

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Required Report - public distribution

Date: 12/21/2011

GAIN Report Number: CA11068

Canada

Food Processing Ingredients

The Food Processing Ingredients Sector in Canada

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Report Highlights:

Opportunities exist to expand U.S. food product sales to Canada's food and beverage processing sector. In this C\$83 billion industry, demand is increasing for many U.S. raw and processed horticultural products as well as other processed ingredients and food flavorings. The following report highlights the performance of the various sectors of Canada's food and beverage processing industry.

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SECTION 1: MARKET SUMMARY

OVERVIEW OF CANADIAN MARKET

Opportunities exist to expand U.S. food product sales to Canada's food and beverage processing sector. In this C\$83 billion industry, demand is increasing for many U.S. raw and processed horticultural products, other processed ingredients and food flavorings. The following report highlights the performance of the various sectors of Canada's food and beverage processing industry.

In 2010, U.S. agricultural exports to Canada reached a record \$16.8 billion. The U.S. agricultural exports to Canada accounted for 15 per cent of total U.S. food and agricultural products, which totaled \$115 billion. Consumer-oriented agricultural products accounted for 14 per cent of total U.S. food and agricultural product sales to Canada in 2010, with fresh fruits and vegetables, snack foods, processed fruits and vegetables and red meat products as the category leaders. American products account for more than 60 per cent of Canada's total agricultural imports. In the first three quarters of CY2011, U.S. agriculture exports to Canada have increased by 13 per cent over the same time frame last year and already stand at \$14 billion.

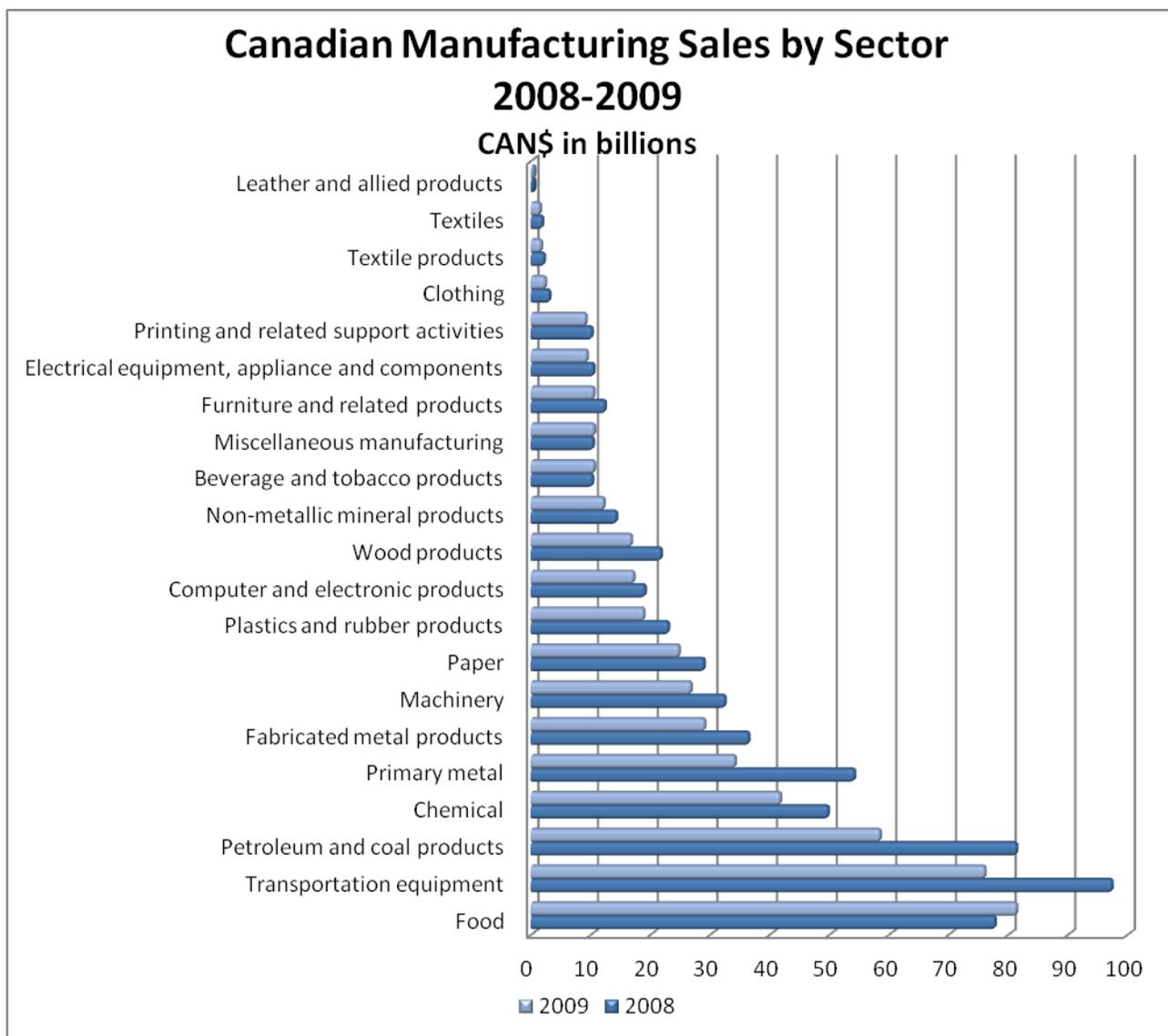
Canada is also an important market for U.S. fish and forestry products. Canada is the largest market for U.S. fish and seafood products, with sales increasing 18 per cent from 2009 to 2010 to reach \$807 million. Despite being a major producer and world exporter of forest products, Canada is also the largest market for U.S. forestry products, with sales in 2010 totaling \$2.2 billion. Combined, total U.S.

farm, fish and forestry product exports to Canada reached a record \$19.9 billion during 2010, approximately \$400 million more than to China, the next largest market destination. Total bilateral trade of agricultural products between the U.S. and Canada reached \$29 billion in 2010, over \$79 million per day. When forestry and fish products are included, bilateral trade reaches over \$42 million.

Under the tariff elimination provision of the North American Free Trade Agreement (NAFTA), the majority of U.S. agricultural products have entered Canada duty-free since January 1, 1998. On December 4, 1998 the United State and Canada signed a Record of Understanding, an agreement to further open Canadian markets to U.S. farm and ranch products.

Trade with Canada is facilitated by proximity, similar culture, language, common lifestyle pursuits, and the ease of travel among citizens for business or pleasure. Many American products have gained an increased competitive edge over goods from other countries as the result of the FTA/NAFTA. Canada's grocery product and food service trades have been quick to seize opportunities under FTA/NAFTA, which permitted them to expand their geographical sourcing area to include the United States. Declining import duties under the trade agreements and an easing of Canadian packaging requirements for processed horticultural products for the food service market have resulted in significant gains in the Canadian market for U.S. consumer-ready foods and food service products.

Food and beverage processing in Canada began in the mid-1800's and has successfully evolved into a sophisticated and vital contributor to Canada's food, agriculture and economic sectors. Food and beverage processing is Canada's largest manufacturing industry by sales and employs over 250,000, more than transportation equipment manufacturing which had previously been the largest sector in the manufacturing industry.



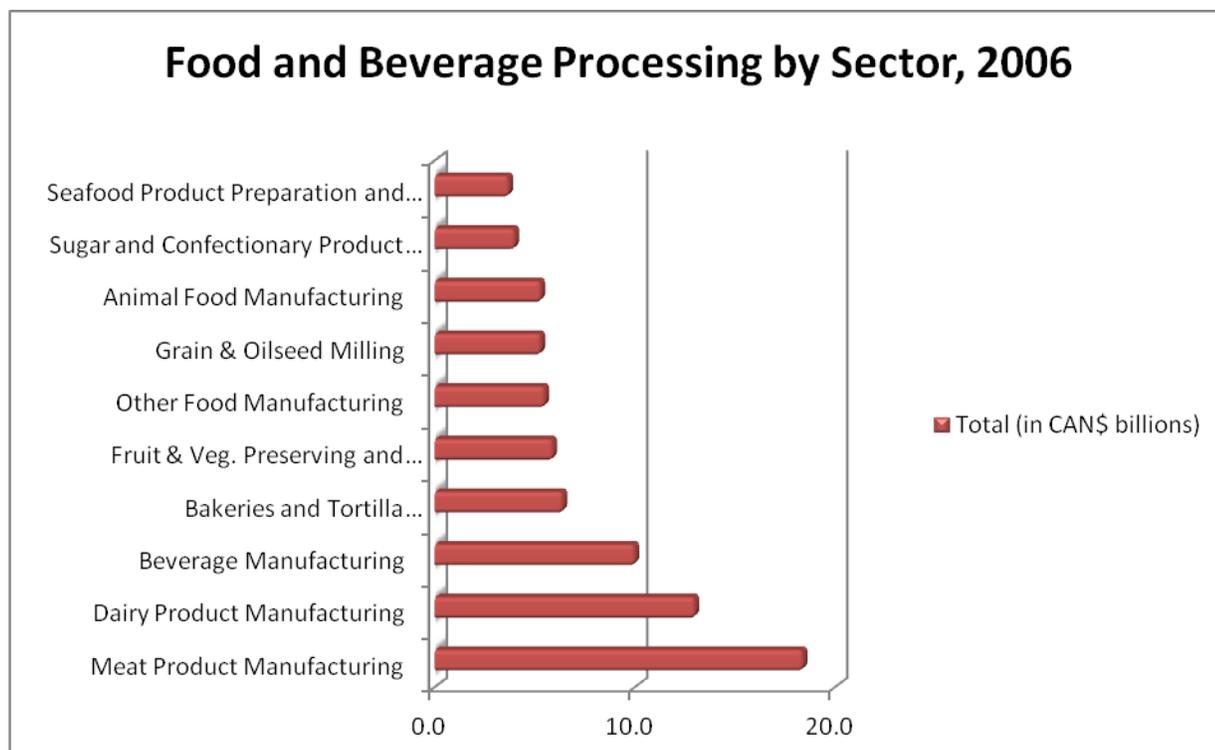
Note:

Figures may not add to totals due to rounding.

Source:

Statistics Canada, Manufacturing industries, CANSIM table 304-0014.

Food and beverage processing is an important contributor to the Canadian economy. In 2007, the food and beverage manufacturing industry had sales of C\$ 83.7 billion and employed 286,000 people. Agriculture and Agri-Food Canada estimates that the Canadian food and beverage processing industry supplies approximately 80 per cent of the processed food and beverage products available in Canada. Beverage processing includes soft drinks and bottled water manufacturing, wineries, breweries and distilleries. A breakdown of the manufacturing industry from 2006, the last year for which data is available, is as follows.



Source: Agriculture and Agri-Food Canada.

Agriculture and Agri-Food Canada has more information on the food and beverage processing industry on their website at: <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1171288446081&lang=eng>.

Canadian Exports of Processed Food and Beverage Products

Exports of processed food and beverage products stood at C\$20.8 billion in 2010, up 7 per cent from 2009. Canadian processed food and beverage products are exported all over the world; however a significant portion is focused in a small number of countries. In 2010, 83 per cent of those exports went to four major markets; the United States (66 per cent), China (8 per cent), Japan (7 per cent) and Mexico (2 per cent). Canada's trade balance in processed food products has remained positive, even throughout the recession. In 2010, exports out-valued imports by over C\$2.5 billion. When processed beverages are factored in, Canada posted a negative trade balance in 2009 and 2010.

Imports of Ingredients for the Canadian Food Processing Industry

The value of processed food imported by Canada in 2010 was C\$17.3 billion. The United States was the main supplier providing 64 per cent of this total, or C\$11.1 billion. Rounding out the top five are Brazil (4.7%), China (4.1%), Thailand (3.3%) and Italy (2%). Over the same time period, Canada imported C\$3.9 billion worth of processed beverages. The United States was again the top supplier with a 31%

market share. The rest of the top five include; France (14%), Italy (11%), Australia (7%), and the United Kingdom (6%).

Canadian food processors utilize both raw and semi-processed ingredients from imported and domestic sources. No data exists on the total value of imported ingredients destined for the Canadian processed food and beverage industry; however imported ingredients are vital inputs to Canadian manufacturers. Imported ingredients cover virtually all food categories. For example, whole raw products such as strawberries, semi-processed products such as concentrated juices and fully prepared products such as cooked poultry have proven to be essential to processors in Canada. Some ingredients, such as tropical and sub-tropical products, are entirely imported whereas manufacturers require substantial imports of numerous other products such as spices, food manufacturing aids and flavorings.

U.S. – CANADA EXCHANGE RATES (C\$ per 1.00 US\$)

Year	C\$	2011	C\$
1970	1.09	Jan	0.99
1980	1.20	Mar	0.98
1990	1.07	May	0.97
2000	1.48	July	0.96
2002	1.57	Sept	1.00
2008	1.06	Nov	1.03
2009	1.14		
2010	1.03		

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN CANADA

Advantages	Challenges
Canadian consumers enjoy a high disposable income	Canadian food processors are now searching the globe for low cost ingredients
Taste and expectations similar	Growth of private label pushing processors to look for less expensive inputs
Good perception of U.S. quality and safety	Tariff Rate Quotas for certain products
Opportunity in global cuisine due to diverse population and growing interest in ethnic foods	Marketing and distribution costs can be high as population is roughly equal to California's and much more spread out
Canadian growing season is limited, opportunity for U.S. producers in off seasons	Retail consolidation forcing competitive pricing, however might be alleviated by new entries to market such as Target
Duty free tariff treatment for most products under NAFTA	Differences in approved chemicals and residue tolerances
Comparable legal systems, time zones, regulatory regimes	Difference in labeling including nutritional content, claims and language
Proximity: most Canadian live within two hours of the U.S. border	Majority of sourcing currently from domestic producers, "Buy Local"

SECTION 2: ROAD MAP FOR MARKET ENTRY

OVERVIEW

Any U.S. food ingredient suppliers seeking to enter the Canadian marketplace have many opportunities. The United States is Canada's largest trading partner, with a 64 per cent market share in the food processing market and a 31 per cent share in the beverage processing market. This is a result of a number of factors, including a convenient shipping corridor and a familiarity with consumer tastes and expectations, and most importantly the North American Free Trade Agreement (NAFTA). There are a number of obstacles U.S. exporters must overcome before exporting to Canada. These include currency, customs procedures and labeling requirements.

Overcoming these obstacles is simple with the right tools. Following are the main steps to take for U.S. exporters entering the Canadian market:

- 1) Contact your State Regional Trade Group,
- 2) Research the competitive marketplace,
- 3) Locate a broker/distributor/importer, and
- 4) Understand the Canadian government standards and regulations that pertain to your product.

A. ENTRY STRATEGY

1) Contact your State Regional Trade Group

State Regional Trade Groups (SRTGs) are non-profit organizations representing state agricultural promotion agencies that use federal, state and industry resources to promote the export of food and agricultural products within specific states. They can help qualifying exporters to obtain partial reimbursement for some marketing costs.

SRTG	States Represented	Website
Food Export USA Northeast	Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont	www.foodexportusa.org
Food Export Association of the Midwest USA	Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin	www.foodexport.org
Southern United States Trade Association (SUSTA)	Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia, the commonwealth of Puerto Rico	www.susta.org
Western United States Agricultural Trade Association (WUSATA)	Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, New Mexico, Oregon, Utah, Washington, Nevada, Wyoming	www.wusata.org

2) Research the Competitive Marketplace

A thorough understanding of consumer trends and needs are required in developing your market strategy. The internet offers a wealth of information for U.S. exporters interested in researching the many aspects and particularities of the Canadian foods and beverage manufacturing sector. Though some consumer data can only be obtained with a fee, there are several industry-specific publications that continuously report on specific developments of interest for U.S. exporters. These publications includes Canadian Grocer (www.canadiangrocer.ca), a magazine that closely follows key developments in the Canadian grocery industry and Food Service and Hospitality (www.foodserviceworld.com), a periodical that continuously offers updated information on the status of the food service industry in Canada.

Sources of information:

Organization	Function/Purpose	Website
Statistics Canada	The official source for Canadian social and economic statistics and products.	www.statcan.gc.ca
Industry Canada	Trade databases.	www.ic.gc.ca
Canadian Restaurant and Foodservices Association	The largest hospitality association in Canada.	www.crfa.ca
Canadian Federation of Independent Grocers	Represents Canada's independently owned and franchised supermarkets.	www.cfig.ca
Consumers' Association of Canada	Represents consumers to all levels of government and to all sectors of society.	www.consumer.ca
Agriculture and Agri-food Canada, Agri-Trade Food Service	Provides information, research and technology policies and programs. Also provides access to statistics. This Ministry is the counterpart to the U.S. Department of Agriculture.	www.agr.gc.ca
I.E. Canada (Canadian Association of Importers and Exporters)	I.E. Canada is a national, non-profit organization committed to providing services to develop and enhance the international trade activity and profitability of importers and exporters.	www.iecanada.com

3) Locate a Broker/Distributor/Importer

It is recommended that most new entrants to the Canadian market secure the services of a broker and/or distributor.

Local representation provides exporters with a domestic advantage to understanding the local, regional and national markets and the opportunities available. Brokers and distributors provide guidance on best business practices, sales contacts, market development, logistics and government regulations. Many also provide merchandising and marketing programs and their volume purchasing power can help reduce retail slotting fees.

The Foreign Agricultural Service offices in Ottawa and Toronto, Canada can provide assistance in locating a broker or distributor. Contacts can be made while exhibiting at USDA endorsed pavilions at SIAL Canada. The office has also assembled a partial list of industry brokers and distributors in a report, Agent and Broker Directory - Central Canada, which can be found on the FAS report website

<http://gain.fas.usda.gov>. It is report CA11025 (dated May 6, 2011). In addition, FAS/Canada can develop lists of potential brokers/distributors or buyers in the market.

4) Understand Canadian Government Standards and Regulations that Pertain to Your Product

The Canadian government has multiple acts that govern the importation and sales of foods. Some of the most important ones are:

- Canada Agricultural Products Act and Associated Regulations
- Consumer Packaging and Labeling Act
- Fish Inspection Act
- Food and Drug Act
- Importation of Intoxicating Liquors act
- Meat Inspection Act
- Weight and Measures Act

A more thorough outline of applicable acts and regulations can be found on the Canadian Food inspection Agency's website at: <http://www.inspection.gc.ca/english/reg/rege.shtml>.

The Canadian Food Inspection Agency, Health Canada and the Department of Foreign Affairs and International trade are the main government ministries U.S. exporters can contact for specific information when studying regulations with which they need to comply. Though Canada and the U.S. share many consumer trends, cultural similarities and lifestyles; many regulations differ including nutrition facts, ingredient declarations and health claim labeling regulations.

Government Organization	Function	Information
Canadian Food Inspection Agency (CFIA)	Government of Canada's regulator for food safety (along with Health Canada), animal health and plant protection.	www.inspection.gc.ca
Canada Revenue Agency	The Canada Revenue Agency (CRA) administers tax laws for the Government of Canada and for most provinces and territories as well as various social and economic benefit and incentive programs delivered through the tax system.	www.cra-arc.gc.ca
Canada Border Services Agency	The Canada Border Services Agency (CBSA) ensures the security and prosperity of Canada by managing the access of people and goods to and from Canada.	www.cbsa.gc.ca
Health Canada	Administers the Food Safety Assessment Program, which assesses the effectiveness of the CFIA's activities related to food safety.	www.hc-sc.gc.ca
Department of Foreign Affairs and International Trade (DFAIT)	The mandate of Foreign Affairs and International Trade Canada is to manage Canada's diplomatic and consular relations and to encourage the country's international trade. DFAIT manages all tariff rate quotas.	www.international.gc.ca
Measurement Canada	Responsible for ensuring the integrity and accuracy of measurement in the Canadian marketplace.	www.ic.gc.ca/eic/site/mc-mc.nsf/eng/Home

For more information on food labeling regulations and other information useful to U.S. food exporters, refer to the Canada 2011 Exporter Guide on the FAS website: <http://gain.fas.usda.gov>.

Information exporters need to understand about labeling regulations can be found on the following sites:

Nutrition Labelling Resource Page: www.inspection.gc.ca/english/fssa/labeti/nutrition-pagee.shtml.

The Guide to Food Labeling and Advertising guide can be found at:

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

In order to better provide information, the CFIA maintains a National Import Service Centre (NISC), which handles telephone inquiries regarding import requirements and inspections in addition to processing import documentation and data. The contact information for the NISC is:

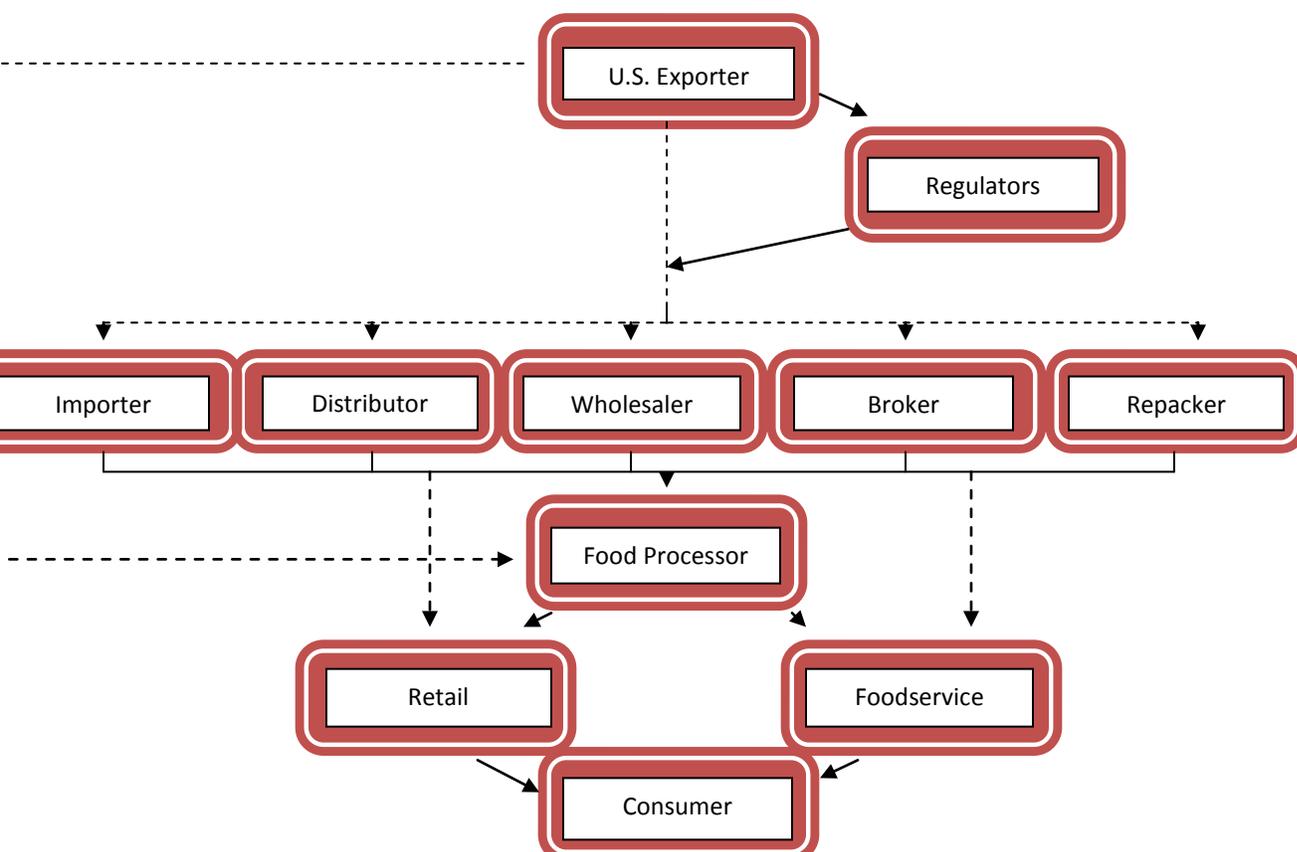
7:00 a.m. to 03:00 a.m. (Eastern Time)

Telephone and EDI: 1-800-835-4486 (Canada or U.S.A.)

1-905-795-7834 (local calls and all other countries)

Facsimile: 1-905-795-9658

B. MARKET STRUCTURE



Consolidation of the Canadian food industry has eliminated numerous intermediary procurement processes. Most food and beverage processing companies now prefer to import directly. Buying direct reduces handling, expedites shipments and generally reduces product costs, provided that volumes are large enough to benefit from a full truck load or consolidated shipments. Small volumes (less than a truckload) are usually procured locally from a Canadian wholesaler, importer, broker or agent.

Procurement methods do vary from company to company and from product to product however regardless of them method of procurement, all products must be in alignment with government import regulation and meet minimum Canadian standards.

Consolidation of the Canadian retail and food service industry has meant that U.S. food and beverage processing companies face increasingly demanding buyers with significant market power. Aside from the continuous pressure on margins, processors are being asked to assist retail and food service companies to help define points of differentiation. New products that truly address specific consumer needs are the best means for processors to stave off the inevitable demand to produce private label product for retail and food service operators.

Processors should be aware that there is a heightened interest in food safety and information ingredients including origin of major ingredients and processing methods. Food service and retail operators are also seeking longer shelf life to deal with both the consumer trend toward fresh products and the geographic challenges of distribution in Canada. Opportunities are increasing in Canada for export ready processors able to meet the rapidly evolving consumer demands and having strong logistics capabilities.

C. COMPANY PROFILES

Top 10 Food and Beverage Manufacturing Firms in Canada

Company (Product Types)	Sales \$1,000/year	End-use channels	Production Location (#)	Procurement Channels
George Weston Ltd. (Fresh and frozen baked goods, also owns Loblaw)	\$32,008,000 (2010)	Retail	Canada (35) U.S. (33)	Distributor/Broker Importer Direct
McCain Foods Ltd. (potato, appetizer and snack)	\$6,098,143 (2010)	Retail HRI	Canada (10) U.S. (10) S. America (3) Europe (12) S. Africa (3) Asia-Pacific (7)	Direct
Saputo Inc. (dairy and bakery)	\$5,810,582 (2010)	Retail HRI	Dairy - Canada (26) U.S. (16) Argentina (2) Europe (2) Grocery - Canada (1)	Direct

Company (Product Types)	Sales \$1,000/year	End-use channels	Production Location (#)	Procurement Channels
Maple Leaf Foods Inc. (pork, poultry, bakery)	\$4,968,119 (2010)	Retail HRI	Canada U.S. U.K. Asia Mexico	Direct
Molson Coors Brewing Co. (beer)	\$3,355,286 (2010)	Retail HRI	Canada (7) U.S. (9) U.K. (4) Asia (1)	Direct
Agropur Coopérative (dairy products)	\$3,345,177 (2010)	Retail HRI	Canada (18) U.S. (7) S. America (2)	Self
PepsiCo Foods Canada (oatmeal, snack foods)	\$3,173,430 (2010)	Retail HRI	Canada (8)	Direct
Parmalat Canada Inc. (dairy and fruit juices)	\$2,198,303 (2010)	Retail HRI	Canada (18)	Direct Importer
Cott Corp. (beverages)	\$1,857,399 (2010)	Retail HRI	Canada (6) U.S. (9) Mexico (2) U.K. (3)	Direct
Pepsi Beverages Co.	\$1,150,726 (2010)	Retail HRI	Canada (6)	Direct

Top Five Foreign Controlled Food and Beverage Manufacturing Firms in Canada

Company (Product Types)	Sales (\$Thou)/year	End-use channels	Production Location	Procurement Channels
PepsiCo Foods Canada (oatmeal, snack foods)	\$3,173,430 (2010)	Retail HRI	Canada (8)	Direct
Parmalat Canada Inc. (dairy and fruit juices)	\$2,198,303 (2010)	Retail HRI	Canada (18)	Direct Importer
Pepsi Beverages Co.	\$1,150,726 (2010)	Retail HRI	Canada (6)	Direct
General Mills Corp. (cereals, bakery, snack foods, frozen and shelf stable fruits and vegetables)	\$761,398 (2010)	Retail HRI	U.S. (28) Canada (2) Asia/Pacific (10) Europe (5) Latin America and Mexico (4) S. Africa (1)	Direct
Smucker Foods of Canada (fruit spreads, retail packaged coffee, peanut butter, shortening and oils, ice cream toppings, sweetened condensed milk, and health and natural foods beverages)	\$413,652 (2010)	Retail HRI	U.S. (17) Canada (4)	Direct Importer

Industry Canada maintains a more complete company directory on their website. A directory of food manufacturing companies can be found at:

<http://strategis.ic.gc.ca/app/ccc/sld/cmpny.do?letter=A&lang=eng&profileId=1461&naics=311>.

A listing of beverage manufacturing companies can be found at:

<http://strategis.ic.gc.ca/app/ccc/sld/cmpny.do?letter=A&lang=eng&profileId=1461&naics=312>.

D. SECTOR TRENDS

Consumer trends have always created opportunities for food manufacturers. However, more recently consumer trends have affected choice and source of ingredients used in food manufacturing. Some of the more important drivers of change influencing consumer trends and manufacturing opportunities include:

- Aging population, obesity and the health care crisis leading to the wellness trend
- Increasing reliance on imported foods and growing worries of food contamination raising the organic, natural and local food trend
- Global warming and other serious environmental challenges driving the ethical eating trends
- Traceability
- Ethnic shoppers
- Food allergies

1. General Health and Wellness

As consumers get older, their desire to lead healthy and active lives is of increasing importance to them. In response to initiatives by governments, health organizations and consumers, 88 percent of manufacturers report that they are planning to release new products with specific nutritional benefits in the next two to three years. Already, 61 per cent of manufacturers have reformulated products to make them healthier. Companies will continue to work to lower the amount of sodium, sugar and high-fructose corn syrup in their products.

One of the fastest growing areas under wellness is functional foods. The market in Canada is current valued at US\$ 4 billion. Functional foods are conventional foods that have had healthy ingredients added to them that go beyond regular nutritional functions. Examples of functional foods include probiotic yogurts (added bacteria cultures to promote health in the gastrointestinal tract); omega-3 fortified eggs, and beverages with added vitamins and minerals. The market for functional foods is large and growing as more and more people are beginning to see the benefits of making small changes to their diets. The market is expected to continue to grow rapidly as consumers gain a better understanding of the relationship between diet and health and as the aging population increasingly turns to preventative health initiatives. For more information on functional foods and nutraceuticals in Canada, visit <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1241014770211&lang=eng>.

2. Organic and Natural

The Canadian introduction of retail chain giant Whole Foods has solidified an industry commitment to healthy eating alternatives. There is increasing interest for food grown under a production system that prohibits the use of synthetic chemicals and also promotes soil health, biodiversity, low stress treatment of animals and sound environmental practices. Although the natural and organic market represents a fraction of overall food spending, the market is growing at a rate of 20 per cent annually and will represent, some experts say, the largest potential for growth in retail in the coming years.

The number of organic items carried in mainstream supermarkets is rising steadily and many of the largest companies including major U.S. food processors have now launched organic products under

some of Canada's best known brands. An example of this is the new organic line of products from Kraft Foods.

Products that claim attributes such as "no antibiotics", "no hormones", and "100% vegetarian feed" do not command the same price premiums as those labeled as certified organic. However, these products are growing because they serve the store interest of differentiation and still carry a 10% to 20% premium compared to regular products while being generally more affordable than organics.

3. Ethical/Environmental Eating

Experts are suggesting that the trend is destined to have the most impact on the food processing industry is the growing interest in sustainability. This trend overlaps with the wellness and organic foods, however ethical eating goes beyond taste and health concerns and into the realm of green politics and anti-globalization. It includes concepts of "fair trade" and "sustainable" and also "food miles" which bring together the related concepts of locality and seasonality. Good farming practices in terms of the treatment of livestock are also part of this trend.

Multinational food processors are actively involved in the sustainability movement with many seeking sustainability certifications from third party organizations such as Ocean Wise, administered by the Vancouver Aquarium, or the Marine Stewardship Council for seafood products. For other products, organizations like the World Wildlife Federation (WWF) and the Forest Stewardship Council (FSC) can provide certification that products were produced in a sustainable fashion. Large companies such as Loblaw, McDonald's and Wal-Mart are beginning to make sustainability an important part of their business plans throughout their entire supply chains.

4. Traceability

As seen in the growing "Buy Local" movement in Canada, consumers increasingly care about where their food comes from. Reasons for this include concern for the local economy and environmental concerns regarding how far food must travel before it reaches the consumers. The concern is also being driven by high profile food safety breaches some of which are related to imported foods as well as issues raised under the wellness and ethical eating headings. However, it is also a food trend in its own right as traditionally certain foods from certain areas were considered to be the gold standard in taste or health. This trend can be an opportunity for U.S. producers since Canadian consumers view products from the United States as safer and of better quality than imports from other countries. Consumers in the internet age no longer accept anything less than transparency. As is the case for the ethical food and organic trend, the ability to prosper from this trend will be closely tied to the ability to track, trace and verify product.

This represents more changes for food processors as it requires an ability to know one's supply chain to a far greater degree than is the case today. Significant improvements have been made in technologies to assist with trace back and product verification. For example, Sobey's (major Canadian supermarket chain) has launched an initiative that allows consumers to enter a code found on the packaging of their seafood on the Sobey's website to find out exactly when, where and how their fish was caught, right down to the name of the fisherman who landed the fish.

5. Ethnic Shoppers

Ethnic food markets in Canada are worth an estimated C\$65 billion today and are growing by an approximate 15 to 20 per cent annually. They are projected to reach C\$128 billion by 2020. By 2031, 72 per cent of the population growth in Canada will be driven by people who are visible minorities. Consumers of South Asian and Chinese backgrounds make up the largest ethnic groups and are projected to continue growing. Immigration from Europe accounts for a smaller percentage than it traditionally has. Within immigrants from the Americas, origin is shifting from the United States and Caribbean to Mexico and South America.

6. Food Allergies

Approximately one in every 13 Canadians is affected by a food allergy and products that cater to those with allergies have been enjoying strong growth. From March 2009 to March 2010, gluten-free products alone grew 12.2 per cent to reach US\$3.63 billion.

In Canada, the priority allergens are: peanuts, tree nuts, sesame seeds, wheat and triticale, milk, eggs, fish, crustaceans, shellfish, soybeans, mustard seeds, grains containing gluten, and added sulphites. Beginning August 4, 2012 these allergens must be listed on a product label, even food allergens and labeling at: <http://www.inspection.gc.ca/english/fssa/labeti/allerg/allerginduse.shtml>

SECTION 3: COMPETITION

Product Category	Major supply Sources by Value	Strengths of Key Supply Countries	Advantages/Disadvantages of Local Suppliers
<p>Red Meat</p> <p>Domestic Production C\$19.8 billion (2009)</p> <p>Imports Fresh, chilled or frozen: US\$1.3 billion (2010) Prepared or preserved: US\$ 615 million (2010)</p>	<p>Fresh, chilled or frozen</p> <p>1. U.S.: 78%</p> <p>2. New Zealand: 11%</p> <p>3. Australia: 6%</p> <p>Prepared or preserved</p> <p>1. U.S.: 93%</p> <p>2. Brazil: 2%</p> <p>3. Thailand: 1%</p>	<ul style="list-style-type: none"> • Availability of year-round grazing lowers production costs for Australia and New Zealand. • Hog and cattle herd numbers remain low in Canada, providing an opportunity for exports. 	<ul style="list-style-type: none"> • Fifty per cent of Canada's pork is exported and is third largest exporter in the world. Federal Government contributes funds to promoting pork. • China re-opening markets to Canadian pork again after H1N1, but requires certification.
<p>Poultry</p> <p>Domestic Production C\$7.5 billion (2009)</p> <p>Imports US\$ 350 million (2010)</p>	<p>1. U.S.: 82%</p> <p>2. Brazil: 15%</p> <p>3. Chile: 2%</p>	<ul style="list-style-type: none"> • The U.S. is the world's largest producer of poultry meat, while Brazil is the largest exporter. Brazil is rapidly expanding its market share in Canada, except with further processing plants that do not want to take the risk of mixing poultry of U.S. and Brazilian origin which would result in being unable to sell processed products to the U.S. • U.S. poultry has the advantage of being able to be shipped fresh as well as 	<ul style="list-style-type: none"> • The Canadian poultry industry is a tariff rate quota regulated industry with live bird and meat prices well above the world market. • Canadian strategy has been to differentiate the product, particularly at retail through air chilling and attributes such as vegetable or grain fed. • The scale of plant operations in Canada remains relatively small due to the controlled supply system. In an effort to mitigate this and to offset difficulty obtaining labor, Canadian processing plants are among the most highly mechanized sectors in Canadian agriculture and employ the latest in robotics.

Product Category	Major supply Sources by Value	Strengths of Key Supply Countries	Advantages/Disadvantages of Local Suppliers
		frozen.	
Fish and Seafood Products Domestic Production C\$ 4.9 billion (2009) Imports US\$ 2 billion (2010)	1. U.S.: 38% 2. China: 16.3% 3. Thailand: 16%	<ul style="list-style-type: none"> • Fish filleting is extremely labor intensive, which accounts for the rapid penetration of China and Thailand in this segment. • China is a major player in aquaculture, which is becoming more important as ocean fish stocks fall. 	<ul style="list-style-type: none"> • Canada is home to more than 160 species of saltwater and freshwater fish and shellfish. • Aquaculture is growing and could exceed US\$ 5 billion within 15 years. • The capture fishery accounts for 76% of total fish and seafood production, 80% comes from the Atlantic. • Canada is the 7th largest exporter of fish and seafood in the world.
Dairy Domestic Production C\$16.2 billion (2009) Imports (excluding cheese) US\$267 million (2010) Imports (cheese) US\$ 239 million (2010)	Dairy (excluding cheese) 1. U.S.: 59% 2. New Zealand: 18% 3. Germany: 7% Cheese 1. U.S.: 22% 2. France: 21% 3. Italy: 20%	<ul style="list-style-type: none"> • The close proximity of the U.S. as well as significant transportation advantage has allowed it to be competitive in the Import for Re-export Program (IREP) which allows dairy products for further processing to be imported into Canada duty-free provided the final product is subsequently exported. • The E.U. has an advantage in the cheese sector as they have been allocated 66% of Canada's cheese quota as a result of the Agreement on Agriculture. • New Zealand's 	<ul style="list-style-type: none"> • The Canadian dairy market operates under a supply management system, which attempts to match domestic supply with domestic demand while paying producers on a cost of production related formula. This system has tended to keep dairy prices in Canada above prevailing global levels. Imports are controlled under TRQ and over quota imports are subject to very high tariffs. • American suppliers have taken advantage of the Import for Re-export Program (IREP). The U.S. is the largest user of this program due to the perishable nature of the products. • Canadian TRQs stipulate 50% dairy content guideline for imported products, resulting in the creation of blended ingredients and products that are designed to circumvent this guideline. Butter-oil-sugar blends were the first major products to be imported

Product Category	Major supply Sources by Value	Strengths of Key Supply Countries	Advantages/Disadvantages of Local Suppliers
		availability of year-round pastures helps to lower production costs. It also holds 61% of Canada's import quota for butter.	tariff-free, displacing Canadian milk for ice cream. More recently there has been an increase in flavored milks imported as "beverages" and a number of milk proteins which are not captured by the dairy TRQ.
<p>Prepared Fruits and Vegetables</p> <p>Domestic Production C\$8.4 billion</p> <p>Imports Prepared Fruits and Vegetables: US\$ 1.6 billion</p> <p>Juices: US\$ 622 million</p>	<p>Prepared Fruits and Vegetables:</p> <ol style="list-style-type: none"> 1. U.S.: 58% 2. China: 9% 3. Chile: 2% <p>Fruit and Vegetable Juices</p> <ol style="list-style-type: none"> 1. U.S.: 64% 2. Brazil: 16% 3. China: 6% 	<ul style="list-style-type: none"> • U.S. suppliers have been well positioned to take advantage of the rapidly growing consumer demand for fresh cut, pre-packaged fruits and vegetables. The demand for these products has grown in recent years. • Concern is growing regarding the safety of imported fruits and vegetables. To the extent U.S. exporters can position their products as leaders in these areas, there will be growing market opportunities over other countries. 	<ul style="list-style-type: none"> • Many firms produce a variety of traditional value-added products such as pickles, relishes, jams, soups, sauces and other items that incorporate a mix of vegetables and juices. • The industry has been shifting away from traditional Canadian vegetables such as squash, beans, potatoes etc. as consumer tastes shift to more exotic items. • Canada has a large greenhouse sub-sector. However the strengthening Canadian and high energy costs is creating increased opportunity for U.S. suppliers.
<p>Snack Foods</p> <p>Domestic Production C\$ 3.4 billion</p> <p>Imports US\$ 1.3 billion</p>	<ol style="list-style-type: none"> 1. U.S.: 58% 2. Germany: 5% 3. Switzerland: 4% 	<ul style="list-style-type: none"> • The U.S. is a major player in the Canadian market due to strong brands and the perishable and bulky nature of many products which magnifies the freight advantage. 	<ul style="list-style-type: none"> • The majority of snack food manufacturing takes place in Ontario and Quebec. • The snack food industry is served primarily by domestic manufacturers, however they are quickly losing share. • Canada has to import sugar, chocolate, cacao and nuts for manufacturing and is not competitive on dairy and egg products.
Beverages			

Product Category	Major supply Sources by Value	Strengths of Key Supply Countries	Advantages/Disadvantages of Local Suppliers
Waters with and without sweeteners or flavorings (including soft drinks) Domestic Production C\$ 5.9 billion Imports US\$ 658 million	Waters with and without sweeteners or flavorings (including soft drinks) 1. U.S.: 74% 2. France: 7% 3. Italy: 5%	<ul style="list-style-type: none"> U.S. brands of soft drinks are well recognized in the Canadian market. 	
Beer Domestic Production C\$8.4 billion Imports US\$610 million	Beer 1. Netherlands: 21.4% 2. U.S.: 21.2% 3. Mexico: 18%		<ul style="list-style-type: none"> Beer sales increased 3.8% in the year ending March 2010 to total C\$9.2 billion. Beer's market share has fallen from 52% to 46% over the last decade while wine's has increased from 23% to 29% over the same time period. Canadian climate not ideal for growing red wines, domestic whites fare better against imports.
Wine Domestic Production C\$ 1.6 billion Imports US\$ 1.7 billion Fermented Beverages Imports US\$ 36 million	Wine 1. France: 22% 2. Italy: 20% 3. U.S.: 16% Fermented Beverages 1. U.K.: 40% 2. U.S.: 38% 3. Japan: 8%	<ul style="list-style-type: none"> Sales of U.S. wines in Canada grew 30% in 2010 to reach \$269 million. 	
Spirits			

Product Category	Major supply Sources by Value	Strengths of Key Supply Countries	Advantages/Disadvantages of Local Suppliers
Domestic Production C\$ 1 billion Imports US\$ 286 million	Spirits 1. U.S.: 98% 2. Guyana: 0.08% 3. Mexico: 0.06%		

SECTION 4: BEST PRODUCT PROSPECTS

PRODUCTS PRESENT IN THE MARKET WITH GOOD SALES POTENTIAL

High Physical Growth – Year 2010

Category	Growing	
	+4% to 10%	Over 10%
Beverages	Whole Bean Coffee (5%)	Single Serve Coffee (126%) Traditional Ground Coffee (11%)
Dry Grocery	Bread – grains/diet/organic (4.4%) Specialty (8.5%) Bagels (6.2%) Sugar (8%) Baking Nuts (10%) Baking chips chocolate (10%) Breakfast cereal (4%)	
Frozen Foods	Thin Crust Pizza (8%)	Alternative Pizza incl. organic, gluten-free, ethnic and seafood (18%)
Perishables	Turkey products (6%)	
Prepared Foods	Dips (8%) Processed Fruits – especially dried (7%)	
Refrigerated & Dairy	Cheese (8%)	Drinkable Yogurt (15%) Yogurt in tubes (17%)

PRODUCTS FACING SIGNIFICANT BARRIERS

For a more in-depth review of Canada's food laws and regulations and how they may affect U.S. food exporters, please see FAS Canada's Food and Agricultural Import regulations (FAIRS) Report. Due to the complexity of legislative requirements, it is recommended to contact a Canadian Food Inspection Agency (CFIA) Import Service Centre to obtain complete and current information regarding your

specific product. The CFIA is responsible for the inspection of food products at all levels of trade. Following are some of the key restrictions that could inhibit certain products from entering the country.

Tariff Rate Quota (TRQ)

Under the General Agreement on Tariffs and Trade (GATT), Canada is permitted to control and limit certain imports under its supply management system. With the signing of the World Trade Organization's (WTO) Agreement on Agriculture in December 1993, Canada converted its existing agricultural quantitative import controls to a system of tariff rate quotas (TRQs) that came into effect in 1995.

Under the TRQ system, applicable products up to a certain volume are imported at the "within access commitment" tariff rate. Over this permitted level, the "over-access commitment" tariff rate escalates. These higher tariffs enable Canada to maintain its system of supply management for certain agricultural products.

The method for establishing the allocation of import access quantities is prescribed in the Exports and Import Permits Act and is administered by the Export and Import Controls Bureau (EICB) of the Department of Foreign Affairs and International Trade (DFAIT). Documentation on the allocation system and principle of TRQ allocation, together with data on permits issued can be found at: www.dfait-maeci.gc.ca/eicb.

Issuance and control of import quota is administered by the EICB in collaboration with the Canada Border services Agency.

U.S. products that fall into this category include:

-
- | | |
|------------------------------------|----------------|
| • Broiler hatching chicks and eggs | • Chicken |
| • Turkey | • Butter |
| • Cheese | • Buttermilk |
| • Milk and Cream | • Dairy Blends |
| • Yogurt | • Margarine |
| • Eggs | |
-

Other Information Affecting Imports of Food Ingredients

Health Canada

Health Canada continues to develop standards and policies for the safety of the food supply, which are applied by the CFIA.

All foods sold in Canada are subject to the Food and Drugs Act and Regulations which contains health and safety requirements, labeling requirements and provision preventing deception and fraud. However, many agricultural and fish products are also subject to other legislations. Consequently, the need for licensing, permits and certificates depends upon the type of food being imported and in some cases on the country or area from which the food is imported. It should be noted that in some provinces, there are additional requirements for certain foods, such as dairy products, bottled water and maple syrup.

The Food and Drug Regulations (FDR) outline the specifications and further requirements for standardized and non-standardized products. The following are just a few examples of regulatory issues, which could pose a barrier for some United States food companies attempting to sell in Canada.

Food Additives: In the absence of specifications under the FDR, food additives must conform to specification in the Food Chemical Codex (as required by section B.01.045 of the FDR). There are differences between Canadian and United States rules. A list of food additives permitted for use in Canada can be found at: http://www.hc-sc.gc.ca/fn-an/securit/addit/diction/dict_food-alim_add-eng.php.

Food Color: Synthetic food colors are the only additives that must be certified by the Health Products and Food Branch of Health Canada before being used in foods. Regulations concerning food colors are listed in Division 6 and Table III of Division 16 of the FDR.

Diet-Related Health Claims: The Canadian Food Inspection Agency enforces specific regulations regarding health claims that can be made about a product or ingredient. These regulations are in place to ensure accuracy and validity. For exact wording, visit <http://www.inspection.gc.ca/english/fssa/labeti/guide/ch8e.shtml#8.4>.

Agricultural Pesticide and other contaminants: Some agricultural pesticides approved for use in the United States are not registered for use in Canada. Foods which are found to contain unregistered residues over 0.1 parts per million are deemed to be adulterated. Specific acceptable Maximum Residue Limits (MRLs) exist for registered pesticides. For further information see: <http://www.hc-sc.gc.ca/cps-spc/pest/part/protect-proteger/food-nourriture/mrl-lmr-eng.php>.

Vitamin and Mineral Fortification: Fortification in Canada is under review. Health Canada has signaled it is looking at expanding discretionary fortification but with restrictions on which vitamins and minerals and what amounts. However, differences remain such as the folic acid exclusion on milled grain and bakery products.

For more information on fortification see: www.hc-sc.gc.ca/fn-an/nutrition/vitamin/index_e.html.

Trans Fats: In July 2007, Health Canada announced that it is adopting the Trans Fat Task Force's recommendation on trans fats, but will ask industry to voluntarily limit the trans fat content of vegetable

oils and soft, spreadable margarines to 2 per cent of the total fat content and to limit the trans fat content for all other foods to 5 per cent, including ingredients sold to restaurants. Canada also requires that the levels of trans fat in pre-packaged food be included on the mandatory nutrition label. For more information on trans fat regulations, visit <http://www.hc-sc.gc.ca/fn-an/nutrition/gras-trans-fats/index-eng.php>.

Organic Standards: As of June 30, 2009, the Organic Products Regulations require mandatory certification to the revised National Organic Standard for agricultural products represented as organic in international and inter-provincial trade, or that bear the federal organic agricultural product legend (or federal logo). Due to the equivalency agreement with the United States, the USDA organic certification is fully recognized in Canada and there is no need for further certification in Canada for USDA-certified organic products. The CFIA has more information on regulations for organic products on their website at: <http://www.inspection.gc.ca/food/organic-products/eng/1300139461200/1300140373901>.

Novel Foods: Health Canada defines novel foods as products that have never been used as food, foods which result from a process that has not previously been used for food, or foods that have been modified by genetic manipulation. Novel foods regulations cover a variety of new food processes including the addition or deletion of genes (commonly referred to as genetically modified foods). For example, Health Canada has reviewed food produced by chemical mutagenesis of seed combined with traditional breeding, the use of new food processing techniques to extend shelf life and improve food quality and the use of natural coloring products introduced to food for purposes either than coloring. Canada's novel foods regulations require that the company, who wants to sell the products, prior to the marketing or advertising of a novel food, make notification to Health Products and Food Branch (HPFB). For more information on the novel food regulations and approval procedure, see: www.hc-sc.gc.ca/fn-an/gmf-agm/index_e.html.

Government Organizations

Agriculture and Agri-Food Canada	<p>1341 Baseline Road Ottawa, Ontario K1A 0C5 Telephone: 613-773-1000 Fax: 613-773-2772 TDD/TTY: 613-773-2600 Email: info@agr.gc.ca www.agr.gc.ca</p>						
Statistics Canada	<p>150 Tunney's Pasture Driveway Ottawa, Ontario K1A 0T6 Online requests: infostats@statcan.gc.ca Telephone: 1-800-263-1136 or 613-951-8116 Fax: 1-877-287-4369 or 613-951-0581 TTY: 1-800-363-7629 www.statcan.gc.ca</p>						
Department of Foreign Affairs and International Trade	<p>125 Sussex Drive Ottawa, ON, Canada K1A 0G2 Facsimile: 613-996-9709 Email: enqserv@international.gc.ca Telephone: 1-800-267-8376 (toll-free in Canada) 613-944-4000 (in the National Capital Region and outside Canada) www.international.gc.ca</p>						
Canada Revenue Agency	<p>For a complete list on how to contact CRA, please consult: http://www.cra-arc.gc.ca/cntct/menu-eng.html</p> <p>Businesses and self-employed individuals can contact 1-800-959-5525</p> <p>The International Tax Services Office for non-resident enquiries can be reached at: International Tax Services Office Post Office Box 9769, Station T Ottawa ON K1G 3Y4 CANADA</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Individuals</td> <td style="padding: 5px; text-align: right;">1-613-952-3741</td> </tr> <tr> <td style="padding: 5px;">Non-resident corporations and corporation accounts</td> <td style="padding: 5px; text-align: right;">1-613-954-9681</td> </tr> <tr> <td style="padding: 5px;">Non-resident trusts</td> <td style="padding: 5px; text-align: right;">1-613-952-</td> </tr> </table>	Individuals	1-613-952-3741	Non-resident corporations and corporation accounts	1-613-954-9681	Non-resident trusts	1-613-952-
Individuals	1-613-952-3741						
Non-resident corporations and corporation accounts	1-613-954-9681						
Non-resident trusts	1-613-952-						

		8753
	Part XIII tax and Non-resident withholding accounts	1-613-952-2344
Canada Border Services Agency	<p>Canada Border Services Agency Ottawa ON, K1A 0L8</p> <p>Call within Canada: Service in English: 1-800-461-9999 Service in French: 1-800-959-2036</p> <p>Calls outside Canada: Service in English: 204-983-3500 or 506-636-5064 Service in French: 204-983-3700 or 506-636-5067 Contact@cbsa.gc.ca www.cbsa.gc.ca</p>	
Canadian Food Inspection Agency	<p>1400 Merivale Road Ottawa, Ontario K1A 0Y9 Tel: 1-800-442-2342 / 613-225-2342 TTY: 1-800-465-7735 Fax: 613-228-6601 www.inspection.gc.ca</p>	
Health Canada	<p>Address Locator 0900C2 Ottawa, Ontario K1A 0K9</p> <p style="padding-left: 40px;">Email: Info@hc-sc.gc.ca Telephone: 613-957-2991 Toll free: 1-866-225-0709 Facsimile: 613-941-5366 Teletypewriter: 1-800-267-1245 (Health Canada)</p> <p>www.hc-sc.gc.ca</p>	
Industry Canada	<p>C.D. Howe Building 235 Queen Street Ottawa, Ontario K1A 0H5 Canada</p> <p>Online: info@ic.gc.ca Telephone: 613-954-5031 Toll-free: 1-800-328-6189 (Canada) TTY (for hearing-impaired only): 1-866-694-8389 (toll-free) Fax: 613-954-2340 www.ic.gc.ca</p>	

Industry Associations

This is not an exhaustive list of all industry associations in operation in Canada; however these are some of the most general. For additional associations, please consult <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1171041784063&lang=eng>.

<p>Canadian Federation of Independent Grocers</p>	<p>2235 Sheppard Ave. E., Suite 902 Willowdale, ON M2J 5B5</p> <p>Tel: 1-800-661-2344 / 416-492-2311 Fax: 416-492-2347</p> <p>Email: info@cfig.ca</p> <p>www.cfig.ca</p>
<p>Canadian Produce Marketing Association (CPMA)</p>	<p>162 Cleopatra Drive Ottawa, Ontario, Canada K2G 5X2 Telephone: (+1) 613-226-4187 Fax: (+1) 613-226-2984 www.cpma.ca</p>
<p>Fruit and Vegetable Dispute Resolution Corporation (FVDRC)</p>	<p>Building 75, Central Experimental Farm 930 Carling Ave. Ottawa, Ontario K1A 0C6 CANADA Phone: 613 234-0982 Fax: 613 234-8036 General E-mail: info@fvdrc.com</p> <p>www.fvdrc.com</p>
<p>Food and Consumer Product Manufacturers of Canada</p>	<p>Phone: 416-510-8024 Fax: 416-510-8043 Email: info@fcpc.ca</p> <p>100 Sheppard Ave E Toronto, ON M2N 6Z1</p> <p>www.fcPMC.com</p>

Publications

Food in Canada	www.canadianmanufacturing.com/food
Canadian Grocer	www.canadiangrocer.com
Foodservice and Hospitality	www.foodserviceworld.com/
C-Store Canada	www.c-storecanada.com
Western Grocer	www.westerngrocer.com
Baker's Journal	www.bakersjournal.com

SECTION 5: FAS/CANADA CONTACTS

USDA/FAS Canada endorses and organizes a U.S. pavilion at SIAL Canada every year. The next SIAL Canada show is scheduled for May 9th to 11th 2012 in Montreal, Quebec.

For further information, please contact:

Office of Agricultural Affairs
 Embassy of the United States of America
 P.O. Box 866, Station B
 Ottawa Ontario

Phone: 613-688-5267
 Fax: 613-688-3124
 Email: agottawa@fas.usda.gov

Find us on the World Wide Web

Visit the FAS home page at www.fas.usda.gov for a complete listing of FAS' worldwide agricultural reporting. To access these reports, click on "Attaché Reports."

Available Market Reports on Canada:

CA11067	Marketing Freedom For Grain Farmers Act Becomes Law
CA11065	Exporter Guide
CA11062	Grain and Feed Quarterly
CA11061	Fruit Annual
CA11060	Success Story: U.S. Gourmet Company Tastes Sweet Success in Canadian Market
CA11059	Bill C-18 – Marketing Freedom for Grain Farmers Act
CA11058	Success Story: Hawaii Export International (Coffee)
CA11057	This Week in Canadian Agriculture 21
CA11056	This Week in Canadian Agriculture 20
CA11055	Livestock Annual
CA11053	Potatoes Annual
CA11051	This Week in Canadian Agriculture 19

CA11050	This Week in Canadian Agriculture 18
CA11048	Northern Trends – Fall Edition
CA11047	This Week in Canadian Agriculture 17
CA11046	Poultry Annual
CA11044	Grain and Feed Quarterly
CA11042	This Week in Canadian Agriculture 16
CA11040	This Week in Canadian Agriculture 15
CA11039	Biotechnology Annual
CA11037	This Week in Canadian Agriculture 14
CA11036	Biofuels Annual Report
CA11035	This Week in Canadian Agriculture 13
CA11034	This Week in Canadian Agriculture 12
CA11033	Northern Trends – Spring Edition
CA11032	Top Ten U.S. Fresh Vegetable Exports to Canada
CA11031	This Week in Canadian Agriculture 11
CA11030	This Week in Canadian Agriculture 10
CA11029	Top Ten U.S. Fresh Fruit Exports to Canada
CA11027	This Week in Canadian Agriculture 9
CA11025	Voluntary- 2011 Agent/Broker Directory – Central Canada
CA11024	This Week in Canadian Agriculture 8
CA11023	Voluntary- 2011 Canadian March Planting Intentions
CA11022	American Wines in Canada
CA11020	Meeting Report from the CGC meeting (April 4-5)
CA11019	In a Nutshell: Explaining Dairy Trade Flows Between the United States and Canada (Voluntary)
CA11017	Exporting Alcoholic Beverages into the Canadian Market
CA11016	Actions Taken Regarding Food Imports from Japan
CA11015	Oilseed and Products
CA11014	Grain and Feed Annual
CA11013	This Week in Canadian Agriculture 7
CA11011	Livestock - Semiannual
CA11009	This Week in Canadian Agriculture 6
CA11008	This Week in Canadian Agriculture 5
CA11007	This Week in Canadian Agriculture 4
CA11006	Canada Food Trends – February 2011
CA11005	This Week in Canadian Agriculture 3
CA11004	Grain and Feed
CA11003	This Week in Canadian Agriculture 2
CA11001	This Week in Canadian Agriculture 1