Canola Council of Canada
Unique non-profit organization
Supply Chain “Eco-system”

- **Western Grain Elevator Association**
- **Canadian Oilseed Processors Association**
- **Life Science Companies**
- **Alberta Canola**
- **Ontario Canola Growers**
- **Manitoba Canola Growers**
- **Canadian Canola Growers Association**
- **SaskCanola**
- **COPE**
- **B.C. Grain Producers Association**

The three Prairie canola grower organizations are core funders of the Canola Council of Canada.
What is Canola?

- Developed in the 1970’s by Canadian plant breeders
- Removed undesirable components of rapeseed to create canola
- First commercial planting in 1970’s

“Canola” = ‘Canada’ & ‘ola’ (oil)
50 Years Later - A World Leader

Canada contributes:

- 31% of global production
- 64% of global seed exports
- 60% of global oil exports
- 65% of global meal exports
43,000 Farmers Grow Canola
Today

14 Canola Processing Facilities
- ADM (2)
- Bunge (5)
- Cargill (2)
- LDC
- Richardson (2)
- Viterra (2)

Map of 14 Canola Processing Facilities in Canada, labeled with cities such as Hamilton, Altona, Nipawin, Fort Saskatchewan, and others.
Canola Harvested Acres & Production

Source: Statistics Canada, Table 32-10-0359-01

*Estimate as of Sep 12, 2019
Over 90% Exported
- 50 Global Markets
Canadian Canola Export Volumes 2018

Source: Statistics Canada, CIMTD
Industry Goal for 2025

• Increase Demand
• Diversify Markets
• Increase sustainable production to 26 MMT/yr

“52 bu/acre by 2025”
2025 Production Target: 26 MMT

Source: Statistics Canada, Table 32-10-0359-01

*Preliminary Estimate
Canola Replaced Summerfallow in Crop Rotation

Canola Harvested Area (acres)

Millionen

Canola
Summerfallow


Canola Council of Canada
20-Year Canola Yield Trend

Source: Statistics Canada, Table 32-10-0359-01

Yield (bu/ac)

20.0 - 45.0

1999 2001 2003 2005 2007 2009 2011 2013 2015 2017 2019*

*Estimate as of Sep 12, 2019

28.2 bu/acre

41.3 bu/acre
52 by 2025: How To Get there

OUR TOOLS FOR INCREASING YIELDS:

- Harvest Management: +2 BU
- Integrated Pest Management: +2 BU
- Fertility Management: +3 BU
- Plant Establishment: +3 BU
- Genetic Improvements: +8 BU

3-YR AVERAGE YIELDS

34 BU (2011-13)

41 BU (2016-18)
Meeting sustainability criteria is important
  - Social license issue for food, feed and fuel markets

Bio-Fuels markets most advanced (regulated)
  - US, EU, Canada

US EPA under RFS II
  - Recognizes Canadian production
  - Uses “aggregate level” approach
Market Access and Sustainability

• EU RED Market
  – Requires 3rd party supply chain certification

• Canola & ISCC since 2011
  – Relationship started in 2011
  – Council very pleased with its relationship
  • Strong mutual support
  • Latest effort
    – Soil Organic Issue
Market Access and Sustainability

• Today
  • ~ 5,000 growers certified under ISCC
  • Active reach out program
    – Webinars, industry publications
    – Experience - almost all growers meet criteria
Market Access and Sustainability

• Several large companies exporting to EU
  • Many delivery points certified
  • Some offer a small premium to growers
  • Expect to export 1 MM Tonnes seed in 2019

• Certification important for other markets
  • Food
  • Bio-fuels for Airlines (coming)
Summary

- **Sustainable Production**
  - Growing supply
  - Looking to diversify global markets

- **ISCC Certification**
  - Very important for EU market access
  - Growing interest in the food sector
  - Future products like bio-jet in all markets will require it
Thank You

For More Information Contact:

Emilie Bergeron
Director, Public Affairs
Canola Council of Canada
912 350 Sparks St.
Ottawa ON K1R 7S8
Canada
bergerone@canolacouncil.org