

The Value of Protein in Canada

Soy protein is found in everything! The use of soy protein isolates (90% soy protein) in food manufacturing continues to increase. Nearly all of this protein, however, is sourced from outside of Canada. The value of these ingredients in Canada is difficult to ascertain, but estimates indicate it may exceed \$94 million annually. This represents lost value to the Canadian industry. **WHY IS NOBODY PRODUCING THIS PRODUCT HERE?**

Being Different

The US based companies produce a range of functional ingredients at low costs with which we cannot compete. To enter this market now, one must have a true unique competitive advantage.

With so much clout by the major protein players, how can those interested in protein processing in Canada be different? WHERE ARE THE MARKET OPPORTUNITIES?

The opportunities lie in providing more value in three key areas:

1. Functionality

Are there functional improvements that can be made? **Yes.** By using specifically designed soybean varieties, and innovation in process engineering, there is room for improvement. There will be more demand for soy ingredients with protein profiles that have specific end use benefits. The result is premium food products, more efficiency in food production, and totally new food products that cannot be imagined at this time. **It begins with processing.**

2. Cache

Image can be everything in the food industry—there is growing interest in organic, non-GMO, and chemical free products. The technology to capture this opportunity is waiting to be implemented in Canada. Serious thought must be given toward the growth and expansion of this foundation.

3. Acceptance

We can build on Canada's ability for identity preservation, and a continued image of quality. Foreign markets may readily accept products originating from Canadian producers more readily than from other jurisdictions—as long as quality, price, and functionality represent true value. This avenue will interest those players interested in the distribution of protein products and that are looking for locations that provide further market windows. **This increased value equates to new market opportunities. Capturing these opportunities is dependent upon the WILLINGNESS AND ABILITY to innovate and invest in new processing.**

US Protein Ingredient Market Size	\$2,640,000,000
US Soy Protein Ingredient Market Size	\$943,008,000
CAN Soy Protein Ingredient Market Size	\$94,300,800
CAN Soy Protein Utilization (kg)	23,575,200
CAN Soy Protein Utilization (ac)	57,904

Oleanergie F2001
First company in Canada to build a processing plant for soy protein isolates
The company's environmentally friendly, hexane-free method to extract soy protein will deliver new premium products.

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Canada's protein experts

We have established a **network** of leading minds in the separation and use of soy proteins. Plant breeders, food scientists, engineers, and chemists are working together to understand and act on opportunities that will emerge. This core of excellence requires continuous long-term planning and industry partnership. Focus will guide us to success.

What it holds for the chain

Market **stability** and a domestic **location** will provide the greatest benefit. Protein processing in Canada, will not impact the price of commodity soybeans. Instead, the benefit to the farmers and processors will be in the building of markets that require specific inputs and that favour, for various reasons, Canadian sourced soybeans.

Positioning Canada

For Canada to capture more of the future value of soy protein, we must position ourselves as the world leader in three areas:

- Developing **technologies** for the isolation of specific soy protein components;
- Maintaining an **image** that is highly respected; and,
- Bringing to market new soybean **varieties**.

Who will lead the way?

Companies with an ability to envision what is possible and act on that vision have an opportunity to make money. This extends to large, small, multinational, or regional firms in the soy industry and food sector. Who will be there in the future? Those with imaginations and drive. Contact Soy 20/20 for assistance in development in this area.

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