MOVING FORWARD
FROM ADVERSITY TO OPPORTUNITY
THE YEAR AT A GLANCE

In 2022, Canadian canola was able to move beyond the tough challenges of recent years and toward new possibilities.

- Rebound in yields
- Big expansions planned in domestic processing
- New pathways opening to growing biofuel markets
- Resolution of some key export issues
- Focus on new markets
- Renewed commitment to innovation
<table>
<thead>
<tr>
<th></th>
<th>2022 RESULTS</th>
<th>2025 TARGET</th>
<th>3-YR AVERAGE (2019-2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exported Seed</td>
<td>5.7 MMT(^1)</td>
<td>12 MMT</td>
<td>9.5 MMT</td>
</tr>
<tr>
<td>Domestic Processing</td>
<td>8.8 MMT</td>
<td>14 MMT</td>
<td>9.9 MMT</td>
</tr>
<tr>
<td>Acres (seeded area)</td>
<td>21.4 million</td>
<td>22 million</td>
<td>21.4 million</td>
</tr>
<tr>
<td>Yield</td>
<td>37.7 bu/acre</td>
<td>52 bu/acre</td>
<td>37 bu/acre</td>
</tr>
<tr>
<td>Production</td>
<td>18.2 MMT</td>
<td>26 MMT</td>
<td>17.7 MMT</td>
</tr>
<tr>
<td>Oil Content (average of No. 1 Grade)</td>
<td>42.1(^2)</td>
<td>Maintain global competitiveness in oil content (10 yr average = 44.0%)</td>
<td>43.3(^2)</td>
</tr>
<tr>
<td>Saturated Fat Content</td>
<td>6.8(^2)</td>
<td>Global leadership position in oil saturated fat content</td>
<td>6.7(^2)</td>
</tr>
<tr>
<td>Meal Crude Protein Content (oil-free, 12% moisture basis)</td>
<td>39.8(^1)</td>
<td>Increase protein availability by target species (10 yr average = 38.6%)</td>
<td>39.6(^2)</td>
</tr>
</tbody>
</table>

\(^1\) Based on preliminary Canadian Grain Commission data
\(^2\) Canadian Grain Commission

MMT = Million Metric Tonnes
All statistics are for 2022 calendar year.

**STRATEGIC PRIORITIES**

We move forward guided by the three strategic priorities of the industry’s Keep it Coming 2025 strategic plan:

**SUSTAINABLE, RELIABLE SUPPLY**
Meeting growing global demand for Canadian canola while increasing the economic and environmental benefits of every acre

**DIFFERENTIATED VALUE**
Demonstrating the quality characteristics of canola seed, oil and meal

**STABLE AND OPEN TRADE**
Creating a trade environment that allows the industry to attain maximum value for canola

**OUR 2025 SUSTAINABILITY GOALS**

- **18% REDUCTION** in fuel use/bushel
- **40% DECREASE** in land needed to produce 1 tonne of canola
- **5 MILLION TONNE INCREASE** in soil carbon sequestration each year
- **4R NUTRIENT STEWARDSHIP** practices utilized on 90% of canola acres
- **SAFEGUARDING 2,000+** species of beneficial insects that call canola fields and surrounding habitat home
PARTNERSHIP ACROSS THE VALUE CHAIN

2022 BOARD OF DIRECTORS

NOMINATED BY CANOLA GROWER ASSOCIATIONS

Charlene Bradley
SaskCanola

Charles Fossay
Manitoba Canola Growers Association

Bernie McClean
Canadian Canola Growers Association

Justin Nanninga
Alberta Canola

NOMINATED BY THE WESTERN GRAIN ELEVATOR ASSOCIATION

Michael Irons
Archer Daniels Midland Company
CCC vice chair

Ryan Law
Bunge

Tracy Lussier
Louis Dreyfus Company

Jeff Pleskach
Cargill Ltd.

NOMINATED BY THE CANADIAN OILSEED PROCESSORS ASSOCIATION

Jarrett Beatty
Parrish & Heimbecker
CCC second vice chair

Jennifer Marchand
Cargill Ltd.
CCC chair

Tessa Ritter
Viterra

Trevor Veenendaal
G3 Canada Limited

NOMINATED BY LIFE SCIENCE COMPANIES

David Kelner
Bayer Crop Science
CCC finance and planning chair

Garth Hodges
BASF

Ryan McCann
Nutrien Ag. Solutions Canada Inc.
**OUR 2022 CORE FUNDERS**

![Logos of various organizations]

**OUR 2022 FINANCIAL SNAPSHOT**

**WHERE OUR CORE FUNDING COMES FROM**

- **46.5%**
  - Provincial Grower Groups Assessment
  - $1,802,500
- **33.5%**
  - Exporters and Processors Assessment
  - $1,298,500
- **19.3%**
  - Life Science Companies Assessment
  - $750,000
- **0.7%**
  - Regular and Affiliate Memberships
  - $28,500

**HOW IT’S ALLOCATED**

- **41.9%**
  - Sustainable Supply
  - $2,599,300
- **32.8%**
  - Industry Leadership
  - $2,032,875
- **17.7%**
  - Public Affairs and Competitiveness
  - $1,098,875
- **7.6%**
  - Utilization
  - $472,525

1Based on the CCC 2022 budget

- **Industry leadership** - includes association management, convening the board and membership, communications, government advocacy, and finance and administration
- **Sustainable supply** - includes canola production and innovation, and canola research
- **Public affairs and competitiveness** - includes market access, trade policy and government advocacy
- **Utilization** - includes global canola brand maintenance and targeted promotion to export markets

Detailed financial reports can be viewed on our website: [canolacouncil.org/about-us/financial-reports](http://canolacouncil.org/about-us/financial-reports)
PROMOTING A TEAM APPROACH TO RESEARCH

A central role of the CCC is to convene and mobilize the full value chain around important challenges and opportunities. In 2022, innovation and research were a key focus.

REFRESHED INNOVATION STRATEGY

In March, the CCC released an updated Canola Innovation Strategy outlining research and development priorities for the years ahead. It provides an aligned vision, from farm to customer, for near-term innovations that will empower canola to do even more for our economy and environment.

The strategy was developed through in-depth consultations with grower organizations and companies along the value chain. The four key pillars to achieve our objectives are:

- **Performance**: Increasing productivity; meeting current and future customer needs; remaining a top crop for Canadian growers; sequestering more carbon in the soil; reducing greenhouse gas emissions; contributing to biodiversity
- **Precision**: Using current and new field tools and technologies to increase productivity and further reduce canola’s environmental footprint
- **Protection**: Protecting the crop from threats to productivity, including pests and climate change factors, while also protecting markets
- **Product**: Ensuring reliable supply to current customers while adapting to changing market demands for food, feed and fuel

PRIORITY
SUSTAINABLE, RELIABLE SUPPLY

With so many opportunities ahead, our biggest challenge moving forward will be meeting market demand.

In 2022, we planted the seeds of many new possibilities. Together, we’ll reap the rewards.
In 2022, the Clubroot Steering Committee achieved consensus on a plan to label clubroot resistance based on reaction to pathotypes 3A, 3D and 3H. All breeding companies will collaborate with common inoculum and procedures as they work toward an expected launch of new labels at the end of 2024.

The Sclerotinia Stem Rot Steering Committee has also been developing a universal label for all sclerotinia control technologies, whether fungicide, resistance, biological or other method.

These advances are building on past progress in cooperative labelling standards for resistance to blackleg and pod shatter. An evaluation scale for assessing verticillium stripe severity is being considered at the Western Canadian Canola/Rapeseed Recommending Committee for possible use in 2023.

With more than 50 speakers, Canola Week was a unique opportunity to align research priorities and plans to build on the cutting-edge canola research now underway.

The annual Canola Digest Science Edition has become a must-read for growers and agronomists following the latest research findings. In 2022, the Science Edition won a Canadian Agri-Food Marketers Alliance “Best of CAMA” gold award.
A growing toolkit of CCC resources at canolacouncil.org to improve yields and profitability

- Agronomy guides
- Canola Calculator tools to optimize seeding, harvest and more
- Canola Encyclopedia, the comprehensive canola growing manual
- Canola Watch e-mail updates
- Webinars and podcasts
- YouTube channel
- Canola Watch exam for Certified Crop Advisors and Certified Crop Science Consultants
- Canola Digest magazine
- Canola Research Hub

This year proved once again how resilient our crop has become. After the devastating drought of 2021, canola production returned to normal levels in 2022, despite less-than-ideal conditions in many areas. Moving forward, our challenge is to build on the potential of these genetics as we aim for our target of 26 million metric tonnes (MMT).

GETTING MORE VALUE FROM NITROGEN FERTILIZER

CANOLA 4R ADVANTAGE

In 2022, the CCC was selected as one of 12 partners across Canada to deliver the federal government’s On-Farm Climate Action Fund (OFCAF). By August, we were ready to launch Canola 4R Advantage, a program providing up to $12,000 per farm per year when canola growers initiate or advance use of 4R Nutrient Stewardship practices.

Canola 4R Advantage is focused on four best management practices: soil testing, enhanced efficiency fertilizers, preferred application and field zone mapping. All are effective ways to support return on nitrogen investments and were selected with guidance from the CCC-led Fertility Steering Committee.

To participate in Canola 4R Advantage, growers must have a 4R Nutrient Stewardship Plan verified by a 4R designated agronomist. In this way, the program promotes the value of expert advice and encourages agronomists across the Prairies to earn their 4R designation through Fertilizer Canada.

MOVING FORWARD WITH 4R NUTRIENT MANAGEMENT IN 2022

85% OF ELIGIBLE COSTS covered through Canola 4R Advantage to expand use of 4R practices

45% MORE AGRONOMISTS seeking 4R designation through Fertilizer Canada

54% OF CANOLA ACRES in Western Canada following basic 4R principles in 2021, up 10% from 2020
GROWING OPPORTUNITIES AS PROCESSING EXPANDS

In 2022, optimism about future canola demand led to exciting plans for canola processing growth in Western Canada. For farmers, these new and expanded plants mean more opportunity to sell directly into a larger domestic market that will be less vulnerable to global disruptions than our export markets.

We expect this development to create more interest in canola among growers in the brown soil zone of southern Saskatchewan and Alberta. Because this area is more prone to drought and high temperatures, it hasn’t been a traditional canola growing area. But with the right knowledge and research investment, canola could become part of a sustainable, profitable crop rotation in this zone.

This new opportunity was a topic of interest at the 2022 Canola Week discussions, and will be a focus of our agronomy specialists in the years ahead.

CONNECTING WITH GROWERS AND AGRONOMISTS

In August, we conducted a survey of 330 agronomy providers from across the Prairies to gauge their views on canola best management practices. They told us that the top agronomic risks for canola growers over the next five years are herbicide-resistant weeds and increased insect pressure. When asked about opportunities to improve agronomic practices, nutrient management and plant establishment were the most common themes.

Respondents also showed good alignment with key best practices including targeting plant stands of five to eight plants per square foot, and swath timing once main stems show at least 60 per cent seed colour change.

In a post-growing season survey, we also checked in with 500 canola growers to measure their progress using canola best management practices.

This feedback will help to shape our knowledge transfer programs as we move forward.
Pursuing Potential in the Indo-Pacific

Joint Advocacy for Action
To realize the tremendous potential to expand trade in the Indo-Pacific, the CCC joined forces with other value chain organizations to encourage a more strategic, coordinated approach to growing and diversifying exports to the region.

With Cereals Canada and Pulse Canada, we jointly commissioned a report on the market access constraints for agri-food exports into the Indo-Pacific region, as well as the policies and support services designed to address them.

This in-depth analysis put forth several recommendations to strengthen government-to-government engagement, regulatory, trade and technical capacity-building and diplomacy. We engaged in extensive outreach which included presentation of this report to the House of Commons Standing Committee on International Trade in June.

We also called on the federal government to provide more investment through the Next Policy Framework for activities that help sustain market access, market development and industry-to-industry advocacy.

New In-Market Resources
Near the end of 2022, we were pleased to see the establishment of a new Indo-Pacific Agriculture and Agri-Food Office as part of the federal government's Indo-Pacific Strategy. New resources to tackle market access issues in a strategic, coordinated manner with industry, can strengthen Canada's position and help the canola sector's growth and competitiveness in the region.

4 Reasons to Focus on the Indo-Pacific

40% of Canada’s canola seed, oil and meal exports are consumed there today

40 economies make up the region, including major canola buyers like China and Japan, and important emerging customers such as South Korea, Thailand and Vietnam

4 billion people live there, and the middle class in Asia is expected to double from 2015 levels by 2025

$47.19 trillion in economic activity make it the fastest-growing economic region in the world

Priority
Stable, Open Trade
Pandemic restrictions, global tensions and supply chain issues have intensified recent market access concerns. Progress in 2022 helped to forge the path ahead.
KEEP IT CLEAN

2022 marked the sixth year of partnership with Pulse Canada, Cereals Canada and the Prairie Oat Growers Association to present Keep it Clean, an annual information campaign to help growers avoid unacceptable product residues and potential market risk. Every year, keepitclean.ca provides a complete, one-stop source of information to protect the marketability of Canada’s canola, cereal and pulse crops.

Prior to seeding, the campaign focused on management of crop protection products that could create market risk. Near harvest, the focus shifted to pre-harvest intervals (PHIs), pre-harvest glyphosate application timing and scouting for blackleg. Growers, agronomists, agri-retailers and other industry members were provided with timely tips and tools via webinars, e-newsletters, videos, articles, social media, and print and digital ads.

MOVING FORWARD TO AVOID MARKET RISK IN 2022

385 Growers, agronomists and other industry members tuned into Keep it Clean webinars

2,012 Certified crop advisors received information on digital tools available at keepitclean.ca/tools, including the pre-harvest glyphosate staging guide, product advisory and spray to swath interval calculator

90% of growers feel it’s important for farmers to consider export standards when growing and handling their crops

RENEWING TRADE RELATIONSHIPS WITH CHINA

REINSTATED ACCESS FOR CANOLA SEED EXPORTERS

In May 2022, trade relations with China took a positive step forward with removal of restrictions for two Canadian canola seed exporters. Throughout three long years of market disruption, the CCC worked closely with government officials on this issue. We will continue efforts to nurture and maintain a predictable, rules-based trade environment.

AVOIDING PREVENTABLE BARRIERS TO TRADE

CANADA’S READY CAMPAIGN

After the severe drought and low returns of 2021, the harvest of 2022 was regarded as the most important in a generation. However, many agriculture industry partners – including the CCC and CCGA – recognized that supply chain issues might stand in the way of delivering 2022 crops to market in the optimum timeframe.

To send a strong message to policymakers and supply chain participants, a coalition of industry partners launched a new campaign outlining a four-point plan to ensure Canadian agricultural products could make it to market. Using the “Canada’s Ready” banner, the campaign emphasized that farmers, processors and exporters were ready to step up and deliver – provided all supply chain participants did their part.

SUSTAINED OUTREACH AMID DIFFICULTIES

In anticipation of a return to more normal trade, the CCC has continued to help the value chain build positive connections with Chinese canola buyers. Exports of oil and meal were well above long-term averages – an encouraging sign that demand for canola remains strong in this market.

The rallying point was canadasready.ca, where supporters were encouraged to add their voice by posting videos and sharing social media infographics.

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MOVING FORWARD FROM ADVERSITY TO OPPORTUNITY
SEEKING THE RIGHT POLICIES HERE AT HOME

Canola’s success is driven by continuous innovation and evolution to meet the ever-changing needs of the global marketplace. To preserve canola’s competitiveness, we seek to advocate for domestic policies and regulatory decisions that will help our ability to supply the world with reliable, sustainable, high-value products.

NITROGEN USE

For decades, Canadian farmers have been leaders in adopting practices that help to reduce greenhouse gas emissions while increasing farm productivity and profitability. Our environmental record is one reason why canola is an ideal feedstock for the low-carbon biofuels market.

To maintain this balance, it’s important that Canadian government policymakers recognize the need for a practical approach to reducing nitrous oxide emissions from nitrogen fertilizers. Science has shown there is no one-size-fits-all solution.

There was renewed urgency to share this message in March 2022, as Agriculture and Agri-Food Canada (AAFC) released a discussion paper on fertilizer emission reductions as part of the federal government’s voluntary target of reducing nitrous oxide emissions by 30 per cent below 2020 levels by 2030.

The CCC and Canadian Canola Growers Association (CCGA) worked collaboratively to gather and share key information with those who make and influence these federal policies.

- In April, we participated in an AAFC town hall, highlighting the importance of nitrogen fertilizer to canola production and voicing the need for reliable data to accurately measure fertilizer emissions and progress.
- In May, we appeared before the House of Commons Standing Committee on Agriculture and Agri-Food as part of the committee’s study on the environmental contribution of agriculture. CCC president Jim Everson provided an overview of the industry’s leadership on sustainability and opportunities for the canola industry to help reduce emissions across other sectors, including through biofuels.
- In August, we submitted a joint response with CCGA to the AAFC discussion paper on fertilizer emissions. Informed by input from provincial canola grower commissions, the submission provided important feedback on best management practices, technology adoption and other challenges and considerations.

In September, the CCC and Fertilizer Canada released a jointly-commissioned report showing that more intensive use of 4R Nutrient Stewardship principles can reduce fertilizer-related GHG emissions by 14 per cent without jeopardizing yields. By examining three scenarios for major cropping systems across Canada, the report helped underscore the need to work collaboratively with farmers and industry across regions to ensure farmers have the flexibility and support to use the practices best suited to their farms.
ADVOCATING FOR CANOLA ON PARLIAMENT HILL

In November, the CCC board of directors were in Ottawa for canola’s first in-person lobby day since before the pandemic. During meetings with parliamentarians, political staff and senior civil servants, the board advanced value chain priorities, including fertilizer and sustainability, international trade and market access, and a competitive and innovative regulatory environment. The day concluded with a successful parliamentary reception co-hosted with CCGA.

PESTICIDE REGULATION

A science-based approach to pesticide regulation is essential for efficient, responsible canola production. The CCC strives to ensure that any changes to Canada’s system will strengthen our ability to keep pace with technological advances and base regulatory decisions on sound, scientific evidence.

In 2022, in response to Health Canada’s discussion paper on possible changes to the Pest Control Products Act, we put forward a submission saying that the Act is fit for purpose and that improvements can be achieved through policy, regulatory or administrative levers.

We also called attention to the shortage of capacity within the Pest Management Regulatory Agency (PMRA). In pre-budget consultations, we requested a permanent increase to PMRA’s base budget so the agency can address, in a timely fashion, the needs of industry and make decisions based on the best possible science.

SEED INNOVATION

This year, the CCC acted on two important opportunities to help shape Canada’s approach to seed development and regulation.

In June, we responded to the federal consultation on development of a new Pan-Canadian Genomics Strategy. This could be a significant opportunity to encourage investments in the genomic research priorities outlined in the new Canola Innovation Strategy.

In collaboration with Seeds Canada and other industry partners, we also co-sponsored the 2022 Seed Summit, a series of free virtual discussions aimed at supporting and increasing understanding of seed system needs as part of the seed regulatory modernization initiative.
The CCC has been working with partners on both sides of the Canada-U.S. border to leverage these advantages and lay the groundwork for successful diversification into this growing sector. In 2022, we were happy to see two important doors opening.

**U.S. BIOFUEL MARKET**

In November, the U.S. Environmental Protection Agency (EPA) announced that renewable diesel, sustainable aviation fuel and other biofuels made from canola oil will qualify as “advanced biofuels” under the U.S. Renewable Fuel Standard program. This gives canola oil a pathway into the U.S. market.

It’s a gratifying outcome after years of outreach to the EPA in coordination with the Canadian Oilseed Processors Association (COPA) and the U.S. Canola Association. Canola is now on a level playing field with other oilseeds competing for a share of this U.S. market.

**CANADIAN BIOFUEL MARKET**

In July, we were pleased to see canola growers’ sustainable farm practices recognized in Canada’s new Clean Fuel Regulations. These regulations have been a top advocacy priority for the CCC, COPA and CCGA, and bode well for canola to become the feedstock of choice for Canadian biofuel production. When incorporated into the Canadian Fuel Regulations, canola-based biofuels could potentially reduce GHGs by 3.5 megatonnes.¹

¹Assuming 5% canola-based biofuel content in diesel fuel
BUILDING UNDERSTANDING AMONG CUSTOMERS AND INFLUENCERS

ENGAGING WITH KEY CANOLA CUSTOMERS

Reduced canola production in 2021 limited our ability to export to some countries, but throughout this period the CCC kept lines of communication open with buyers. Our outreach to customers included:

- Continuing a series of meetings with processors in Mexico, consistently a top importer of Canadian canola seed
- Engaging with 12 vegetable oil buyers in South Korea, our fourth largest oil market
- Interacting with members of China’s oil and livestock feed sectors through webinars as well as a virtual presentation to over 700 attendees at China’s third global oil and oilseed summit
- Meeting with the sole canola buyer in Dubai, UAE

CONSUMER INFLUENCERS

With partners like the American Heart Association, Canolainfo continued to monitor important food industry topics and share canola information with credible influencers in the health, nutrition and food sectors. Activities in 2022 included participating in the American Heart Association’s Industry Nutrition Forum for food industry leaders and nutrition scientists, and co-hosting a Facebook Live event on canola oil for 100 health professionals in partnership with the Association of Nutrition Schools in Mexico.

Canolainfo dispelled misinformation while exhibiting at the Food & Nutrition Conference and Expo. The event attracted commodity groups, health associations, consumer packaged good companies and food service suppliers.

PROMOTING CANOLA MEAL ADVANTAGES

As canola oil demand grows, it’s more important than ever to ensure canola meal is properly valued as a feed ingredient by the world’s growing livestock and aquaculture markets.

An abundance of research has shown canola meal is a source of high-quality protein that supports high levels of livestock production and new research is showing canola meal helps to reduce methane emissions in dairy herds. In 2022, we brought these messages to feed and livestock producers in our most promising meal markets.

During a trade visit to Indonesia, the Philippines, Vietnam and Thailand, the CCC team extended information to feed mills, feed associations and top dairy producing companies.

In China, we hosted two canola meal webinars reaching more than 140 professionals from leading dairy and feed companies. The CCC team also met in Canada with members of Mingsui Grains & Oils Trading Co., Ltd., a significant buyer of Canadian canola meal, mainly for distribution to China’s aquaculture industry.

At California’s Dairy Sustainability Summit, Canolamazing shared information via a virtual booth on canola meal’s ability to reduce enteric emissions – a highly relevant finding in a state under significant regulatory pressure to reduce methane emissions.

At the Animal Nutrition Conference of Canada in Saskatoon, Dr. Chaouki Benchaar of AAFC Sherbooke presented his research on canola meal in dairy diets.
INNOVATIVE. SUSTAINABLE. RESILIENT.
Creating superior value for a healthier world.