



ANNUAL REPORT

2021-2022



Executive Director & Chair Message



Brian Innes
Executive Director

From the Executive Director's desk:

I'm humbled by the year we've lived since I joined Soy Canada in May 2021. Building on our first seven years continues an important journey of bringing the value chain together and connecting with our customers. Our report outlines just a few of the ways we're delivering value for members and the soybean industry through leadership and collaboration. From our Northern Soybean Summit on the expansion and quality of northern soybeans to our inaugural market access committee meeting on pesticide and seed technology, we brought together all aspects of the industry to create value through collaboration. We connected our industry with hundreds of customers in Japan and Southeast Asia through online seminars, launching a modernized food-grade variety finder that promotes our world leading genetics. And we kept soybean priorities front and centre with political leadership through our advocacy on container service and biofuel. I'm excited for our journey to continue.

Brian Innes
Executive Director



Jason McNaughton
Chair

From the Chairperson's desk:

Our industry always finds a way, with the past year buoyed by continued resilience and strong prices. The 2021 soybean growing season was a record for some while a test for others. In Eastern Canada, production was strong on the back of record yields in Ontario with a wet October creating a challenging harvest for growers and exporters. In Western Canada, a drought reduced production of all crops. As a sector, our seed companies, processors and exporters also found a way to succeed despite continued Covid-19 related supply chain challenges and a global shipping crisis that confronted our exporters shipping in containers. Amidst all of this, the continued importance of Soy Canada providing leadership and value to all those participating was clear. We have a proud past, and after coming together more in the last year than ever before, we have lots of growth ahead.

Jason McNaughton
Chair

Our Goals & Strategic Priorities



Double production in the next decade

	2016	2021 results	2027 target
Total seeded acres	5,467,100	5,321,000	10,000,000
Eastern Canada	3,592,100	3,919,000	4,000,000
Western Canada	1,875,000	1,402,000	6,000,000
Yield (bushels/acre)	44.1	43.7	48.2
Eastern Canada	46.1	49.8	53
Western Canada	40.1	26.8	45



Build on Canadian soybeans' contribution to natural capital

- Improve the natural environment that supports our industry
- Be recognized in Canada and around the world as a global leader in sustainable production of high-quality soybeans



Increase world-leading high-quality food grade production by 25%

	2016	2021 results	2027 target
Food grade production (tonnes)	1,250,000	1,302,000	1,800,000
Food grade seeded acres	1,000,000	1,037,000	1,250,000



Increase competitiveness, exports and processing of commodity soybeans

	2016	2021 results	2027 target
Eastern Canada protein (13% moisture)	40.6% (35.3%)	40.3% (35.1%)	41.1% (36%)
Western Canada protein (13% moisture)	38.7% (33.7%)	36.0% (31.3%)	40.2% (35%)
Whole soybean exports (tonnes)	4,500,000	4,373,000	10,500,000
Domestic processing (tonnes)	1,878,000	1,649,000	2,500,000

Our Board

Soy Canada is governed by a board of directors made up of **representatives from across the country and the value chain.**

 **Jason McNaughton**
Chair

 **Scott Persall**

 **Crosby Devitt**

 **Jeff Loessin**
Vice-Chair

 **Winston Van Staveren**

 **Ramzy Yelda**

 **Mark Jorgensen**

 **Jeff Stonehouse**

 **Melvin Rattai**
Secretary-Treasurer

 **Ernie Sirski**

Our Members





PRIORITY

Industry Leadership



When issues or opportunity arise where the value chain needs to come together, Soy Canada is there to **provide leadership and a voice for Canadian soybeans.**

Advocating for industry-wide priorities in Ottawa

As the Canadian Clean Fuel Regulations were developed, we worked to enable demand for biofuel made from soybean oil. Alongside partners such as the les Producteurs de grains du Québec, Grain Farmers of Ontario, the Canadian Oilseed Processors Association and the Canola Council, we ensured that Canadian soybeans will be a competitive feedstock for biofuels and advocated so that producers can easily take advantage of this market opportunity.

As a contributing member of the Canada Grains Council, we worked with partners to advance our common interests in seed and crop protection policy. This included submissions on the Government of Canada’s proposals to modernize how plant breeding innovations like gene editing are regulated and being an active participant in the Pest Management Regulatory Agency’s transformation agenda.

The source of information on Canadian soybeans

Keeping members and other interested stakeholders informed about the latest on Canadian soybeans remained a top priority. In addition to dozens of targeted member meetings, our monthly member newsletter was reborn to help members stay up to date on the latest affecting the Canadian soybean industry. Our websites continued to be a hub for both domestic and international customers looking for information about Canadian soybeans and to

connect with suppliers. In 2021 we had more than 15,000 visitors to our website and more than 3,200 visitors to our soybean buyer’s product portal that resulted in 267 trade leads for members.

Challenge: Mobilizing to improve poor container service



Poor service from international container shipping lines continued to be a major challenge in 2021. As an issue affecting many shippers, we joined a coalition with others like Pulse Canada to amplify our voice and advocate for action. Hundreds of letters were sent to political leaders, numerous meetings were held with government officials and politicians, and we were part of a Transportation Summit with five federal ministers to explain how poor container service is hurting the industry. Our multipronged strategy that advances structural solutions to improve service continues.



Market Access & Trade Policy

With **70% of production exported to over 60 countries every year**, working to prevent issues and support predictable and competitive trade rules is vitally important for the value chain.

Managing market access issues

We kept a close watch on possible issues and maintained regular contact with Government of Canada representatives on current issues such as China’s facility registration requirement, ongoing restrictions on bulk shipments to Vietnam as well as Japanese GM labelling requirements.

Where there were cross-commodity issues of interest, we worked alongside the Canada Grains Council to identify and advance solutions with government. This was the case with India’s order to certify shipments as non-GMO, as well as proposed GM and gene-edited regulations from India and China.

European Union

The European Union is an important market for Canadian soy, representing 19% of the 2021 exports. Throughout the year, we monitored proposed changes to pesticides, labelling and deforestation policy that could impact market access. We contributed to the Canada-EU biotech dialogue with industry partners, proposing solutions to improve the predictability of the GM approval process.

Bi-lateral trade agreements

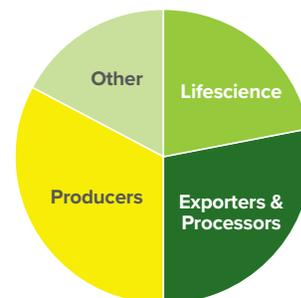
Trade policy continued to evolve in 2021 with the Government of Canada advancing trade agreement negotiations with the United Kingdom, India, the Association of Southeast Asian Nations as well as Indonesia.

With trade diversification and improved market access being important priorities, we provided our input into government negotiators so that the agreements can provide meaningful market access opportunities.

Enabling innovation in crop protection and seed

In 2021 we hosted our first joint Market Access Committee meeting that brought together the whole value chain to proactively prevent market access issues related to pesticides and seed innovation. Working with the Grain Farmers of Ontario, we covered both corn and soybeans. The committee evaluated the residue profile of 11 new pesticide ingredients and reviewed potential trade risks. The status of market acceptance for new biotech and gene-edited seed traits in key markets was also reviewed.

Participants came from across the value chain to the market access committee to promote innovation and maintain market access



Building Demand for Canadian Soybeans



For over 30 years, the Canadian soybean industry has built a reputation for high quality and traceability. Our work continues as opportunities emerge with growing populations, increased demand for feed and a growing demand for plant-based diets.

Expanding market diversification

Soy Canada continues to connect with international customers to share the advantages of using Canadian soybeans. We pivoted from in-person to virtual events this year, connecting with over 400 participants from Japan and throughout Asia by hosting two seminars and participating in two webinars. Our efforts allowed us to maintain contact with customers and highlight the quality, traceability and sustainability of our soybeans. In addition to our events, we helped our exporter members connect directly in more than 35 meetings with customers from Vietnam and Malaysia.

Value chain communication

Our market development activities engaged all segments of the value chain. Seed companies and producer representatives heard directly from exporters what customers are looking for, and our producer representatives shared directly with customers how their on-farm efforts contribute to Canada's reputation for quality and sustainability. For example, Steve Twynstra, a producer from Ailsa Craig, Ontario presented at our seminars about how his agronomy and management help him produce top-quality soybeans.

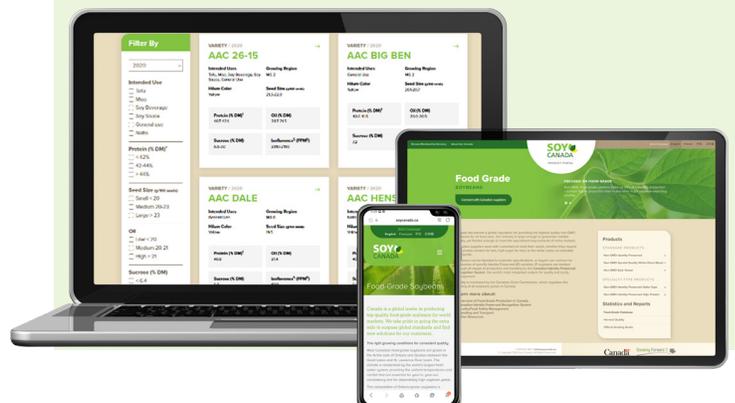
Delivering sustainable Canadian soy

As customer interest increases, having a sustainability program is becoming more important. Building on previous discussions, we charted a path to implement a voluntary program to deliver verified sustainable soybeans to our customers. We launched a discussion paper on how we can implement a sustainability system and held consultations across the value chain. Our work continues as we implement a program that meets market needs and those of our value chain.

Highlighting Canadian quality

To showcase our world leading food-grade soybean varieties, a new food-grade variety finder was developed and added to the Soy Canada website. This allows users to find varieties based on key quality characteristics such as protein content and those best suited for tofu or other uses. With our first phase now complete, we'll continue to expand it to include varieties grown across the country.

visit buycanadiansoybeans.ca



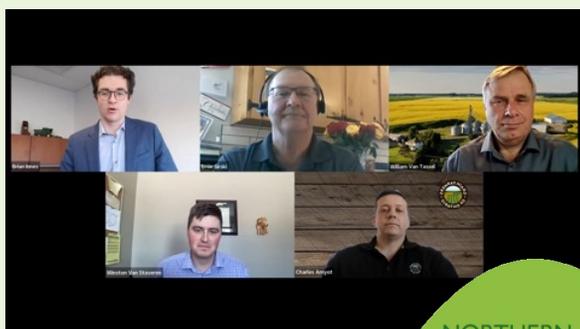
Coordinate Research & Innovation



With a diverse country, a diverse value chain, and a soybean industry that now extends from the Atlantic Ocean to the Rocky Mountains, **Soy Canada coordinates research and innovation efforts to grow our industry and compete with the best in the world.**

Driving focus at the Northern Soybean Summit

Getting the most from our significant private, grower and public investment in seed genetics and research, drives Soy Canada to coordinate the industry. In support of the Field Crop Research Alliance, we delivered a Northern Soybean Summit to bring awareness of national research priorities, ongoing research, and to bring focus to what's needed for the expansion and quality of northern and western Canadian soybeans. With nearly 200 participants from across the value chain, as well other stakeholders like government and universities, the event provided an open window into our research priorities. Members and participants also valued the opportunity to have candid discussions about producing and marketing western Canadian soybeans, enabling all aspects of the value chain to make better informed decisions on how soybeans can add value to their business.



Food-type research at Harrow

Collaborative research between Agriculture and Agri-food Canada's Harrow Research Centre became a Soy Canada project in 2017 but has been around since 1997. The research lab provides quality data about Canadian food grade soybean varieties for Soy Canada members. They conduct research and monitor seed composition as well as processing performance for tofu and soymilk. In 2021 we continued to support the program under the new leadership of Eric Fedosejevs so that it remains an asset for our industry.

Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada		Harrow Research & Development Centre, Harrow, Ontario		SOYMILK & TOFU ANALYSIS	
Variety: Harovinton, Standard (2020 Crop)		Company: Harrow RDC		Sample Contains 125 g Dry Matter Protein	
Lab ID: C200094				Water : Protein Ratio 18:1	
				Seeds were soaked for 22 hours at 13° C	
Raw Bean					
Physical Characteristics			Composition on dry matter (DM) basis *		
Moisture	9.5 %		Protein	45.0 %	
Sample Weight	306.7 g		Oil	19.4 %	
Dry Matter (DM)	277.5 g		Total Free Sugars	10.9 %	
Seed Size (DM basis)	19.89 g/100 Seed		Sucrose	6.0 %	
Water Uptake Factor (as-is)	2.29 g/g bean		Stachyose	4.9 %	
Water Uptake Factor (DM basis)	2.49 g/g bean		Total Carbohydrates	17.5 %	
HunterLab Colour			Total Isoflavones 2130 µg/g		
L	54.96	a 7.23 b 19.71	Daidzein 830 µg/g		
Whiteness Index	-156.05		Genistein 1170 µg/g		
			115:75 Protein Ratio 1.5		
* To convert to 13% moisture basis, multiply by 0.87 (except 115:75).					
Soymilk					
Yield (Protein basis) 16.44 L/kg			Composition (w/v)		
Yield (DM basis) 7.41 L/kg			Protein 5.06 %		
pH 6.58			Oil 2.12 %		
Viscosity 4.35 cP			Total Free Sugars 1.30 %		
			Solids 10.23 %		
HunterLab Colour			Refractive Index 9.75 ° Brix		
L	85.18	a 0.57 b 14.28	Specific Gravity 1.02		
Whiteness Index	-7.16		Protein Recovery 83.20 %		
Tofu					
		Yield (kg tofu/kg)		Texture / Compression	
Coagulant	Whey Vol. (ml)	Protein basis	DM Bean basis	Hardness, break, (N)	Firmness (N/mm) Springiness
GDL	6.3	16.41	7.39	1.58	0.29 0.82
CaSO ₄	2.3	16.54	7.45	0.91	0.18 0.66
MgCl ₂	16.1	16.16	7.28	0.78	0.17 0.61
Comments:					
<small>Analyses were conducted following procedures in Mullin et al. 2001. Food Research International 34: 669-677 and using NIR calibrations provided by the instrument manufacturer or developed at Harrow RDC. The data is provided without warranty, express or implied, of fitness for any particular purpose. Please refer to the accompanying pdf document 'Soymilk & Tofu Analysis - Guide to Interpreting Results' for more information on the test.</small>					
Supported by:					



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