



Canada's
Nature
Advantage

We invest in nature. We invest in our future.

From Insights to Impact:

Canada's Nature Advantage Research & Policy

October 2, 2025



Agenda

1:30-1:35	Welcome
1:35-1:40	Introducing Canada's Nature Advantage
1:40-1:45	Abacus Data
1:45-1:50	Case Study: Nutrien
1:50-1:55	Oxford Economics
1:55-2:00	Case Study: Wahkohtowin Development Inc.
2:00-2:20	Panel Discussion
2:20-2:50	Q&A
2:50-3:00	Closing Remarks



Housekeeping



**You are muted
upon entry into
the webinar**



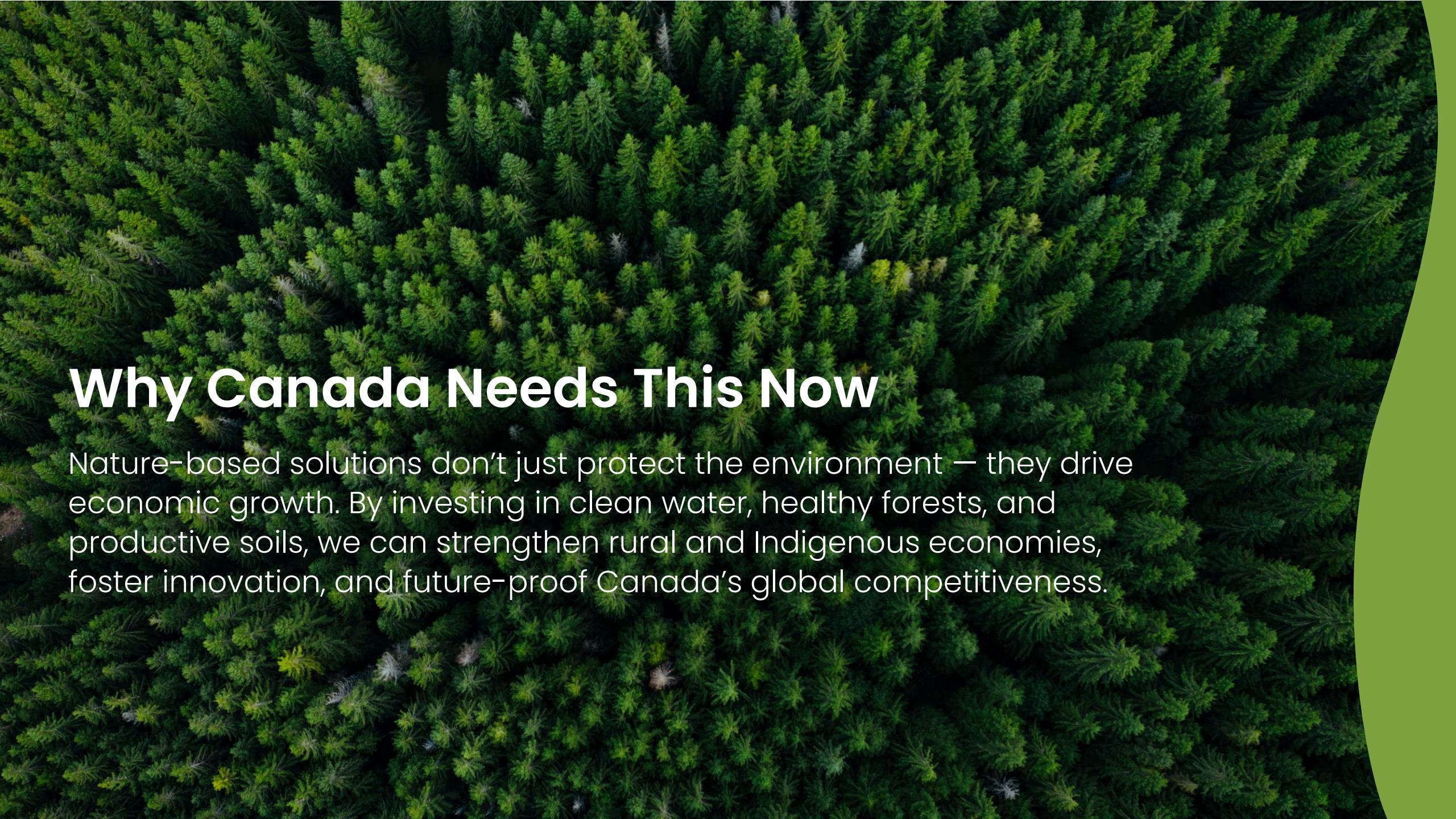
**Use the Q&A
function to ask
questions**



**The recording
will be available
afterwards**



**Please complete
the post-
webinar survey**

The background of the slide is a high-angle aerial photograph of a vast forest. The trees are primarily evergreens, creating a dense, textured pattern of dark green and yellowish-green hues. The perspective is from above, looking down at the canopy.

Why Canada Needs This Now

Nature-based solutions don't just protect the environment — they drive economic growth. By investing in clean water, healthy forests, and productive soils, we can strengthen rural and Indigenous economies, foster innovation, and future-proof Canada's global competitiveness.

Canada's Nature Advantage – Pillars



Cost-benefit research,
case studies

Mobilizing business-
leaders' network

Investment-enabling
policy proposals

Independently
branded 'surroun-
sound' campaign

Led by Industry. United by Nature.

Canada's Nature Advantage is spotlighting business models and policy solutions that reflect the true value of nature – and that reward forest managers, farmers and Indigenous communities who steward our lands and waters – to build a resilient economy. Together, we are amplifying demand for nature-based solutions and calling for policies that invest in Canada's most powerful economic asset: nature.



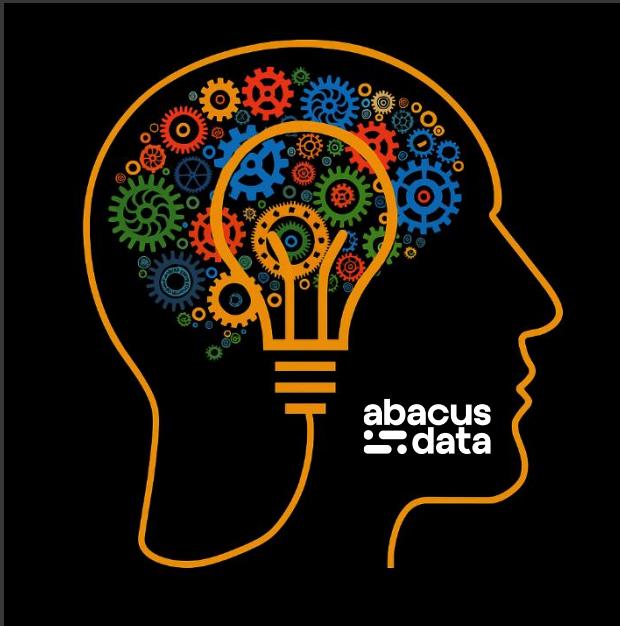
Building a Stronger Economy Through Nature-Based Solutions

Public Opinion Research Findings

Presented by David Coletto
October 2, 2025



CANADA'S MOST SOUGHT AFTER AND INFLUENTIAL VOICE IN EXPLAINING PUBLIC OPINION, POLITICAL BEHAVIOUR, AND OUR SOCIETY IN CANADA.



Founded in 2010

16 Research Professionals

Official pollster for the
Toronto Star

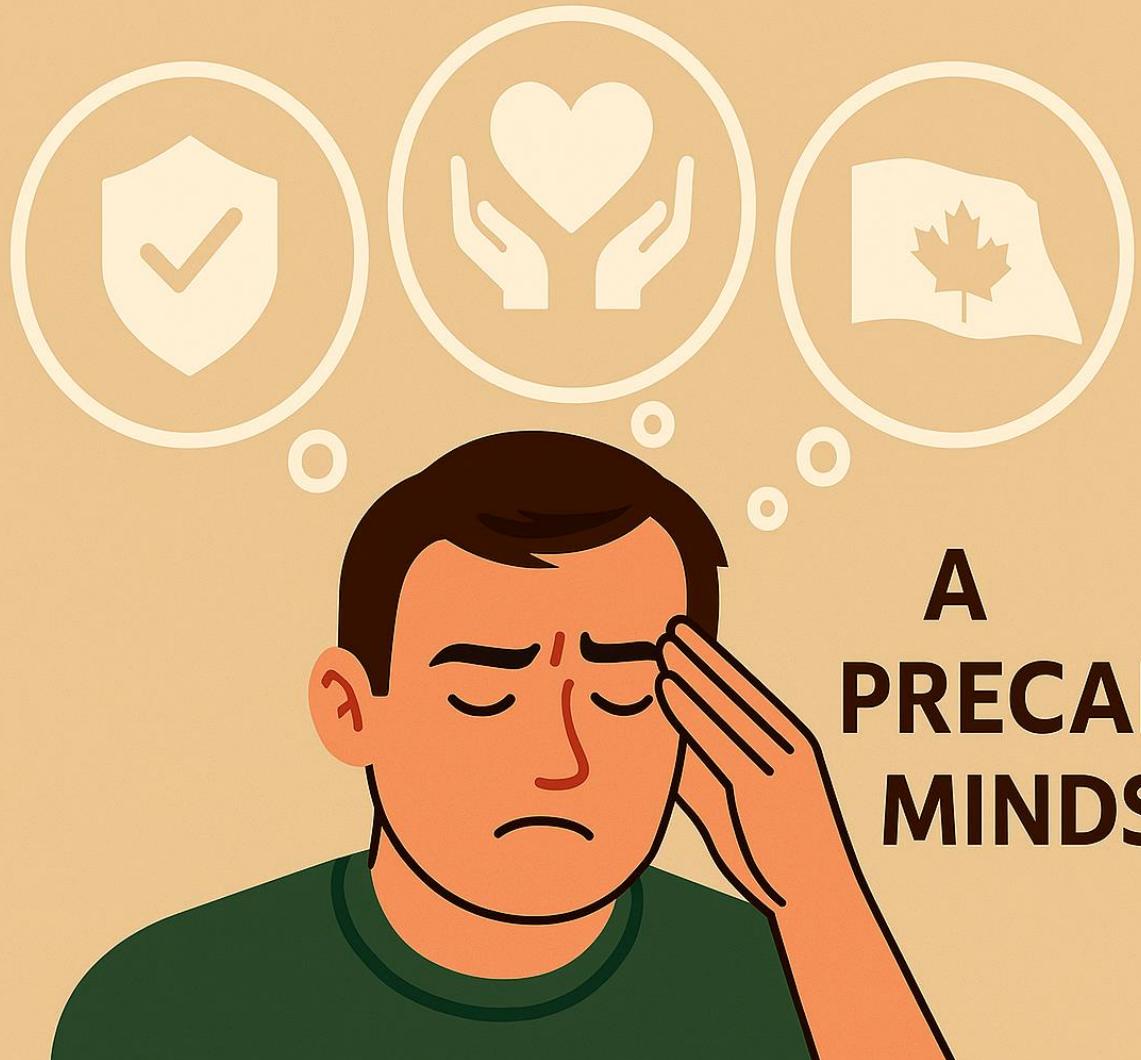
Located in Ottawa, Toronto,
Halifax London, Hamilton and
Edmonton

SOME OF THE BRANDS AND
ORGANIZATIONS WHO TRUST US



Deloitte.

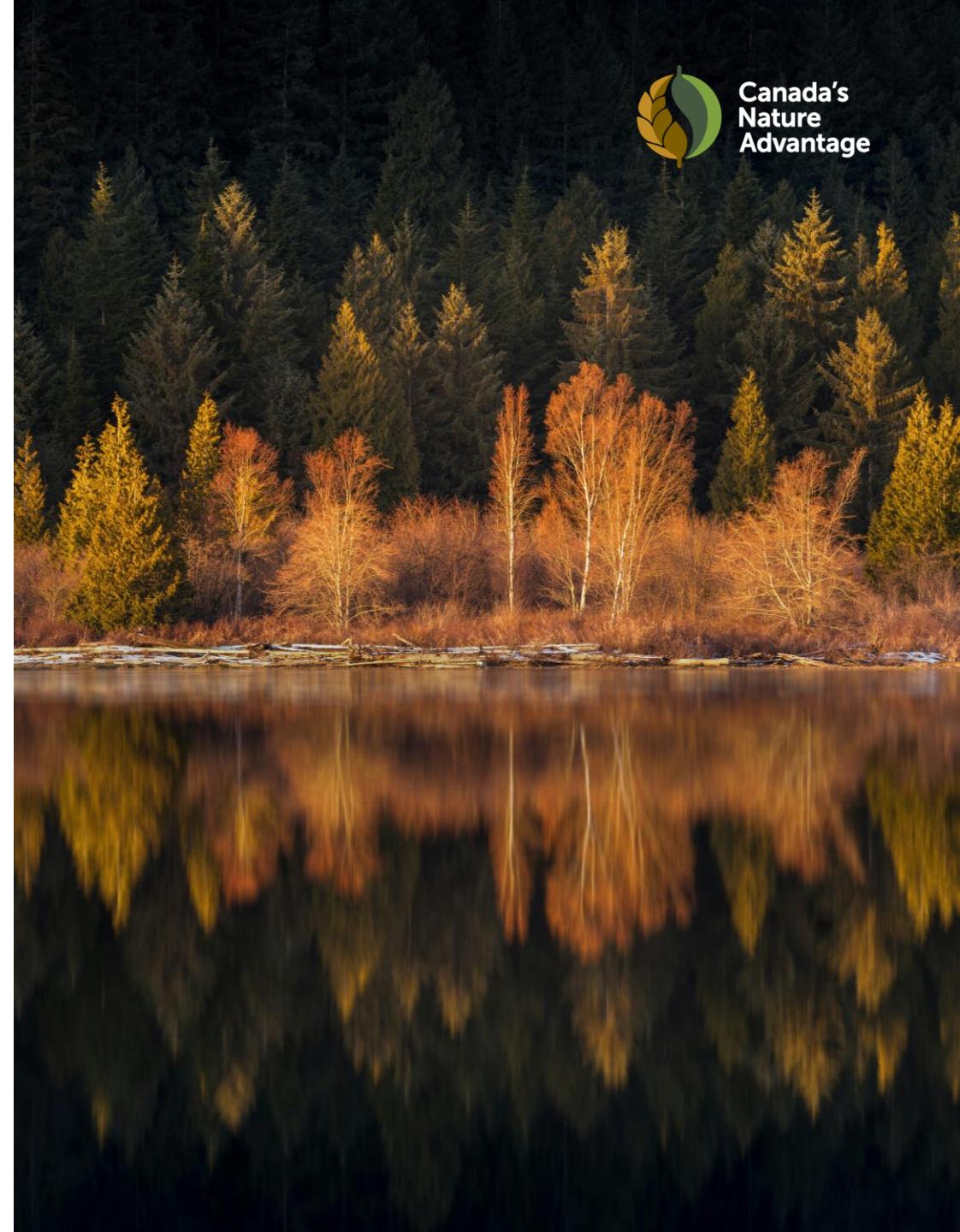




A mindset shaped by unpredictability – where people feel the future is unstable, institutions are unreliable, and personal resilience is always being tested.

METHODOLOGY

- Sample size: 2,500 adult Canadians with an oversample in British Columbia and Manitoba.
- Survey field dates: September 12 to 19, 2025.
- The data was weighted by age, gender, education and region.
- Totals may not add up to 100 due to rounding.



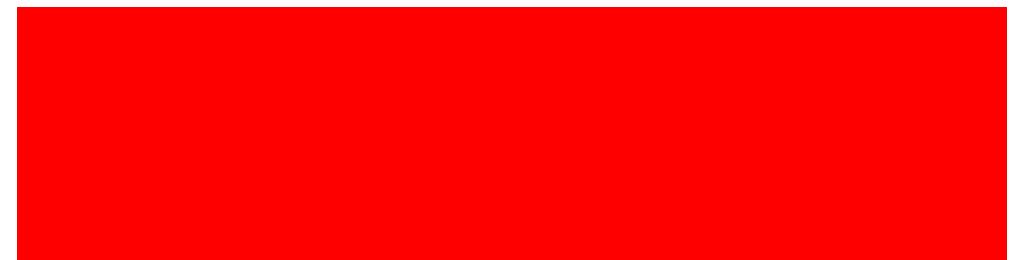
CLIMATE ACTION WANTED

ECONOMY REMAINS TOP OF MIND



MOST CANADIANS ACKNOWLEDGE THAT CLIMATE CHANGE IS HAPPENING AND BELIEVE THE GOVERNMENT SHOULD BE TAKE ACTION TO ADDRESS IT

Climate change is a crisis that requires urgent political action from Canadians and their government



45%

Climate change is happening, and Canadians and their government should act, but not in a way that changes too much



38%

Whether or not climate change is happening, Canadians and their government collectively shouldn't make it a priority

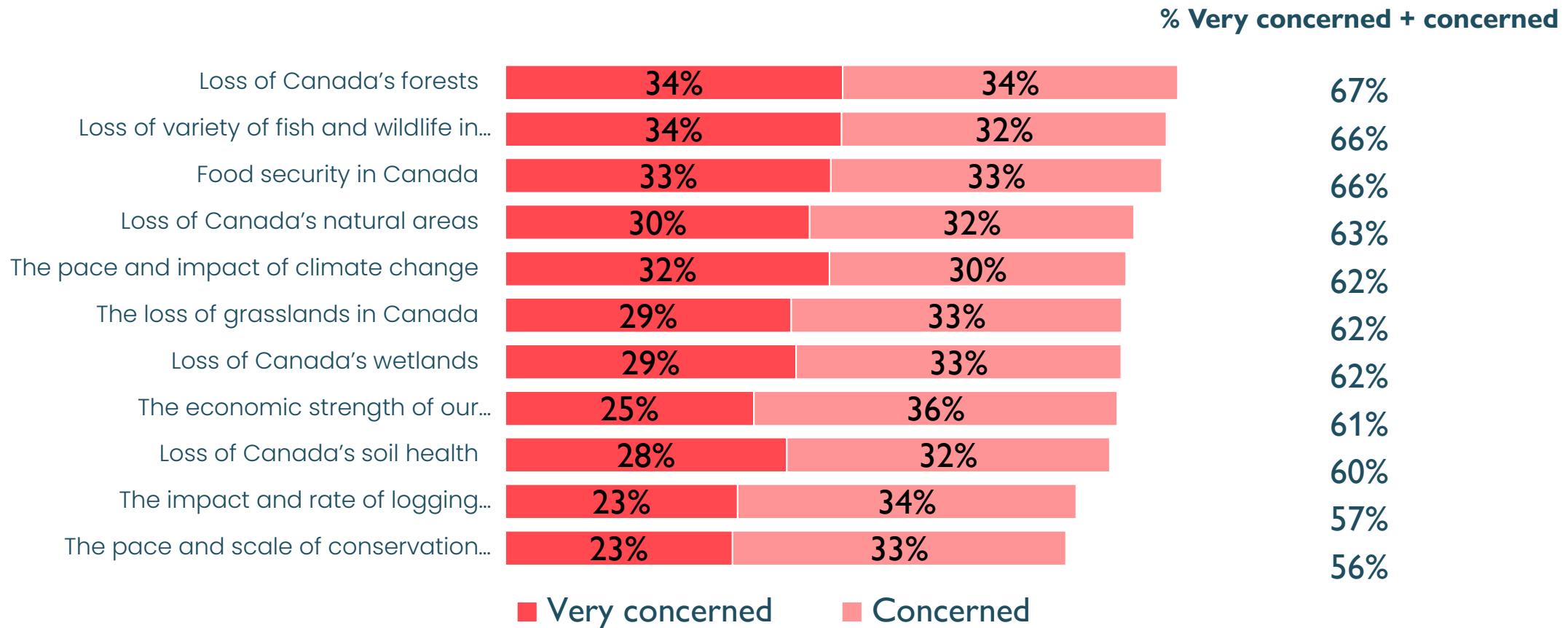


17%

83%

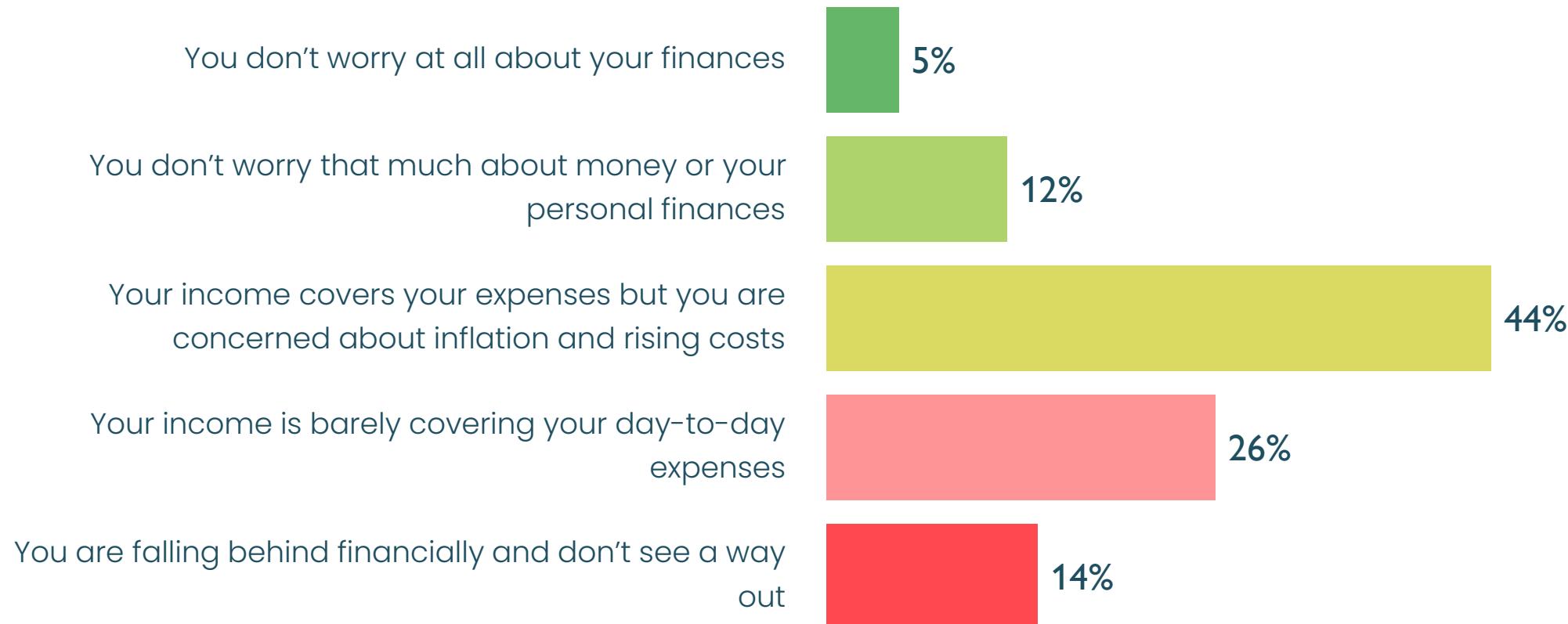
Q. Which statement comes closer to your own views – even if neither is exactly right?

TOP ENVIRONMENTAL CONCERNS: LOSS OF FORESTS, WILDLIFE, AND FOOD SECURITY LEAD THE LIST – BUT CANADIANS ARE CONCERNED ABOUT SEVERAL ENVIRONMENTAL ISSUES



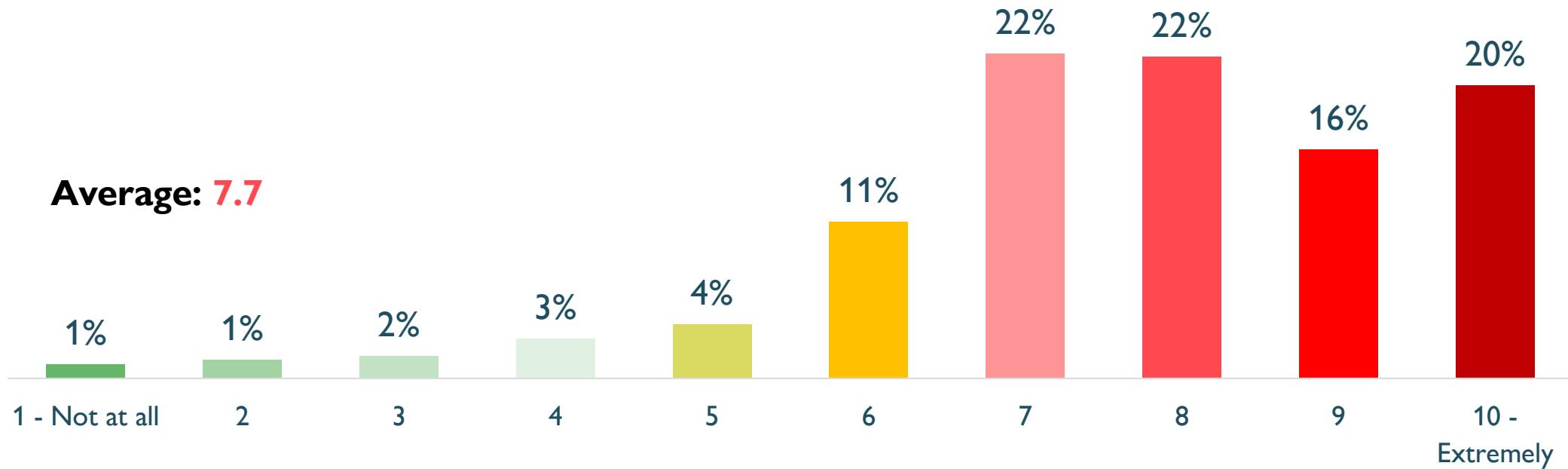
Q. And how concerned are you about each of the following?

MOST CANADIANS (83%) ARE WORRIED TO SOME DEGREE ABOUT THEIR FINANCES



Q. Which of the following comes closest to your experience?

AND MOST CANADIANS (79%) EXPRESS A HIGH DEGREE OF CONCERN (RATED 7-10) OVER THE STATE OF THE CURRENT ECONOMY.

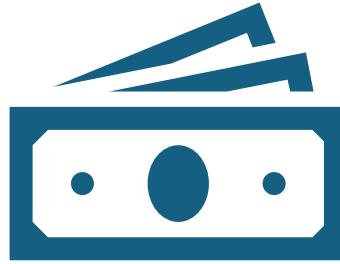


Q. How concerned are you with the current economy?

NATURE IS VIEWED AS A VALUABLE ECONOMIC ASSET



CANADIANS OVERWHELMINGLY AGREE THAT NATURE IS ONE OF THE COUNTRY'S MOST VALUABLE ECONOMIC ASSETS (91%) – CRITICAL FOR A SUSTAINABLE ECONOMY (90%), LONG-TERM RESILIENCE (87%), AND CANADA'S NATIONAL STRATEGY (87%).



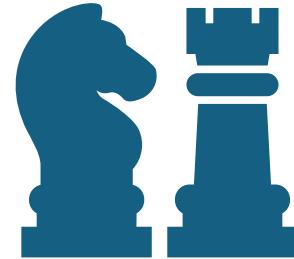
91% AGREE
NATURE IS ONE OF
CANADA'S MOST
VALUABLE ECONOMIC
ASSETS



90% AGREE
NATURE IS A POWERFUL
RESOURCE FOR GROWING A
PROSPEROUS, SUSTAINABLE,
AND PROUDLY CANADIAN
ECONOMY



87% AGREE
BY INVESTING IN NATURE,
CANADA CAN SECURE LONG-
TERM ECONOMIC RESILIENCE
AND INDEPENDENCE

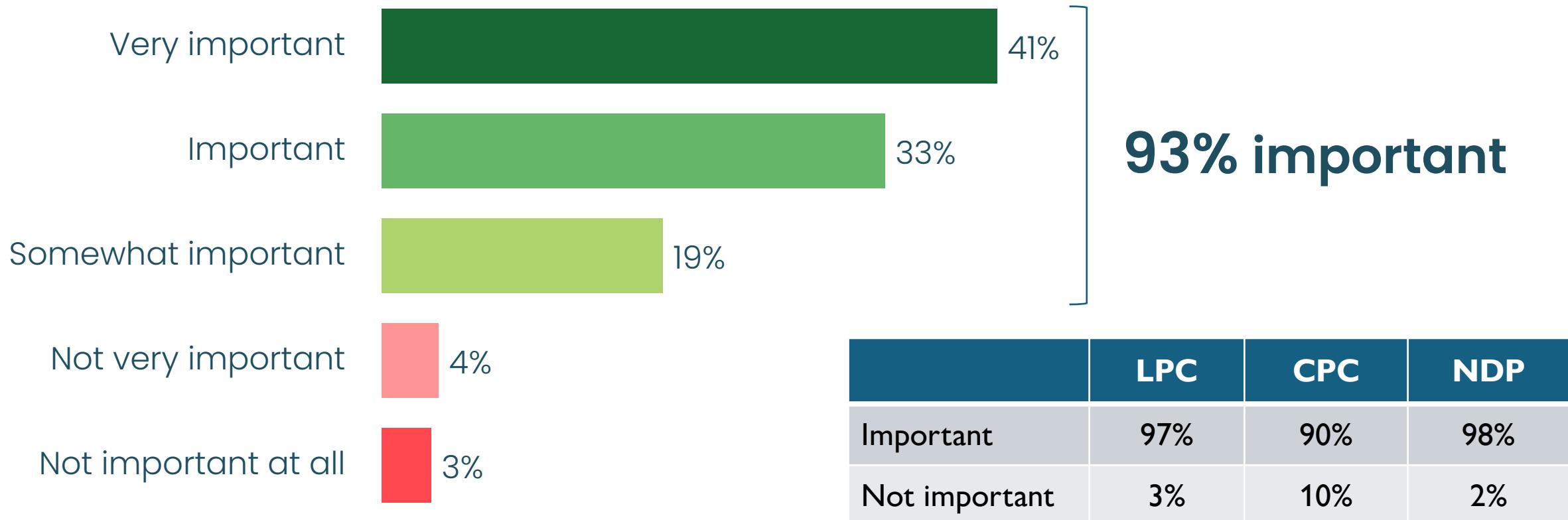


87% AGREE
PURSUING NATURE-BASED
SOLUTIONS IS IMPORTANT TO
CANADA'S NATIONAL
STRATEGY

Q. To what extent do you agree or disagree with each of the following?

ALMOST ALL CANADIANS (93%) BELIEVE IT IS IMPORTANT FOR CANADA TO POSITION NATURE AS ONE OF ITS MOST VALUABLE ECONOMIC ASSETS

– A SENTIMENT ALSO SHARED BROADLY ACROSS PARTIES



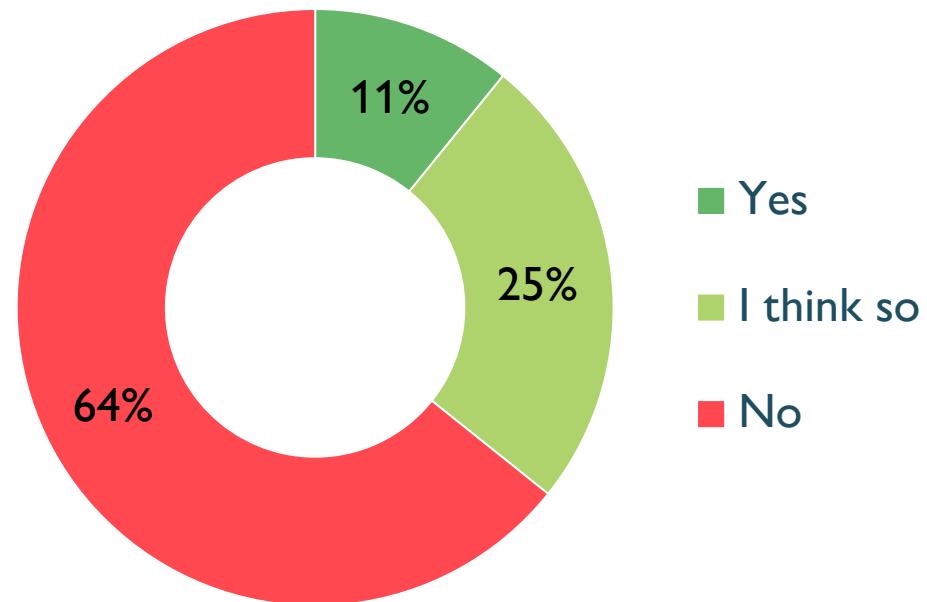
Q. Overall, how important do you think it is for Canada to position nature as one of its most valuable economic assets?

STRONG SUPPORT FOR NATURE-BASED SOLUTIONS AND GOVERNMENT INVOLVEMENT

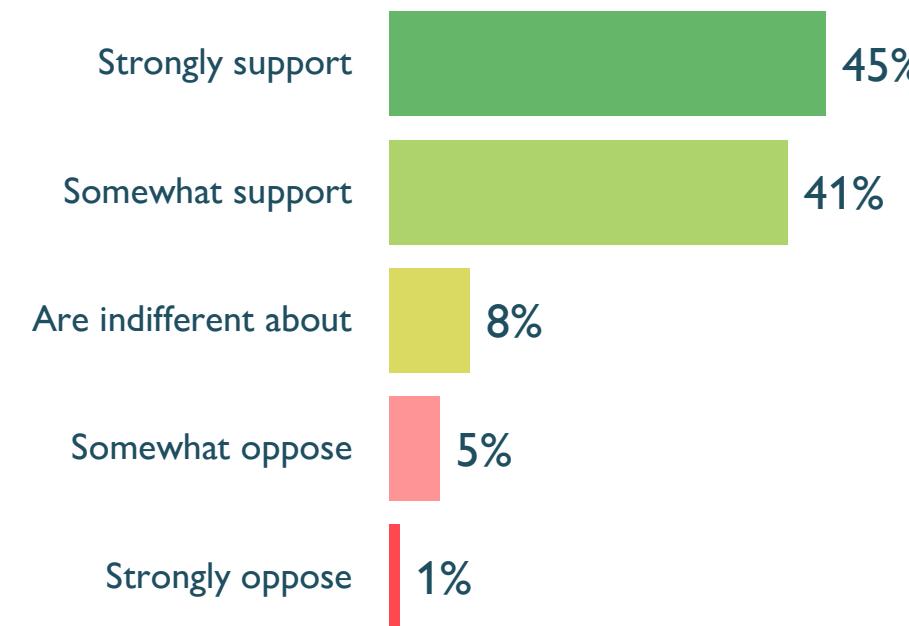


WHILE ONLY ABOUT ONE IN THREE (36%) CANADIANS ARE FAMILIAR WITH THE TERM “NATURE-BASED SOLUTIONS” (NBS), ONCE EXPLAINED, 85% SUPPORT PURSUING THEM

Have you ever heard of “Nature-based Solutions” before?



To what extent do you support Canada pursuing Nature-based solutions as a general approach?



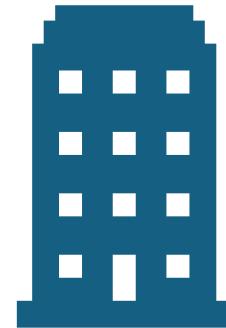
Q. Have you ever heard of “Nature-based Solutions” before?/ To what extent do you support Canada pursuing Nature-based solutions as a general approach?

ABOUT 8 IN 10 SUPPORT BOTH THE FEDERAL AND PROVINCIAL GOVERNMENT HELPING BUSINESSES TRANSITION THEIR OPERATIONS TO ADOPT NATURE-BASED SOLUTIONS



79% support the federal government helping businesses transition their operations to adopt Nature-based Solutions.

	LPC	CPC	NDP
Support	88%	72%	80%
Oppose	6%	12%	7%

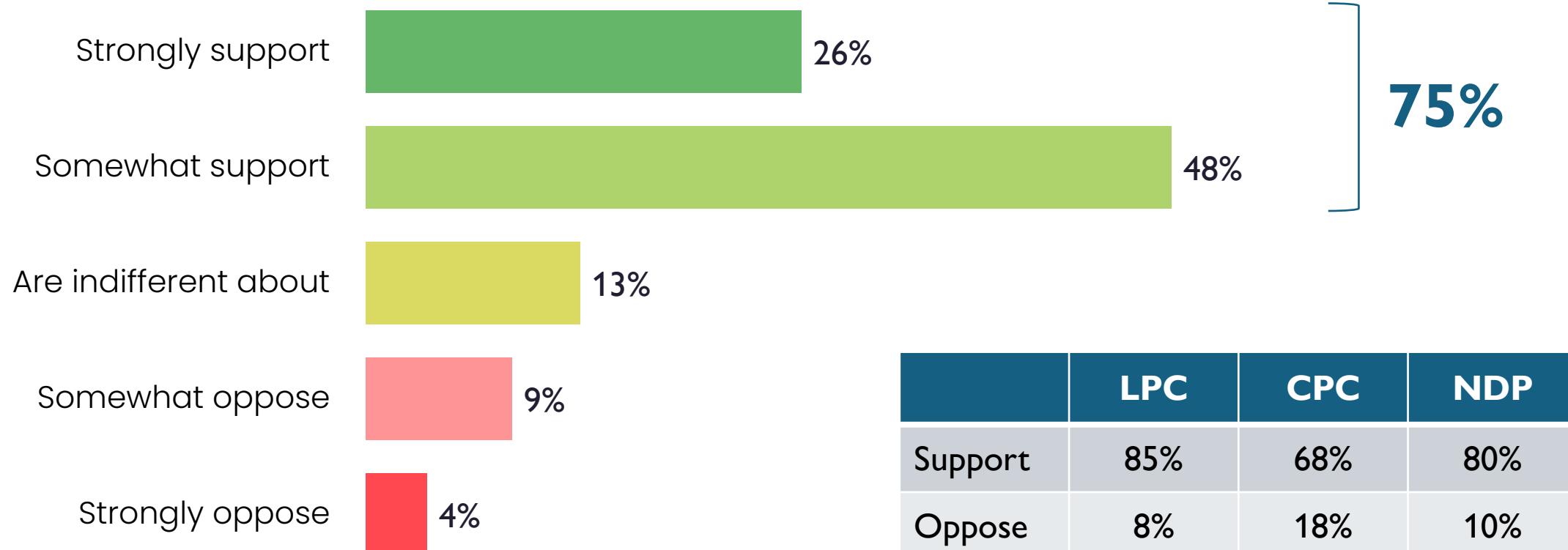


80% support the provincial government helping businesses transition their operations to adopt Nature-based Solutions.

	BC	AB	SK	MB	ON	QC	ATL
Support	84%	75%	83%	78%	80%	81%	77%
Oppose	9%	18%	6%	10%	10%	7%	8%

Q. To what extent do you support or oppose the **federal /provincial government** helping businesses to transition their operations to adopt Nature-based Solutions?

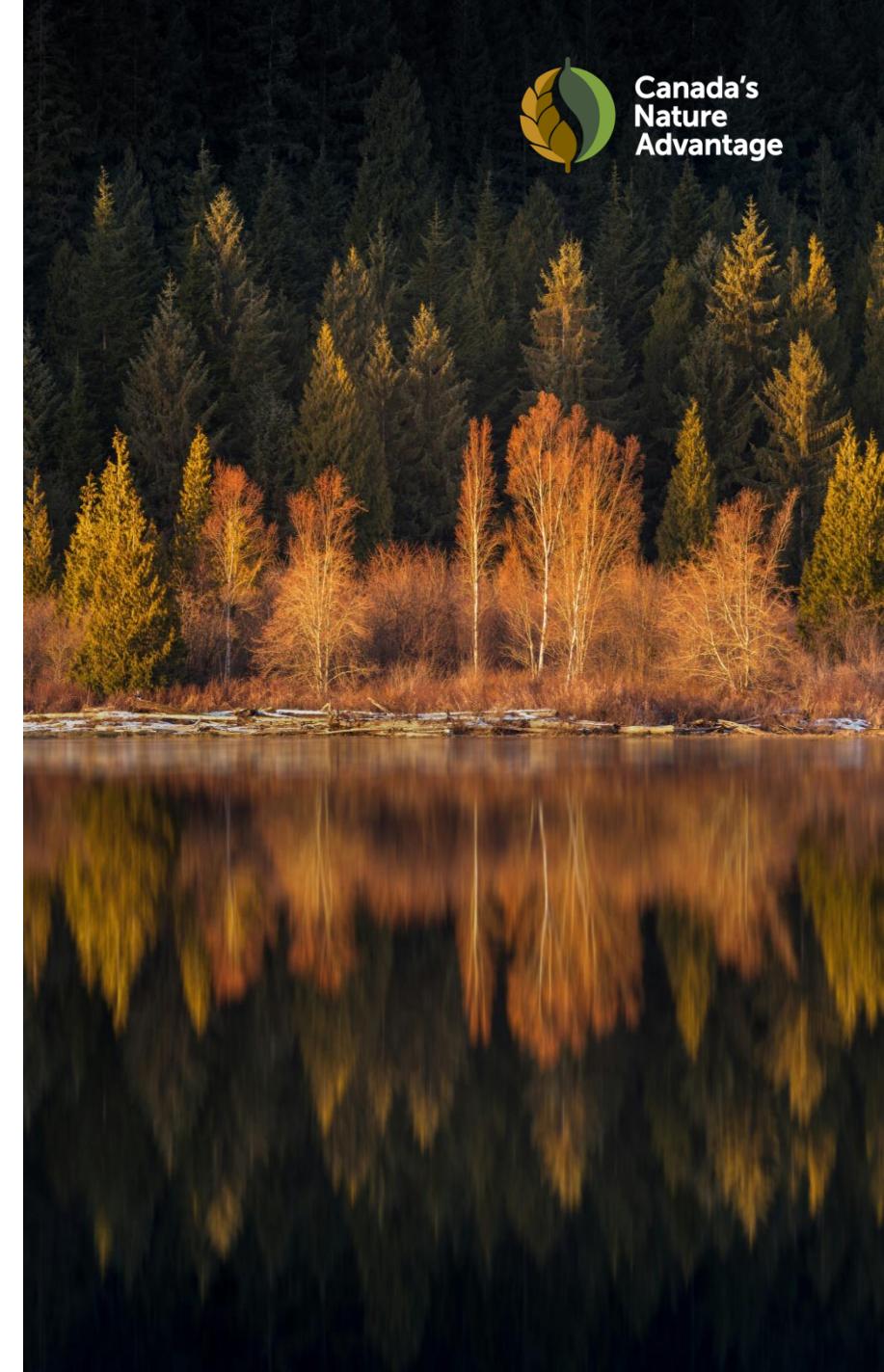
3 IN 4 CANADIANS SUPPORT THE FEDERAL GOVERNMENT DEDICATING MORE OF ITS EXISTING INVESTMENT PORTFOLIO TO ENCOURAGE PRIVATE INVESTMENT IN NATURE-BASED SOLUTIONS



Q. The Government of Canada manages an investment portfolio supporting economic stability, growth, and innovation. There is discussion about dedicating a larger share of this portfolio toward policies that encourage private investment in Nature-based solutions [...] Based on what you know & assume about the potential of nature-based solutions to support Canada's economy, how strongly do you support or oppose the federal government dedicating more investment in this way?

MAIN TAKEAWAYS

- Canadians balance climate priorities with financial pressures, favouring approaches that strengthen economic stability while addressing environmental concerns.
- Nature-based Solutions gain strong support when explained, with backing tied to health and environmental benefits, though proof of economic value remains essential.
- Federal policy tools such as investment recognition, tax incentives, and better data systems receive broad majority support, highlighting opportunity despite cost concerns.
- The Canada's Nature Advantage campaign reinforces support by linking nature to community and ecosystem benefits, showing messages framed beyond economics resonate most.





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Case Study: Nutrien

*Agriculture and Water Stewardship in the Lake
Winnipeg Basin*



Lake Winnipeg Basin (LWB) Project

An applied learning project demonstrating how water stewardship planning and implementation create values for farmers and empowers them to tell a data-driven story about their contribution to positive environmental outcomes.

- Landscape-based approach with a water stewardship planning and implementation process.
- 4 farms, covering about 45k acres of primarily grains, oil seeds, potatoes, and forages.
- Analyzed water stewardship plan implementation for environmental, social, and financial outcomes using a third-party verifiable approach.



DIAGEO



Demonstrated outcomes from farm implementation



Through a third-party verifiable valuation (EcoMetrics), the LWB Project has been able to demonstrate that participating farms are:

- already creating value to ecosystem services, such as nutrient cycling, reduced runoff, water regulation, etc.
- creating significantly more value by implementing practices that support water stewardship outcomes (e.g., 4R nutrient management, cover crops, reduced tillage practices, irrigation efficiencies, seeding marginal areas to forages, etc.)
- reducing impact and providing value for the broader watershed and stakeholders while producing food;
- contributing to quantifiable outcomes for GHG removals and nutrient retention in the landscape.

Total social and market value created per acre across all outcomes for all farms¹

All acres across all four farms	Value type	2023		2024	
		Delta - cultivated acres	Delta - cultivated acres	Delta - non-cultivated acres ²	Delta - non-cultivated acres ²
Per acre	Social	\$6,950	\$6,949	\$498,879	\$498,879
	Market	\$33	\$33	\$677	\$677

Volumes of total carbon sequestered, and N and P retained in the landscape from implemented water stewardship practices across all four farms

Total across all four farms	C, N, and P	2023		2024	
		Delta - cultivated acres	Delta - cultivated acres	Delta - non-cultivated acres ²	Delta - non-cultivated acres ²
Total across all four farms	C (tons)	34,105	36,518	66	66
	N (lbs)	412,241	431,598	1,248	1,248
	P (lbs)	2,984	3,199	285	285

¹Delta – difference between baseline (traditional farming) and current practices.

²This column for 2024 is the value related to the farm who implemented an edge of field opportunity on non-cultivated land.

Oxford Economics

*Cost-Benefit Analysis to investigate the
economic value of nature-based solutions*



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Economic Analysis Findings



- Oxford Economics conducted a Cost Benefit Analysis (CBA) to investigate the value of a selection of Natural Climate Solutions (NCS)
- The project required an innovative approach to provide evidence to support leveraging private sector investment in NCS
- A range of benefits beyond GHG emissions reductions were assessed
- The results indicate substantial potential value and if marketised these benefits outweigh the costs for private sector investment in many NCS

Approach

- Eleven NCS 'initiatives' were selected, and a CBA was conducted with material 'co-benefits'
- Transfer values from other relevant studies were used to value the co-benefits, and these were applied to the 'area of opportunity' along with additional scaling factors
- Costs were adapted from Drever et al., 2021 (expenditure + opportunity costs)
- Costs and Benefits were profiled over the 10-year study period and aggregated with 2025 CDN\$ (applying a 3% discount rate)

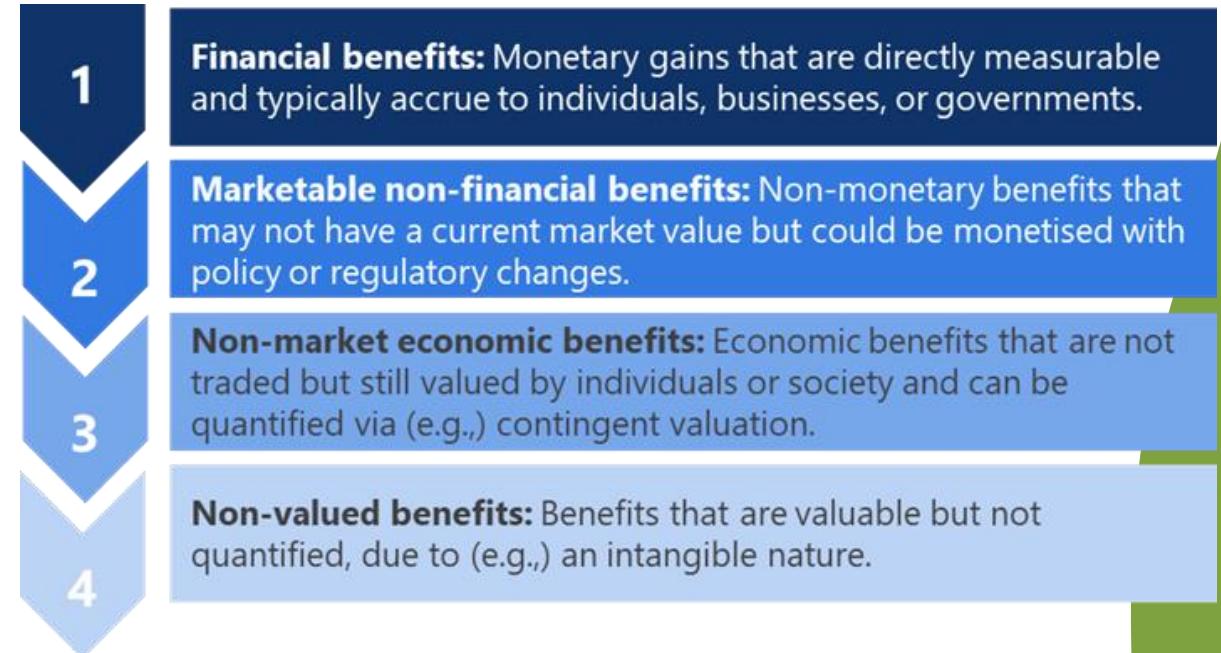
Sector	Hotspot	NC S	NCS pathway	Initiative
Agriculture	Prairies	1	Regenerative cropping practices	Cover crops, reduced tillage
		2	Improved pasture practices	Grasslands conservation
	Southern Ontario	3	Avoided conversion of remnant natural habitats in agricultural lands	Avoided forest conversion, avoided conversion of freshwater mineral wetlands
		4	Trees in agricultural lands	Silvopasture, riparian tree planting
		5	Regenerative cropping practices	Cover crops, reduced tillage
	British Columbia	6	Old forest conservation	Old forest conservation
		7	Fire risk management	Fire risk management

The steps of CBA generally consist of:

1. Define the scope and boundary of the assessment.
2. Identify material costs and benefits.
3. Quantify material costs and benefits.
4. Profile costs and benefits over time and discount.
5. Calculate benefit-to-cost ratios over time.
6. Conduct sensitivity analysis and interpret results.

Interpretation

- The benefits were categorised as:
 1. Financial
 2. Marketable non-financial
 3. Non-market economic
 4. Non-valued
- A Benefit Cost Ratio (BCR) was produced assessing which benefits were required to 'switch' to a BCR greater than 1.
- If these benefits were to be marketized and the private sector were financially compensated for their value, the business case is then made for private sector investment in the NCS.
- The GHG emissions reductions are additional and could be achieved without direct payments where the BCR is greater than 1.



Results

- The NCS have a range of Net Present Value (NPV) and BCR and overall there is substantial value to be created by the implementation of NCS
- A BCR lower than 1, this does not necessarily mean they are not valuable, but that additional mechanisms (e.g. carbon markets) may be required to deliver them
- The results are indicative of the scale of value that could be achieved for the valued benefits (note other benefits and values are possible).
- For implementation, scale and the specific geography of the initiative, along with the assumptions applied, will affect the BCR achieved, and further assessment at a more local scale would be required.

NCS Initiative	Net present value (2025 CDN\$)	BCR
NCS1 Cover Crops (Prairies)	2,051, 000,000	4.7
NCS1 Reduced Tillage (Prairies)	2,924, 000,000	2.9
NCS2 Grassland Conservation (Prairies)	- 781, 000,000	0.1
NCS3 Wetlands Conservation (Southern Ontario)	38, 000,000	6.7
NCS3 Forest Conservation (Southern Ontario)	796, 000,000	4.9
NCS4 Silvopasture (Southern Ontario)	358, 000,000	30.5
NCS4 Riparian Tree (Southern Ontario)	482, 000,000	2.1
NCS5 Cover Crops (Southern Ontario)	1,266, 000,000	2.9
NCS5 Reduced Tillage (Southern Ontario)	884, 000,000	2.5
NCS6 Old Forest Conservation (British Columbia)	- 566, 000,000	0.2
NCS7 Fire Risk Management (British Columbia)	- 111, 000,000	0.7

Findings

- Broadly the results place the NCS into three categories:
 1. Financial benefits alone lead to a BCR greater than 1
 2. Additional benefits would need to be marketized
 3. May require direct subsidization or carbon markets
- The key benefits for potential marketisation are:
 1. Regulation of water timing and flows
 2. Erosion regulation
 3. Soil nutrient regulation
 4. Pollination
- All NCS provide an effective discount on the price of GHG emissions reductions
- Under-provision of NCS is a market failure, but markets can be leveraged to help provide them

NCS Initiative	Key findings
NCS1 Cover Crops (Prairies)	Financial benefits are greater than costs
NCS1 Reduced Tillage (Prairies)	Erosion regulation OR soil nutrient regulation required
NCS2 Grassland Conservation (Prairies)	Direct subsidisation or carbon markets required
NCS3 Wetlands Conservation (Southern Ontario)	Regulation of water timing and flows OR water purification AND soil nutrient regulation required
NCS3 Forest Conservation (Southern Ontario)	Erosion regulation OR pollination OR regulation of water timing and flows required
NCS4 Silvopasture (Southern Ontario)	Financial benefits are greater than costs
NCS4 Riparian Tree (Southern Ontario)	Regulation of water flows and timings AND erosion regulation OR pollination required
NCS5 Cover Crops (Southern Ontario)	Financial benefits are greater than costs
NCS5 Reduced Tillage (Southern Ontario)	Financial benefits are greater than costs
NCS6 Old Forest Conservation (British Columbia)	Direct subsidisation or carbon markets required
NCS7 Fire Risk Management (British Columbia)	Direct subsidisation or carbon markets required

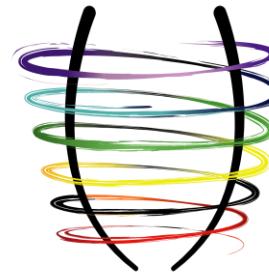


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Case Study: Wahkohtowin Development Inc.

Improved Forest Management in Northern Ontario





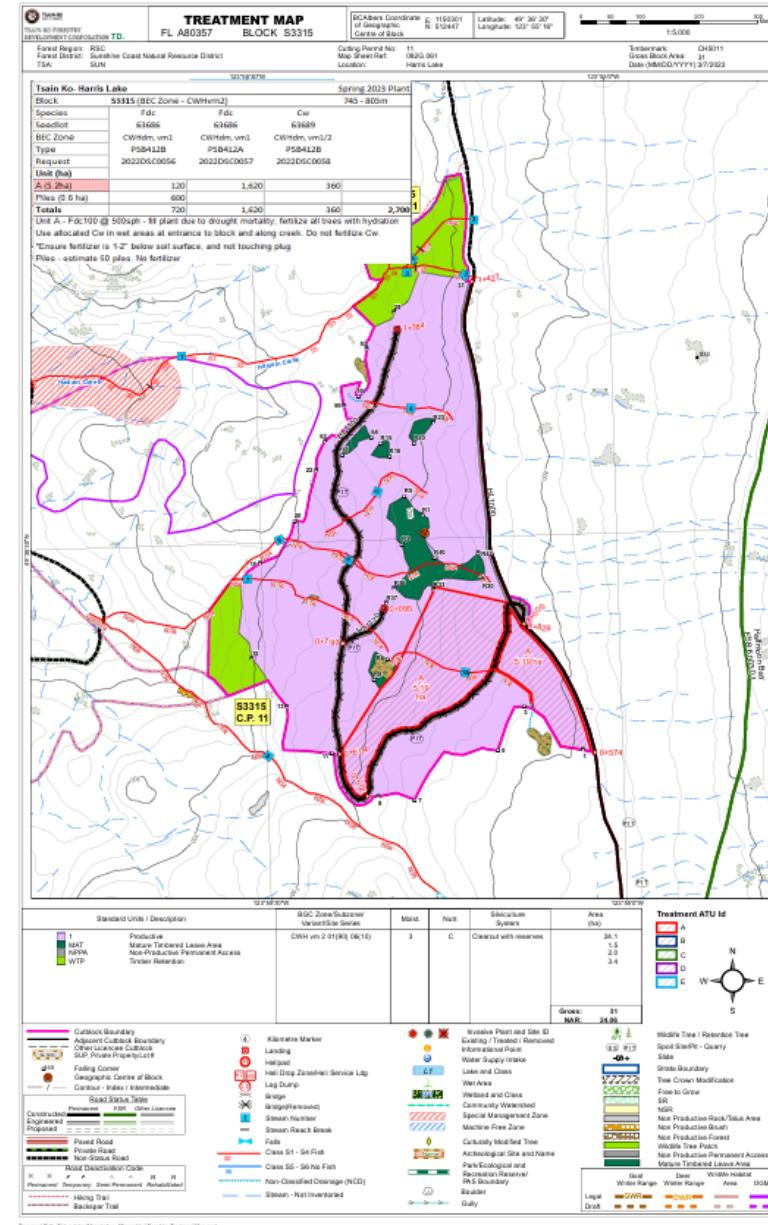
Wahkohtowin Development GP Inc.

- Indigenous-led private company owned by three First Nations in Northern Ontario founded in 2016
- Diversified investments in forest sector: harvesting company, sawmill, co-gen, housing, nature-based climate solutions, policy and consulting services.
- Lead on mycorrhizal inoculation of forest seedling carbon project-35m trees inoculated to date
- Pilot cohort for VERRA Nature Framework Biodiversity Credit—Avoiding herbicide application
- Youth Guardian program in 5th year of operation
- Sovereignty and cultural revitalization at the core of mandate from Owner-Nations



**The Forest Sector in Canada
is in distress and is
increasingly unable to
finance enhanced, long-
term, sustainable forest
management activities**

- Market Conditions
- Cost of Production including long-term management
- Duties and Tariffs



Mycorrhizal Inoculation for Improved Forest Management: Carbon Financed, Indigenous-Led Solution



- Grant and Private Funding to assess 25-year-old research trial established by partner Mikro-Tek Inc.
- Commercialization funding to inoculate 53 million trees—currently in year 3 of 4 and certify stand volume increase as IFM carbon project.
- 35 million trees inoculated to date
- 15–45% increase in stand volume
- Targeting inoculation of 100m+ trees per year
- Host-Nation benefit sharing agreement and recognition of Nation-specific strains as locally owned intellectual property—UNDRIP Article 31



PANEL DISCUSSION



AUDIENCE Q & A

Please submit your questions using the Q&A function on Zoom



Policy Vision



As leaders and entrepreneurs in agriculture, forest management, finance, and Indigenous-led enterprises,

We are calling for a modern economic strategy that reflects the true value of nature, and

that places our working landscapes – and the farmers, foresters and Indigenous people who steward them –

at the heart of Canada's clean and competitive economic future.



Collaborate with us

- Visit natureadvantage.ca
- Be a case study
- Shape analysis and research
- Participate in events
- Share CNA with your networks

Contact:

Info@natureadvantage.ca



JOIN US AT CANADA CLIMATE WEEK XCHANGE

Unlocking Canada's Nature Advantage

Canada's Nature Advantage is a growing network of business leaders committed to unlocking the full potential of nature—healthy forests and soils, clean air and water, and vibrant rural and Indigenous communities. Join us to explore how businesses are recognizing nature's value to drive economic, social, and environmental outcomes, and engage with newly released research and thought leaders to discover how to bring these opportunities to scale.

November 26, 2025

4-6 PM

Toronto, ON





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joining!