



SASKATCHEWAN ADVANTAGE

Saskatchewan Agri-Value and Production Overview

- Saskatchewan is known worldwide as a consistent and reliable supplier of safe, high-quality grains, oilseeds, pulses, livestock and agri-food products.
- In 2021, the province produced the majority of Canada’s lentils (89 per cent), chickpeas (81 per cent), durum (81 per cent), flaxseed (71 per cent), dry peas (49 per cent), canola seed (48 per cent), and oats (43 per cent).
- Saskatchewan has 18.6 million hectares of cultivated farmland and is home to more than 40 per cent of Canada’s total farmland. We also have more than six million hectares of pasture and land dedicated to permanent cover for forage crops.

- Saskatchewan is a global leader in agricultural trade with international sales of \$17.5 billion in 2021.
- Saskatchewan’s central location in North America and its extensive rail and road network offer easy access to ports leading to global markets.
- Saskatchewan’s ability to produce a diverse array of agricultural products provides the basis for establishing a vibrant food, beverage and bioproducts processing industry. This industry is further supported by a strong agri-processing research infrastructure.

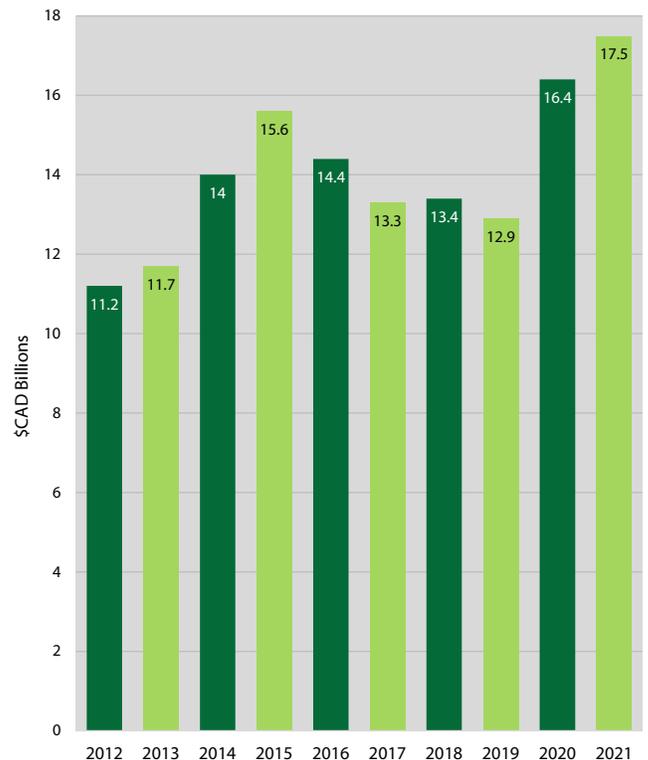
Saskatchewan: A World Leader in the Supply of Safe, Quality Food

Saskatchewan’s Top 10 Agri-Food Export destinations and their value in 2021

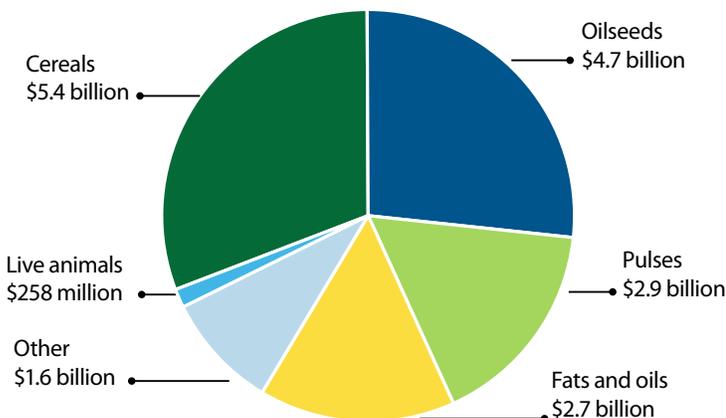
United States.....	\$4.3 billion	Algeria.....	\$557 million
China.....	\$3.6 billion	Bangladesh.....	\$482 million
Japan.....	\$1.3 billion	India.....	\$399 million
Mexico.....	\$959 million	Turkey.....	\$387 million
United Arab Emirates.....	\$636 million	Italy.....	\$355 million

**2021 data*

Saskatchewan Agri-Food Exports to the World 2012-2021



Saskatchewan’s Total 2021 Agri-Food Exports: \$17.5 Billion



saskatchewan.ca/invest



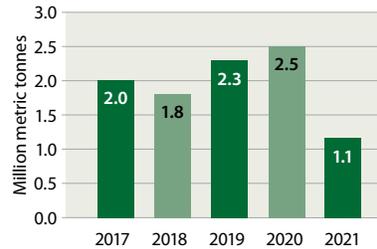
Pulses

Dry Pea Opportunity

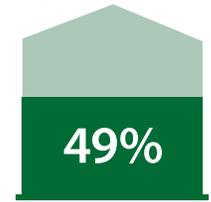
Saskatchewan is the world's leading exporter of dry peas, accounting for 36 per cent of global dry pea exports in 2021.

- Pea demand globally continues to increase as consumers become more focused on health and sustainability.
- Significant opportunity exists to expand pea processing capacity, such as dry fractionation or protein isolate manufacturing, in Saskatchewan.

SK Annual Dry Pea Production



Saskatchewan's share of Canada's dry pea production

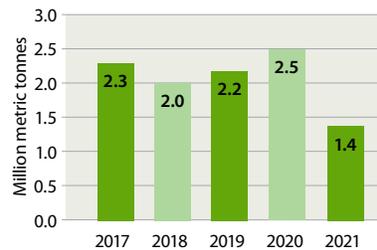


Lentil Opportunity

Saskatchewan is the world's leading exporter of lentils, accounting for 51 per cent of global lentil exports in 2021.

- Value-added opportunities exist for splitting and packaging lentils.
- Additional opportunities include the fractionation and milling of lentils to produce starch and protein-enriched flour. Polyphenols can be extracted and isolated from lentil hulls and marketed as a natural antioxidant.

SK Annual Lentil Production



Saskatchewan's share of Canada's lentil production



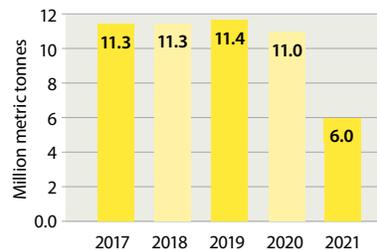
Oilseeds

Canola Opportunity

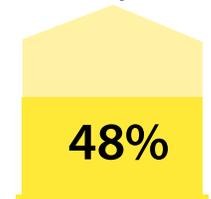
Saskatchewan is the world's leading exporter of canola seed, accounting for 19 per cent of global canola seed exports in 2021.

- With almost five million metric tonnes of canola seed leaving the province unprocessed, opportunity exists to increase processing capacity right in Saskatchewan.
- Additional opportunities exist from increased awareness and demand for canola meal, oil and protein internationally.

SK Annual Canola Seed Production



Saskatchewan's share of Canada's canola seed production



Flax Opportunity

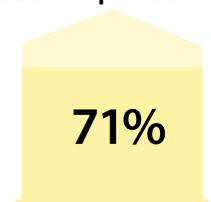
Saskatchewan is the world's second-largest exporter of flaxseed, accounting for 16 per cent of global flaxseed exports in 2021.

- Significant opportunity exists to increase capacity to crush flaxseed to produce oil, cake, meal and other food ingredients within Saskatchewan.
- New opportunities exist around flax fibre, peptides and protein which can be used as an energy source and for the development of industrial and construction materials.

SK Annual Flaxseed Production



Saskatchewan's share of Canada's flaxseed production



All percentages based on 2021 data

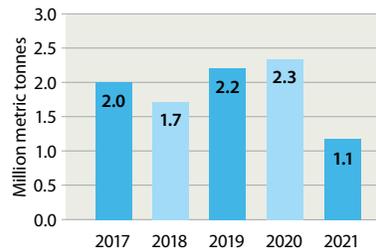
Cereal Grains

Oat Opportunity

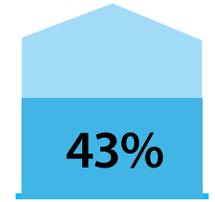
Saskatchewan is the world's leading exporter of oats, accounting for 23 per cent of global oat exports in 2021.

- Oats are an excellent source of dietary fibre. Due to the nutritional benefits of oats, and being gluten-free, there has been increasing interest in using them as a functional food.
- Opportunities exist around increasing the production of semi-processed or "clipped" oats, oat protein and oat beverages.

SK Annual Oat Production



Saskatchewan's share of Canada's oat production



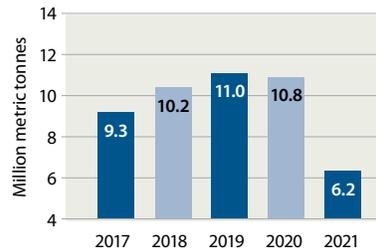
Wheat* Opportunity

Saskatchewan exports seven million metric tonnes of unprocessed wheat annually.

- Significant opportunity exists to increase processing capacity right at the source, including the production of milled flours for breads and bakery products.
- Wheat flour can be further processed into purified starch and protein isolates (gluten) through wet processing, separation and drying.

**Includes all wheat classes except durum*

SK Annual Wheat Production



Saskatchewan's share of Canada's wheat production

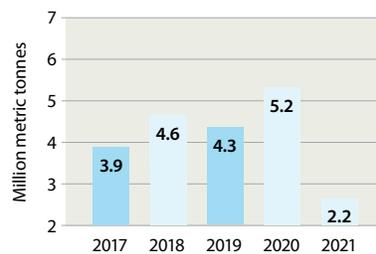


Durum Opportunity

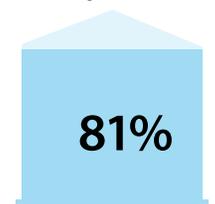
Saskatchewan is the world's leading exporter of durum, accounting for 35 per cent of global durum exports in 2021.

- Processing opportunity exists for the production of noodles, pasta and couscous.
- Durum wheat is used to produce puffed and hot cereals, desserts, filler for pastries, various types of bread and high quality noodles.

SK Annual Durum Production



Saskatchewan's share of Canada's durum production



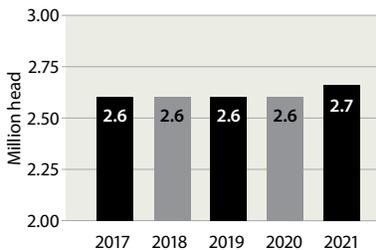
Livestock

Cattle Opportunity

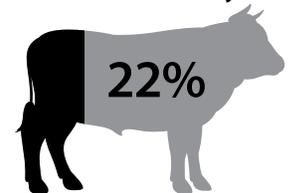
Saskatchewan is the second-largest beef-cattle producing province in Canada and a world-class provider of beef genetics.

- Saskatchewan has more than six million hectares of natural or seeded pasture and close proximity to feed supply.
- This access provides value-added opportunities in backgrounding and finishing cattle.

SK Annual Cattle Inventories*



Saskatchewan's share of Canada's cattle inventory

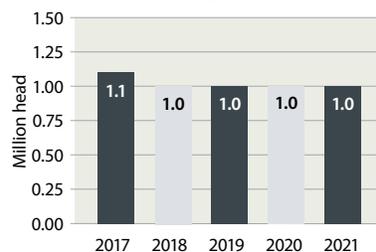


Hog Opportunity

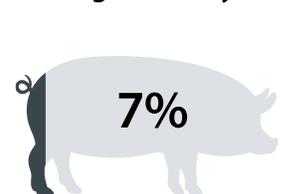
Saskatchewan has world-class hog genetics and is a low-cost production area for hogs in Canada and North America.

- A small portion of Saskatchewan's market hogs are finished in-province, creating opportunities for investment in meat processing facilities.
- Temperature extremes in Saskatchewan help to reduce disease issues and improve biosecurity.
- With one of the lowest animal densities in the world, Saskatchewan has opportunities to increase hog inventories.

SK Annual Hog Inventories*



Saskatchewan's share of Canada's hog inventory



**Values as of July 1, 2021*

Investor Support Services

The Government of Saskatchewan can provide expeditor services for new agri-businesses. These services include but are not limited to:

- Assistance with maximizing the competitiveness of your business, including path-finding for infrastructure challenges.
- Assistance with labour and skills training.
- Assistance with market development, including delivering supportive Government of Saskatchewan programming.
- Assistance in developing relationships with suppliers in your sector.
- Providing industry and community insight.

The Government of Saskatchewan is also available to assist with pre-investment planning, including preparing a program for a visit to Saskatchewan, arranging site visits for potential investment locations and arranging meetings with industry stakeholders.

Saskatchewan Tax Rates

12%
general
corporate
tax rate

10%
manufacturing
corporate tax rate
(as low as)

2%
small
business
tax rate

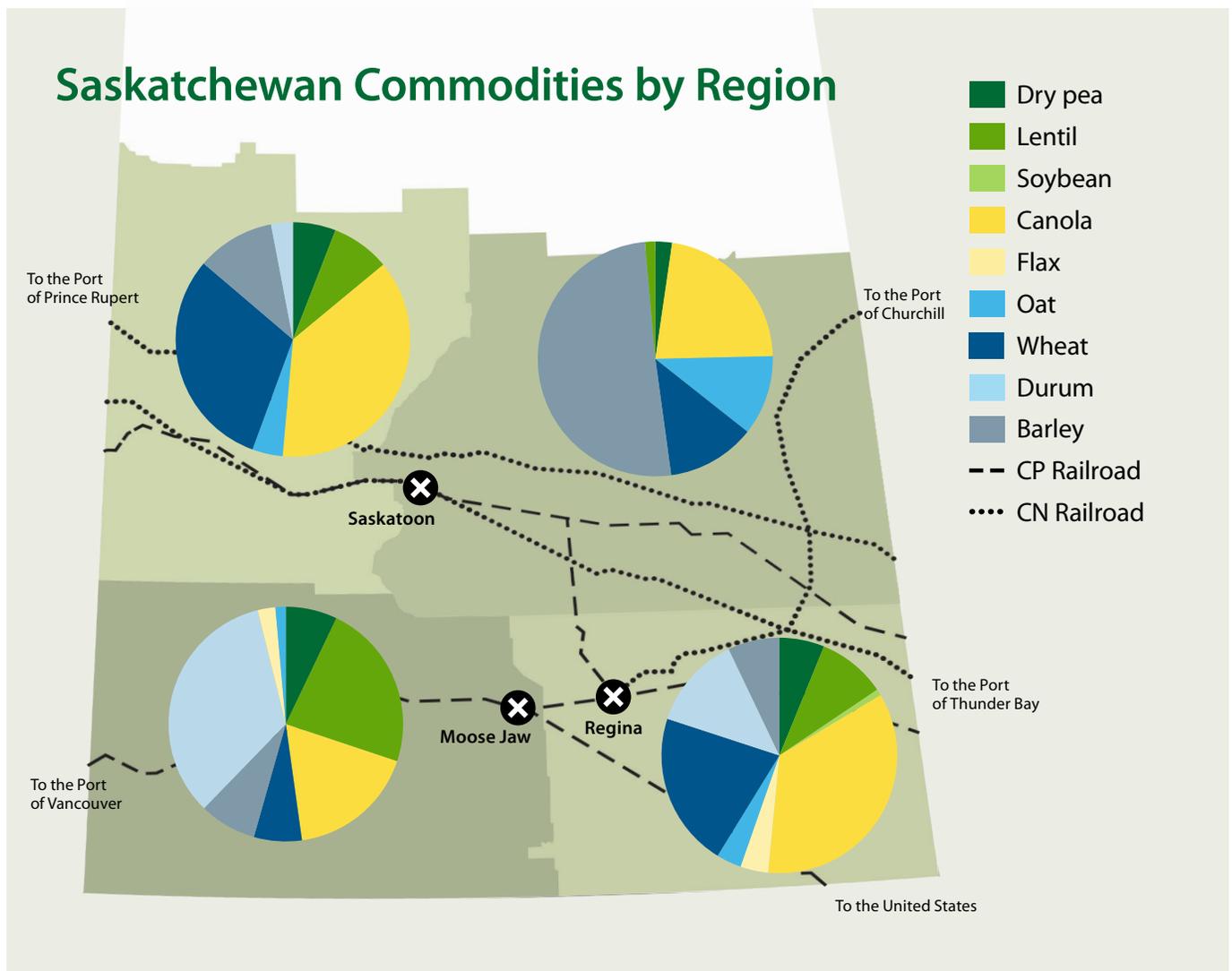
0%
corporate capital
and payroll taxes;
no health premiums

Saskatchewan's Agri-Value Advantage

Competitive business environment

Saskatchewan is home to one of the most attractive investment environments in the world because of our Saskatchewan Value-Added Agriculture Incentive and streamlined and responsive regulatory system.

Saskatchewan Commodities by Region



For more information on agriculture opportunities in Saskatchewan, contact:

Saskatchewan Ministry of Agriculture
306-787-5942 | doingagbusiness@gov.sk.ca

For more information on value-added investment opportunities in Saskatchewan, contact:

Saskatchewan Ministry of Trade and Export Development
306-529-7910 | invest.sask@gov.sk.ca