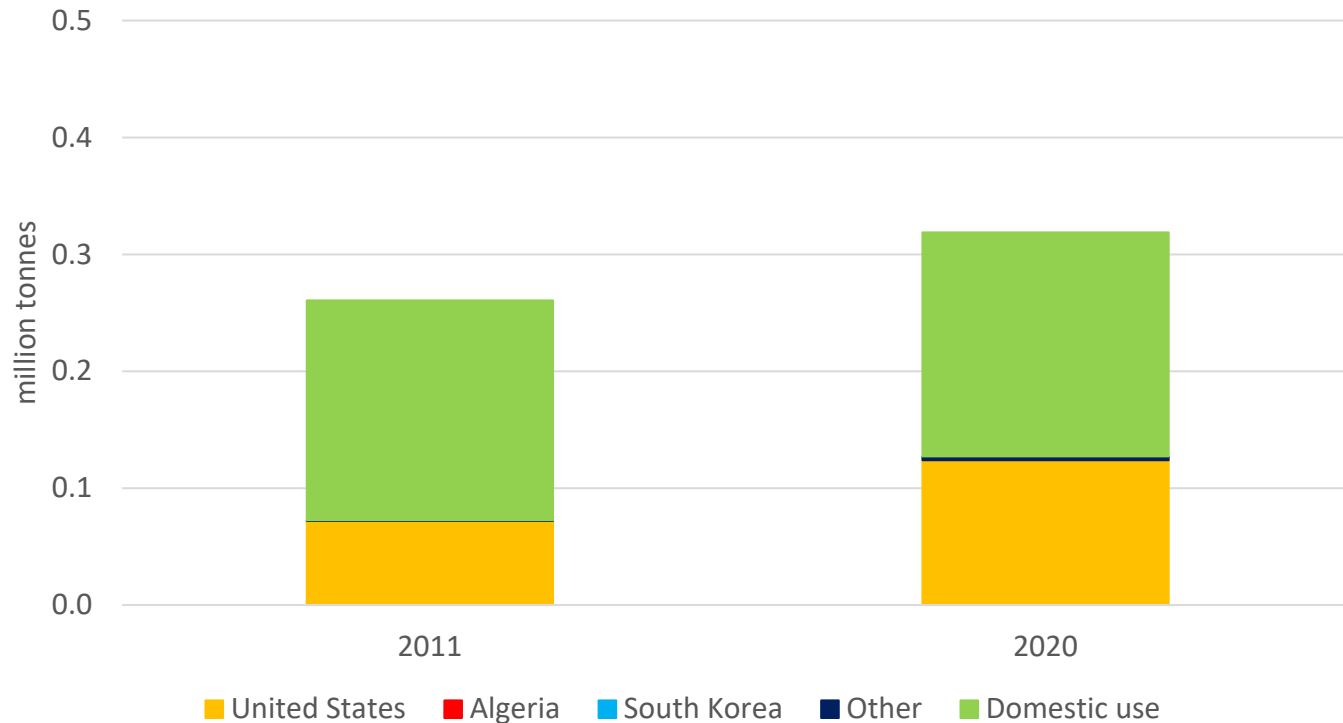
In 2020, 24% or 1.1 million tonnes of canola oil were used domestically and 76% or 3.4 million tonnes were exported; US accounted for 52% of total exports, China 32%, South Korea 4%, Chile 4%, Mexico 3%, and Malaysia 1%.

Domestic Canola Meal Consumption & Exports



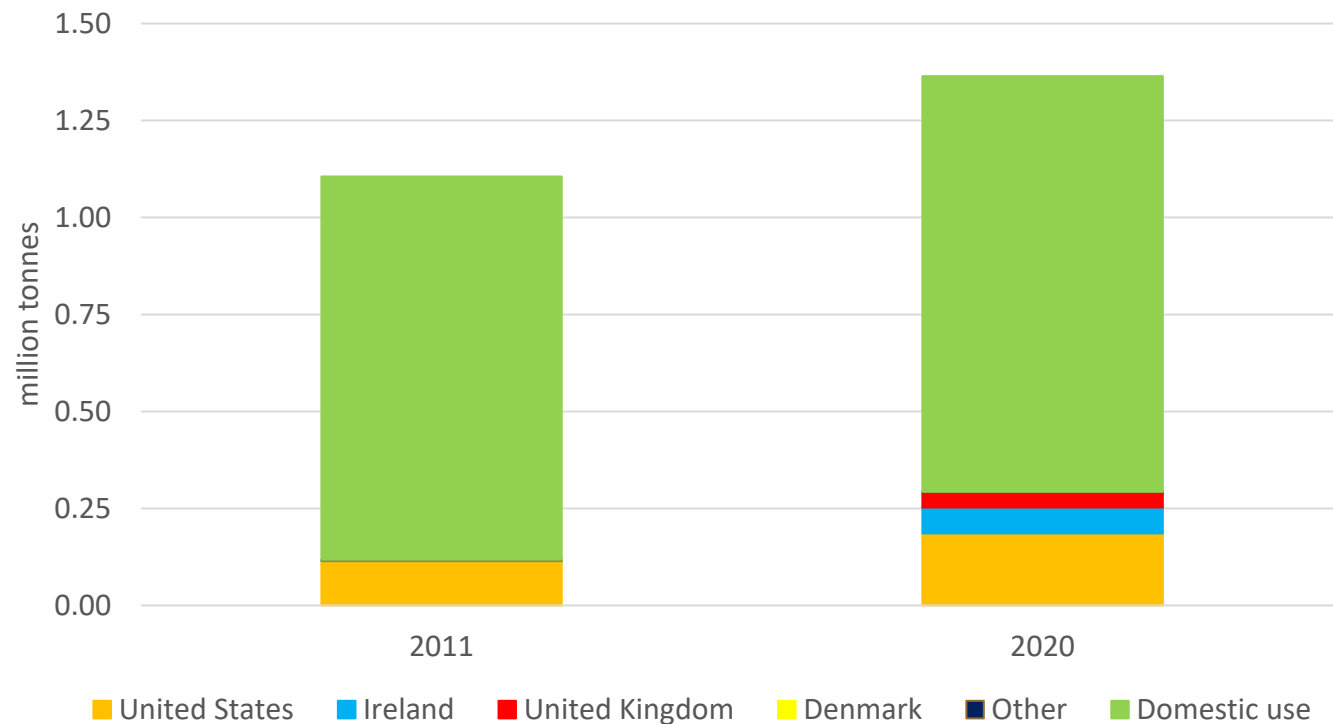
In 2020, 13% or 756 thousand tonnes of canola meal were used domestically and 87% or 5.0 million tonnes were exported; US accounted for 69% of total exports, and China 30%.

Domestic Soybean Oil Consumption & Exports



In 2020, 60% or 192 thousand tonnes of soy oil were used domestically and 40% or 127 thousand tonnes were exported; US accounted for 97% of total exports

Domestic Soybean Meal Consumption & Exports



In 2020, 79% or 1.1 million tonnes of soy meal were used domestically and 21% or 293 thousand tonnes were exported; US accounted for 63% of total exports, Ireland 22%, and UK 14%

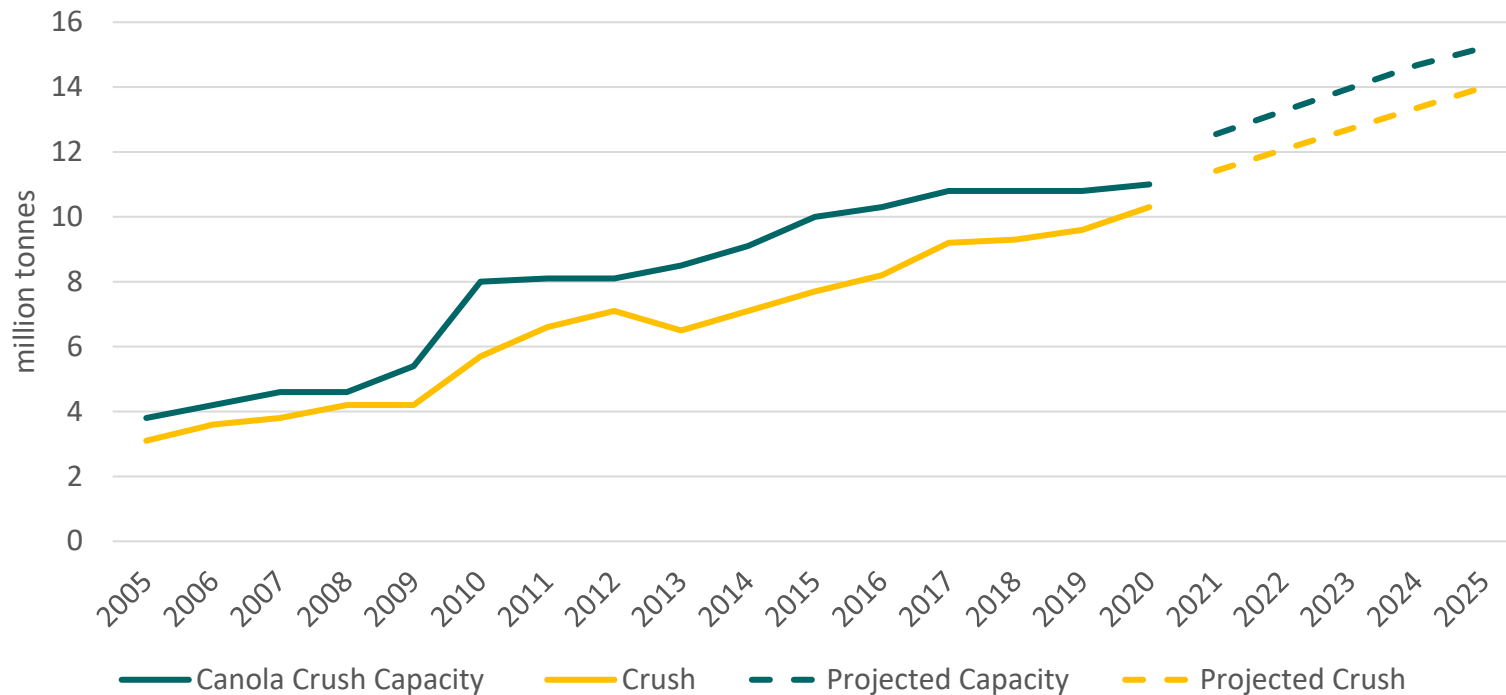
Value-added of the Industry

- It is estimated that processing canola and soybeans in Canada is now responsible for \$6.5 billion in economic activity every year.
- About 8,900 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 \$1 billion have been invested in plant construction; crush capacity has more than doubled, reaching a new high of 11.0 million tonnes for canola and 3.2 million tonnes for soybeans in 2020.

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 2020	Projected 2025*
Production	9.1	18.0	18.7	26.0
Seed Exported	5.2	8.5	11.8	12.0
Processing (domestic crush)	3.7	7.5	10.3	14.0
Canola Oil Production	1.55	3.3	4.5	6.3
Canola Meal Production	2.15	4.2	5.8	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 2020	Projected 2027*
Production	3.34	6.36	13.0
Seed Exported	1.86	4.43	10.5
Processing (domestic crush)	1.30	1.76	2.5
Soybean Oil	0.25	0.32	0.5
Soybean Meal	1.00	1.36	1.9

Values expressed in million tonnes

*Source: Soy Canada