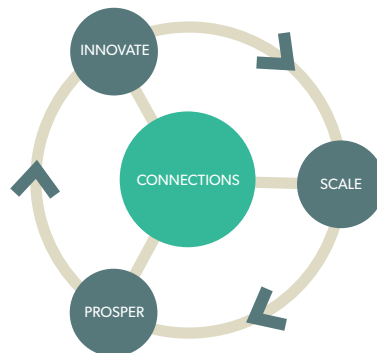


SECTOR ROADMAP 2035

Creating a roadmap for Canada's Plant-based Food, Feed and Ingredient Ecosystem



SECTOR ROADMAP DIALOGUE SESSIONS

Protein Industries Canada continues to work on the creation of a long-term roadmap for the advancement of Canada's plant-based foods, feed and ingredient sector.

The roadmap will serve as a clear articulation of the urgency and outcomes, that are facing Canada as we work to establish ourselves as a global leader in the production of plant-based ingredients and food.

To craft a unified message for our sector, we held a series of dialogue sessions throughout July and August and gathered input from members and stakeholders across the value chain. In addition to that, we have created a survey for members and stakeholders that were unable to attend our sessions.



5

ENGAGEMENT
SESSIONS



+100

PARTICIPANTS

REPRESENTING THE AGRI-FOOD VALUE CHAIN:

- Research/Post-Secondary
- Logistics
- Ag Tech
- Government (Federal, Provincial and Municipal levels)
- Commodity/Industry Groups
- Biotechnology
- Non-Profit Organizations
- Ag Manufacturing
- Ingredient & Food Processors
- Financial/Business Services

FEEDBACK AND REACTIONS

Throughout the five Roadmap sessions, dialogues covered a range of topics, as each group of participants presented views based on their area of expertise or place on the value-chain. While everyone brought different perspectives, the overall reaction to the Roadmap was positive, with strong support for a unified plan to grow Canada's plant-based food, feed and ingredient ecosystem.

Most notably, participants rallied around the concept of putting a stake in the ground for Canada – \$25 billion in sales by 2035. Participants were supportive of not only the \$25 billion goal, but also the idea of rallying as a collective and working together to achieve the goal. While there was high support for the goal and the concept of the Roadmap, it was noted that more work needs to be done to flush out the activities that will get us there. It was generally accepted that the Roadmap would provide the general direction, but it would be up to the ecosystem as a whole to own actions and contribute to its success.

There were also many discussions around targets and benchmarks. In a number of the sessions, there was a desire to better understand where we are now and what targets are needed to make sure the ecosystem is on track to reach the goal in 14 years.

In addition to the general concept of the Roadmap, lengthy discussion took place around each outcome – Innovate, Scale and Prosper — and the recommended actions that would need to occur to reach each. There was strong support for the three buckets of Innovate, Scale and Prosper and for each of their resulting outcomes. However, it was felt that more needed to be included on four specific topics in order for the Roadmap – and the sector – to be successful.

FEED AND CO-PRODUCTS

Utilizing the entire seed – oil, protein and starch – is key to achieving the goal of \$25 billion. As a sector we must focus on realizing the value from every part of the seed as it works its way through the value chain. Most of the focus has been on the protein for ingredient and food use. However, there is value in the starch and co-products that result from processing. Success will depend on extracting all of the value – and more focus has to be placed on feed. It is recognized that a thriving livestock industry is key to the long-term success of Canada's plant-based ecosystem.

ENGAGEMENT OF INDIGENOUS PEOPLE AND OTHER UNDER-REPRESENTED GROUPS

The inclusion of Indigenous communities and other under-represented populations is important to creating economic growth for Canada. The agrifood industry in Canada needs to do more to engage Indigenous communities and people into the economic opportunity that is in front of us. Employers need to put effort into creating job opportunities and business growth for Indigenous peoples across Canada, while also addressing concerns such as food safety and sovereignty.

INFRASTRUCTURE

There is a need for a significant investment into infrastructure to reach the \$25 billion goal. While the conversation tends to focus on the need to build a considerable number of new processing plants, there is also a need to focus

on the supporting infrastructure – from transportation, to water and waste-water, to internet in rural areas. There was avid discussion about the role municipalities play in ensuring that the necessary infrastructure is either in-place or readily available to new companies looking to invest in Canada or grow their domestic footprint. Having the infrastructure to support our integrated value chain is key to positioning Canada as the global leader.

SUSTAINABILITY AND CLIMATE CHANGE

Making crop production and ingredient and food processing more sustainable resonates with consumers and helps the world tackle one of its greatest challenges: climate change. It is also an area that Canada can lead – largely because of our innovative agrifood sector and our commitment to sustainability. Positioning Canada as a leader, and having the metrics to support our brand, will be key to defining our position in the global marketplace. The Roadmap must consider what needs to be done to ensure the sector is contributing to Canada’s carbon goals, while also leveraging it as a brand attribute.

DIALOGUE SESSION SURVEYS

Participants were asked to respond to a short survey at the end of the sessions and were engaged to respond to a more comprehensive one following the sessions. Here are some of the key findings:

- **81%** of participants have indicated they believe the vision is achievable.
- **67%** believe that the roadmap to execute on the vision to be on track.
- **72%** of respondents believe that \$25 billion in annual sales by 2035 is an attainable goal.
- **84%** of respondents believe the goal and purpose of the roadmap is clear.