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**Report Highlights:**

While the Canadian food and beverage processing sector has faced increased operating costs and lost sales related to COVID-19, the \$89 billion sector remains a steady source of demand for U.S. agricultural raw, semi-raw, and processed ingredients. Continued Government policy emphasis on Canadian value-added production and exports should sustain food and beverage processing growth and import demand over the near term.

# Market Fact Sheet: Canada

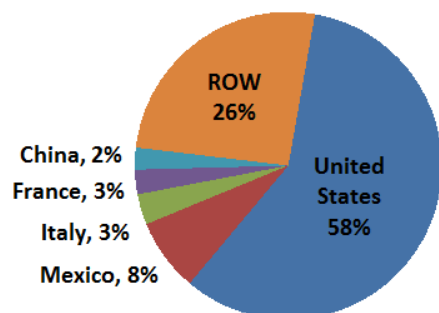
## Executive Summary

The population of Canada is approximately 37 million and 90 percent of Canadians live within 100 miles of the U.S. border. In 2019, Canada was the number one export destination for U.S. agricultural exports. For new-to-market and new-to-export firms, Canada offers stable financial markets and a sophisticated logistics network that supports \$120 million worth of daily two-way trade in food and agricultural products. In 2019, Canada's food and beverage processing sector was valued at close to \$88.8 billion; opportunities exist to expand U.S. food and beverage product sales.

## Imports of Consumer-Oriented Products

U.S. exports of consumer-oriented products to Canada reached \$16.2 billion in 2019, far exceeding the value of the next largest market, Mexico. Imported ingredients are vital inputs to Canadian food and beverage manufacturers. Canada relies heavily on two-way trade with the United States and depends on it for their raw, semi-processed and processed ingredients. Sophisticated and extensive cross-border logistics between Canada and the United States help to create trade opportunities for both countries.

### Imports of Consumer Oriented Products - 2019



## Food Processing Industry

Canada's food and beverage processing sector is vital to its economy and ranks as the second largest sector for Canada, accounting for 18 percent of the country's manufacturing. Canada's 2019 agri-food exports exceeded \$43 billion, making it the fifth-largest global exporter of agricultural products.

In 2019, food and beverage processing sales reached \$89 billion with food processing accounting for 90 percent of total sales and beverage processing accounting for the remaining 10 percent. The leading food manufacturing sectors are in meat processing (\$22.6 billion) and dairy product manufacturing (\$11 billion). There are 9,796 food and beverage processing establishments, 90 percent of which have fewer than 100 employees.

## Quick Facts CY 2019

### Imports of Consumer-Oriented Products

\$26.9 billion

### List of Top 10 Growth Packaged Food Products in Canada

- |                                     |                          |
|-------------------------------------|--------------------------|
| 1) Biscuits/Snack Bars/Fruit Snacks | 2) Savory Snacks         |
| 3) Spreads                          | 4) Edible Oils           |
| 5) Rice/Pasta/Noodles               | 6) Confectionary         |
| 7) Baked Goods                      | 8) Processed Fruits/Veg. |
| 9) Sauces/Dressings/Condiments      | 10) Packaged Foods       |

### Food Industry by Channels (U.S. billion) 2019

<b>Total Food &amp; Beverage Industry</b>	<b>\$256</b>
Retail (including alcoholic beverages)	\$97
Food Service	\$70
<b>Food &amp; Beverage Processing Sales</b>	<b>\$89</b>
- Food Processing	\$80
- Beverage Processing	\$9

### Top 10 Canadian Food & Beverage Processors

(By Company Share)

Food Processors	Beverage Processors
1) Loblaw Cos Ltd	1) PepsiCo Beverages
2) Saputo Inc.	2) Coca-Cola Ltd
3) Kraft Heinz Canada ULC	3) Nestle Waters
4) Nestlé Canada Inc.	4) Loblaw Cos Ltd
5) Agropur Cooperative Ltd	5) Canada Dry Motts
6) Parmalat Canada Ltd	6) A Lassonde Inc.
7) Frito-Lay Canada	7) Minute Main Co.
8) General Mills Canada Corp	8) Minute Maid Co
9) Sobeys Inc.	9) Sobeys Inc
10) Schneider Corp	10) Naya Waters Inc.

### GDP/Population

Population: 37.6 million  
 GDP: \$1,653 billion USD (2017 est.)  
 GDP per capita: \$48,400 USD (2017 est.)

Note: The exchange rate \$1 USD : \$1.3269 CAD has been applied for 2019.

**Data and Information Sources:** Trade Data Monitor, Global Agricultural Trade System, Statistics Canada, Conference Board of Canada, World Factbook and Euromonitor International.

## Strengths / Weaknesses / Opportunities / Threats

Strengths	Weaknesses
High economic growth rate and a weaker Canadian dollar.	A smaller and consolidated sector.
Opportunities	Threats
Perception of quality and safety for U.S. ingredients and other food inputs.	Increasing competition from competitors with Canadian subsidiaries.

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## Section I: Market Summary

### Overview of the Canadian Food Processing Market

The Canadian food and beverage processing sector is sophisticated and among the most competitive in the world. It's the largest manufacturing sector in Canada, after transportation and one of Canada's largest employers, with 266,000 employees, accounting for approximately 18 percent of total manufacturing employment. In 2019, food and beverage processing sales reached \$89 billion.<sup>1</sup> Over the period 2009 to 2018, growth in food manufacturing Gross Domestic Product (GDP) outpaced that of beverage manufacturing and total manufacturing.

Canada's agri-food exports exceed \$43 billion per year, making it the fifth-largest exporter of agricultural products in the world, after the European Union, the United States, Brazil and China, respectively. The Conference Board of Canada reported the Canadian food-manufacturing sector is operating at 90 percent capacity. By 2025, the Canadian Government aims for agri-food exports to reach an estimated \$57 billion.

Canadian food and beverage processors utilize raw, semi-processed, and processed ingredients. They try to source locally whenever possible due to avid support for the Canadian "local economy," and the strength of Canada's "buy local" movement. However, Canadian processors continue to rely on a wide range of imported ingredients. For example, commodities such as fresh berries, lettuce and tree nuts have become essential to the food processing industry.

Canada's well-established multinational manufacturers, such as Saputo Inc., PepsiCo, Inc., Kraft and others, contribute to the cross-border trade between Canada and the United States as they leverage global supply chains to create efficiencies and foster innovation.

### COVID-19 Update

In addition to economy-wide [COVID-19 Economic Response Plan](#), the Canadian Government [announced](#) approximately \$60 million in May 2020 for food and beverage processors to offset the additional costs of retrofitting facilities and procuring personal protective equipment. Early outbreaks of COVID-19 in Canadian food and beverage processing facilities, particularly meat processing, highlighted the efforts made by the industry as well as the varying degree of risk across the sector. The Canadian food and beverage processing industry estimates the sector has lost billions in sales since March 2020 and spent more than \$600 million on COVID-related cost increases. Industry guidance, updates and responses to frequently asked questions are available on [Health Canada](#), [Agriculture and Agri-Food Canada](#) and [Canadian Food Inspection Agency](#) (CFIA) websites.

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<sup>1</sup> All values are expressed in U.S. dollars unless otherwise specified.

**Table 1. Advantages and Challenges Facing U.S. Products in Canada**

Advantages	Challenges
U.S. geographic proximity lowers transportation costs and results in a high-level of U.S. brand awareness.	Sophisticated selection of raw, semi-processed, and processed food inputs already available in the Canadian market.
Similar shopping patterns and culinary tastes / preferences support U.S. products.	Differences in acceptable food enhancers, additives, chemicals and residue tolerances.
Duty free tariff treatment for most products under USMCA.	Tariff rate quotas apply for certain products such as dairy and poultry.
High U.S. quality and safety perceptions among Canadians.	Avid support for sourcing ‘locally,’ and supporting local growers and processors.
High fruit vegetable/nut consumption among Canadians create sales opportunities as selected food inputs do not grow in sufficient quantities in Canada.	As operating costs are generally higher for most Canadian processors than in the U.S., buyers are always seeking competitive pricing on their food inputs.

## Section II: Road Map for Market Entry

### Entry Strategy

To facilitate initial export success, FAS/Canada recommends the following steps when entering the Canadian market:

1. Contact an international trade specialist through your state department of agriculture.
2. Thoroughly research the competitive marketplace.
3. Locate a Canadian partner to help identify key Canadian accounts.
4. Learn Canadian government standards and regulations that pertain to your product.

For more information on these steps, please consult the FAS/Canada [Exporter Guide](#). The best entry method depends on the specific food product and the particular sub-sector. FAS/Canada encourages companies to participate in Canadian trade and consumer shows, to help them evaluate the market. A partial list of Canadian trade shows can be found under [Local Trade Events in Canada](#). USDA endorses [SIAL Canada](#), the largest food trade show in Canada. This annual event alternates between Montreal and Toronto. In addition to industry shows, various trade associations provide excellent networking opportunities and their own trade show formats, such as the [Ontario Independent Meat Processors](#) (OIMP) or the [Canadian Institute of Food Science and Technology](#), and [Food and Beverage Canada](#).

FAS/Canada works with four [State Regional Trade Groups](#) (SRTG) and their respective U.S. state departments of agriculture to provide one-on-one export counseling and services that include business trade missions, support for selected tradeshow, and identification of potential Canadian partners.

## **Import Procedures**

U.S. exporters are urged to review FAS/Canada Food and Agricultural Import Regulations and Standards (FAIRS) Country Report ([CA2020-0081](#)) and Certificate Report ([CA2020-0084](#)) to better understand the Canadian import regulations and standards that apply to your product. CFIA provides extensive information on the [programs and services](#) it offers for importing commercial foods into Canada, including a [Guide to Importing Food Products Commercially](#). In addition, the CFIA [Automated Import Reference System](#) (AIRS) provides specific import requirements for food items by the Harmonized System (HS) classification, and detailed by place of origin (i.e., a specific U.S. state), destination in Canada (i.e., a specific province) and end use of the food item (e.g., for animal feed, for human consumption, etc.).

U.S. exporters should be aware that the [Safe Food for Canadian Regulations](#) (SFCR) came into effect on January 15, 2019 whereby 14 sets of existing regulations were consolidated. Certain parts of the regulations are being phased in over 12 to 30 months. U.S. food processors are encouraged to understand how the SFCR may apply to them as new requirements may apply. [Getting started: Toolkit for food businesses](#) is an online toolkit provided by CFIA to help businesses understand the traceability, labelling and advertising requirements that apply to their products.

## **Distribution Channels**

Canadian food processors utilize raw, semi-processed, and processed ingredients. Food and beverage manufacturers source ingredients through various avenues. Larger multinationals with operations on both sides of the border usually maintain a global procurement office at their headquarters office and a regional procurement office in Canada. These global brands leverage vendors along their global supply chain to help them source ingredients in Canada.

For small- to medium-sized Canadian manufacturers, many will source their ingredients from local Canadian food ingredient brokers or distributors.<sup>2</sup> If the volumes are high enough, then some Canadian manufacturers may be able to import directly from U.S. growers/exporters.

U.S. firms, particularly small- to medium-sized firms, are recommended to partner with a Canadian ingredient broker or distributor. In most instances, food distributors will import and take title of the shipment and warehouse the product. The ingredients will be part of their catalog of offerings. Most distributors are not in the business of pioneering or finding new manufacturing or foodservice accounts. There are a select number of ingredient brokers and they are prepared to serve as sales people for their principals and will pioneer the ingredient to established industrial and foodservice accounts.

All food brokers take a percentage of the product sales revenue, ranging from three percent to six percent. The percentage is determined by several factors: the type of product category, market niche potential, expected sales volume, and any additional services that may be requested by the U.S. principal. It is not uncommon for a broker to request a monthly retainer fee as they must introduce the product to prospective industrial accounts. Once targeted sales volumes are established, brokers typically transition fee structures to a percentage of sales. All fees are negotiated between the principal and the broker prior to any future transactions.

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<sup>2</sup> Agricultural Canada defines small- to medium-sized firms in Canada as businesses with up to 250 employees and annual revenues not exceeding \$39 million USD in sales. This definition differs from the U.S. Small Business Administration, as employees size may vary but on average is up to 500 to 750 employees.

## Market Structure

The country's leading processing sectors are meat and poultry processing (\$23 billion), dairy product manufacturing (\$11 billion) and other food products (\$9.5 billion), which combined account for 50 percent of sales/shipments in the food and beverage processing sector. Over the period of 2009 to 2018, grain and oilseed milling grew the most (6.5 percent) followed by other food manufacturing (5.8 percent), while meat and dairy processing and bakeries grew the least, by 1.6 percent, 0.6 percent and 1.6 percent respectively. Food and beverage manufacturing GDP in Saskatchewan, Prince Edward Island, New Brunswick, Quebec and Alberta experienced the highest provincial rates of growth, though the food and beverage industries are heavily concentrated in/around Toronto and Montreal.<sup>3</sup>

**Table 2. 2019 Canada Food & Beverage Manufacturing Sales** (Billion U.S. Dollars)

Food & Beverage Processing Sub-Sector	Sales	Market Share
<b>Food Manufacturing</b>	<b>\$79.8</b>	<b>90%</b>
Meat product manufacturing	22.6	25%
Dairy product manufacturing	11.1	13%
Other food manufacturing	9.5	11%
Bakeries and tortilla manufacturing	9.1	10%
Grain and oilseed milling	8.0	9%
Animal food manufacturing	6.1	7%
Fruit and vegetable preserving and specialty food manufacturing	6.1	7%
Seafood product preparation and packaging	4.2	5%
Sugar and confectionery product manufacturing	3.0	3%
<b>Beverage Manufacturing</b>	<b>\$8.99</b>	<b>10%</b>
Soft drink and ice manufacturing	2.58	3%
Wineries	0.96	1%
Distilleries	0.93	1%
Breweries	0.45	1%
<b>Food and Beverage Manufacturing</b>	<b>\$88.8</b>	

Source: Statistics Canada, *Manufacturers by industry*

## Key Market Drivers & Sector Trends

Shifting demographics, healthy eating, and sustainable lifestyles are among the recent [developments](#) shaping consumer preferences and product development in Canada. Canada's population is aging and immigration is driving modest population growth. In 2017, one in five Canadians was foreign born, and in the last census, more than 13 different ethnic origins claimed more than one million Canadians each; reaching a total national population of nearly 37 million. The ethnic food market in Canada was estimated at \$49 billion in 2015 and is projected to reach \$97 billion by 2020. More importantly, selected ethnic foods with some modification for Western taste buds have now become mainstream in the diets of many Canadians. For example, masala seasoning, commonly used in South Asian cuisine, and Thai chicken broth are readily available on store shelves today and incorporated in everyday cuisine.

<sup>3</sup> The Canadian Agri-Food Policy Institute: Canadian Agri-Food Processing Competitiveness, Quality Growth and Global Opportunities.

Ontario's [Bring Home the World](#) campaign underscores the effort to harness global tastes to local production.

Canada's [Food Guide](#) was revised in January 2019, reflecting an emerging consensus in Canada favoring fruit, vegetables, whole grains and plant-based proteins, while reducing sodium, sugars, fats and carbohydrates. Canadian consumers are increasingly reflecting those priorities in their food purchasing and consumption habits. Food and beverage processors are also responding to these changing trends to keep up with consumer demand for eating healthy, in response to voluntary sodium reduction targets, and in anticipation of forthcoming [front-of-package labeling](#).

The food guide places more focus on plant-based sources of protein and there are Canadian manufacturers exploring plant-based alternatives. Both in the United States and Canada, consumers are increasing consumption of soy, rice and other non-dairy alternatives. Nielsen Canada reported this category grew by four percent in value and six percent in volume in 2017. Millennials are among the population segment driving consumption patterns; [Food in Canada](#) noted that 23 percent of them consume meat alternatives a few times a week versus only three percent of boomers and two percent of seniors. To keep abreast of these changes, larger Canadian manufacturers are investing in vegetarian / vegan brands, such as Canada's largest meat processor's acquisition of U.S.-based meat-free [Lightlife Foods](#).

The rise of the 'ethical shopper' continues, along with greater demand for 'trust' in food brands reflecting healthy, safe, and sustainable choices. Canadian manufacturers and other industrial accounts are also incorporating biodegradable and efficient packaging into their daily operations. The Provision Coalition of Canada estimates 40 percent of all food produced in Canada is lost in landfills, with 20 percent of waste derived from the processing sector. Canadian manufacturers are under pressure to identify innovations that can reduce food waste, largely in recognition of its impact on climate change. As an example, Maple Leaf Foods has committed to carbon neutrality, reducing its Greenhouse Gas emissions (GHG) by 30 percent by 2030 and reducing its environmental footprint.

### **Section III: Competition**

Statistics Canada reported that there were approximately 9,796 food and beverage processing establishments in Canada in 2019.<sup>4</sup> Approximately 90 percent of Canadian food processors maintain fewer than 100 employees, with less than one percent of firms employing 500 employees or more. Buying power is consolidated with the larger companies, which may put pricing pressure on some U.S. food and beverage companies, while at the same time creating challenges for U.S. exporters working with smaller companies and smaller orders. Aside from these challenges, processors must be prepared to distinguish their company and products from their competition in order to establish long-term sales.

Innovation, Science and Economic Development Canada maintains a comprehensive directory of companies on [their website](#) that include food and beverage processors.

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<sup>4</sup> [Government of Canada, Canadian Industry Statistics](#).

**Table 3: Top Ten Packaged Food and Soft Drink Manufacturers in Canada**

<b>Packaged Food</b> (Retail Sales in Million U.S. Dollars)		
<b>Company</b>	<b>2019</b>	<b>Company Share</b>
Loblaw Cos Ltd	\$2,751.5	6.2%
Saputo Inc.	\$2,307.6	5.2%
Kraft Heinz Canada ULC	\$1,942.1	4.4%
Nestlé Canada Inc.	\$1,752.5	3.9%
Agropur Cooperative Ltd	\$1,746.2	3.9%
Parmalat Canada Ltd	\$1,716.8	3.9%
Frito-Lay Canada	\$1,367.2	3.1%
General Mills Canada Corp	\$1,086.2	2.4%
Sobeys Inc.	\$953.0	2.1%
Schneider Corp	\$738.9	1.7%
<b>Soft Drinks</b> (in Million Liters)		
<b>Company</b>	<b>2019</b>	<b>Company Share</b>
PepsiCo Beverages Canada	1,070.5	15.6%
Coca-Cola Ltd	898.6	13.1%
Nestlé Waters of Canada Ltd	734.8	10.7%
Loblaw Cos Ltd	579.4	8.5%
Canada Dry Motts Inc.	429.7	6.3%
A Lassonde Inc.	321.8	4.7%
Minute Maid Co Canada Inc.	233.6	3.4%
Minute Maid Co of Canada	226.2	3.3%
Sobeys Inc.	190.8	2.8%
Naya Waters Inc.	160.1	2.3%

Source: Euromonitor International

#### **Section IV: Best Product Prospects**

In 2019, Canada was once again the leading destination for U.S. agricultural and related products with total export value reaching \$24.8 billion. U.S. exports of consumer-oriented products reached \$16.2 billion representing 24 percent of global category exports. The top export categories included prepared food, fresh vegetables and fruits, snack food and non-alcoholic beverages, which account for 50 percent of consumer-oriented exports to Canada.

There is a strong ‘buy local’ movement, which drives Canadian consumers to source locally produced fruits and vegetables when available. However, U.S. produce benefits from seasonal complementarity (capturing increased market share immediately before and after the Canadian growing season) and a strong reputation for food safety. Canada imports 80 percent of its fresh vegetables between November and June.

Although, no data exists on the total value of imported inputs/ingredients destined to the Canadian food processing sector, exports indicate that semi-raw products, selected fresh fruits and vegetables, nuts, and



other products and processing inputs not readily grown in Canada are in higher demand and continue to be largely imported from the United States. Below are products present in market that have had consistently good sales potential.

**Table 4: 2019 Imports of Food and Beverage Processing-Related Products** (U.S. Billion Dollars)

Description	Imports from World	Imports from U.S.	U.S. Market Share	Major Competitors
Food Preparations & Misc. Beverage*	4.3	3.5	82%	China, Italy, Mexico
Baked Snack Foods (pastries pretzels, cookies, etc.)	1.6	1.2	76%	Mexico, Italy, Germany
Other processed food, ingredients and beverage bases (malt, cane or beet sugar)	1.5	1.2	81%	China, Sweden, Germany
Fresh fruit	3.7	1.4	38%	Mexico, Guatemala, Chile
Processed Fruit	1.1	0.5	45%	Mexico, China, Chile
Fresh vegetables	2.8	1.7	62%	Mexico, China, Spain
Chocolate & Cocoa Products	1.3	0.7	52%	Switzerland, Mexico, Belgium
Processed Vegetables	1.2	0.7	58%	China, Spain, Italy
Tree Nuts	1	0.7	66%	Vietnam, Turkey, Thailand
Beef and Beef Products	0.9	0.6	69%	Australia, New Zealand, Mexico
Pork & Pork Products	0.9	0.8	87%	Italy Denmark, Germany
Snack Food NESOI	0.9	0.4	54%	Mexico, UK, China
Dog and Cat Food	0.8	0.7	92%	Thailand, China
Condiments & Sauces	0.8	0.6	78%	Italy, China & Thailand
Non-Alcoholic Beverages	0.5	0.48	90%	Netherland, South Korea

*\*Includes food preparations, food concentrates, fruit syrups, extracts, flavoring powders, mixes, etc.*

Source: Trade Data Monitor

**Baked Goods Sector:** Imports accounted for 22 percent of total bread and bakery products, including: fresh and frozen breads, rolls, cakes and pastries; cookies and crackers; flour mixes and dough; and dry pasta. Euromonitor International forecasts a compound annual growth rate of one percent annually to 2023 for the Canadian baked goods sector.

**Fruit & Vegetable Processing Sector:** In 2018, imports accounted for 47 percent of shipments, including frozen food (such as potato products), pizza and non-frozen food (such as canned and dried fruit) and vegetables and ready-to-serve juices. Canadian consumers – especially millennials with active families and busy careers – and manufacturers are moving in the direction of less processed fruit and vegetable products, fruit and vegetable juices with less sugar, and frozen meals.

**Meat Sector:** Animal protein consumption is forecast to be on a longer-term decline as the proportion of consumers in the older age groups grows significantly as they reduce their calorie

intake from meat. However, a study from the Washington-based Food Marketing Institute and North American Meat Institute finds that “convenience-focused meat and poultry” saw robust growth in 2018, including value-added (up five percent), fully-cooked (up three percent) and frozen (up two percent). The fastest growing category on Canadian shelves is meat snacks.

**Poultry and Egg Sector:** Canadian poultry and egg markets operate under the umbrella of ‘supply management,’ which restricts imports to control supply and maintain artificially high prices. The United States has a commanding share of the imported poultry meat market (87 percent), much of which is purchased under the Import for Re-Export Program (IREP) and the Duties Relief Program (DRP). Though Brazilian producers can provide frozen products at lower prices than the United States, some Canadian plants are reluctant to source poultry from Brazil as commingling of U.S. and Brazilian-origin products could prohibit sales of the processed products to the United States. In 2018, U.S. suppliers provided 93 percent of Canadian imports of egg and egg products, with China, Thailand, Taiwan, Vietnam, and the Netherlands sending the remainder.

**Dairy Sector:** The Canadian dairy industry also operates under the supply management system. The United States is the largest supplier of dairy products under the IREP, due in part to the perishable nature of dairy products. The European Union has a distinct advantage in the cheese trade as a result of provisions of the Uruguay Round (1994) and the Comprehensive and Economic Trade Agreement that entered into force in September 2017. Low cost of production supports New Zealand’s dominant position (>60 percent) in Canada’s imports of butter.

**Seafood Sector:** Imports represent 75 percent of Canadian seafood consumption, with the United States accounting for 24 percent of Canada’s imports. At-home consumption of fish and seafood is seen as flat to declining, while food service demand is growing, particularly full-service restaurants.

**Sugar & Confectionary Sector:** The United States accounts for approximately 47 percent of Canada’s confectionary imports. Euromonitor International forecasts a slowdown in the growth of Canada’s confectionery market compared to other processing sectors. However, sugar-free confections are gaining popularity.

## **Section V: Key Contacts and Further Information**

### **Foreign Agricultural Service (FAS) Ottawa:**

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### **Attachments:**

No Attachments