

IT'S  
AMAZING  
WHAT  
ONE MORE  
BUSHEL OF  
CANADIAN  
CANOLA  
CAN DO.



KEEP IT COMING

WITH EVERY ADDITIONAL BUSHEL WE GROW AND SELL, WE STRENGTHEN THE POSITIVE IMPACT OF CANOLA. MORE JOBS. HEALTHIER FOOD. GREATER PROFITABILITY FOR FARMERS, PROCESSORS, LIFE SCIENCE COMPANIES AND EXPORTERS.

NOW WE'RE READY TO SET OUR SIGHTS HIGHER. OUR INDUSTRY IS EMBARKING ON A NEW PHASE OF GROWTH, GUIDED BY A BOLD NEW STRATEGIC PLAN.

READ ON TO FIND OUT HOW WE ARE PREPARING FOR THE OPPORTUNITIES AHEAD. TOGETHER, WE'RE READY TO KEEP IT COMING, STRAIGHT THROUGH TO 2025.

HIGHER YIELD,  
INCREASED PRODUCTION,  
HIGHER PROFIT,  
MORE WORK,  
MORE OUTPUT,  
HAPPY VALUE CHAIN,  
**A FEW MORE SMILES.**

IT'S AMAZING WHAT ONE MORE BUSHEL OF CANADIAN CANOLA CAN DO.



KEEP IT COMING

# WHERE WE'VE COME FROM AND WHERE WE'RE GOING

ONCE CONSIDERED A NICHE CROP, CANOLA IN THE LAST DECADE GREW TO BECOME A LEADER IN CANADIAN AGRICULTURE.

Today the canola industry is a leader in profitability for farmers. A leader in industry investment and commitment from Canadian and international companies in handling, processing and seed technology. A leader in building markets based on canola oil's health profile and protein content for animal feed. A leader in global canola trade. And in tackling market access.

The canola industry also rose to become an important economic engine in Canada and on average now generates \$19.3 billion annually in economic activity and nearly a quarter of a million jobs in production, transportation, processing, refining and food development, manufacturing and service. It grew to become the number one cash crop for more than 43,000 Canadian growers.

We have done this through a full value chain approach where we set clear targets and executed deliberate plans to achieve them. We don't intend to change that. Our industry is proud of our history.

But we are also keenly aware of the potential that lies ahead and the responsibility inherent in being an industry this significant. There is still a long way to go. But it's not just about meeting our own full potential. It is about the compelling potential for health solutions and protein requirements to meet growing global food demand. **The world is telling Canada's canola industry to keep it coming.**

Consider this: The Food and Agriculture Organization (FAO) predicts that the world's need for food will double by 2050, and numerous reports predict major growth in food demand to 2025. The world is looking for answers around critical health issues such as cardiovascular disease and diabetes.

Canola oil has the science to prove its benefits on these health issues. We are part of the solution. In addition, the demand for high oleic specialty oils is a major opportunity in various markets.

The need for protein will grow, as will the need to address global health. Of particular note, the FAO predicts "a massive increase in animal protein demand, needed to satisfy the growth in the human population." So Canada's canola industry needs to be actively exploring markets where we can optimize the use of protein on the planet.

We also need to be exploring opportunities for components in canola, such as

industrial uses, nutraceuticals, and new product requirements of the future.

Moving our industry forward to fulfil all of this potential requires bold solutions to meet the needs of the future. **While we will continue with the collaborative, deliberate approach that has built our success, we also understand that with the onus of being a leader comes the need for thoughtful responsibility.**

Thoughtful responsibility in resource stewardship, innovation, collaboration and communication.

The canola industry has been a leader in moving forward the national discussion on sustainability. It is clear our industry has a responsibility to continue to be part of the solution.



We are deeply committed to the natural resources of Canada.

Now is also the time to focus clearly on an innovation agenda so that we can continue to grow toward our full potential as a leader in healthy solutions. A leader in meeting the growing demand for animal protein. A leader in profitability across the value chain. A leader in agriculture as an economic driver in Canada. And a leader in being part of cross-commodity sustainability solutions.

**So first of all we will introduce bold new solutions in maximizing production through yield increases.**

Thus far, canola's growth has been around genetics and acres.

Our future is about capturing the full potential of these genetics. We have new science that will inform our agronomy efforts through a better understanding of the dynamics of soil zones, disease and insect pressure and weather with genetics. We believe that the growing genetic potential of the crop is capable of getting us to 52 bushels per acre of sustainable production by 2025 with the right agronomy. This requires a major shift in our approach to increase sustainable yields on close to the same amount of acres. Our approach is based on an intensive investment in agronomic research, technology transfer, collaboration and communication. The groundbreaking new approach means that we will harness the full capacity of industry agronomists, advisors and scientists to target growers with the right research results at the right time. Through this approach we will

THE TASK AT HAND IS FORMIDABLE. OUR GOALS AND TARGETS ARE BOLD, AND SUCCESS IS FAR FROM ASSURED. BUT THE CANOLA INDUSTRY WILL MOVE FORWARD THOUGHTFULLY AND RESPONSIBLY.

respond to each producer's unique circumstances, in order to maximize production from every single seed of planted canola.

**Second, we will grow our markets through a highly sophisticated approach in order to create differentiated value at a competitive price by providing quality products with various functionalities.** The

markets we engage will be those that recognize canola oil's superior properties and canola meal's protein advantages. Growing canola requires a significant investment in technology and we need these sophisticated markets in order to ensure sustained profitability in the value chain. The bulk of our efforts will continue to be in established major markets, but we will be paying close attention to growing new market opportunities.

**And equally important, we will pursue effective strategies to improve trade environments in existing and potential export markets.** We will challenge ourselves to be leaders in creating a positive trade environment free of tariff and non-tariff barriers and trade disruptions.

One constant in all of this is science. The canola industry partners with government to invest heavily in scientific research and innovation, and this must continue. Science around the health benefits and energy profile of canola drives market growth in global markets that are demanding healthy solutions. Science-based solutions drive market access efforts and science-based regulation. And science drives growth and prosperity for canola growers.



KEEP IT COMING

**CANADIAN CANOLA. KEEP IT COMING.**

# MISSION

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.

# INDUSTRY GOAL

INCREASE DEMAND IN MARKETS THAT RECOGNIZE THE VALUE OF CANOLA OIL, MEAL AND SEED. INCREASE SUSTAINABLE PRODUCTION TO MEET DEMAND THROUGH YIELD IMPROVEMENT TO ACHIEVE 26 MMT BY 2025.

## STRATEGIC PRIORITIES FOR ACHIEVING THE CANOLA 2025 TARGETS:

- 1 Sustainably and profitably increase canola production in Canada to meet global demand for 26 MMT of Canadian canola by increasing yield to an average of 52 bu/acre. Improve quality characteristics of seed, oil and meal to meet new and existing customer requirements.
- 2 Meet global demand of 26 MMT by differentiating and demonstrating the quality characteristics of canola products to meet new and existing customer requirements at a competitive price.
- 3 Create a competitive, stable and open trade environment that consistently allows the industry to attain the maximum value for canola and its products free of tariff and non-tariff trade barriers.

TARGETS	2011 & 2012 AVG.	2013	2025
Exported Seed	8.11 MMT	8.5 MMT (2012/13 Crop Year)	12 MMT
Domestic Processing	6.87 MMT	7.5 MMT (2012/13 Crop Year)	14 MMT
Acres	20.2 Million	19.8 Million	22 Million
Yield	31.2 BU/Acre	40 BU/Acre	52 BU/Acre
Production	14.24 MMT	18 MMT	26 MMT
Oil Quality	*13% High Oleic and Specialty Oil Acres 7% Saturated Fat	*15.5% High Oleic and Specialty Oil Acres 7% Saturated Fat	High oleic and specialty oil attracts 1/3 of canola acres Global leadership position in oil saturated fat content Maintain global competitiveness in oil content
Meal Quality			Increase protein availability by target species
Trade Environment			Tariff free and non-tariff barrier free access to top markets

\*Estimated

# HOW WE'LL GET THERE

## STRATEGIC PRIORITY

## PRIORITY DESCRIPTION

## KEY TACTICS

## 2025 MEASUREMENT



### 1 SUSTAINABLE, RELIABLE SUPPLY

SUSTAINABLY AND PROFITABLY INCREASE CANOLA PRODUCTION IN CANADA TO MEET GLOBAL DEMAND FOR 26 MMT OF CANADIAN CANOLA BY INCREASING YIELD TO AN AVERAGE OF 52 BU/ACRE. IMPROVE QUALITY CHARACTERISTICS OF SEED, OIL AND MEAL TO MEET NEW AND EXISTING CUSTOMER REQUIREMENTS.

Develop and implement a collaborative research and development strategy that ensures leading edge, adequately resourced research to support the growth and contribution of the canola industry.

Set a new standard in science-based technology transfer to growers and industry partners that optimizes the full genetic potential of canola in a sustainable, profitable manner.

Use a coordinated, targeted approach to deliver canola innovation to the appropriate audience at the correct time.

Utilize science and innovation to identify and promulgate the best sustainability practices and measurements.

52 BU/Acre

22 Million Acres = 26 MMT

Oil Quality:

- 1/3 High Oleic and Specialty Oil Acres
- 7% or Lower Saturated Fat

Meal Quality:

- Increase protein availability by target species



### 2 DIFFERENTIATED VALUE

MEET GLOBAL DEMAND OF 26 MMT BY DIFFERENTIATING AND DEMONSTRATING THE QUALITY CHARACTERISTICS OF SEED, OIL AND MEAL TO MEET NEW AND EXISTING CUSTOMER REQUIREMENTS AT A COMPETITIVE PRICE.

Develop a targeted country and customer approach to align canola's functional attributes with customer requirements.

- Key Markets: Conduct research, develop and implement a country-specific marketing plan, based on product differentiation, in order to maintain and expand key markets
- Secondary Markets: Conduct research, develop and implement marketing strategies in other countries with potential for growth
- Tertiary Markets: Conduct research on market potential

Expand the profile of canola oil as a superior, healthy oil in key markets.

Bioproducts: Determine biofuel and new product opportunities to expand the demand for canola.

26 MMT of demand

Increase share in key markets for vegetable oil by 1% per year

Increase secondary markets to represent 20% of demand

Increase meal value to narrow value gap between oil and meal



### 3 STABLE AND OPEN TRADE

CREATING A COMPETITIVE, STABLE AND OPEN TRADE ENVIRONMENT WHICH CONSISTENTLY ALLOWS THE INDUSTRY TO ATTAIN THE MAXIMUM VALUE FOR CANOLA AND ITS PRODUCTS FREE OF TARIFF AND NON-TARIFF TRADE BARRIERS.

Promote science based, risk appropriate solutions to ensure a competitive operating environment.

Pursue trade policy initiatives with governments that will promote reliable, competitive and open market access.

Work with governments to increase use of canola products in alternative markets.

Ensure government officials are informed of canola priorities and canola's value proposition so that they make decisions that are conducive to sustained profitability in the canola industry.


Positive trade environment in top markets

Market access issues are dealt with efficiently and effectively

Canola priorities are reflected in governmental policy and process

Governments in major markets appreciate the contribution of canola to food quality and security

No trade impediments resulting from non-science based regulation



MORE CANOLA,  
STRONGER ECONOMY,  
BETTER BUSINESS,  
MORE JOBS,  
HAPPIER HOMES,  
**MORE FAMILY DINNERS.**

IT'S AMAZING WHAT ONE MORE BUSHEL OF CANADIAN CANOLA CAN DO.



KEEP IT COMING

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