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Canada Trends – Natural/Health Foods

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Report Highlights:

Canadian consumers are increasingly interested in natural/health foods. This report looks into the trends in health food products and areas for possible U.S. exports. Among the categories reviewed are: natural foods, gluten-free, organic, functional foods/superfoods, low sodium foods, pre-packaged foods with low levels of trans fats, natural health products/vitamins, buy local and flexitarianism. Regulations applicable to health foods are also outlined along with resources for required information.

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OVERVIEW: CANADIAN FOOD TRENDS TO 2020

Natural/health food is a growing trend in the Canadian marketplace. The continued popularity of convenience foods and consumers' growing interest in healthy food options will change the ways in which Canadians spend their food dollars between now and 2020. *Canadian Food Trends to 2020*, a report commissioned by Agriculture and Agri-Food Canada, forecasts major changes in the Canadian diet and in Canadian consumers' food expenditures. According to the report, Canadian consumers are becoming more time and health sensitive, increasing the demand for and popularity of quick and healthy meals.

Also according to the report, although sales of convenience items like frozen foods, prepared foods, ready-to-eat salads, and take-out continue to grow (up 30 percent or more between 1998 and 2003), Canadian consumers say they plan to purchase fewer convenient and prepared foods. From 1981 to 2001, the average percentage of food expenditures going towards convenience items grew to from 6 percent to 10 percent. By 2003, more than half of the meals eaten in Canadian households contained a prepared or semi-prepared food component. Canadians are demanding that the convenience foods they buy be both tasty and nutritious. Consumer interest in purchasing and eating more nutritious foods has grown in recent years, as the link between a nutritious diet and good health has been clearly established. Convenience food manufacturers are scrambling to meet the demands of busy, health-conscious consumers by cutting trans fats, using sugar substitutes, and creating low-calorie options. To cater to consumers who want good food on the go, retailers are increasingly selling products like veggies and dip, fruit, yogurt, and nuts in single-serving sizes.

The increasing number of hours spent at work by parents in dual-income and single-parent families, as well as the increasing number of childless households, are raising demand for healthy and ready-to-eat specialty foods. Household income will continue to be a factor in Canadians' food choices. As incomes increase, consumers 'food purchases tend to shift from low-cost fare to more expensive packaged and processed convenience goods. Young adults born in the 1980s and early 1990s are predicted to have the most influence on healthy and convenient food trend-setting for the next decade, as many of them start families of their own.

Understanding these trends will be a challenge for food service providers. Increased consumer demand for healthy and convenient food products has already created change in the fast food restaurant market. Restaurants are repositioning themselves as fresh, fast, and healthy in an attempt to capture the growing nutrition-conscious adult market. Both restaurants and grocery retailers have responded to consumer demands for convenience by offering take-out, curbside pickup, and ready-to-eat food products.

Food exporters from the United States face a knowledgeable and more demanding Canadian consumer. To be successful in the Canadian marketplace, U.S. exporters should study and understand Canadian food trends. In addition to health and nutrition, Agriculture & Agri-Food Canada has identified the following as some current factors driving consumer food spending trends:

- Convenience: Time pressures of dual-earner and lone-parent families' increases demand for convenience foods (e.g. prepared meals, microwave foods, sauces and condiments, fresh chilled prepared foods, "home meal replacements") and for foodservice (e.g. take-out foods and dine-in).
- Quality and Freshness: Willingness to pay more for quality. For many consumers, freshness means quality. Many private-label products offer exceptional quality for the price (value).
- Variety: Strong demand for new and innovative foods on store shelves and restaurant menus.
 Growing popularity of imported exotic fruits and vegetables, ethnic foods and restaurant concepts.
- Safety of the Food Supply: Heightened media attention to such issues as product recalls, mad cow disease, food irradiation, biotech foods, etc. has led to more scrutinizing consumers.
- Organic: Domestic supply growth is not keeping pace with domestic demand.
- Environmental Concerns: Especially among the youth market, environmental concerns may have implications for food demand (e.g. processing, bulk packaging, organic foods, and avoidance of certain food product categories (such as meat).
- Access to Information: Consumers are more connected, aware and discriminating.

Immigration patterns have changed the face of Canadian cities, where 75 percent of Canada's population resides. Immigration in the 1990s was dominated by newcomers of Asian origin, who now account for about 10 percent of the population of Canada's two largest cities, Toronto and Vancouver. The combination of the influx of Asian, as well as other ethnic origin immigrants with contrasting dietary traditions, and the trend among consumers for a healthier diet has transformed the Canadian food supply. Compared to twenty years ago, Canadians are consuming less sugar, animal fats (including butter and lard), red meat, eggs, canned vegetables, skim milk powder, and alcoholic beverages and consuming more rice, breakfast cereals, nuts, vegetable-based fats, chicken, fish, fresh vegetables, cheese, yogurt, coffee, and soft drinks.

KEY NATURAL/HEALTH FOOD TRENDS

Within the natural/health food sector there are several emerging trends that many Canadians now take into consideration when buying products. Overall health-conscious Canadians, especially ageing baby boomers, are eating more fruits, vegetables and "light" foods (e.g. low fat, cholesterol, sodium, etc). The following provides more detail on the most predominant food trends capturing consumer attention and increased market share.

Natural foods are considered to be foods that do not contain any artificial ingredients, coloring ingredients, or chemical preservatives, and, in the case of meat and poultry, is minimally processed. Like in the United States, Canada has not regulated the definition or parameters of natural foods. There are rising concerns about consumers' protection from misleading products. The Canadian Food Inspection Agency restricts the use of "natural" to foods that have not been significantly altered by processing and gives examples of processes that do or do not significantly alter food. This includes two specific additional requirements:

- A natural food or ingredient of a food is not expected to contain, or to ever have contained, an added vitamin, mineral nutrient, artificial flavoring agent or food additive.
- A natural food or ingredient of a food does not have any constituent or fraction thereof removed or significantly changed, except the removal of water.

Gluten-Free

With an estimated 1 in every 133 Canadians affected by Celiac Disease, there has been a strong push in Canada to offer more gluten-free food products. Celiac Disease is a medical condition in which the absorptive surface of the small intestine is damaged by gluten. Gluten is a protein commonly found in wheat, rye, tritcale, and barley. This has led towards growing popularity in ancient grains that are gluten-free like millet, sorghum, taro, and yams. Other popular gluten-free foods include: soybeans, corn, potatoes, rice, and tapioca. There is also growing evidence that a gluten-free diet may improve other chronic health issues.

Organic

Wrapped up in connotation as "health foods" sales of organic foods continue to increase, and Canada is an important market for U.S. organic exports. The United States supplies about 74 percent of the total market in Canada for prepackaged organic foods. Canadian organic production has concentrated on exports, mostly of bulk grains and oilseeds. In Canada, organic food sells at a price premium and sales are forecasted to rise, especially as quality and availability increasingly matches that of conventionally produced foods. The total retail market is estimated to be over \$2 billion in value and growing at 15 – 20 percent per year.

Functional Foods/Superfoods

Functional foods, often referred to as superfoods are gaining wide popularity among Canadian consumers focused on choosing foods that may help prevent disease and aging. Blueberries, almonds, yogurt, kefir, and even dark chocolate are some of the foods that are gaining favor in Canada as the new superfoods. Functional foods are any healthy food claimed to have a health-promoting or disease-preventing property beyond the basic function of supplying nutrients. The general category of functional foods includes processed foods or foods fortified with health-promoting additives, like "vitamin-enriched" products. Fermented foods with live cultures are considered as functional foods with probiotic benefits. Antioxidants as immune boosting foods are receiving special attention as well.

Antioxidants are defined as any substance that inhibits oxidation or inhibits reactions promoted by oxygen or peroxides. Antioxidants are viewed as helpful in disease prevention and maintaining health.

They can be placed in four main groups: vitamin C, vitamin E, caratenoids, and selenium. Also, phytochemicals such as flavanoids, lutein, lycopene, and lignin come from plants and are also important. Currently, there are limited, permitted antioxidant claims that are allowable in Canada but "immunity cuisine" is one of the top 10 food trends in 2010. Food color, or eating the rainbow as it is sometimes called, has also become a hot issue in health, as well as a change in the recommended number of daily servings of fruit and vegetables being moved from five to seven. The color purple in food has also become popular because of its perceived health benefits; purple potatoes and purple chick peas are starting to become more widely available.

Low Sodium Foods

Canadian consumers are becoming more conscious about the level of sodium in prepackaged processed foods and in restaurant meal foods. A Canadian coalition of health groups is urging the Canadian government to set graduated targets for sodium according to food categories and to monitor food industry's compliance. Figures from Statistics Canada show that the average Canadian consumes in excess of 3,100 mg of sodium a day with the major source identified as processed foods. Health Canada (like the U.S. National Academy of Sciences) has determined that an appropriate daily intake for a healthy adult is 1,200 mg to 1,500 mg of sodium. Canada's Minister of Health announced the establishment of a Sodium Working Group on October 25, 2007, as a first step towards the development of a long-term national strategy to reduce dietary sodium levels. In its first report issued in the summer of 2010, the Sodium Working Group set a target of 33 percent reduction in average sodium intake to 2300 mg/day by year 2016. To date sodium reduction remains voluntary for Canadian food industry, but this may change in the future.

Pre-Packaged Foods with Low Levels of Trans Fats

Canada was the first country to require that the levels of trans fat in pre-packaged food be included on the mandatory nutrition facts table. That requirement took effect on December 12, 2007. It was intended, in part, to act as an incentive for the food industry to decrease the trans fat content of foods. Health Canada (HC) says that the requirement has clearly had the desired effect as demonstrated by the significant number of products on the Canadian market that have been reformulated. In June 2007, the HC called on industry to voluntarily reduce the levels of trans fat in the Canadian food supply to the lowest levels recommended by the Trans Fat Task Force and announced that the Canadian government would monitor the progress. Canada's Trans Fat Task Force recommended a trans fat limit of 2 percent of the total fat content for all vegetable oils and soft margarines, and a limit of 5 percent of the total fat content for all other foods, including ingredients sold to restaurants. HC has asked the industry to show significant progress to reduce trans fats levels, or it will introduce regulations to ensure the levels are met. HC has been monitoring trans fat levels in Canada and released its fourth report in December 2009. The fourth set of data is the last data set for the two-year Trans Fat Monitoring Program. Currently, Health Canada is analyzing the impact of the two year monitoring program on the average trans fat intake of Canadians to determine the best ongoing approach to reach the targets recommended by the Trans Fat Task Force. The results are available on the HC website at: http://www.hc-sc.gc.ca/fnan/nutrition/gras-trans-fats/tfa-age_tc-tm_e.html

Natural Health Products/Vitamins

Vitamins or natural health products (NHP) have become increasingly popular as Canadians look for

better ways to manage their health. Over 75 percent of Canadians purchased natural health products in 2005, according to an Ipsos Reid study commissioned by the Canadian Health Food Association (CHFA). Health Canada defines NHPs as:

- vitamins and minerals;
- herbal remedies:
- homeopathic medicines;
- traditional medicines such as traditional Chinese medicines (TCM);
- probiotics; and
- other products like amino acids and essential fatty acids.

NHPs must be safe for consideration as over-the-counter products and not require a prescription to be sold. Products requiring a prescription will continue to be regulated under the Food and Drug Regulations.

Buy Local

The growing tension in Canada between local produce and in season (often imported) produce has been very politically driven with and the goal to increase consumption of locally sourced food. Buying local is linked with increasing healthy food consumption. Many consumers believe that this simply means taking into account food miles. However, about 80% of the environmental impact comes from the farm and production phase, and very little comes from transportation. Another argument countering the environmental benefits of Canadians buying local looks at how much it costs to store local crops instead of receiving imports delivered fresh from where they are in season. There is a big need to help consumers understand the facts and to feel less guilt about not buying local. They can have access to choice and variety with some education and an increase in confidence of safety in imported foods.

Flexitarianism

Flexitarianism is defined as being a flexible vegetarian; someone who is gradually cutting back on the amount of meat being eaten without eliminating meat completely. This is marketed as healthy. An example of this would be the VB6 Diet which is based around the concept of eating vegan (no products from animals) before six o' clock and eating meat for the evening meal. Under this scenario the best way to improve diet is to just try to eat less meat overall, an idea that has been around for a while. Exporters could try to tie the products they promote with health issue ideas surrounding this ideal.

REGULATIONS

The following is an overview of specific regulations that may affect health food products in Canada. For a more complete list of regulations refer to the *Canada Exporter Guide Annual 2010* (CA0036) which can be found at:

 $\underline{http://gain.fas.usda.gov/Recent\%20GAIN\%20Publications/Exporter\%20Guide_Ottawa_Canada_10-19-2010.pdf}$

Labeling Requirements

The basic packaging and labeling requirements necessary for U.S. agricultural exports to Canada are:

- Labels in English and French,
- Net quantities in metric,
- List of ingredients,
- Durable life date (if shelf life 90 days or less),
- Common name of product,
- Company name and address,
- Minimum type size specifications,
- Conformity to standardized package sizes stipulated in the regulations, and
- Country of origin labeling on shipping container.

Although the Universal Product Code (UPC) or bar code is not required or administered by government, virtually all retailers require products to be labeled with a UPC.

The Guide to Food Labeling and Advertising in Canada

The Canadian Food Inspection Agency (CFIA) has prepared a *Guide to Food Labelling and Advertising* that details the regulatory requirements for selling packaged foods and beverages in Canada. The CFIA has the authority to refuse entry, detain, return, or remove from retail shelves any imported processed food product that does not meet the federal food labeling requirements.

The CFIA Guide includes information on:

- -Basic Labeling Requirements *
- -Advertising Requirements
- -Claims as to the Composition, Quality, Quantity and Origin of Foods
- -Nutrition Labeling *
- -Nutrient Content Claims *
- -Health-Related Claims *
- -Other Product Specific Requirements

The full guide is available on the CFIA website at:

http://www.inspection.gc.ca/english/fssa/labeti/guide/toce.shtml

Food Additive Regulations

Canada's Food and Drugs Act and Regulations strictly control the use of food additives. Most foods approved for sale in the United States would comply with Canadian additive regulations, but differences can occur in the permissible levels and uses of food colorings and food preservatives. The food additive tables in Division 16 of the Regulations prescribe which additives may be used in foods sold in Canada,

^{*}Regulations differ from the United States and require adherence for retail sales in Canada.

to which foods they may be added, for what purposes, and at what levels. Products containing non-permitted food additives may be refused entry into Canada. Canada's Food and Drugs Act and Regulations are available on the Internet at: http://laws.justice.gc.ca/en/F-27/C.R.C.-c.870/index.html

Specific technical questions relating to Canada's Food and Drugs Act and Regulations may be directed to:

Food Directorate Health Products and Food Branch Health Canada 251 Sir Frederick Banting Driveway, Tunney's Pasture Ottawa, Ontario K1A 0K9

Email: food-aliment@hc-sc.gc.ca

Website: http://www.hc-sc.gc.ca/contact/fn-an/hpfb-dgpsa/fd-da-eng.php

Organic Foods

The import and sale of organic food products in Canada are governed by the same rules and regulations that apply to non-organic food products. No distinction is made between organic and non-organic foods with regard to import requirements. Currently, all Canadian packaging and labeling, grade, and inspection regulations apply equally to organic and non-organic foods.

Canadian Organic Regulations became official after they were published in the Canada Gazette, Part II, on December 21, 2006. With the support of the Canadian organic industry, Canada's previously voluntary system for marketing organic food now falls under a federal regulatory framework.

a. Enforcement Date of Regulations

Federal regulations for organic products – the Organic Products Regulations – came into full force on June 30, 2009. On this date, organic products marketed in or imported into Canada must be certified by a certification body accredited by the Canadian Food Inspection Agency (CFIA). The National Standard for Organic Agriculture, which sets out the permitted and prohibited practices, can be accessed online at the Canadian General Standards Board (CGSB).

http://www.tpsgc-pwgsc.gc.ca/cgsb/on_the_net/organic/index-e.html

b. Organic Equivalency Agreement

On June 17, 2009, the United States and Canada jointly announced an organics equivalency agreement, the first one of its kind. The equivalency agreement follows a review by both nations of the other's organic certification program and a determination that products meeting the standard in the United States can be sold as organic in Canada, and vice versa.

Under a determination of equivalence, producers and processors that are certified to the National Organic Program (NOP) standards by a U.S. Department of Agriculture accredited certifying agent do not have to become separately certified to the Canada Organic Product Regulation (COPR) standards in order for their products to be represented as organic in Canada. Likewise, Canadian organic products certified to COPR standards may be sold or labeled in the United States as organically produced. Both the USDA Organic seal and the Canada Organic Biologique logo may be used on certified products from both countries. The COPR has been in effect since June 30, 2009. The equivalency agreement is expected to lead to greater market opportunities for organic producers in both countries.

c. Organic Production Standards

The definitions of Canada's production methods for organic agriculture and the substances used (e.g., permitted substances list) are laid out in CGSB publications entitled the *Organic Production Systems General Principles and Management Standards* and the *Organic Production Systems Permitted Substances List*. These documents are available on the following CGSB listed above.

Normally, whenever a country seeks U.S. determination of its organic standards, the U.S. proceeds with a similar request of the USDA National Organic program (NOP) by the foreign government in order to facilitate the entry of U.S. organic exports. The United States and Canada have been involved in negotiations for the past year and announced on June 17th, 2009 that an official equivalency agreement has been reached. The agreement, the first of its kind is expected to expand market opportunities for organic products in both countries. More information can be found at: http://www.inspection.gc.ca/english/fssa/orgbio/orgbioimporte.shtml

Food Fortification

The addition of vitamins and minerals to food in Canada is controlled by the Food and Drug Regulations and only foods fortified with certain nutrients, and to levels specified in the Regulations, may be sold in Canada. In 1998, Canada began a review of its food fortification policy. The review responded to concerns that the current policy and practices are too restrictive and that they limit the development of new products, as well as Canadians' access to fortified foods available in other countries. The proposed policy is outlined in the document, *Addition of Vitamins and Minerals to Food*, 2005: *Health Canada's Proposed Policy and Implementation Plans*. It would retain current fortification practices to prevent and correct nutritional problems, such as requiring the addition of Vitamin D to milk to combat the childhood disease of rickets and the addition of folic acid to flour to reduce birth defects. Fortifying foods to restore vitamins and minerals lost through processing would also continue. The document can be found here: http://www.hc-sc.gc.ca/fn-an/nutrition/vitamin/fortification final doc 1-eng.php

The policy would create a new provision for food fortification done at the "discretion" or "choice" of the manufacturer (within defined limits set by Health Canada) to meet a market demand, a process known as discretionary fortification. The policy also calls for an expansion of the product category of special purpose foods. The policy review is ongoing. Health Canada is expected to draft regulations to implement the policy, although no time frame has been announced. There will be a comment period when the draft regulations are published in the *Canada Gazette* Part I. The regulatory process usually takes about 12-18 months. For more information on food fortification, visit www.healthcanada.gc.ca/fortification

"Natural" Meat Claims

The term "natural" cannot be used on any meat product in Canada, as it is felt that the term cannot be defined properly in terms of the context of food production. Any natural product can only have come from completely wild and unfarmed animals that are harvested and processed. However, the Method of Production protocol can be submitted to CFIA prior to label application. The phrase must be worded exactly as printed in the Canadian policy on Method of Production claims. This can be obtained by request from Dr. Bileby's office.

Dr. Mark Bielby, D.V.M. Recipe and Label Registration Unit Canadian Food Inspection Agency 1431 Merivale Road Ottawa, Ontario, Canada K1A 0Y9 Telephone: (613) 221-1428

Fax: (613) 228-6622

Mark.Bielby@inspection.gc.ca

A written protocol must be submitted to the Label Registration Unit. This must include a written description of the procedures that are in place to validate the claim made (e.g. meat raised without the use of antibiotics would require evidence from birth, from hatcheries and feed mills, if applicable) from slaughter and from processing that there is segregation of the product from the conventional line). These protocols must be audited by an independent third person auditor who then will send a report to CFIA. There are 20-30 common method of production claims that have been approved by the Fair Labelling Unit. Some of these claims include:

- Raised without the use of antibiotics (this includes anticoccidials)
- Raised without the use of added hormones
- Raised without animal by-products
- Free-range
- Free run
- Grain-fed
- Vegetable Grain-fed
- Milk-fed veal

There has been some tightening of definitions of the above label claims. A practical definition and review is available through contacting the office above. This above list of claims is not exhaustive, and a company may submit a Method of Production claim for review by CFIA.

Diet-Related Health Claims

The 2002 amendments to the *Food and Drug Regulations* allow diet-related health claims on foods for the first time in Canada. These claims are limited to those based on sound scientific evidence that has established a relationship between certain elements of healthy diets and reduction of risk of certain diseases. A diet-related health claim is a statement that describes the characteristics of a diet that may reduce the risk of developing a diet-related disease or condition, such as osteoporosis or stroke, and the properties of a food that make it a suitable part of the diet. For more information, go to: http://www.hc-

sc.gc.ca/fn-an/label-etiquet/claims-reclam/index-eng.php

For example, the label of an advertisement for a food which is low in sodium might carry the following diet-related health claim (providing specific composition and labeling conditions are met): "A healthy diet containing foods high in potassium and low in sodium may reduce the risk of high blood pressure, a risk factor for stroke and heart disease. (Naming the food) is low in sodium."

The *Food and Drugs Act and Regulations* provide for claims that deal with the following relationships:

- A diet low in sodium and high in potassium, and the reduction of risk of hypertension;
- A diet adequate in calcium and vitamin D, and the reduction of risk of osteoporosis;
- A diet low in saturated fat and *trans* fat, and the reduction of risk of heart disease;
- A diet rich in vegetables and fruits, and the reduction of risk of some types of cancer; and
- Minimal fermentable carbohydrates in gum, hard candy or breath-freshening products, and the reduction of risk of dental caries.

ADDITIONAL RESOURCES

The following is a short summary of further references.

Contacts

Office of Agricultural Affairs U.S. Embassy, Canada P.O. Box 5000 Ogdensburg, NY 13669-0430 Telephone: (613) 688-5267

Fax: (613) 688-3124

Email: agottawa@fas.usda.gov

Robin Tilsworth, Agricultural Minister-Counselor Robin Gray, Agricultural Attaché Darlene Dessureault, Senior Agricultural Specialist Mihai Lupescu, Agricultural Specialist Joyce Gagnon, Administrative Assistant

Foreign Agricultural Service U.S. Consulate General Toronto P.O. Box 135 Lewiston, NY 14092-0135 Telephone: (416) 646-1656

Fax: (416) 646-1389

Email: agtoronto@fas.usda.gov

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Useful Websites

Canadian Food Inspection Agency		
Home Page	http://www.inspection.gc.ca	
Acts and Regulations	http://www.cfia-acia.agr.ca/english/reg/rege.shtml	
Guide to Food Labelling and Advertising	http://www.inspection.gc.ca/english/fssa/labeti/guide/toce.shtml	
Meat & Poultry Inspection Regulations	http://www.inspection.gc.ca/english/fssa/meavia/meaviae.shtml	
Fish Inspection Directorate	http://www.inspection.gc.ca/english/fssa/fispoi/fispoie.shtml	
Novel Foods	http://www.hc-sc.gc.ca/fn-an/gmf-agm/index-eng.php	

Health Canada	T
Home Page	http://www.hc-sc.gc.ca/index-eng.php
Food and Drugs Act	http://laws.justice.gc.ca/en/F-27/
Nutrition Labeling	http://www.hc-sc.gc.ca/fn-an/label-etiquet/nutrition/index_e.html
Canada's Food Guide	http://www.hc-sc.gc.ca/fn-an/food-guide-aliment/index-eng.php
Food and Nutrition	http://www.hc-sc.gc.ca/fn-an/index-eng.php
Natural Health Products	http://www.hc-sc.gc.ca/dhp-mps/prodnatur/index-eng.php