



# Growing Opportunity

A Policy Strategy for Value-Added Investment in  
Alberta and the Edmonton Metropolitan Region

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DR. KERRI L. HOLLAND

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# Executive Summary

The Edmonton Metropolitan Region (EMR) continues to set ambitious economic development goals. Attracting new investment, as well as supporting business retention and growth, are central components to meeting this objective. Recognizing the important role of agriculture within the region, Edmonton Global has identified the industry as a key sector for investment attraction.

In recent years, numerous studies have highlighted the need to increase value-added processing to realize the agricultural industry's full potential to generate revenue, create jobs and enhance domestic food security. Attracting value-added agricultural investment is also a central part of Alberta's current agenda for economic recovery.

Alberta has many advantages that position it well for agricultural investment. However, there are also some notable challenges that if addressed, would foster a more competitive business environment. To ensure that the EMR remains competitive and attractive for investment, it is beneficial to analyze what other regions are doing to support value-added agriculture and mitigate similar barriers to investment. This paper examines the business environment in neighbouring provinces (Saskatchewan and Manitoba) and within Alberta. This study has provided valuable insight into what policy action the Alberta government and the EMR could implement to become more competitive and grow economic opportunities.

## Key Recommendations include:

### **Province of Alberta**

- Enhance Alberta's Agriculture Strategy and Establish an Advisory Council
- Implement Incentive Programming and Build Investor Confidence
- Clarify Government Support for All Sectors
- Develop Investment Attraction Services

### **The Edmonton Metropolitan Region**

- Create a Regional Agriculture Strategy and Action Plan
- Market the EMR Advantage
- Produce an Interactive Value-chain Asset Map/Business Database
- Champion Agriculture and Create Partnerships within Value-Chain

# Introduction

Agriculture and the agri-food industry are a vital part of Alberta's economy. The province's fertile land, abundant natural resources, skilled labour, and outstanding research institutions are some of the many factors that have enabled a strong and diverse industry. In 2020, Alberta's agri-food sector generated over \$56 billion<sup>1</sup> in sales and \$12.4 billion in agriculture and food-product exports.<sup>2</sup> As the industry continues to evolve, stakeholders have an incredible opportunity to foster an environment that encourages innovation and growth to meet market demands.

In recent years, numerous studies have highlighted the need to increase value-added processing to realize the agricultural industry's full potential to generate revenue, create jobs, and enhance domestic food security.<sup>3</sup> Attracting value-added agricultural investment is also a central part of Alberta's current agenda for economic recovery from consecutive years of depressed oil markets and the financial impact of the COVID-19 pandemic.<sup>4</sup> In 2020, the provincial government stated, "Agriculture in Alberta will lead our economic recovery," and set targets of 2,000 jobs and \$1.4 billion in private investment by 2024.<sup>5</sup>

The Edmonton Metropolitan Region (EMR) continues to set ambitious economic development goals. Attracting new investment, as well as supporting business retention and growth, are central components to meeting this objective. Recognizing the important role agriculture and the agri-food industry have within the region, Edmonton Global has identified it as a key sector for investment attraction.<sup>6</sup>

The EMR has many advantages for investment and a proven ability to attract new and innovative agribusiness and value-chain services. However, there is a perception among stakeholders that there are barriers to agricultural investment that are holding the region back from being as successful as it could be. The first section of this paper will provide some context by briefly discussing value-added agriculture in Canada. Analysis will then shift to the key challenges that Alberta stakeholders are identifying as areas that need to be addressed to better support agricultural investment goals. This discussion serves as a reference for policy recommendations.

To ensure that the EMR remains a competitive business environment for investment, it is beneficial to analyze what other regions are doing to support value-added agriculture and mitigate similar barriers to investment. Southern Alberta, Saskatchewan and Manitoba have arguably been very successful in attracting agricultural investment, especially within the last five years. Analyzing these three jurisdictions (one regional and two provincial) allows for valuable lessons to be drawn from within the province as well as neighbouring provinces with comparable agricultural assets.

This research project aims to provide a better understanding of policies that could be adopted by both the province and region to improve the EMR's positioning for investment attraction. As plant protein processing has been identified as a key investment opportunity not only for the province of Alberta, but specifically for the EMR, particular focus will be given to this sector within the discussion.<sup>7</sup>

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1 This figure was calculated by combining the 2020 sales of the following: Farm cash receipts, food manufacturing, beverage manufacturing, pesticide, fertilizer and other agricultural chemical manufacturing, food/beverage retail and food service. Karen Spencer and Kim McConnell, "Alberta Agri-Food Futures," SPP Pre-Publications Series, University of Calgary, School of Public Policy, (July 2021).

2 Alberta, "Agriculture Trade Services-For Exporters," Accessed October 4, 2021.

3 Canada, *Unleashing the Growth Potential of Key Sectors*, Advisory Council on Economic Growth, February 6, 2017.; Canada, *House of Commons Standing Committee on Agriculture and Agri-Food, Room to Grow: Strengthening Food Processing Capacity in Canada for Food Security and Exports*, Fourth Report, 43rd Parliament, 2nd session, April 2021.; Canada, *Senate, Standing Senate Committee on Agriculture and Forestry, Made in Canada: Growing Canada's Value-Added Sector*, July 2019.; Alberta, *Standing Committee on Alberta's Economic Future Report on Agri-food and Agribusiness, Growing and Diversifying Alberta's Agri-food and Agribusiness Sectors*, Twenty-Ninth Legislature, Third Session, April 2017.

4 Alberta, "Selling Alberta to the World: An Investment and Growth Strategy," September 17, 2020.

5 Greenhouse Canada, "Manitoba announces \$4.2M rebate for province's first large-scale greenhouse," June 30, 2020.

6 Edmonton Global is a not-for-profit economic organization that works on behalf of the Edmonton Metropolitan Region and its members to establish and advance regional economic development goals.

7 Spencer and McConnell, "Alberta Agri-Food Futures," 2021.; Nichols Applied Management, "Research Support for the Development of an FDI and Trade Strategy," Collaboration with Toma and Bouma Management Consultants, submitted to Edmonton Global, January 14, 2019.

# Methodology

The foundation of this research is based on an extensive literature review of primary and secondary sources. To compliment this information, over twenty personal interviews were conducted with stakeholders from government, industry groups, and business to gain a more thorough understanding of the challenges and opportunities that exist for value-added agriculture investment in Canada, in Alberta, and within the EMR specifically.<sup>8</sup>

## Section 1: The Canadian Context

A 2017 report by the federal Advisory Council on Economic Growth (“The Barton Report”) identified the potential of Canada’s agri-food sector for economic growth and increased export capacity. The Barton Report argued that with supportive policy measures, Canada could enhance its role as a trusted global leader in agri-food products by building on its existing assets and taking advantage of global trends (e.g., growing global population, increased demand for protein sources, sustainability concerns, a need for trusted markets, etc.).<sup>9</sup> In 2018, the federal Economic Strategy Table for Agri-food concluded that by 2025 Canada could achieve \$85 billion in annual export value if the country can “seize value-added opportunities, including more domestic processing, innovative end-uses for agri-food products, co-product manufacturing and turning waste products into revenue streams.”<sup>10</sup> In 2019, Canada’s agri-food exports hit a record high of \$67 billion.<sup>11</sup>

Canada is internationally recognized for producing safe, high-quality, stable, and abundant agricultural commodities and food products. However, the majority of commodities produced are exported in their raw state and processed in other countries, often to be imported back into Canada as finished goods. It has been widely accepted by both government and industry, that increasing the nation’s value-added processing capacity is key to growing the economy, creating jobs, reducing trade disruptions and enhancing domestic food security.<sup>12</sup>

Attracting and retaining agricultural processors in Canada can be a challenging task. The Standing Senate Committee on Agriculture and Forestry (2019) and the House of Commons Standing Committee on Agriculture and Agri-Food (2021) have identified barriers to increasing the nation’s value-added processing capacity. The reports conclude that regulatory burden, labour shortages, cost-pressures (e.g., carbon tax, accessing capital, low profit margins), infrastructure (e.g., rail, roads, ports, broadband), and trade barriers (international and interprovincial) are some of the key factors impacting agricultural investment, innovation, and value-added growth.<sup>13</sup> The policy recommendations put forth by the parliamentary committees are guiding the federal

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8 There were 21 interviews conducted for this research project. Interviewees were chosen based on their specialized knowledge. Interviewees were contacted via email and given an overview of the research topic/questions. Interviews were primarily conducted over the telephone (16) and five responded to questions via email correspondence. The interviews were based on the elite interviewing approach first developed by Lewis Anthony Dexter (1970) and refined by other political science scholars, which allows for general questions and open discussion/responses. Lewis Anthony Dexter, *Elite and Specialized Interviewing*, (Evanston, IL: Northwestern University Press, 1970). Also see: Jeffrey M. Berry, “Validity and Reliability Issues in Elite Interviewing,” *Political Science and Politics Journal*, 35, 4, (December, 2002), 679-682.

9 Canada, *Unleashing the Growth Potential of Key Sectors*, 2017.

10 Canada, *Canada’s Economic Strategy Tables: Agri-food, “The Innovation and Competitiveness Imperative: Seizing Opportunities for Growth,”* September 2018.

11 Canada, *Agriculture and Agri-Food, Departmental Results Report: 2019-2020*, 2020.

12 Value-added agriculture is defined as “the production techniques and processes that add economic value to a raw agricultural product.” Canada, *Made in Canada: Growing Canada’s Value-Added Sector*, 2019.; Canada, *Unleashing the Growth Potential of Key Sectors*, 2017.; Canada, House of Commons, Standing Committee on Agriculture and Agri-Food, William Greuel, Protein Industries Canada, Witness Testimony, Meeting No. 9, December 1, 2020.; Canada, Room to Grow: Strengthening Food Processing Capacity in Canada for Food Security and Exports, 2021.; Canada, *Canada’s Economic Strategy Tables: Agri-food, “The Innovation and Competitiveness Imperative: Seizing Opportunities for Growth,”* September 2018.; Royal Bank of Canada (RBC), “Farmer 4.0: How the coming skills revolution can transform agriculture,” August 2019.

13 Canada, Room to Grow: Strengthening Food Processing Capacity in Canada for Food Security and Exports, 2021.; Canada, “Made in Canada: Growing Canada’s Value-Added Sector,” 2019.; Canada, William Greuel, Protein Industries Canada, Witness Testimony, 2020.; Canada, House of Commons, Standing Committee on Agriculture and Agri-Food, Sylvain Charlebois: Agri-Food Analytics Lab, University of Dalhousie, Witness Testimony. Meeting No. 9, December 1, 2020.; Shelley Thompson, Ted Bilyea and Margaret Zafriou, “Canadian Agri-Food Processing Competitiveness, Quality Growth and Global Opportunities: A Snapshot of Current Trends-Key Findings,” The Canadian Agri-Food Policy Institute, March 2020.; Agri-Food Analytics Lab, “Canadian Food Manufacturing: An Overview in 2010, 2020, and Forecast to 2030,” May 6, 2021.; D.C. Fraser, “Industry official touts Manitoba as ‘Silicon Valley of plant-based protein.’” *The Western Producer*. February 25, 2021.; Canada, *Canada’s Economic Strategy Tables: Agri-food, “The Innovation and Competitiveness Imperative: Seizing Opportunities for Growth,”* September 2018.



and provincial governments in taking action on areas such as regulatory reduction/change, the Temporary Foreign Workers Program and investments in infrastructure, among others.

The federal and provincial governments have also been making substantial investment to support innovation and economic growth in the agriculture and agri-food industry. One of the best examples of a shared funding initiative is the Canadian Agricultural Partnership (CAP), a five-year (2018–2023), \$3 billion, federal-provincial-territorial program “to strengthen and grow Canada’s agriculture and agri-food sector.”<sup>14</sup> In the Prairie provinces, CAP represents a federal-provincial investment of \$406 million in Alberta, \$388 million in Saskatchewan, and \$176 million in Manitoba.<sup>15</sup> Investments under CAP support projects that aim to grow trade and expand markets, and promote innovation, sustainability, and diversification within agriculture. The federal government has also made a significant step in promoting innovation and industry competitiveness by investing \$950 million in the Innovation Superclusters Initiative.<sup>16</sup>

## The Promise of Plant Protein

Protein Industries Canada (PIC) is one of five innovation superclusters established in 2018 with the intent to develop the plant protein value-chain in Canada. PIC has \$153 million to invest over a five-year period to enable partnerships, innovation, research, and economic growth within the agricultural industry.<sup>17</sup> Among PIC’s objectives are to expand the agricultural labour force, attract new capital investments, and reduce regulatory burden. It has co-invested in projects that are developing new processing technologies, new ingredients, and on-farm technology.

There is a growing global demand for plant-based food and ingredients. Advances in technologies that break down plant components into protein, fibre, and starch are expanding the value-chain opportunities for the development of processed ingredients, meat and beverage alternatives, pet food, cosmetics, pharmaceuticals, construction materials, etc.

A 2021 Bloomberg Intelligence report projects that the value of the global plant protein market will be \$162 billion by 2030 (7.7% of the global protein market), an increase from \$29.4 billion in 2020.<sup>18</sup> Within Canada, growth in the plant protein food/beverage market is also expected to continue along a growth trajectory. Sylvain Charlebois, Senior Director of the Agri-Food Analytics Lab at Dalhousie University, explains, “Canadians are still committed to animal proteins but at the same time they’re also looking for other options, including plant-based” for reasons related to health, environment, and cost.<sup>19</sup> Charlebois estimates that the domestic market for plant protein will reach one billion dollars by 2025, an increase from \$300 million in 2020.<sup>20</sup>

Developing the plant protein industry in Canada has often been described as a “once in a generation” opportunity.<sup>21</sup> A 2021 report commissioned by the Netherlands states that the plant protein industry will soon enter the “storming” phase of growth and that there is a “window of opportunity” for Dutch companies in Canada to collaborate in areas such as ingredient processing and product development.<sup>22</sup> The Canada West Foundation

14 Federal and provincial funding is a 60/40 cost-share. Canada, Agriculture and Agri-Food, “Canadian Agricultural Partnership,” June 24, 2021.

15 Alberta, “Canadian Agricultural Partnership: Creating jobs by investing in Alberta agriculture,” News Release, June 11, 2021.; Saskatchewan, Business and Industry, “Canadian Agricultural Partnership,” Accessed September 2021.; Manitoba, Agriculture and Resource Development, “Canadian Agricultural Partnership,” Accessed September 2021.

16 Canada, “Innovations Superclusters Initiative,” June 22, 2021.

17 Protein Industries Canada, “Banking on Plant Protein: An Interview with Protein Industries Canada CEO Bill Greuel,” July 23, 2019.

18 Bloomberg Intelligence, “Plant-based foods poised for explosive growth,” August 2021.

19 Ina Sidhu, “New plant-based protein facility opens flagship location in northeast Calgary,” CTV News, March 18, 2021.

20 Brian Cross, “Plant-based protein booms.” *The Western Producer*. May 13, 2021.

21 Protein Industries Canada, *The Art of the Possible: Annual Report 2020-21*, Accessed October 2021.; Carlo Dade, Naomi Christensen and Sarah Pittman, “Sprouted: The Plant Ingredient Opportunity Taking Root on the Prairies,” Canada West Foundation, December 2017.; David Dzisiak, “Canada has all the ingredients to be a global leader in agriculture, but the opportunity won’t last forever,” *Globe and Mail*, April 15, 2021. Note: David Dzisiak is Chief Operating Officer at Botaneco, a natural-ingredient manufacturer based in Calgary, AB.

22 Netherlands, Ministry of Foreign Affairs, “Market Study: Opportunities for the Netherlands in the Canadian Plant Protein Sector,” March 2021, Prepared by Serecon.

argues the Prairie provinces could globally dominate in plant protein but there needs to be increased government support, collaboration/coordination within the value-chain, and improved access to capital.<sup>23</sup> CWF argues that research into product innovation and commercialization is key to driving sector growth and that Alberta, Saskatchewan, and Manitoba all have incredible assets in their academic institutions and food development centres to support the plant protein sector's expansion.<sup>24</sup>

## Key Points

- Increasing Canada's value-added processing is key to realizing the full economic potential of the agriculture and agri-food industry.
- Recognizing value-added processing is a critical part of Canada's economic growth and recovery plan.
- Attracting value-added agriculture investment has been challenging for Canada as a whole. The federal and provincial governments are taking policy steps to mitigate barriers and encourage innovation and growth.
- Growing global demand for plant-based protein ingredients is an opportunity for the Prairie region to expand the value-chain and attract investment.

## Section 2: Alberta: Identifying Barriers to Investment

Alberta is the third-largest exporter of agri-food products after Ontario and Saskatchewan, accounting for approximately 20% of Canada's total.<sup>25</sup> The province is a major producer of beef and pork, and grows a diversity of high-quality oilseed, cereal, and pulse crops. Alberta has the commodity production to meet growing global demand for both animal and plant protein. In addition to natural resources, Alberta has world-class post-secondary training, research institutions, passionate industry associations, and driven business leaders which can support value-added investment, innovation, and growth.

Agriculture has a key role to play in Alberta's Recovery Plan to boost the province's economy and create jobs. Similar to other provincial governments, Alberta has expressed its support for the agriculture and agri-food industry by reducing regulatory burden, investing in research, funding infrastructure projects, and increasing investment attraction. The Agri-Food Sector Investment and Growth Strategy (2020) aims to attract \$1.4 billion in investments and create 2,000 jobs in the agri-food sector by 2023–24.<sup>26</sup> As part of this strategy, the provincial government aims to "grow primary and value-added agricultural exports to a projected \$16 billion by 2023, a 37% growth relative to 2019."<sup>27</sup> Developing the value-chain and expanding processing capacity will be critical to effectively meeting these economic objectives.

Karen Spencer and Kim McConnell argue, "the twenty-first century is the agri-food industry's time to shine, and Canada – and more specifically Alberta – is sitting in an ideal position to lead and capitalize."<sup>28</sup> Alberta

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<sup>23</sup> Dade et al., "Sprouted: The Plant Ingredient Opportunity Taking Root on the Prairies," 2017.

<sup>24</sup> Ibid.; Marissa Dimmell, "The Sprouting Plant-Based Ingredient Industry in the West," Canada West Foundation, July 6, 2021.

<sup>25</sup> Alberta Seed Guide, "Alberta Agri-Food Exports," July 29, 2019.

<sup>26</sup> Alberta, Agriculture and Forestry, 2020–2021 Annual Report, June 2021.

<sup>27</sup> Alberta, Article, Minister of Agriculture and Forestry Devin Dreeshen, "Investing in irrigation in Southern Alberta," July 9, 2021.

<sup>28</sup> Spencer and McConnell, "Alberta Agri-Food Futures," 2021.

has many assets to support agribusiness but there are concerns among stakeholders that the province is not as competitive as it could be. In researching for this project, a few key themes were commonly identified as challenges that need to be overcome.

## Lack of Government Champions

Industry stakeholders would like to see political leaders better champion agriculture and promote the many benefits (economic, environmental, social) the industry provides.<sup>29</sup> Those within the plant protein sector argue that a key barrier to attracting investment has been the lack of political strategy and commitment.<sup>30</sup> If provincial leaders offered more public support for plant protein processing, it would serve as a positive signal to investors and help support the ability to attract necessary capital for projects.<sup>31</sup>

A Calgary Economic Development (CED) report (2020) found that the focus on oil and gas in the province has overshadowed the need to support agricultural investment.<sup>32</sup> Feedback from stakeholders for this project largely affirmed the CED's conclusion.

Industry groups have not been included in policy discussions on developing a value-added strategy and many expressed that it is not clear what the province's strategy actually entails.<sup>33</sup> Leanne Fischbuch, Executive Director for Alberta Pulse Growers, states, "Maybe the government could actually share their agriculture value-added strategy with the sector and the public to gain some feedback and understanding of what the goals are. We just don't know much about it."<sup>34</sup>

Investment decisions are the result of multiple factors but it seems that politics matter. Multiple interviewees explained that the province has lost out on investment opportunities over lack of political motivation to communicate/meet with investors in a timely fashion and unwillingness to offer incentives comparable to other provinces.

## Difficulties Accessing Capital

Stakeholders believe that government commitment could play an enhanced role in investor confidence and capital investment.<sup>35</sup> Tax incentives are also suggested as a way that the provincial government could encourage more growth in value-added industry.

A government official explained that the provincial government largely relies on Alberta having the lowest corporate tax rate in Canada (8%) for attracting investment.<sup>36</sup> In comparison to Alberta's 8% corporate tax rate, Saskatchewan and Manitoba are both currently at 12%. However, industry stakeholders have stated that this one factor is not enough to compete with other jurisdictions.

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29 *Ibid.*; realagriculture, "It's time to embrace the future of the agri-food industry," Interview with Kim McConnell, July 16, 2021.; Leanne Fischbuch, (Executive Director, Alberta Pulse Growers), Email Correspondence with Author, September 7, 2021.; Edmonton Metropolitan Region Board, "Regional Agriculture Master Plan: Situation Analysis," July 23, 2018.

30 realagriculture, "It's time to embrace the future of the agri-food industry," July 16, 2021.; Fischbuch, Interview, 2021.; Global News, "Agriculture producers worry funding cut will stall diversification," April 27, 2021.; Allison Ammeter (Chair of Plant Protein Alliance of Alberta, Director with Alberta Pulse Growers, Former Director with Protein Industries Canada), Interview with Author, July 26, 2021.; Dan Brewin (CEO Plant Protein Alliance of Alberta), Interview with Author, July 22, 2021.; Kevin McGeough (CEO More Than Protein Ingredients), Interview with Author, July 29, 2021.

31 Brewin, Interview, 2021.; McGeough, Interview, 2021.

32 Calgary Economic Development, "Agribusiness Market Study," June 2020.

33 Jennifer Blair, "Study finds major gap in Alberta's valued-added strategy," July 13, 2021.

34 Fischbuch, Correspondence, 2021.

35 Brewin, Interview, 2021.; McGeough, Interview, 2021.

36 Michelle Normand (Investment Attraction Manager, Department of Agriculture and Forestry, Government of Alberta), Interview with Author, July 22, 2021.

The lack of incentive programming limits the province's competitiveness and Alberta may in fact put itself at risk of existing companies relocating to other jurisdictions.<sup>37</sup> GrainFrac, an Edmonton-based company that has developed technology to extract fibre from grains, has voiced their criticism of Alberta's business environment. GrainFrac President Brad Shapka explains that what Alberta is willing to offer to investors pales in comparison to other jurisdictions. Shapka states, "We have a huge amount of natural resources and we know there is a huge demand for plant proteins. Yet we are doing very little here to stimulate this environment. ... It puzzles me, I don't understand why there isn't more political will and general understanding of the benefits."<sup>38</sup>

In 2020, Peter Casurella, Executive Director of SouthGrow, a regional economic development alliance in southern Alberta, stated,

Governments will need to invest big if they want to reap the benefits of a booming value-added sector. If we want to create economic activity, it takes legitimate public investment in making that happen. ... Big payoffs require big bets. It's a nice thing to say the private sector can do this on their own, but the private sector will only go where they have the most support. That's an important consideration as we create a value-added strategy.<sup>39</sup>

In response to repeated criticisms that funding programs were complex and hard to navigate for applicants, the provincial government announced in June 2021 that they would introduce a "simplified grant process."<sup>40</sup> The province has also increased the lending limit of the Agriculture Financial Services Corporation to \$15 million and updated their loan renewal process by introducing automatic renewal for loans in good standing, developing a new client-friendly process for loan payment deferral, and accepting electronic client signatures.<sup>41</sup>

## Lack of Unity and Conflict Between Groups

As the farm population declines and farms become increasingly consolidated, it is crucial that agricultural industry groups find common ground to strengthen their position to inform and influence policymakers and the public. However, Alberta's agricultural industry is lacking a strong unified voice and groups are often portrayed as adversaries. For example, there has been tension between beef producers and groups/businesses supporting plant protein. Beef producer organizations have accused plant protein companies of misleading consumers on their labels, grandstanding, and at times vilifying the animal protein industry to promote their products.<sup>42</sup>

Tension between animal and plant protein groups is not just confined to Alberta but because of the significant economic and cultural ties many Albertans have with the beef industry, it seems to be amplified. However, the conflict between groups has been over-generalized in the media and many producers, especially those with mixed farming operations, see the potential benefits of increasing value-added opportunities for plant protein. Over 60% of beef farms in Canada are mixed farming operations that produce a range of oilseeds, cereals and pulses. Jill Harvie, Public and Stakeholder Engagement Manager for the Canadian Cattlemen's Association, explains that most beef producers do not see plant proteins as a threat and that the production of animal and plant proteins can complement each other and reduce waste.<sup>43</sup> This sentiment was similar to a beef producer interviewed for this project. They stated,

37 Nichols Applied Management, "Research Support for the Development of an FDI and Trade Strategy," 2019.

38 Tiphonie Roquette, "Protéines végétales : l'Alberta se prive-t-elle d'une poule aux oeufs d'or?", Radio-Canada, May 25, 2021.

39 Jeremy Simes, "Alberta launches strategy for value-added agriculture." *The Western Producer*, February 20, 2020.

40 Elyse Dzenick, "Accessing incentives for agriculture investments just got easier," *Edmonton Global*, June 23, 2021.

41 Alberta, 2020–2021 Annual Report. 2021.

42 Jennifer Blair, "Some cattle producers have a beef with fake-meat labelling," *Alberta Farmer Express*, November 30, 2020.; Alexis Kienlen, "Having just turned 50, Alberta Beef Producers looks to make changes," *Alberta Farmer Express*, September 25, 2019.; GERALYN WICHERS, "Animal protein's bad rap is affecting recruitment: global experts," *Manitoba Co-operator*, June 24, 2021.

43 *Guardians of the Grasslands*, "Plant and Animal Proteins," YouTube, August 21, 2019.

Most cattle guys don't see plant protein as a direct competitor. In fact, I think for some of us who grow crops too it probably would give us more market opportunities and give us access to more feed sources. ... I think the reason why there is such a pushback from the industry [beef] sometimes is that these companies [plant protein products] present us as a competitor—telling the public their goal is to make animal protein obsolete.<sup>44</sup>

Whether the competition between sectors is as severe as it is often portrayed, it raises an important consideration of how tensions between industry groups may influence political actors and/or affect the investment environment. There is a general consensus within the plant protein sector that the Alberta government has been resistant to fully supporting and promoting them because of the possible conflict with the beef industry.

## The Need to Build a Value-Chain Network

Forming partnerships and establishing connections within industry sectors is a crucial component of taking value-added agriculture to the next level. These connections help establish a supportive ecosystem and help create investment opportunities. For example, for the plant protein sector, qualifying for PIC funding is dependent on the collaboration of multiple partners to foster innovation.

In 2018, the Plant Protein Alliance of Alberta (PPAA) was established with government funding of \$250,000 per year for a three-year period. The volunteer board of directors represented industry, business, think-tanks, economic development specialists, legal experts, and management consultants. The aim of PPAA was to promote the province's plant protein industry, provide education, and build partnerships within the value-chain. In March 2021, government funding was not renewed and the organization had to discontinue its operations.

The PPAA played a role in developing the proposal for the PIC supercluster, attracting the Plant-based Food Summit (Bridge2Food) to Western Canada (Calgary and Saskatoon) in 2019 and establishing shared goals with Ag-West Bio (Saskatchewan) and the Bioscience Association (Manitoba) to form P3C. Through webinars, networking events, and their website, the PPAA developed a strong communication program that facilitated connections among its members and highlighted innovation within the industry. On the PPAA's agenda for the upcoming year was to develop a cohesive plant protein strategy to present to the provincial government.<sup>45</sup>

Another industry group has received CAP funding to perform a similar role as PPAA, but more specifically focused on hemp. In 2021, Alberta Hemp Alliance (AHA) was awarded \$300,000 to be spent over two-years to promote the hemp sector, explore investment opportunities, and make connections within the sector. New and innovative processing technologies are creating opportunities for whole plant utilization. Executive Director of the AHA, Manny Deol, strongly believes that there is enormous potential for Alberta's hemp industry, but that there is a need to develop the value-chain and make crucial connections among producers, researchers, and businesses.<sup>46</sup> In 2021, BioComposites group (Drayton Valley) expanded their operation, Canadian Rockies Hemp opened North America's largest hemp processing plant in Bruderheim (\$20 million), and Inca Renewable Technologies Inc. have stated their intention to set up a 100,000 sq ft facility in the province to process hemp-based panelling for RVs.<sup>47</sup> Deol would like to see political leaders promote hemp and believes support from regional leaders would help strengthen the ability to attract investors.<sup>48</sup> The AHA plans to be financially self-sufficient after the government funding ends.

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<sup>44</sup> Interviewee requested anonymity.

<sup>45</sup> Brewin, Interview, 2021.; Ammeter, Interview, 2021.

<sup>46</sup> Manny Deol, (Executive Director, Alberta Hemp Alliance), Interview with Author, August 20, 2021.

<sup>47</sup> Alex McCuaig, "Hemp processor proposed for Alta.," *The Western Producer*, September 23, 2021.

<sup>48</sup> Deol, Interview, 2021.

## Key Points

- Stakeholders feel there is a lack of government champions for agriculture – especially for the plant protein sector.
- Industry expertise could be better utilized to inform a value-added strategy.
- Agribusiness companies, especially those in plant protein, are finding it difficult to access capital.
- Alberta’s agricultural industry is lacking a strong unified voice. Animal and plant protein stakeholders are often portrayed as competitors.
- There is a need to facilitate a network and make connections within Alberta’s agricultural value-chain.

## Section 3: Southern Alberta: A Regional Approach to Agricultural Investment Attraction

The Calgary and Lethbridge regions have experienced a number of high-profile agribusiness investments in recent years. Access to a diverse agricultural commodity base, an extensive irrigation system, and proximity to major trade routes have all been advantages in supporting investment and economic growth. Western Economic Diversification Canada (WEDC) has compiled asset maps for both regions, which list key processors, niche innovators, research institutions, industry associations, and other supportive supply-chain businesses.<sup>49</sup>

Some of the notable examples of investment in the past year include: Enterra (\$30 million) and Lovingly Made (\$20 million) in the Calgary region. There have also been a number of expansions announced in 2021 including: Sofina’s \$200 million chicken processing plant, Harmony Beef’s 30% processing capacity increase, and Botaneco, which is planning to invest \$185 million in feed-protein processing and \$130 million to process oilseed food ingredients.<sup>50</sup>

The Lethbridge-Taber region has also had considerable growth in value-added industry. Richardson Oilseed’s \$120 million canola processing plant expansion (2016) and Cavendish’s \$430 million potato plant (2019) have added substantial investment to an established food processing hub in the Lethbridge-Taber area. Keri Sweetman argues, “agriculture has always been the foundation” of southern Alberta, which has never had as strong an oil-and-gas presence as the province’s north.<sup>51</sup> Some of the many established processors in the region include Sunrise Poultry Processors, Sunnyrose Cheese, Lantic (Roger’s Sugar), Frito-Lay, McCain Foods, and Lamb Weston. In addition, four of the five federally inspected beef processing plants in the province are in southern Alberta.<sup>52</sup> Two of these facilities, Cargill (High River) and JBS (Brooks), are responsible for over 70% of Canada’s processed beef.<sup>53</sup>

49 Western Economic Diversification Canada, “Lethbridge-Taber Agri-Food Corridor Map,” June 2018.; Western Economic Diversification Canada, “Calgary Agri-Food Asset Map,” Accessed August 2021. Note: In August 2021, the Government of Canada announced that Western Economic Diversification would become two agencies, Pacific Economic Development (British Columbia) and Prairies Economic Development (Alberta, Saskatchewan, Manitoba).

50 Devin Dreeschen, (Minister of Agriculture), Facebook Post, July 17, 2021. Note: Devin Dreeschen served as Alberta’s Minister of Agriculture and Forestry from April 30, 2019 to November 5, 2021.

51 Keri Sweetman, “Working together to grow a southern food corridor,” Plant Protein Alliance of Alberta, May 13, 2019.

52 Cargill (High River), JBS (Brooks), Bouvry Export (Calgary), and Harmony Beef (Rocky View County). The only federally inspected beef processing plant in the Northern region of the province is Canadian Premium Meat (Lacombe). Canada Beef, “Canadian Beef and Veal Primary Processors,” Accessed August 2021.

53 Naomi Powell, “Everything’s on the table: How COVID-19 could change Canada’s meat processing industry,” Financial Post, May 16, 2020.

## Branding a Regional Approach

The announcement of the international Bridge2Food Summit, which took place in Calgary in June 2019, served as a catalyst for municipalities in the Lethbridge-Taber area to formalize a regional partnership to promote their agriculture sectors.<sup>54</sup> Canada's Premier Food Corridor is made up of five communities along Highway 3 in southern Alberta, including the City of Lethbridge, Lethbridge County, the towns of Taber and Coaldale, and the Municipal District of Taber.<sup>55</sup> The aim of the consortium is to advance the agri-food sector in southern Alberta through investment attraction and advocacy for the agri-food industry.<sup>56</sup>

We believe there is strength in numbers ... Marketing a region has much more appeal on a national and international level than marketing our communities individually. – *Trevor Lewington, CEO of Economic Development Lethbridge*

One area where the region is well-positioned is in its history of co-operation and collaboration. We've been doing it for decades. To make this happen, we have to be able to play together and we have proven that we can.<sup>57</sup> – *Martin Ebel, Economic Development Officer, County of Lethbridge*

We need to leverage each other's strengths and to be each other's champions. To be engaged globally, we definitely need to partner.<sup>58</sup> – *Ben Young, Economic Development Officer, Town of Taber*

The brand of 'Canada's Premier Food Corridor' (CPFC) has also been given legitimacy with formal recognition by the provincial government. As Premier Jason Kenney stated in April 2021,

Lethbridge is part of Canada's premier food corridor. That's why we're working to create new opportunities to diversify the economy and expand southern Alberta's agri-food sector. This is key to creating good jobs both today when we need them and as we emerge from this crisis and in the face of the challenges that our economy has experienced from the past several years.<sup>59</sup>

Members of the CPFC feel that investment in one municipality has resulted in a positive impact for them all. For example, when Cavendish expanded in Lethbridge, trucking companies in the Taber area saw an increase in business.<sup>60</sup> The CPFC believe their brand is gaining traction and leading to new investment opportunities (e.g., Grassland Taber Collaborative) as well as giving existing businesses the confidence to expand (e.g., Corteva Canola, Whole Leaf Foods). Supportive businesses like WG Pro, a co-packing company, established a Lethbridge location in 2019, and in 2020, Federated Co-operatives Limited (FCL) opened a \$42.8 million fertilizer terminal in the Taber area, further strengthening the ecosystem of agribusiness in the region.<sup>61</sup>

The CPFC are actively engaged in developing a cohesive strategy, which includes planning for long-term growth and implementing a marketing plan. They currently have a website and promote the region's agricultural industry on social media (#SouthernAlbertaFeedsTheWorld).<sup>62</sup> Collaboration and open communication are regarded as key to ensuring all five districts are served equally when there are investment opportunities.

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54 The focus of the June 2019 Bridge2Food Summit (Plant-based foods) was "Shifting Consumer Behaviour." This Summit was a partnership between Protein Industries Canada and Bridge2Food which held two Canadian events – Saskatoon and Calgary.

55 Sweetman, "Working together to grow a southern food corridor," 2019.

56 Canada's Premier Food Corridor, Homepage, Accessed October 2021.

57 Sweetman, "Working together to grow a southern food corridor," 2019.

58 Ibid.

59 Dale Woodward, "Kenney on hand to kickstart Agri-food Hub and Trade Centre," *Medicine Hat News*, April 1, 2021.

60 Tim Kalinowski, "Building a Food Cluster: Canada's Premier Food Corridor seeking to deal Southwest Alberta into the global agri-food game," March 24, 2020.

61 *The Taber Times*, "Co-op opens new fertilizer terminal near Grassy Lake," October 14, 2020.

62 Kalinowski, "Building a Food Cluster: Canada's Premier Food Corridor seeking to deal Southwest Alberta into the global agri-food game," 2020.

Members agree that now that the Food Corridor has been mapped, an important step will be to “link businesses that don’t already do business with each other” and create a supportive network to keep money within the region.<sup>63</sup>

If you can swap that import and replace it with something that’s locally produced, that’s the synergy and the real power of a cluster. We have the food processors, but we also have the electrical companies, the food safety consultants — we have all of those vendors here. But it’s all about how do you link them together and actually combine to create greater economic activity together, and hopefully pull some of the dollars from other jurisdictions to spend them here.<sup>64</sup> – *Trevor Lewington, CEO of Economic Development Lethbridge*

The CPFC are confident in the region’s advantages to supporting value-added agriculture, but all members agree that capital remains a barrier for innovative businesses in the area. They also identify the lack of a “sophisticated product development infrastructure many companies are looking for like the Food Processing Development Centre one finds in Leduc.”<sup>65</sup> However, they do highlight the contributions that post-secondary institutions in Lethbridge have made to support the agri-food cluster.

Since the CPFC formed, the alliance has supported expanding plant protein processing within the region. Members of the CPFC joined the Plant Protein Alliance of Alberta (PPAA) and the CEO of Economic Development Lethbridge, Trevor Lewington, served as Vice-Chair of the PPAA. Kirk Hughes, Director of Community Development for the Municipal District of Taber states, “We’re transitioning from oil and gas to an alternative economic model. Some of it is alternative energy, but a big chunk of it is going to be alternative proteins.”<sup>66</sup>

Another excellent example of regional co-operation in southern Alberta is SouthGrow Regional Initiative, “an economic development alliance of twenty-four south central Alberta communities.”<sup>67</sup> Members of the CPFC also belong to SouthGrow and the alliance has been a strong voice for the agricultural industry and promoting value-added investment.

## Government Investment

As part of the Alberta’s Recovery Plan, the province has made several major funding announcements to support agriculture in the Lethbridge region. First, in July 2020, the province announced it would fund a \$150 million expansion of Highway 3, which connects Taber to Burdett, an east-west agriculture corridor. The town of Coaldale stated that the infrastructure project is “pivotal in attracting both domestic and foreign investment, creating effects of local trade, support services, and other economic opportunities for southern Albertans to benefit from.”<sup>68</sup> Second, in October 2020, the province announced it would contribute \$244.5 million towards an \$815 million investment into modernizing and increasing the capacity of southern Alberta’s irrigation infrastructure.<sup>69</sup> In November 2021, the province made an additional funding announcement of \$117.7 million towards the irrigation project.<sup>70</sup> Third, in March 2021, the province committed \$27.8 million towards the construction of the Agri-Food Hub and Trade Centre.<sup>71</sup> This facility, which is valued at \$70.5 million and scheduled to open in 2023,

63 *Ibid.*

64 *Ibid.*

65 *Ibid.*

66 *Ibid.*

67 SouthGrow Regional Initiative, “About Us,” Accessed September 2021.

68 Taz Dhaliwal, “Southern Alberta stakeholders weigh in on Highway 3 twinning project,” *Global News*, July 14, 2020.

69 Ten participating irrigation districts will contribute \$143 million and the remaining funds will come from a loan from the Canada Infrastructure Bank. The irrigation districts will be responsible for repaying the loan. Eloise Therien, “Historic’ \$815M irrigation investment announced for southern Alberta agriculture,” *Global News*, October 9, 2020.

70 The additional \$117.7 funding will be also be provided in partnership with the Canada Infrastructure Bank and ten participating irrigation districts. *Canada Infrastructure Bank*, “Investing in Irrigation,” November 12, 2021.

71 Woodward, “Kenney on hand to kickstart Agri-food Hub and Trade Centre,” 2021.



is being built as part of a broader expansion initiative of Lethbridge's Exhibition Park.<sup>72</sup> Once operational, the Centre is expected to generate over \$90 million annually for the regional economy and create at least 50 jobs.<sup>73</sup> Chris Spearman, who served as Mayor of Lethbridge from 2013–2021, explains that the Centre will bring international attention to the region, its agricultural community, and value-added products; showcasing Canada's Premier Food Corridor.<sup>74</sup>

## Key Points

- Southern Alberta has an established and diverse agribusiness community. While the region has experienced new private investments, many existing companies have also expanded in recent years.
- Canada's Premier Food Corridor is a regional approach to promoting agriculture and value-added industry in southern Alberta. The regional alliance, SouthGrow, which has broader economic development goals, has also strongly supported agricultural investment.
- CPFC was formed to strategically pursue regional economic development. Members have collectively worked together to find and promote shared goals. Collaboration and open communication have been critical components of making sure all members see benefits.
- The region has offered their clear support for plant protein processing and spin-off businesses.
- The region has an asset map, which serves as an important tool for new investors and for facilitating connections among existing businesses.
- The Government of Alberta has made major investments to support southern Alberta's agricultural industry, which will in turn foster investment attraction and growth.

## Section 4: Saskatchewan

The quality, diversity, and reliable supply of commodities produced in Saskatchewan make it an attractive jurisdiction for value-added investment. The province is the world's largest exporter of canola, wheat, peas, lentils, mustard seed, flaxseed, and oats, and the second largest cattle-producing province in Canada.<sup>75</sup> In 2020, Saskatchewan exported \$16.9 billion in agri-food products, including an estimated \$3.2 billion in value-added exports.<sup>76</sup> Canola oil, canola meal, and processed oats were Saskatchewan's top value-added products.<sup>77</sup>

The Saskatchewan government has set ambitious targets to increase export value by 2030. Some of the Saskatchewan Growth Plan's goals include: increasing processing capacity to process 75% of the province's canola and 50% of pulse crops, growing Saskatchewan's agri-food exports to \$20 billion, and increasing value-added revenue to \$10 billion and private capital investment to \$16 billion annually.<sup>78</sup> Similar to Alberta,

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<sup>72</sup> *Ibid.*

<sup>73</sup> *Ibid.*

<sup>74</sup> *Ibid.*

<sup>75</sup> Saskatchewan, "Agriculture and Agri-Value," Accessed October 2021.

<sup>76</sup> *Ibid.*

<sup>77</sup> Rob Paul, "Saskatchewan ag exports hit a record," *Toronto Star*, March 20, 2021.

<sup>78</sup> Saskatchewan, "Significant New Agriculture Investment Announced in Southeast Saskatchewan," News Release, May 25, 2021.; Saskatchewan, "Major Agriculture Investment Announced in Saskatchewan," News Release, April 26, 2021.; Saskatchewan, "Governments of Canada and Saskatchewan Invest in Pulse Starch Research," News Release, June 22, 2021.;

the Saskatchewan government has committed to reducing regulatory burden, invested in its Food Development Centre (\$2.3 million), announced expansion of the province's irrigation system (\$4 billion over 10 years), allotted funding for job training programs, invested in research, and committed to infrastructure improvements (\$7.5 billion) to stimulate economic recovery.<sup>79</sup> The province has also announced four new international trade and investment offices.<sup>80</sup>

Saskatchewan has experienced significant agricultural investment in recent years. In 2021, approximately \$2 billion in funding was announced for canola processing. These projects included: Richardson Oilseed doubling the size of its Yorkton plant, Cargill and Viterra building new facilities near Regina, and Ceres Global Ag constructing a plant in Northgate (SE Sask.). These four projects are expected to increase the province's crush capacity by more than 5.7 million tonnes annually.<sup>81</sup>

The plant protein sector has also seen growth and investment in recent years. AGT Food Ingredients (AGT), one of the world's largest commodity traders of pulses, staple foods, and food ingredients, continues to make substantial investments throughout the value-chain. For example, President and CEO, Murad Al-Katib notes that AGT has invested over \$150 million into the province's railway system and grain network as they saw a need to streamline access to international markets.<sup>82</sup> As part of this value-chain investment, AGT recently opened a \$65 million grain cleaning terminal in Delisle and have moved their short-line railway headquarters to this location. Al-Katib states, "the province is poised for a generational opportunity in agricultural value-added industry thanks to rising global demand for plant protein and accelerating development of rail and logistical infrastructure."<sup>83</sup>

In January 2022, AGT in partnership with Federated Co-operatives Limited (FCL) announced their plans to build a new canola crushing plant near Regina. The project, valued at \$360 million, is part of a larger \$2 billion investment by FCL to develop an Integrated Agriculture Complex (IAC) near Regina, which will also include a renewable diesel fuel facility.<sup>84</sup> The canola crush plant will supply approximately 50% of the feedstock required to produce 15,000 barrels of diesel per day with the remainder of the supply contracted from other canola crush facilities. Including the IAC project, the province has attracted over \$12 billion in capital investment in agriculture since early 2021.<sup>85</sup> Saskatchewan Premier, Scott Moe, states that the IAC project "will provide additional momentum to Saskatchewan's growing economy."<sup>86</sup>

Other notable examples of value-added investment in Saskatchewan include Agrocorp and Avena Foods, which have both expanded their operations since 2019.<sup>87</sup> In addition, Ingredion announced a \$25.7 million expansion of the Vanscoy pulse-processing facility in November 2020, which brings the company's total investment in the facility to over \$200 million since 2018.<sup>88</sup> Jorgen Kokke, Ingredion's Executive Vice President and President, Americas, states, "The plant-based food industry is experiencing unparalleled growth and we are excited about this expansion, which will accelerate the production and accessibility of plant-based ingredients to

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79 Saskatchewan, "Building a Strong Saskatchewan: \$7.5 Billion Invested in Infrastructure Over Two Years to Stimulate Provincial Economic Recovery," News Release, May 6, 2020.; Saskatchewan, "Food Centre Expansion Will Support Saskatchewan's Value-Added Agriculture Sector," News Release, May 4, 2021.; Saskatchewan, "Saskatchewan Announces \$4 Billion Irrigation Project At Lake Diefenbaker," News Release, July 2, 2020.

80 Saskatchewan currently has international offices in Japan, India, Singapore, and China and is establishing four new trade and investment offices in London, United Kingdom; Dubai, United Arab Emirates; Mexico City, Mexico; and Ho Chi Minh City, Vietnam. Saskatchewan, "Saskatchewan to Open Four New International Trade and Investment Offices in 2021-22," News Release, May 12, 2021.

81 Sean Pratt, "Merits of new crusher focus debated," *The Western Producer*, July 15, 2021.; Cargill \$350m. Source: Cargill, "Cargill unveils plans for new canola processing facility in Regina, Saskatchewan," News Release, April 22, 2021.; Viterra \$800m Source: Arthur White-Crummey, "Viterra planning huge canola crusher for Regina area." *Regina Leader-Post*, April 26, 2021.; Ceres \$350m (USD) Source: Ceres Global, News Release, May 25, 2021.; Saskatchewan, "Significant New Agriculture Investment Announced in Southeast Saskatchewan." 2021.

82 Kyle Benning and Thomas Piller, "Saskatchewan commodity trader completes rail network," *Global News*, July 19, 2021.

83 Kathy Kerr, "Agri-food, resource industries ready to fuel Sask. CRE growth," *Real Estate News Exchange*, May 17, 2021.

84 Federated Co-operative Limited, "FCL to construct \$2 Billion Integrated Agriculture Complex entering into Joint Venture with AGT Foods on a new Canola Crushing facility," January 17, 2022.

85 *Ibid.*

86 *Ibid.*

87 In 2019, Agrocorp opened a protein extraction facility in Cut Knife, SK. Agrocorp opened their first facility in 2012 in Moose Jaw. *ThinkSask*, "Agri-Value Stories," Accessed October 2021. Avena Foods is expanding their operation with a second Saskatchewan oat processing facility in Rowatt, SK. *Food in Canada*, "Avena Foods building new oat-processing facility," February 27, 2020.

88 Mary Ellen Shoup, "Ingredion to acquire 100% ownership of Verdient Foods advancing pulse-based protein production," *Food Navigator-USA*, November 2, 2020.

meet the needs of our customers.”<sup>89</sup> There have also been investments in cannabis and hemp processing in Saskatchewan, with Alberta-based companies Endless Sky (Redvers) and Blue Sky Hemp Ventures (Saskatoon) setting up facilities.

There are some key factors that are making Saskatchewan an attractive investment environment.

## Motivated Government

The Government of Saskatchewan appears to be highly motivated to increase value-added agricultural investment in the province. Jeremy Harrison, Minister of Trade and Export Development, explains that the government works closely with investors to “win the deal amid a very competitive investment climate.”<sup>90</sup>

The province has been very good to work with to guide us through the decision-making process on where Cargill should invest. We operate in 70 countries around the world and so we’ve got a lot of different geographies in which we can invest our owner’s capital.<sup>91</sup> – *Jeff Vassart, President of Cargill*

Saskatchewan is a great place for agribusiness. There is a commitment from the government that they want us here. ... They are willing to partner as things come up and that creates opportunity and additional investment.<sup>92</sup> – *Chantelle Donahue, VP Corporate Affairs, Cargill*

Other agribusiness leaders have described the provincial government as “very supportive,” “quick to help,” and “responsive” noting that it “made business easy for us.”<sup>93</sup>

The Saskatchewan government also actively engages industry stakeholders about their value-added strategy. Godwin Pon, Director of the Value-Added Unit for the Department of Agriculture, states, “We solicit feedback on the Province’s Growth Plan, and opinions on priorities and actions to achieve targets for the value-added sector. Working and consulting with industry groups has been an ongoing, essential priority regarding strategic ag value-added development for Saskatchewan.”<sup>94</sup>

Municipalities have also demonstrated how motivated they are in attracting agribusiness into Saskatchewan. For example, in April 2021, Viterra announced that it would build the “world’s largest integrated canola crush facility,” on 630 acres near Regina.<sup>95</sup> The land was purchased for \$4 million, which was estimated to be \$2.5 million under market value.<sup>96</sup> The deal raised considerable controversy, but Regina City Council argued, “selling the land for below market value, without a public offering, was justified to create jobs and spur increased economic activity.”<sup>97</sup> Mayor of Regina, Sandra Masters, stated,

We’re looking for the economic impact. We’re looking to put people back to work and we’re looking to grow certain sectors of our city. And again, when economic opportunities arise – and we’ve lost them before because we haven’t been able to be competitive. We’re competing with every other jurisdiction because ... in these economic times everyone is bidding on projects like this because everyone wants money being spent in construction happening in their cities with long-term job opportunities.<sup>98</sup>

89 Bridge2Food, “Ingredient unveils its newest facility to support greater plant-protein development,” September 14, 2021.

90 Arthur White-Crummey and Evan Radford, “Cargill to build \$350M canola crusher,” Saskatoon Star-Phoenix, April 23, 2021.

91 Evan Radford, “Cargill to build \$350M canola crusher in Regina area,” Regina Leader-Post, April 23, 2021.

92 ThinkSask, “Cargill | Saskatchewan Agri-Value,” Accessed October 2021.

93 ThinkSask, “Agri-Value,” YouTube Channel, Accessed October 2021.

94 Godwin Pon, Director of the Value-Added Branch, Department of Agriculture, Government of Saskatchewan, Email Correspondence. September 20, 2021.

95 CJME News, “Viterra planning canola crush facility in Regina,” April 26, 2021.

96 Colton Wiens, “Council offers land worth \$6.3M to unnamed purchaser for \$4M,” CTV News Regina. April 12, 2021.

97 CJME News, “Viterra planning canola crush facility in Regina,” 2021.; Arthur White-Crummey and Murray Mandryk, “Viterra is mystery buyer in secretive City of Regina land deal,” Regina Leader-Post, April 14, 2021.

98 Heidi Atter, “Regina mayor says if voters don’t like land deal, they can vote council out next election,” CBC News, April 15, 2021.

## Incentive Programming

Saskatchewan provides incentives to help attract investment including the Saskatchewan Value-added Agriculture Incentive (SVAI), the Manufacturing and Processing Exporter Tax Incentive, and the Saskatchewan Commercial Innovation Incentive (Patent Box Program).<sup>99</sup> Chantelle Donahue, VP Corporate Affairs for Cargill, explains that tax credits definitely make a difference in where Cargill decides to invest globally.<sup>100</sup>

The SVAI is often cited by companies as a main advantage of investing in Saskatchewan.<sup>101</sup> The program offers a non-refundable, non-transferrable 15% tax rebate on eligible capital expenditures with a value of at least \$10 million for new or expanded value-added agriculture facilities. Grain Millers completed a \$100 million expansion in 2019 at their Yorkton oat plant and credits the SVAI for being flexible and user-friendly in how it helped their company.<sup>102</sup> Cargill's President, Jeff Vassert, has also stated that the SVAI was "a motivating factor" in the \$350 million canola crush plant in Regina announced in 2021.<sup>103</sup> Companies such as Ingredion and Agropur have also acknowledged the province's tax credit programs for supporting their expansions.<sup>104</sup>

## Investment Tools/Online Presence

Saskatchewan has two online investment tools that are especially noteworthy. First, the Value-Added Agriculture Services Map.<sup>105</sup> This interactive map overlays various layers of data such as crop production, rail lines, grain elevator locations, co-packing, research institutions, and other supportive business services. Godwin Pon states that the map serves as a helpful tool to "identify optimal locations where a processing facility may want to consider locating based on production availability and other factors."<sup>106</sup> Second, SaskAgrisource was launched by Ag-West Bio in June 2021, in partnership with the Saskatchewan Government.<sup>107</sup> SaskAgrisource is a user-friendly website that contains an extensive list of businesses offering bioscience and/or agri-value products and services in the province. There is no cost for businesses to add their name and description to the database and their location is added to an interactive map online.<sup>108</sup>

The Saskatchewan Investment Attraction organization, ThinkSask, has a strong online marketing presence. The agency has profiled a number of existing businesses for their website and YouTube channel that share first-hand experiences of both small and large companies in the province and showcase the business environment, government support, and innovation and investment opportunities for agriculture.

## Ag-West Bio

Ag-West Bio (AWB) is "Saskatchewan's bioscience industry association and bioeconomy catalyst."<sup>109</sup> Since 1989, the organization has worked to facilitate and commercialize research in the province. A not-for-profit and membership-based company, AWB members include public research institutions, private companies

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99 Pon, Correspondence, 2021. *Saskatchewan, Agriculture, Business and Economic Development*, "Saskatchewan Value-added Agriculture Incentive," Accessed July 2021.

100 ThinkSask, "Cargill | Saskatchewan Agri-Value," 2021.

101 Radford, "Cargill to build \$350M canola crusher in Regina area." 2021.; ThinkSask, *Agri-Value Stories: Grain Millers*, Accessed October 2021.; ThinkSask, "Agri-Value Stories," Accessed October 2021. ThinkSask, *Agri-Value, YouTube Channel*, Accessed October 2021.

102 ThinkSask, *Grain Millers*, 2021.

103 Radford, "Cargill to build \$350M canola crusher in Regina area, 2021.

104 ThinkSask, *Agri-Value, YouTube Channel*, Accessed October 2021.

105 Saskatchewan, *Agriculture, Trade and Value-Added Branch*, "Value-Added Agriculture Services Map," Accessed September 2021.

106 Godwin, Correspondence, 2021.

107 SaskAgrisource, *Homepage*, Accessed September 2021. *SaskAgrisource is a partnership of Ag-West Bio, Saskatchewan Ministry of Agriculture and the Saskatchewan Ministry of Trade and Export.*

108 Ag-West Bio, "Ag-West Bio launches Sask Agrisource database, a new resource for Saskatchewan's agri-value sector," June 16, 2021.

109 Ag-West Bio, "About," Accessed September 2021.

(from start-ups to multinationals), research organizations, economic development organizations, and commodity groups. AWB currently receives \$1.7 million annually from the federal and provincial governments as part of the Canadian Agricultural Partnership (CAP) program.<sup>110</sup> The organization aims to create partnership opportunities among members through networking events, conferences, information seminars, and through their online database.

AWB has been a leader in supporting research, development, and investment into plant protein processing. While the Plant Protein Alliance of Alberta was in operation, the group found many areas of common interest with AWB and the Bioscience Association of Manitoba, and co-operated under the banner of P3C, the Prairie Plant Protein Coalition. In addition, AWB played a significant role in developing the PIC supercluster proposal, which in collaboration with industry partners, has enabled over \$400 million of investment in plant protein projects across the Prairies.<sup>111</sup> Some notable Saskatchewan cost-shared projects in the past two years include: AGT Food and Ingredients partnership with ulivit (\$11.3 million)<sup>112</sup>; Ingredion's expansion of the Vanscoy pulse processing plant (\$25.7 million)<sup>113</sup>; and the GrainFrac (Edmonton-based company), Tomtene Seed Farm, and Ripple Foods PBC collaboration (\$4.3 million), which will utilize the specialized dry-processing technology patented by GrainFrac.<sup>114</sup>

## Key Points

- There is momentum in value-added investment. Canola and pulse processing have drawn major investment in Saskatchewan's value-chain.
- Governments in Saskatchewan appear to be very motivated to work with investors and help existing agribusiness expand. Stakeholder feedback is overwhelmingly positive in their experience working with government officials at both the provincial and municipal level. The government also regularly engages with industry and business stakeholders for advice and policy feedback.
- Saskatchewan's tax incentive programs, particularly the SVAI, are commonly cited as a key factor in new investment decisions and enabling existing businesses to expand.
- Value-added mapping and database information can help support investment attraction and make connections among agribusinesses and supportive services.
- Ag-West Bio is a significant asset to support business and research opportunities. AWB is fostering a network among businesses and value-chain services. Among the many benefits of creating these partnerships is the ability to qualify for PIC funding.

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<sup>110</sup> Ag-West Bio, "Governments Renew Investment in Saskatchewan's Agricultural Biotechnology Sector," News Release, June 18, 2018.

<sup>111</sup> Protein Industries Canada, "Protein Industries Canada and partners launch Sector Roadmap," September 22, 2021.

<sup>112</sup> Protein Industries Canada, "Protein supercluster funding awarded to AGT Foods and ulivit start-up," June 27, 2020.

<sup>113</sup> Ingredion's Vanscoy plant processes dried peas, lentils and fava beans. Protein Industries Canada, "Partnership to improve the functionality of pulse-based ingredients," November 10, 2020.

<sup>114</sup> Protein Industries Canada, "New partnership to improve protein content of pulse-based products," News Release, March 4, 2021.

# Section 5: Manitoba

Agriculture and agri-food are a main contributor to Manitoba's economy. The province produces a diverse range of commodities; Manitoba leads the nation in hog production and pork processing, and is the third-largest beef-producing province. Manitoba is also one of Canada's largest potato growers along with Alberta and Prince Edward Island.<sup>115</sup> In 2020, the province's top crops based on seeded acres were canola, wheat, soy beans, and oats.<sup>116</sup> Despite only growing 5% of Canada's dry peas, which is considerably less than both Saskatchewan and Alberta, the province has been able to attract major investments in plant protein processing.<sup>117</sup> Manitoba's ample water resources and favourably priced hydroelectricity are advantages for companies specializing in protein fractionation.<sup>118</sup>

Some of the major investments in recent years include: Roquette's pea-processing plant in Portage la Prairie (\$600 million), Merit Foods' pea and canola processing facility in Winnipeg (\$150 million), and Paterson's oat plant (O Foods) in Winnipeg (\$94 million).<sup>119</sup> In addition, a number of businesses have expanded including Simplot's potato plant in Portage la Prairie (\$460 million), Maple Leaf Foods (\$182 million) in Winnipeg, and McCain Foods (\$75 million) in Portage la Prairie and Carberry.<sup>120</sup>

Manitoba has been able to successfully attract agricultural investment and enable businesses to scale up. Government leaders, at both the provincial and municipal levels are clearly motivated, and incentive programming has proven to be a valuable tool. Moreover, the province has implemented a clear protein strategy, formed a consortium to bring together various stakeholders, and emphasized an overarching goal of sustainability.

## Motivated Government

In 2016, a newly elected Progressive Conservative government made attracting agricultural investment into the province a top priority. In 2017, Roquette's CEO Jean-Marc Gilson stated, "Along with primary material and relatively easy access to North America [logistics] ... We found ourselves in front of an administration, which did everything, in fact, not only to help us but has accompanied us in an extraordinary way...that made the decision."<sup>121</sup>

Manitoba's Assistant Deputy Minister for Agriculture Maurice Bouvier explains that the province has supported investment attraction by providing a concierge service with a single point of contact and "aggressive timelines" for communications and approvals.<sup>122</sup> Daryl Domitruk, Executive Director of Manitoba Pulse Producers, explains that being a smaller province, the government understands how much of a short- and long-term economic impact agricultural investment can generate.<sup>123</sup> Domitruk says that Manitoba may just be "hungrier" than other governments to get deals made, and he credits Portage la Prairie, both the city and rural municipality, for aggressively promoting themselves.<sup>124</sup>

115 Robert Arnason, "Potato acreage continues prairie expansion," *The Western Producer*, August 5, 2021.

116 Allan Dawson, "Manitoba's top crops in 2020," *Manitoba Co-operator*, October 29, 2020.

117 Field peas represent the majority of the acreage on the Prairies with around 2.2 million acres in Saskatchewan and 1.7 million acres in Alberta. The fractionation plants in Manitoba are having a big impact on the seeded acreage in the province, rising from 76,000 acres of field peas in 2017 to 176,000 acres in 2020. Robyne Bowness, "Prairie pulse crop update," *Top Crop Manager*, August 2021.; Manitoba, Agriculture, "Manitoba Markets: Estimates of Field Crop Production 2020," Accessed September 2021.

118 Martin Cash, "Growing strong Province's plant-based protein industry in solid shape," *Winnipeg Free Press*, May 5, 2020.

119 realagriculture, "Roquette powers up \$600 million pea protein plant," January 18, 2021.; CBC News-Manitoba, "\$94M oat mill to be built in Manitoba with help from province," October 3, 2019.; realagriculture, "Merit commissioning \$150 million food-grade canola and pea protein facility," February 11, 2021.

120 Portage Regional Economic Development, J.R. Simplot Company Announces \$460 Million Expansion, Creating Nearly 100 New Jobs: Pallister." February 14, 2018.; Robert Arnason, "Maple Leaf Plans Pre-Cooked Bacon Plant for Winnipeg," October 5, 2021.; McCain Foods, "McCain Foods Commits \$75 Million to Manitoba Production Facilities," News Release, December 3, 2018.

121 Manitoba PC Caucus, "Roquette CEO Jean-Marc Gilson on why his company is investing in Manitoba," January 20, 2017.

122 Manitoba Agriculture, "Invest in Manitoba," YouTube Channel, January 19, 2021.

123 Daryl Domitruk (Executive Director, Manitoba Pulse Growers). Interview with Author, July 22, 2021.

124 *Ibid.*

Portage la Prairie is a city 75 kilometres west of Winnipeg with a metro population of approximately 20,000 people. The city has experienced significant investment in recent years. Some of the largest agribusinesses in the region include Simplot, Roquette, Nutripea, McCain, and Can-Oat Milling (Richardson-Pioneer). Other local agri-food business includes Avena Foods (formerly Best Cooking Pulses), Better Hemp Company, and Prairie Quinoa. It should also be noted that the region is home to Manitoba's Food Development Centre, which is similar to those in Alberta (Leduc) and Saskatchewan (Saskatoon), and is an incredible asset to help support and grow the agri-food industry.

Portage la Prairie Mayor Irvine Ferris believes companies are looking to the region because of its central location in Manitoba and proximity to different modes of transportation.<sup>125</sup> Ensuring infrastructure needs are met (e.g., roads, water, wastewater treatment) has also been critical to supporting agribusiness growth. Dominique Baumann, CEO for Roquette in Canada, explains that government support (both provincial and municipal) has been ongoing and that they "have had tremendous help in terms of bringing whatever was needed to the right level."<sup>126</sup> Since 2017, government has invested over \$110 million to upgrade infrastructure and utilities in the Portage la Prairie area to support agribusiness growth.<sup>127</sup> The most recent announcement in August 2021, was a \$25 million project for upgrading one of the city's main transportation routes.<sup>128</sup>

There is a vision to create an agricultural ecosystem in Portage la Prairie, and Roquette is one of the key players that has been propelling the region's development since it opened in 2020. Dominique Baumann explains that if Roquette sees an opportunity, the company talks with a potential partner and they collaboratively work with the Manitoba government to help attract them.<sup>129</sup> Roquette has constructed their facility to accommodate future growth and plans to expand production beyond peas.<sup>130</sup> The company has also partnered with Prairie Fava, a small fava bean<sup>131</sup> processor located near Glenboro, Manitoba, on a \$19.2 million project, which has received PIC funding.<sup>132</sup>

## Incentive Programming

A 2021 report commissioned by the Netherlands argues that a key reason Manitoba has been able to attract a "disproportionate" amount of plant protein investment is largely due to the province's financial incentives.<sup>133</sup> Many companies that have invested in Manitoba cite the tax incentives as a major reason why they decided to locate in the province. In 2019, Paterson GlobalFoods (PGF) shortlisted North Dakota and Manitoba to build their new oat processing plant, O Foods Ltd.<sup>134</sup> Andrew Paterson, President of PGF, stated that he was convinced by the Manitoba government to ultimately choose Winnipeg. Transportation logistics and the high-quality oats within the region were major considerations.<sup>135</sup> However, Paterson credits incremental tax support as the "single biggest reason this plant is in Manitoba and not in the United States."<sup>136</sup>

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125 Riley Laychuk, "Massive pea-processing plant nears completion, opening new market for Manitoba growers," *CBC News*, February 2, 2021.

126 Martin Cash, "Growing strong Province's plant-based protein industry in solid shape," *Winnipeg Free Press*, May 5, 2020.

127 Manitoba, "Province invests in Major Infrastructure Upgrade in Portage la Prairie," *News Release*, August 9, 2021.

128 The total project cost has received funding from the provincial government (\$8.3 million), the Government of Canada (\$12.5 million) and the City of Portage la Prairie (\$4.2 million). Manitoba, "Province invests in Major Infrastructure Upgrade in Portage la Prairie," *News Release*, August 9, 2021.

129 *The Future Economy*, "Building the Global Future of Plant-Based Proteins: Dominique Baumann, Roquette," September 30, 2020.

130 Cash, "Growing strong Province's plant-based protein industry in solid shape," 2020.

131 Fava beans are a pulse crop that is part of the legume family. The terms fava beans, faba beans, and broad beans are often used interchangeably and refer to the same commodity.

132 Protein Industries Canada, "Investment to Further Pea and Fava Bean Processing on the Prairies," *News Release*, June 19, 2020.; Kelvin Heppner, "\$19.2 million announced for faba bean and pea processing research," *realagriculture*, June 19, 2020.

133 Netherlands. "Market Study," 2021.

134 Dave Bedard, "Paterson stakes Manitoba site for oat processing plant," *AGCanada*, October 3, 2019.

135 *Ibid.*

136 Ed White, "Paterson plans new oat plant for Manitoba," *The Western Producer*, October 10, 2019.

The Manitoba Capital Works Incentive (MCWI) is an incremental tax financial program designed to support new businesses as well as help existing businesses expand. Requirements include: a minimum capital investment of \$10 million by the company; 65% of total project costs must be from the private sector; the company has to demonstrate potential to create at least 10 jobs and/or create substantial/measurable economic benefit to the province; construction must commence within 6–24 months; and that the project proponent is both property owner and taxpayer.<sup>137</sup> The company will receive the tax rebate of the incremental (new) education property taxes that are generated as a result of capital investment on an identified property for a period of up to 20 years or until education property taxes are eliminated, whichever is sooner.<sup>138</sup> Some examples of companies that will have ongoing benefits from the MCWI include Simplot (Portage la Prairie), which will receive an estimated \$6.3 million, Merit Functional Foods (Winnipeg), which will receive a \$4.5 million rebate, and Vermillion Growers (Dauphin), which will receive \$4.2 million.<sup>139</sup>

## The Manitoba Protein Advantage

In September 2019, the Manitoba government announced the “Manitoba Protein Advantage” at the first-ever Manitoba Protein Summit, which brought together leaders from the crop and livestock sectors, processors, academics, government, and other stakeholders with the aim of finding new insight into protein opportunities. The strategy is expected to help the Manitoba government achieve their set target of attracting \$1.5 billion in investment and 1,550 jobs by 2025.<sup>140</sup>

The Manitoba Protein Advantage is comprised of a number of policy actions. First, Manitoba announced a \$362,000 investment into the Food Development Centre to accelerate the pace of protein ingredient development.<sup>141</sup> Second, the province signed a memorandum of understanding (MOU) to become part of the “Protein Highway,” a cross-border network for plant protein innovation. Third, an annual competition, the “Manitoba Protein Challenge” was created as a “friendly competition between protein entrepreneurs to accelerate the creation of new products.”<sup>142</sup> Fourth, the creation of the Manitoba Protein Consortium (MPC), which brings together a diverse group of stakeholders to develop an action plan. Manitoba’s Minister of Agriculture stated,

We committed to working with industry, academia and government to create value and jobs from growing and processing animal and plant protein. The consortium brings together members of the plant and animal protein value chains – from producer to processor to retailer, academia and innovator – to provide leadership for a path to position Manitoba as first in class in sustainable protein industry development.<sup>143</sup>

The MPC was given three key tasks: provide advice to the government and stakeholders on implementing the Manitoba Protein Advantage; engage with stakeholders to define sustainability and create metrics to quantify Manitoba’s sustainability; and to ensure stakeholder accountability for specific actions.

The MPC is composed of eight volunteer members from both the animal and plant protein sectors, business leaders, environmental groups, academia, and research institutions.<sup>144</sup> There is also a Strategic Advisory Body

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<sup>137</sup> Manitoba, *Business and Economic Development*, “Tax Credits and Programs: Manitoba Works Capital Incentive,” Accessed August 2021.

<sup>138</sup> *Ibid.*

<sup>139</sup> Manitoba, “International Food Processor Announces Major Expansion of Manitoba Operations,” *News Release*, February 14, 2018. *Top Crop Manager*, “Manitoba plant protein production receives governmental support,” August 18, 2020.; *Greenhouse Canada*, “Manitoba announces \$4.2M rebate for province’s first large-scale greenhouse,” June 30, 2020.

<sup>140</sup> Manitoba, *Agriculture and Resource Development*, “The Manitoba Protein Advantage,” Accessed August 2021.

<sup>141</sup> Ian Froese, “Plant-based proteins an opportunity, not a threat, to Manitoba farmers, summit told,” *CBC News*, September 19, 2019.

<sup>142</sup> *Ibid.*

<sup>143</sup> Manitoba, “Province Creates New Protein Consortium to Further Manitoba’s Protein Advantage Strategy,” *News Release*, January 21, 2020.

<sup>144</sup> The consortium’s members include Tracey Maconachie (President, Bioscience Association Manitoba), Kristen Tapley (Ducks Unlimited Canada), Dickson Gould (President, Progressive Group of Companies), Sav Bellissimo (Federated Co-operatives, Saskatoon), James Battershill (Founder, Juno Food Labs), Emily Murray (GM, Cargill’s McDonald’s beef patty business), Dr. Emma McGeough (Assistant Professor, Animal Sciences at University of Manitoba) and Neil Cunningham (Director, Climate and Clean Technology).



that has seventeen industry leaders.<sup>145</sup> In the first two years of operation (2019–20, 2020–21), the Department of Agriculture had an annual budget of \$100,000 to support protein industry development (i.e., MPC projects), which has been increased to \$150,000 for fiscal year 2021–22.<sup>146</sup> The MPC currently does not have paid memberships nor does it have any paid staff.

At the 2019 Manitoba Protein Summit, the overarching theme was the common ground and mutual benefit for animal and plant protein groups to work together and promote investment.<sup>147</sup> Zero Waste Scotland recognized the Manitoba Protein Advantage in their 2020 report for integrating animal protein into a strategy with plant protein goals. The authors argue that it has “helped reduce friction between sectors and organisations” and has “ensured buy-in and engagement during development and implementation.”<sup>148</sup>

## Focus on Sustainability

In collaboration with Manitoba’s Department of Agriculture, the MPC engaged Canadian and international stakeholders in dialogue to develop a Sustainable Protein Action Framework. The MPC conducted 77 individual meetings with more than 300 participants and received more than two dozen written submissions. With this stakeholder information, the MPC worked with industry leaders (Sustainable Protein Design Team) from Canada (Manitoba, Ontario, and Saskatchewan), the Netherlands, and Bulgaria to “prioritize strategic actions and identify opportunities for scalable impact.”<sup>149</sup> Chair of the MPC, Dickson Gould, stated, “The Challenge Dialogue discipline has been a transformational process for developing shared understanding, actions and next steps in our goal to achieve the full potential of the Manitoba Protein Advantage Strategy.”<sup>150</sup>

In January 2021, the MPC held the Sustainable Protein Innovation Forum, which was an online event attended by approximately 85 organizations, where the new Sustainable Protein Action Framework was released.<sup>148</sup> David Wiens, Chair of the Dairy Farmers of Manitoba, states, “The framework covers the entire sustainable protein landscape and will serve as a reference to guide future actions and position Manitoba as a leader in sustainability.”<sup>151</sup> Some of the key sustainability goals focus on innovation and research to reduce greenhouse gases, water usage, energy consumption, and waste in production and processing.

In February 2021, the second annual Manitoba Protein Summit was held with more than 650 participants attending virtually. There were a number of speakers and online panel events. Minister of Agriculture, Blaine Pederson, stated, “Events such as Manitoba’s Protein Summit open doors for Manitoba companies and help connect them with global stakeholders. Providing these opportunities will ensure Manitoba will continue to be a leader in protein innovation.”<sup>153</sup>

The 2021 Summit emphasized sustainability as a key objective of the province’s protein strategy. At the event, Dori Gingera-Beauchemin, Deputy Minister of Manitoba Agriculture, stated, “Knowing how to sustainably produce food is extremely important in order for us to pave the way to be a global leader in protein.”<sup>154</sup> Guest speaker

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145 Manitoba, *Manitoba Protein Advantage, “Manitoba Protein Consortium and Strategic Advisory Body: Biographies,”* October 18, 2021.

146 Sughantha Nathaniel, (Director of Industry Development and Resilience, Government of Manitoba), *Email Correspondence with Author*, October 19, 2021.

147 Froese, “Plant-based proteins an opportunity, not a threat, to Manitoba farmers, summit told,” 2019.; Alexis Stockford, “Laying a foundation for protein in Manitoba,” *Manitoba Co-operator*, October 17, 2019.

148 William Clark and Michael Lenaghan, “The Future of Food: Sustainable Protein Strategies Around the World,” *Zero Waste Scotland*, June 2020.

149 Manitoba, “Manitoba Hosts Forum on Sustainable Protein Innovation,” *News Release*, January 29, 2021.

150 In 2020, MPC also engaged with the University of Manitoba to develop a Protein Research Strategy that aims to align and leverage synergies in the research and innovation community. Manitoba, *Agriculture, “Welcome to the Manitoba Protein Summit,”* February 2021.

151 Manitoba, *The Manitoba Protein Advantage: A Strategy for Sustainable Protein Production and Innovation*, September 2019.

152 Manitoba, “Manitoba Hosts Forum on Sustainable Protein Innovation,” *News Release*, January 29, 2021.

153 Manitoba, *Agriculture, “Welcome to the Manitoba Protein Summit,”* February 2021.

154 Ed White, “Sustainability key to protein sector,” *The Western Producer*, March 11, 2021.

Abby Lyall, Vice President of Big Ideas Ventures, explained that sustainability is something large venture capital firms are looking at as an advantage.<sup>155</sup> Lyall argued, “The policy response that different governments have will really dictate attracting investment as well as attracting innovative entrepreneurs to those geographic areas.”<sup>156</sup>

Sustainability is a key consideration of many foreign governments and investors concerned about environmental footprint. The discourse on environmental sustainability is especially tied to the plant protein sector and foreign investors are looking at opportunities that utilize sustainable production methods and prioritize sustainable research.<sup>157</sup> As an industry leader, Roquette has championed sustainability goals and often attributes renewable hydroelectric power as a major factor in their decision to invest in Manitoba.<sup>158</sup> Journalist Ed White argues, “The focus on sustainability measures and proving sustainability is a worldwide trend that puts pressure on food commodity providers to prove what they produce helps rather than hurts the planet and humanity.”<sup>159</sup>

## Key Points

- The Manitoba government, at both the provincial and municipal levels (e.g., Portage la Prairie), has been extremely motivated in attracting value-added agriculture investment.
- Incentive programming has stimulated investment in new and existing agribusiness.
- Manitoba’s Protein Strategy has set clear goals and has taken an approach that supports both animal and plant protein investment.
- Manitoba’s Protein Consortium has brought together groups with the aim to promote shared goals, make connections, gather information, and develop an action plan. The government is utilizing the expertise of stakeholders to inform their policy decisions.
- Emphasizing sustainability as a key goal is attractive for foreign investors – especially in plant-based ingredient processing and agri-food.

## Section 6: Policy Recommendations

The agriculture and agri-food industry are a stable and significant contributor to Alberta’s economy and the nation as a whole. For years, both government and industry stakeholders have touted the industry’s potential for further economic growth. Agriculture has demonstrated its resiliency during the COVID-19 pandemic and governments, at all levels, have regarded it to be a cornerstone of their economic recovery plans. Increasing value-added investment and adapting to changing market demands are key to working towards ambitious economic goals.

The federal and provincial governments have a fundamental role to play in building an attractive investment environment. Governments must continue their work to address labour shortages, reduce burdensome regulation, fund innovative research and projects, promote Canada’s agriculture and agri-food industry, and invest in

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<sup>155</sup> Manitoba, Agriculture, “Attracting Investment in Protein Innovation and Technologies: Abby Lyall, VP Big Ideas Ventures,” Manitoba Protein Summit, February 2021, Posted on YouTube, Manitoba Agriculture, YouTube Channel, April 7, 2021.

<sup>156</sup> *Ibid.*

<sup>157</sup> Netherlands. “Market Study” 2021.

<sup>158</sup> Laychuk, “Massive pea-processing plant nears completion, opening new market for Manitoba growers,” 2021.

<sup>159</sup> White, “Sustainability key to protein sector,” 2021.

infrastructure. The business environment is shaped by many factors and governments at all levels are trying to find the best ways to overcome barriers and create opportunities for investment.

Alberta has many advantages that well-position it for agricultural investment. However, there are also some notable challenges that if mitigated, would foster a more competitive business environment. The analysis presented in this paper provides key insights into the policy environment of neighbouring provinces and within Alberta. These findings can help inform policy action for the Alberta government and the EMR that will help better position them for economic success.

## Province of Alberta

### Key Recommendations:

- Enhance Alberta's Agriculture Strategy and Establish an Advisory Council
- Implement Incentive Programming and Build Investor Confidence
- Clarify Government Support for All Sectors
- Develop Investment Attraction Services

### a. Enhance Alberta's Agriculture Strategy and Establish an Advisory Council

The Agri-food Sector Investment and Growth Strategy was developed by the province of Alberta as part of Budget 2021 "to increase the value of the agriculture and agri-processing sector in Alberta's economy and enable business success."<sup>160</sup> The strategy includes three pillars: investment attraction, increasing exports, and expanding irrigation infrastructure. These three pillars are valuable objectives but there needs to be a clear action plan to be able to effectively reach goals.

Taking inspiration from Manitoba's Protein Strategy would be valuable. The Manitoba government has made a clear commitment to both animal and plant protein and is championing both sectors. The strategy and action plan that have resulted from this commitment is largely due to the exceptional group of stakeholders coming together to find common ground, promote mutual objectives, and advise the provincial government.

The Government of Alberta would be well-served to establish an advisory council of industry and business leaders that could be assigned the task of developing an action plan for attracting value-added investment and growing the industry as a whole. There are many champions of agriculture within various industry groups, regional economic organizations, businesses, research institutions, etc. Government needs to utilize the motivation and expertise of this group to create a network, encourage collaboration, and foster buy-in. Carlo Dade, Director of the Trade and Investment Centre for the Canada West Foundation, argues that adopting a provincial strategy would "help unify the industry rather than keeping the current divisions between animal and plant protein."<sup>161</sup> For the livestock industry, it could help them promote a more positive narrative for the substantial economic, social, and environmental roles they have in the province. For the plant protein industry,

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<sup>160</sup> Alberta, "Ministry Business Plan Agriculture and Forestry," Budget 2021, Accessed September 2021.

<sup>161</sup> Roquette, "Protéines végétales : l'Alberta se prive-t-elle d'une poule aux oeufs d'or?," 2021.

it could help strengthen their political influence and promote a sector with extraordinary potential. Similar to Manitoba's Protein Consortium, this group could hold networking and information events and facilitate both domestic and global connections.

## b. Implement Incentive Programming and Build Investor Confidence

Alberta is largely relying on its low corporate tax rate to draw investors. This is an advantage that Alberta has over other jurisdictions, but it will not be enough on its own. Both Saskatchewan and Manitoba's tax credit programs have proven to be a major incentive for new investment as well as enabling existing businesses to scale up their operations. In 2021, the federal Standing Committee on Agriculture and Agri-Food reported that during their committee hearings they often heard from witnesses that private investors were highly encouraged by tax incentives such as investment tax credits.<sup>162</sup>

Accessing capital is a common challenge for many investors and combining a low corporate tax rate with incentive programming would be an advantage for Alberta. Stakeholders have been critical of complex government programs, so it is essential that the application process be streamlined and easy to understand, with approvals processed quickly. Serge Buy, CEO of the Agri-food Innovation Council, states, "government support should focus on taxation and investment promotion ... [and] collaborate with industry to actively attract private investments in agri-food research and innovation by promoting opportunities, success stories and incentives for investments."<sup>163</sup>

## c. Clarify Government Support for All Sectors

If Alberta's agriculture and agri-food industry is going to live up to its full potential, it requires a strong commitment and follow through from government leaders. Government support is not only about funding, but also offering clear and sustained support. Saskatchewan and Manitoba's governments are aggressively promoting their agricultural industry, its various sectors, and related investment opportunities.

Stakeholders in the plant protein value-chain would like to see leadership in Alberta's provincial government be more vocal about their commitment to the sector. Lending vocalized support for plant protein initiatives would help facilitate investment by building investor confidence. Dan Brewin, former CEO of PPAA, explains that especially for investors who may be unfamiliar with plant protein, the commitment from government can be crucial.<sup>164</sup> Brewin states, "In Manitoba, the provincial government was prepared to put a stake in the ground and claim that it was important for its economy to support this. ... They got that spark from the government that we're missing today."<sup>165</sup>

In October 2021, More Than Protein Ingredients announced construction of a \$100 million facility in Bowden, which plans to open in 2023.<sup>166</sup> They will operate the first yellow pea wet fractionation plant in Alberta as well as perform research and development to expand into other pulse processing like lupins.<sup>167</sup> CEO Kevin McGeough has expressed how challenging it has been getting investors over the past year,<sup>168</sup> noting that it would be an immense

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<sup>162</sup> Canada. *Room to Grow: Strengthening Food Processing Capacity in Canada for Food Security and Exports*, 2021.

<sup>163</sup> *Ibid.*

<sup>164</sup> Brewin, Interview, 2021.

<sup>165</sup> Jennifer Blair, "The plant protein ship hasn't sailed — but time is running out," *Alberta Farmer Express*, March 22, 2021.

<sup>166</sup> Sean Pratt, Sean, "New pea plant thrills growers," *The Western Producer*, October 7, 2021.

<sup>167</sup> More Than Protein Ingredients took ownership of W.A. Pulse and Grain Solutions (Innisfail) in 2020.

<sup>168</sup> Jennifer Blair, "Bowden pulse-processing plant still a go, says new CEO," *Alberta Farmer Express*, June 14, 2020.

help if the provincial government developed a plan for the protein sector and offered their support. He believes this would help encourage more investors to support their project, which has currently raised approximately half of the funding required.<sup>169</sup> The Manitoba and Saskatchewan governments have invested in plant protein processing and attracted multimillion-dollar plants to their provinces. McGeough is confident that the return for Alberta would be “very large” if it were to follow suit, “but the opportunity won’t last forever.”<sup>170</sup>

The PPAA was a strong advocate for the plant protein sector, and among its many accomplishments was the creation of a network of stakeholders along the plant protein value-chain. PIC CEO Bill Greuel, has stated that collaborative projects including research and development, lead to opportunities for foreign direct investment.<sup>171</sup> Developing partnerships among industry and agribusiness is also critical to qualify for funding programs (e.g., PIC funding) and fostering an ecosystem for value-added industry in the province. As we see in the Manitoba case, Roquette has been actively encouraging other investors and building partnerships, which has created momentum. The abrupt decision not to renew PPAA’s funding in March 2021 blindsided the group, and did not reflect well on the Alberta government’s commitment to the plant protein sector regardless of their reasoning.<sup>172</sup> By establishing an advisory council to develop a provincial protein strategy, it would allow for this networking to resume and build on what the PPAA had effectively begun.

The Manitoba Protein Consortium and Saskatchewan’s Ag-West Bio are actively facilitating industry/business/research partnerships and collaboration. It is important that Alberta establish a body that could serve a similar role to remain competitive. It is critical that government offer long-term support and a clear mandate for the group to see measurable results in investment.

## d. Develop Investment Attraction Services

The Alberta Investment Attraction Act passed in 2020, creating a government-owned corporation known as the Invest Alberta Corporation. The organization was given an annual budget of \$6 million for a three-year period.<sup>173</sup> While the organization’s website states, “Invest Alberta is your one-stop government connection to doing business in Alberta,” there is considerable confusion between government departments (Agriculture and Forestry and Trade and Investment) and Invest Alberta as to who is responsible for taking the lead with agribusiness investors.<sup>174</sup> There needs to be more clarity of roles in investor relations. Furthermore, it would be beneficial for Invest Alberta to have a staff member with experience in agribusiness that could offer expertise, and a board member with a background in agriculture/agribusiness, which would send an important signal that the industry is a priority for investment attraction.

In a 2021 policy paper that examined investment attraction agencies in Ontario and Alberta, Mitchell Davidson explains that many questions remain about how the Invest Alberta agency will function, including their strategic mandate, resources, how they will work across ministries, and how their responsibilities will fit within a broader investment agenda. However, Davidson points out that while Invest Alberta is still at a “formative moment,” “the choices that policymakers make on these different considerations – including with respect to agency mandates and operational roles and responsibilities – will ultimately determine their effectiveness.”<sup>175</sup>

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169 McGeough, Interview, 2021.; Doug Collie, “\$100 million pea processing facility breaks ground in Bowden,” *MountainView Today*, October 12, 2021.

170 Blair, “Bowden pulse-processing plant still a go, says new CEO,” 2021.

171 Canada, William Greuel, *Protein Industries Canada, Witness Testimony*, 2020.

172 Despite praising the PPAA for their achievements, the only public explanation the Department of Agriculture has offered is as follows: “due to the need to focus limited program funds on projects that directly support the value-added sector and encourage innovation and technological advancement, Agriculture and Forestry will not provide further operational funding to the PPAA.” Jennifer Blair, “Plant processing advocate gets the axe,” *Alberta Farmer Express*, May 3, 2021.

173 Kevin Mehi, “Bill 33: Invest Alberta Corporation to Attract Foreign Investment to Province,” *MLT Atkins*, July 21, 2020.

174 Invest Alberta, “Why Alberta,” Accessed October 2021.

175 Mitchell Davidson, “Attracting 21st Century Investment: A Blueprint for The Creation of Invest Ontario and Invest Alberta,” *Policy Papers. Ontario 360*, February 17, 2021.

Saskatchewan's investment attraction website, ThinkSask, has had an active online presence showcasing the province from the perspective of agribusiness leaders. This helps to sell the province and its many success stories. Invest Alberta could employ a similar tactic to promote Alberta and its many innovative and successful agribusinesses.

## The Edmonton Metropolitan Region

### Key Recommendations:

- Create a Regional Agriculture Strategy and Action Plan
- Market the EMR Advantage
- Produce an Interactive Value-chain Asset Map/Business Database
- Champion Agriculture and Create Partnerships within Value-Chain

There is a strong case to be made for investing in the Edmonton Metropolitan Region. Edmonton Global has identified the agri-food industry as a key investment opportunity and regional leaders have affirmed their commitment. The approval of the Regional Agriculture Master Plan (RAMP) in August 2021 solidified a regional initiative that will support the agriculture industry's economic growth now and into the future. RAMP preserves prime farmland and encourages members of the EMR to work strategically in their land planning and think long-term.

### a. Create a Regional Agriculture Strategy and Action Plan

The RAMP report, *Agriculture: Our Legacy and Our Future*, recognizes the benefits of a regional approach that encourages and supports the economic growth of value-added agriculture. With accelerated value-added investment and production, the EMR's total direct economic output from agriculture could potentially reach \$25 billion by 2046.<sup>176</sup> Developing a regional approach could help support this ambitious goal. The RAMP Task Force recommends that the development of a regional strategy should be led by "individuals with expertise in the fields of agricultural production, agricultural economics, economic development and market development."<sup>177</sup>

In April 2021, all thirteen regional mayors of the Edmonton Metropolitan Region (EMR) signed an MOU to work in partnership to develop the Collaborative Economic Development (CED) initiative which could serve as an overarching strategy for regional economic partnership.<sup>178</sup> City of St. Albert Mayor, Cathy Heron, stated, "It is exciting to see so many regional partners offer their support for this new approach. Together, we will look at opportunities to provide a simplified and faster path for business investment in targeted areas by making the regulatory environment easier to navigate. This will include work to reduce red tape, and document available tools and strengths that we can leverage to increase investment opportunities."<sup>179</sup>

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<sup>176</sup> This projected total combines the estimated value from gross farm sales and value-added agricultural products. Edmonton Metropolitan Region Board, "The Economic Imperative for RAMP," Summary of the presentation prepared by Toma and Bouma Management Consultants, December 2019.

<sup>177</sup> RAMP Task Force, *Agriculture: Our Legacy and Our Future*, Final Draft Regional Agriculture Master Plan, July 2021.

<sup>178</sup> The thirteen signatories represented the following municipalities: City of Beaumont, Town of Devon, City of Edmonton, City of Fort Saskatchewan, City of Leduc, Leduc County, Town of Morinville, Parkland County, City of St. Albert, City of Spruce Grove, Town of Stony Plain, Strathcona County and Sturgeon County.

<sup>179</sup> City of St. Albert, "All 13 Edmonton Metro Region Mayors commit to working together on new Collaborative Economic Development initiative," News Release, April 20, 2021.

Lessons can be drawn from the regional approach of Canada's Premier Food Corridor. The Lethbridge-Taber group is strengthening stakeholder relationships, advocating for infrastructure and provincial funding support, and promoting agricultural/value-chain investment opportunities for the region. The objectives of this group have also been closely aligned with those of the SouthGrow Regional Initiative. Together these two groups have been a strong voice for building a value-added ecosystem for agriculture in southern Alberta.

Lessons can also be taken from the Manitoba case study and particularly how motivated Portage la Prairie has been to successfully attract investment and pursue their goal of building an agri-food cluster. The city and rural municipality continue to make large investments into infrastructure upgrades (e.g., water, wastewater, transportation, etc.) and champion the industry to get provincial and federal support for local initiatives. The Alberta government has made several large funding announcements in southern Alberta to support their agri-food ecosystem. The EMR could lend their voice to encourage the provincial government to invest in infrastructure that could help support agribusiness in the Edmonton region.

Developing a regional approach to economic development could build a stronger case to support value-added agricultural investment in the EMR. The challenge will be to balance each municipality's autonomy while establishing regional objectives.

## b. Market the EMR Advantage

Edmonton Global has been successful at developing an online presence to showcase the economic opportunities in the EMR for potential investors. In-person events have been challenging to schedule during the pandemic and as such, online marketing is a fundamental resource for foreign investors to access. Continuing to hold online forums with business leaders, providing information on regional advantages (Food Development Centre, post-secondary institutions, skilled labour pool, etc.), and policies that support business will help promote the region for investment opportunities. Furthermore, the region needs to share the success stories of existing businesses and put a spotlight on new and innovative companies like Canadian Rockies Hemp (Bruderheim), which has built North America's largest hemp processing plant, and Faba Canada, which is the region's first protein fractionation plant, specializing in processing faba beans. Also featuring companies that focus on creating environmentally friendly products, like Plant Plus (Edmonton International Airport), who is developing eco-friendly packaging from plant fibre, would highlight the innovation and commitment to sustainability within the region. The EMR needs to promote these investments to create momentum in investment attraction.

The regional marketing plan would benefit from more data that communicates/justifies why costs might be higher in the region and how regional advantages offset/outweigh those costs.<sup>180</sup> Continuing to build on some of the information gathered by the Edmonton Metropolitan Region Board (EMRB) and Edmonton Global will continue the region's efforts to present the most compelling case to investors.

In addition, data should be collected internally about economic development initiatives within the region. This data could help establish standards of practice within the region and provide feedback about how the EMRB and Edmonton Global could better support members. It is also important that feedback from investors is collected. This information would be valuable to better understand how the region can build on its strengths and address areas where it might be underperforming.

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<sup>180</sup> Tyler Westover (Manager, Economic Development Team, Sturgeon County), Interview with Author, September 9, 2021.; Michael Richard (Investment Attraction Lead, Sturgeon County), Interview with Author, September 9, 2021.

## c. Produce an Interactive Value-chain Asset Map/Business Database

The EMR would benefit from expanding its current site selector map and creating a more interactive value-chain asset map. Saskatchewan's value-chain asset map tool provides exceptional detail that could be implemented for the EMR. The maps that Western Economic Diversification Canada created for southern Alberta (Lethbridge-Taber and Calgary) are useful, but Saskatchewan's interactive model is more user-friendly in its ability to layer the information that different investors want.

The SaskAgrisource database is also proving to be a valuable tool for investors, and it is creating awareness and connections among existing businesses. The EMR could adapt this tool on a regional level to help foster an ecosystem for value-added agriculture. It may also help identify what areas of the value-chain are lacking in the region to help inform a more aggressive focus on attracting specific types of business. In turn, it could also help present a compelling case to attract a business. For example, the lack of toll processing and co-packing capacity in the region has been identified as an issue that needs to be addressed to attract new investment and help enable scale-up opportunities for existing companies.<sup>181</sup> If a database of value-chain businesses was created, it could help provide convincing data to a co-packing company that there is a clear demand and a network of businesses ready to take advantage of their services.

## d. Champion Agriculture and Create Partnerships

The Edmonton Metropolitan Region can serve as a champion for agriculture and the agri-food industry. It can lend its voice to encourage provincial leaders to take action and enable a more competitive business environment. In addition, it can also help promote a better understanding of the many economic, social, and environmental roles the agricultural industry performs within the region. In June 2020, the Counties of Parkland, Sturgeon and Leduc studied the need for a tri-county regional communications plan. One of the key findings from their report is that there was "very low mainstream understanding of what agriculture is and what it means within the county from both an economic and social aspect."<sup>182</sup> Leanne McBean, Business Retention and Expansion Lead for Sturgeon County, explains that education is a critical component of convincing both government leaders and citizens about the important roles of agriculture and what potential there is for continued economic growth.<sup>183</sup> Developing a communications plan will be an important part of creating an effective regional agriculture and value-added strategy.

Fostering partnerships with industry and business leaders is an important role for EMR leaders and the region's economic development teams. The expertise and connections these organizations have could be utilized and supported. When appropriate, the EMR could help strengthen these organizations' policy proposals to government by voicing their support and/or giving them a platform by involving them in panel discussions at in-person or online events. In turn, these organizations may be a valuable resource to the EMR by identifying opportunities in the region's value chain, assisting with investment attraction to the EMR, providing insight about industry trends (e.g., food waste reduction, sustainable product/packaging development, alternative proteins, etc.), and offering policy feedback.

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<sup>181</sup> Nichols Applied Management, "Research Support for the Development of an FDI and Trade Strategy," 2019.; Plant Protein Alliance of Alberta, "The State of Toll-Processing of Plant Proteins in Alberta," Prepared by Sven Anders, Catalina Romero and Bruno Wichmann, February 2021.; Battle River Alliance for Economic Development (BRAED), "BRAED-Camrose Value-Added Cluster Project-Phase 1 Alberta cluster project," April 2020.

<sup>182</sup> Parkland, Sturgeon and Leduc Counties, *Tri-County Agriculture Communications Plan: Research and Insights Report*, Prepared by AdFarm, June 2020.

<sup>183</sup> Leanne McBean (Business Retention and Expansion Lead, Sturgeon County), Interview with Author, September 9, 2021.



# Conclusion

To be competitive, as a region and a province, it is necessary to build on strengths and mitigate barriers to investment attraction. Challenges are not insurmountable, and this research project has highlighted some policy steps that could be taken in a collaborative effort with stakeholders. The search for better practices and policy ideas should be an ongoing process to ensure the EMR, and the province, are in the best position to attract investment and support existing businesses with expansion. Ambitious economic targets have been set and with motivated leaders, both in industry and government, there is enormous potential to grow opportunities in innovation and value-added agriculture.

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