Presentation Overview

1. Overview of the Canadian canola industry
2. The Canola Council of Canada
3. Sustainability in the canola industry
The Canadian Canola Industry

43,000 canola growers
20 million acres
18.4 MMT produced (2015)
$8 billion in farm cash receipts (2015)
$19.3 billion in economic activity
249,000 jobs
Canadian Canola accounts for...

35% of global canola-quality production

65% of global canola trade

Export markets are critical for the industry
More than 90% of Canadian canola is exported in seed, oil or meal form
The Canola Council & Sustainability
The Canola Council of Canada

The Canola Council is the first industry association in Canada to represent all links in the value chain.

Our members include canola growers, crop input suppliers, grain handling companies, exporters, processors, and food and feed manufacturers.

Our mission is to advance the growth and profitability of the canola industry based on innovation, sustainability, resilience and the creation of superior value for a healthier world.
Keep it Coming 2025

**Sustainable, Reliable Supply**
Sustainably and profitably increase canola production to meet global demand for 26 MMT

**Differentiated Value**
Meet 26 MMT of demand by differentiating and demonstrating the quality characteristics of canola products

**Stable, Open Trade**
Create a competitive, stable, and open trade environment that allows the industry to attain the maximum value for canola

**Goals:**
- 26 MMT of production and demand by 2025
- 52 bushels/acre
Sustainability in the Canola Industry
Meeting Market Needs

Regulated Sustainability Markets
- Biofuels in the EU and US
- $700 million/year market opportunity

Demand Driven Sustainability Markets
- Food and feed markets
- Pre competitive / Differentiated demand
- Variety of sustainability initiatives, schemes, tools, metrics
Renewable Energy Directive (RED) - EU

- Established to meet GHG reductions
- Sustainability certification **required** for all biofuel feedstocks
- **Opted into ISCC** (International Sustainability and Carbon Certification) **voluntary scheme**
- Supply chains exporting to the EU RED are fully certified sustainable

Potential exports to the EU
~ 500,000 tonnes of seed / year
ISCC Adoption

• Opted into most advanced, well organized, ready for the market, fully approved by EU RED
• Growers can supply any crop they grow as ISCC certified
  – But, the grower must be part of an ISCC certified supply chain

• 1,000 growers in western Canada are certified
• 5 companies have obtained ISCC certificates for Canadian canola in recent years¹

Renewable Fuel Standard (RFS2) - USA

- Carbon Metric – set by US EPA
- Non-Carbon Sustainability Metrics

- CCC worked with Canadian government
  - EPA approved Canada – same basis as US agriculture
  - All Canadian feedstocks now have same open access

- Entire canola supply chain meets US EPA sustainability requirements for the biofuels market (RFS 2)

Exports to the US under this approval:
~ 800,000 tonnes of seed / year
Readiness

- Growers committed to sustainability
- Strong research basis for sustainability story
- Advanced modern agriculture systems and practices
- Large array of legislation governing labour, land use, water, biodiversity, pesticides, forests, parks, etc.
- Rule of law prevails, and is enforced
- Full certification across entire supply chains under ISCC
- Regulators in US and EU have confirmed that their sustainability criteria are being met
- Well positioned for discussions with other markets
Thank you.