



**BRAED**

BATTLE RIVER ALLIANCE  
FOR ECONOMIC DEVELOPMENT

**VALUE-ADDED AGRICULTURE  
INVESTMENT AND CLUSTER DEVELOPMENT PROJECTS  
2019-2020**

**Briefing  
Activities and Reports**



WORK HERE



LIVE HERE



INVEST HERE

The Battle River Alliance for Economic Development (BRAED) is pursuing investment linked to the region's strength in agriculture. This briefing outlines the work which was completed in fiscal year 2019-2020. It is created to provide BRAED's partners with a reference document.

**In the briefing are:**

- Page 3 Notes from the Seed Cleaning Plant Operators meeting on November 29, 2019.
- Page 9 Links to final reports for the *Value-added Agriculture Cluster Development Study*, the *BRAED Value-added Ag Investment Guide* and the *Pulse Fractionation Sample Business Case*. These tools are economic development tools for BRAED member municipalities. They provide solid, region-specific industry research and support the ability to present an investment case.
- Page 10 Overview and web links for presentations from the Fractionation 101 Workshop, held on February 20, 2020.
- Page 15 Notes and presentations from the Regional Value-Added Agriculture Forum held on March 10, 2020.



**REGIONAL SEED PLANT OPERATORS ROUND TABLE**  
**November 29, 2019**

## **Battle River Region - Seed Cleaning Plants Roundtable** **November 29, 2020      Flagstaff County Offices, Sedgewick Alberta**

### **ATTENDING**

Alliance:	Tom Coppock, Peggy
Beaver County:	Tyler Suchy, Colin Lang, Brent Christensen, Jerry Magnusen
County of Camrose:	Murray van Petten
Coronation:	Glen Hartel, Colin Wager
Lougheed:	Jeremy Simpson
Strome:	Blair Peregrym, James Brodie
Wainwright:	Dennis Dalton
BRAED:	Mark Giebelhaus, Ed Kuslik, Stan Schulmeister, Arnold Hanson, Brian Ducherer
Facilitating:	Cathy Goulet, BRAED Executive Director

### **AGENDA**

1. Welcome and Introductions
2. Presentation on the Battle River Alliance for Economic Development
  - a. Cathy Goulet, Executive Director
3. Round table
  - a. Compiling regional asset inventory
    - i. How is your seed cleaning plant performing?
    - ii. What are your key opportunities and challenges?
    - iii. Where are your markets?
  - b. Brain storming
    - i. Can BRAED play a role in the future of seed cleaning plants in the region?
4. Next steps

### **Presentation on BRAED (see attached) and discussion of three opportunities being explored**

#### **Yellow Pea Processing Facility**

This would be for a fairly straightforward first-stage processing facility – essentially a seed cleaning plant with several cleaning lines and colour sorters, ability to remove the hull, split the peas and size them. Final steps would be polish and bagging for human consumption. (\$5-20 million)

**Consensus** – *this is a project that the existing seed cleaning plants could consider as a joint venture.*

*Some of the infrastructure is already in place. Major questions are: who are the partners and who is the market? Can we get a business case developed?*

#### **Pea Protein Fractionation Facility**

This facility would source cleaned yellow peas and would then peel, mill and process the peas into pea flour, fibre and starch. The products would be bagged and prepared for shipment by truck or rail. (\$100-\$400 million for any significant scale).

**Consensus** – *this has good potential and more information would be helpful. Request to hold a*

*Fractionation 101 workshop with processors, background research, industry experts and producers.*

*Question: how fractionation plants cleaning seeds?*



### Canola Protein Facility

You may be aware of a new plant being developed in Manitoba that will use a patented “puratein” technology being used to extract protein from canola. This might be a more creative option for the business plan, but given that this is a patented technology, it would be challenging to get all of the numbers (such as licensing costs) into a feasibility plan.

**Consensus – this is the least promising at this time.**

### Compiling regional asset inventory

Participants were asked to complete a confidential questionnaire and the results were gathered. A sample questionnaire is attached.

#### Consolidated results:

Staffing – Peak (6 responses)	3.7 employees
Staffing – Off-peak (6 responses)	2.3 employees
Year built – original facility (6 responses)	1964
Year built – with replacement (6 responses)	1974
<b>Past Upgrades</b>	
Descriptors	Feed sheds, scales, new warehouses, sales areas, drive shed, screening bins, Gravity tables, colour sorter, more storage, wind screen, treating system
When	From 1980 – 2017 (new plant) Average year of upgrades: 2006
<b>Upgrades needed</b>	
Descriptors	Plant replacement immediate (3), plant replacement 10-20 years (1), Scale, colour sorter, additional leg, wind and screen machine, gravities, indent, bins.
<b>Annual Processing</b>	
What	Mostly farm saved seed. Some export, separations for market
How much	4, 348,000bu total 621,143bu average

### Discussion of future for seed cleaning plants in the region

In a facilitated discussion the following opportunities and challenges were identified.

#### Opportunities

- For joint venture between seed cleaning plants
  - Who is the partner
  - Who will purchase the product
- Clean & sell common seed oats
- Capacity
- Joint Ventures

- Pea Fractionation
- Malt plants
- Fusarium sorting
- Diversifying product lines
- Pedigreed Seed – Westlock, Three Hills,
- Hemp Seed Cleaning
- Organic certification
- Inter – Cropping
- Cattle feed / Consumer Business
- Pet food Sales
- Co-op System in AB
- Trading own product – processing custom now
- Market investigation
- Trading Own product
- Processing custom now
- Market Investigation

### **Challenges**

- Yellow Pea Processing
- Lack of expansion potential and space
- Rail Car access
- Lots of neighbouring seed plants
- Size and age of facility limits ability to bring on new technology
- Limited season for some, only open 6 months
- Staffing – Peak & Seasonal
- Specialized skills
  - Governance issues
- Not business focused
  - Lack of capital / reserves
  - Cannot be profitable just based on seed cleaning
- Need to diversify
  - Plant Breeder Rights could make viability an issue
  - Competitive position
- Price
- Accessibility
  - Weather and other uncontrollable factors

### **What can BRAED do to support seed cleaning plants in the region?**

- Continue to bring the operators together and help with building the discussion.

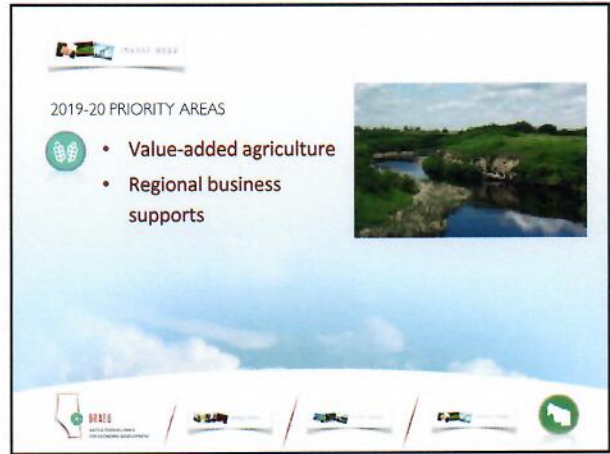
### **Next Steps:**

1. Deliver a Fractionation101 workshop in the BRAED region
2. Hold a Value-added agriculture roundtable in March
3. Host a follow-up roundtable for seed cleaning plants





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**NEXT STEPS**

**2019-2021**

- Targeted investor leads and case preparation
- Indepth investor and opportunity research

**FUNDING**      \$ 172,000

- Gov't Canada      \$30k
- Province of Alberta      \$56k
- City of Camrose      \$30k
- BRAED      \$56k

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**QUESTION FOR YOU**

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**THANK-YOU**

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**Research and Reports completed December 31, 2019**  
Found at [BRAED Agriculture](#)

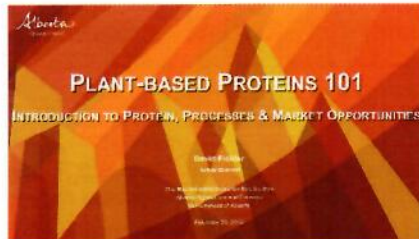
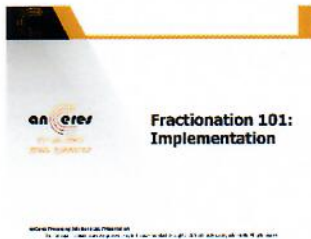
- Value-added Agriculture Cluster Development Study
- BRAED Value-added Ag Investment Guide
- Pulse Fractionation Sample Business Case



## Fractionation 101 Workshop

February 20, 2020

This workshop was offered in partnership with the Plant Protein Alliance of Alberta, MLTAikens and Farm Credit Canada. Forty-three representative from industry, investors and municipal governments joined BRAED in Killam for a full day of presentations and discussion.



The presentations are available at <https://ppaa.ca/library>



# FRACTIONATION 101 WORKSHOP

Feb. 20, Killam





## Fractionation 101 Workshop

Plant-ingredient processing offers a global opportunity with a realistic path to economic diversification for Alberta. Have questions? We have answers!

To explore the value-added processing of crops such as pulses, canola and hemp, [Plant Protein Alliance of Alberta](#) is hosting a workshop in Killam with partners BRAED, FCC and MLT Aikins.

### About the Workshop

Please join us for presentations by industry experts **Trevor Pizzey**, president of anCeres Processing Solutions, **David Fielder**, a senior scientist with Alberta Agriculture, and **Corey Keith**, founder of consulting firm Keith and Associates. After their talks will be a panel discussion with questions from the audience. Networking time to follow.

The Fractionation 101 Workshop will focus on very practical topics such as the various processes used to extract proteins and other ingredients from crops; markets for products and by-products; costs to construct processing facilities; key factors when deciding to build and locate facilities; who is investing and financing these facilities; and what can local governments and others can do to attract them.

This workshop will be a training opportunity for entrepreneurs and companies looking to build, supply or invest in value-added processing, local governments, economic development groups, financial institutions, suppliers, food companies and consultants.

### Details

Date: Thursday, Feb. 20

Location: Living Room Theatre, 5018 50<sup>th</sup> Street, Killam

Time: Workshop 1:30-4:30 pm, Networking 4:30-6 pm

Eventbrite Tickets: <https://www.eventbrite.com/e/fractionation-101-workshop-tickets-90466793615>

### Price:

: \$50 for PPAA members

: \$100 for General Admission

### Event Sponsors



## Speakers

### Trevor Pizzey



Trevor is the president of anCeres Processing Solutions, a Calgary-based engineering and project management firm with subject matter expertise in grain processing. He's passionate about helping Western Canadian small- and medium-sized agribusinesses feed the world. Trevor is a specialist in managing the design and construction of grain processing facilities, including navigating the increasingly complex regulatory environment his clients operate in.

Trevor was raised on a pedigreed seed farm in western Manitoba, where the family business also included the operation of a special crops processing facility and a retail crop inputs outlet.

He graduated from the University of Manitoba, where he received his B.Sc. in Engineering (Industrial). His subsequent 30 years in the grain foods processing industry included leadership of Viterra's \$1B North American food ingredients manufacturing portfolio.

### David Fielder



David is a senior scientist with the Bio-Industrial Opportunities Section of Alberta Agriculture & Forestry, where he has established a value-added fractionation program to help companies develop novel products and processes. This program can assist companies develop botanical ingredients from concept to pilot-scale process development. A number of his recent clients are focused on Natural Health Products as well as several non-food applications.

David received his master's degree in natural product chemistry from Carleton University in Ottawa. He worked he worked as a research chemist for the federal department of Agriculture (Agriculture and Agri-Food Canada.) David then worked for two Canadian biotechnology companies, developing and commercializing botanical extracts for human and animal health. As a phytochemical, David has more than 25 years of experience working with a variety of plant materials, including cereal grains, oilseeds, herbs, algae and specialty botanicals.

## Corey Keith



Corey has helped companies and organizations think strategically and obtain financing for more than 35 years. He worked in the banking industry for 25 years, at one point managing a portfolio of \$100-million dollars. He served as vice-president, business development, with an early stage technology company and as senior investment manager with a private investment firm. He formed his own business management consulting company in 2003, Keith & Associates.

As part of his consulting business, Corey founded and served as president of AVNet, a not-for-profit angel investor network that connected Alberta companies seeking investment with a national network of private investors. Corey is a past director of the Mississauga Technology Association, the Toronto Biotechnology Incubator and the Alberta Agrivalue Business Facilitators. He also served as one of 31 Challenge Panel members for the Province of Alberta's "Results Based Budgeting" process. He currently serves on the board of PPAA.

## **Questions?**

### Event Organizer:

Alan Hall, COO, Plant Protein Alliance of Alberta

Phone: 403. 506.1105

[alan@ppaa.ca](mailto:alan@ppaa.ca)

### Local Contact:

Cathy Goulet, executive director, Battle River Alliance for Economic Development (BRAED)

Phone: 780.618.4967


[executivedirector@braedalberta.ca](mailto:executivedirector@braedalberta.ca)





## BRAED Value Added Agriculture Forum March 10, 2020

**value + added AGRICULTURAL FORUM**




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FOR ECONOMIC DEVELOPMENT  
braedalberta.ca | (780) 385-2450

March 10, 2020  
Norseman Hotel  
Camrose Alberta

**BOOK NOW!**

**value + added AGRICULTURAL FORUM**



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10:00	BRAED's Value-added Agriculture Industry Development Program
10:30	Investment Attraction and Cluster Development Project Presentation • Outlook Market Research • Serecon Consulting
11:15	Facilitated Conversation
12:00	Luncheon Speaker: Western Diversification's Role in Rural Industrial Development <i>Justin Reimes, Assistant Deputy Minister, Alberta Region</i>
1:00	Discussion – next steps
2:00	Seed cleaning operators follow-up meeting
3:00	Adjourn

**BOOK VIA EVENTBRITE**

March 10, 2020 | Norseman Hotel | Camrose Alberta



## VALUE ADDED AGRICULTURE FORUM

March 10, 2020; Camrose, Alberta

### NOTES

#### *Background*

Presentations (see attached powerpoint decks) by BRAED, Outlook Market Research and Serecon Consulting.

#### *Round Table Discussion*

##### **Question One**

Should we proceed down this path towards value-added agriculture diversification?

##### **Feedback**

- Private sector involvement in BRAED, in order to get something happening, investment dollars are going to come from local farmers and organization. BRAED will need to be a lot more action oriented.
- Make sure that BRAED has a narrower focus
- More specifically, Darryl Truman represents a parcel of land, the old Camrose auction lot, Dry Fractionation plant.
- A chair should call a meeting that will coalesce support from private investors.
- There is some high-risk capital available.
- Such a multi-faceted thing, potential worldwide market, great to start making things here instead of shipping it down the line.
- There are big and small opportunities flowing from the opportunities presented.
- From Beaver County Seed Cleaning: are there enough players to make something happen? They think so.

##### **Consensus**

- There is potential and the information presented moving forward to pursue a value-added agriculture industry cluster and specifically a plant protein fractionation facility.

##### **Question Two**

What do you want to see BRAED do as a next step?

- What is the action piece?

##### **Feedback**

- This is a community venture, get behind the interest, have a general meeting of producers, a new generation coop by producers, clear understanding of what is being invested in specifically, and last but not least – each community could donate \$1,000 to move forward to the next step
- Dry fractionation facility is explicit target – \$20 to 30 Million
- What is the cursory market?
- Need to involve Seed Cleaning Plants
- Combination Community/Coop Investing, Maybe Private Investing.
- Bring in securities commission as needed
- Possibly two facilities, if needed; First to market for area; size of project that is enough for start-up, modular/expandable



- Communities leading something together
- Pulse fractionation plant is where we should be focused
- Get producers to the table, producers need to know their avenue going forward
- There's a lot of money out there, a Vermilion farmer donated \$4M recently to a local project.
- Letting BRAED come to an end is a waste. The infrastructure would just have to be rebuilt.
- If we ship grain to Vancouver, we pay the freight. If we fractionate, then ship, the consumer/customer will buy the product with the freight as a whole.
- Transportation is a major factor, but we live close to an airport that ships an empty cargo plane to China every day. Exploring more methods of transportation is critical.
- How do you involve the small seed-cleaning plants?

### **Action**

- This initiative needs a lead individual who is going to be a shaker and mover, person with a vision for the region. BRAED could possibly lead that.
- BRAED should be tasked with the community fundraising piece
- BRAED to remain involved to keep credibility
- BRAED needs to be funded (privately), the organization keeps everybody together, reorienting the project right towards investment is needed, matter of getting those next two pieces in place
- Letting BRAED come to an end is a waste. The infrastructure would just have to be rebuilt.

### **Feedback on the forum**

- Want to see more seed-cleaning plants coming.
- All the speaking was really good.
- Enjoyed the round-table interaction, more specifics for a plan next time
  - Echo: more producers need to be involved.
- Needs to be joint effort, committees from each community to promote and bring ideas together
  - Echo: round-table discussions were beneficial.
- (More) Communication about the event in advance.
- Modular Vision may attract local investment, may not need foreign investment
- Seed-cleaning plants know the farmers, they need to “find the money in the chaff”, find investors in their relationships
- Most important aspect of today: get down to business.
- BRAED shifts to being an agency.
- Municipalities are always going to be a partner.
- Anybody talk to AP?







**Value Added Agriculture Forum  
March 20, 2020; Camrose Alberta  
ATTENDEES**

Mark	Baxter	Outlook Market Research
Brent	Christensen	Holden Seed Plant
Guy	Christenson	Western General
Ben	Christenson	Western General
Lindsay	Christenson	Western General
Shelley	Cook	Town of Coronation*
Brian	Ducherer	Village of Ryley*
Dana	Ewachko	Town of Viking
Mark	Giebelhaus	Village of Holden*
Cathy	Goulet	BRAED
Alan Hall	Hall	PPAA
Arnold	Hanson	BRAED Member at Large*
Carley	Herbert	Town of Wainwright
Jeanette	Herle	Flagstaff County
Anjah	Howard	Camrose County
Edward	Kusalik	Town of Daysland*
Colin	Lang	Holden Seed Plant
Patricia	MacQuarrie	City of Camrose
Terry	Magneson	Holden Seed Plant
Nathan	Nuymen	Western Economic Diversification
Justin	Reimer	Western Economic Diversification
Perry	Robinson	Town of Sedgewick
Kevin	Smook	Beaver County
Darryl	Trueman	Trueman Realty
Markus	Weber	Serecon Consulting
Tom	Zwack	Flagstaff County

\* *BRAED Executive Committee Member*



**VALUE-ADDED AG FORUM**  
March 10, 2020



1




**VALUE ADDED AGRICULTURE**

- To 2017**
  - Eastern Alberta Trade Corridor - Regional Ag Capacity
  - Investment Potential – BRAED Region
- 2018-2019**
  - Value added agriculture value proposition
  - PPAO Opportunity Fam Tour
- 2019-2020**
  - Targeted marketing and lead generation
- 2020-2021**
  - Business case development



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**MANDATE**

Drive Collaborative Regional Economic Development Planning and Serve as a Catalyst for Action

- Economic Development Capacity
- Investment
- Partnerships




2





**OUR PARTNERS SO FAR**



- Camrose County
- City of Camrose
- Beaver County
- Flagstaff County
- Paintearth Economic Partnership
- MD of Wainwright
- Town of Wainwright
- PPAO
- Government of Alberta
- Export Canada



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**BRAED REGIONAL MAP**

3



**NEXT STEPS**

**BRAED'S WORLD HAS CHANGED**

Funding 2017-2020	
GOA Annual Operations	\$300,000
Municipal Partners	\$133,500
GOA CARES Funding	\$200,000
<b>Annual available funds</b>	<b>\$ 211,167</b>




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AS OF TODAY \$50,000 VERBAL COMMITMENT




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QUESTION FOR YOU

- Should we proceed down this path towards value-added added agriculture diversification?
  - Tweaks, seismic changes
- Who are the partners?
  - What will I do?



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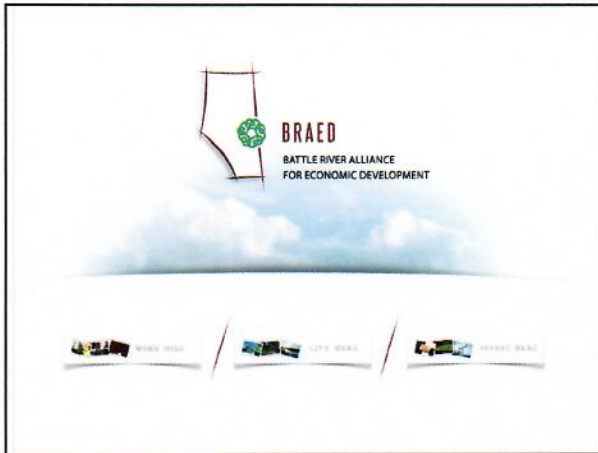
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THANK-YOU



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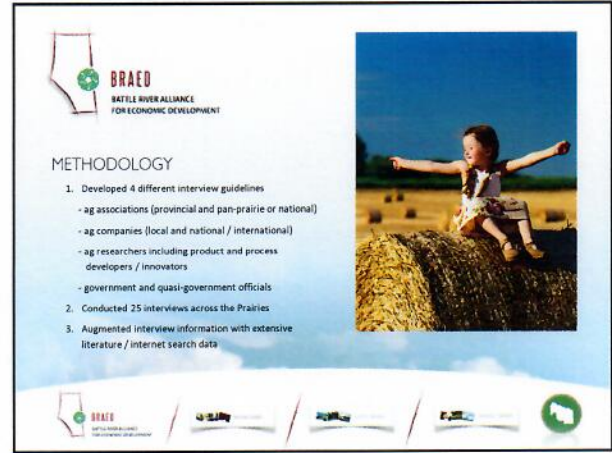
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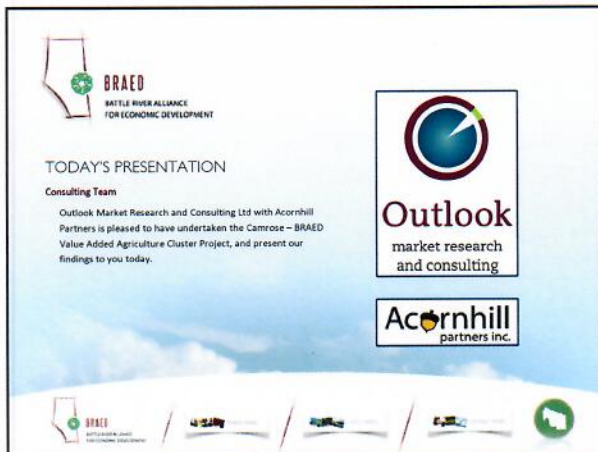
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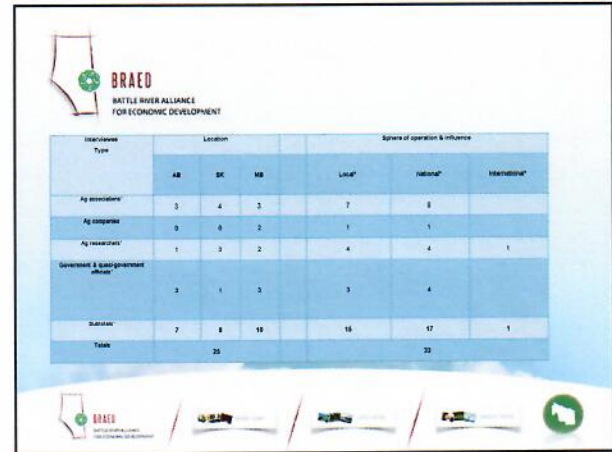
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**KEY INSIGHTS**

A. 2 top value-added processing opportunities for the region

1. Plant-based protein opportunities for human consumption including:
  - a. protein isolate and concentrate production from pulses (especially yellow peas)
  - b. protein extraction from cold-pressed canola meal to produce "golden tofu", dairy substitutes, etc.

Continued...




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**BONUS OPPORTUNITY (3<sup>RD</sup>)**

A. Whole plant utilization of hemp (mainly in northern areas of the region)

1. cold-pressed oil and meal
2. hemp flour or hemp kernels/nuts/hearts
3. CBD and other cannabinoids and polyphenol compounds
4. fibre for biocomposites
5. chaff residuals / off-grade seed / immature plants for livestock feed (if / when approved)






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**KEY INSIGHTS (CONTINUED)**

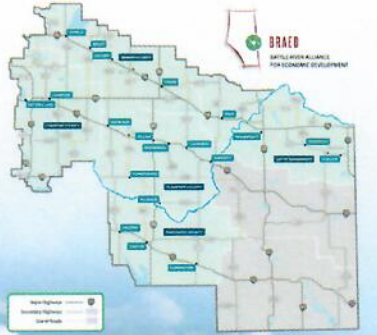
2. Milling / fractionation of peas, fababeans and other pulses including:
  - a. production of protein concentrates and isolates for pet / livestock and aquaculture feeds
  - b. pulse flour production for higher inclusion rates in pastas / bread to increase fibre and protein
  - c. fababean fractionation:
    - All company working with Nestlé on fababean protein extraction
    - Saskatchewan Pulse funded several years on faba utilization research (ongoing).

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**BRAED REGIONAL MAP**




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**THE BRAED REGION "FIT"**

A. Very well suited to production and processing

1. Pulses and canola for plant-based protein
2. Pulse flour and starch co-product
  - Farmers demonstrated willingness to meet local and export demands
  - Protein Industries Canada will support new businesses and encourages strategic alliances between genetics providers / producers / processors
  - Excellent highway and rail system.




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**GO FORWARD RECOMMENDATIONS**

Recommendations for BRAED region:

1. Focus on
  - protein ingredient production (e.g. protein isolates / concentrates) from pulses (and possibly cold-pressed canola meal) &
  - value-added uses of the co-product streams (starches, feed ingredients).
2. Pursue Protein Industries Canada support for plant-based protein production.
3. Monitor progress of hemp production and processing to gauge the size and sustainability of the opportunity




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### GO FORWARD RECOMMENDATIONS

**Phase 2: Developing the Value Proposition**


- A second phase would capitalize on the in-depth knowledge and contacts from Phase 1 to form a value proposition of what Camrose and the BRAED region has to offer investors in the value-added agriculture and the Pan-Prairie Protein Industries Supercluster. These projects are the platform of which to build a true investor outreach program that will attract new value-added agriculture business to the BRAED region.
- Understanding the precise assets in each community to match the opportunities identified in Phase 1 will be a cornerstone of Phase 2. Working with each community to identify natural, human, capital, and infrastructure resources is essential to understanding where new investment should be researched and promoted. Developing an Opportunity-Asset Matrix will be an objective of Phase 2.




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### IN CONCLUSION



# Questions? Thank You

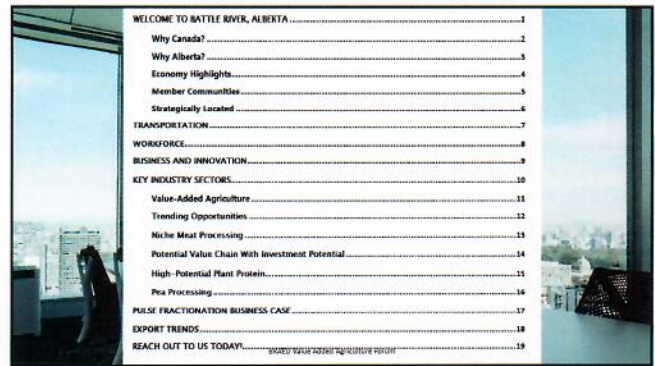


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**Value-added Agriculture**

**BRAED Advantages**

- Abundant and low-priced feedstock
- Advanced manufacturing and processing capabilities
- 9.5% lower agri-food manufacturing costs than in the US (source: BRAED)
- Highly competitive tax rates, with a combined federal/provincial rate of 27%
- Specialized farms with a strong focus on organic production

Pea Processing  
Canola Meal  
Plant Proteins

March 10, 2020 BRAED Value Added Agriculture Forum

3

**Trending Opportunities**

- Niche Meat Processing → organic and Halal meat
- Pet/animal food → pulse-based pet food
- Functional food ingredients → protein powder, snack bars

March 10, 2020 BRAED Value Added Agriculture Forum

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**Table 4: Seed Cleaning Plant Capacity in the BRAED Region (in bushel)**

Hourly Capacity	Annual Capacity
300-350	1,000,000
400	800,000
450	1,200,000
200	180,000
200	480,000
500-600	600,000
300	450,000
300	600,000
Total: 5,310,000	

Based on an annual throughput of 65,700 MT/year with the assumption of 19% protein, 76% starch and 5% fibre as well as a max truck load of 27.22 MT, a trucking cost of \$48/km, and 95% plant efficiency we get the annual freight costs associated with each location to ship their finished products to Edmonton:

Camrose: \$900,000

Figure 3: Cleaning Cash Balance End of Year 5 Relative to Initial Investment

March 10, 2020 BRAED Value Added Agriculture Forum

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**Value-Added Agriculture Investment Guide**

**Pulse Fractionation: A Strategic Business Case for Value-Added Agriculture**

www.braedalberta.ca

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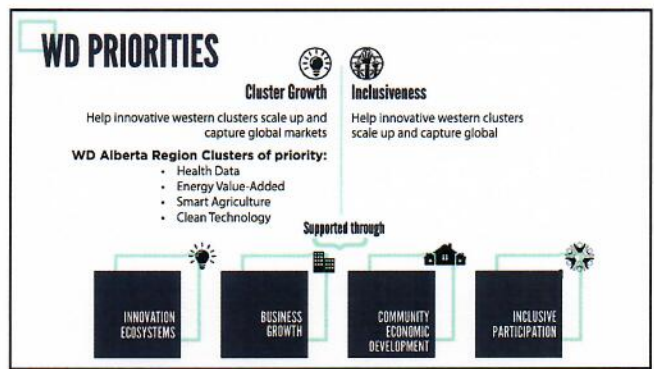
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**WD FUNDING PROGRAMS**

- Regional Economic Growth Through Innovation
- Business Scale-Up and Productivity (BSP)
- Regional Innovation Ecosystem (RIE)
- Western Canada Business Services Network (WCBSN)
- Western Diversification Program

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**Community Futures Wood Buffalo**

- \$230,000 investment
- \$2.5M in loans
- 33 businesses rebuilding the community

**WD SUCCESS STORY**

**Business Link**

- \$350,000 investment
- 500 business advisory services
- 400 participants receiving training

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**COMMUNITY FUTURES**

- 27 locations throughout rural Alberta, including in Fort McMurray
- 7,381 clients
- 385 loans worth a total of \$23.3M
- 1,052 jobs created, maintained or expanded
- \$68M in current investments in small businesses throughout rural Alberta

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**WD SUCCESS STORY**

**Village of Foremost**

- \$825,000 in investments
- 9 businesses / 6 prototypes
- regulatory certification critical to growth

11

**WD RESULTS**

IN 2018/2019

- 3,219 JOBS
- \$837.5M EXPORT SALES
- \$232M BUSINESS SALES GROWTH FROM ECONOMIC ACTIVATION


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**WD SUCCESS STORY**

**Canada Coal Transition Initiative (CCTI)**

- \$4.3M investment
- Business development initiatives, community transition centres and strategic planning
- Cactus Corridor: including special areas Hanna and Youngstown
- Battle River: including Counties of Paintearth and Flagstaff, Forestburg, Castor, Coronation, Halkirk, Heister

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### SMART FARM INVESTMENTS

- **Olds College Smart Farm**  
\$1.9M to support a living lab to develop agricultural technologies, advance practices, and improve sustainability.
- **EC Labs Inc.**  
\$350,000 to support launch of hair care products using Alberta-sourced, natural ingredients.
- **Barr-Ag Ltd.**  
\$2.15M to enhance processing capacity and develop new agricultural product line.

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### WD RESULTS



[PL](#)  
[AY](#)

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