Exporter Guide

FOOD & BEVERAGE IN CANADA

Market Profile
July 2011

CONTENTS

1 MARKET STRUCTURE

All figures are in $US unless otherwise specified

1.1 Market Overview

Price and convenience are important to Canadian consumers. However, the culture of convenience now faces the challenge of a counter-trend towards fresh, simple, and traditionally prepared foods, which undermines the position of frozen foods and similar products. There is also a growing trend towards being more health conscious and therefore a growing demand for nutritional quality. The emergence and development of ethical niches adds further challenges to the industry. The response of food retailers must accommodate these differing interests.

Food Retail[1]

The Canadian food retail industry had a total revenue of $92.6 billion in 2010, which is predicted to grow by 4.9 percent to $97.2 billion in 2011. The performance of the industry is forecast to decelerate, with an anticipated compound annual growth rate (CAGR) of 4.6 percent for the five year period 2009-2014, which is expected to drive the industry to a value of $110.2 billion by the end of 2014.

Foodservice[2]

The Canadian foodservice market had a total revenue of $15.4 billion in 2010, and is expected to grow by 3.2 percent to $15.9 billion in 2011. Market consumption volumes increased with a CAGR of 1.5 percent between 2005-2009, and reached an estimated total of 7.3 billion transactions in 2010. The performance of the market is forecast to decelerate, with an anticipated CAGR of 2.7 percent for the five year period 2009-2014, reaching a market value of $17.0 billion by the end of 2014.

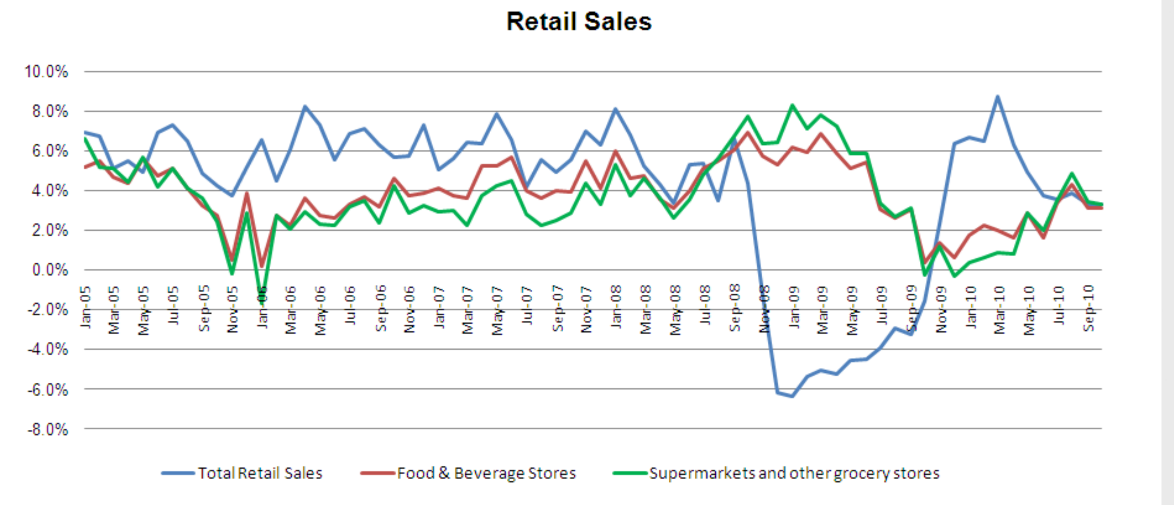
Cafés and restaurants sales proved the most lucrative sector for the Canadian foodservice market in 2009, with total revenues of $7.6 billion, equivalent to 51.4 percent of the market's overall value. In comparison, sales of fast food generated revenues of $5.3 billion in 2009, equating to 35.8 percent of the market's aggregate revenues. The remaining 12.8 percent is accounted for by the cost sector and other.

1.2 Market Drivers[3]

The Canadian economy has recovered well since the economic downturn of 2008/2009. However, its strong growth of the 1980s and 1990s will be difficult to replicate since this was so closely tied to a buoyant United States market. Real GDP grew by 3.1 percent in

2010, largely as a result of higher commodity prices. The forecast for 2011 is growth of 2.5 percent[4]. The Canadian economy continues to be largely influenced by the United States recovery due to their close trading relationship.

Retail sales at food and beverage stores have been increasing, but they have not outperformed the wider retail sector in 2010 as can be seen below. Supermarkets have been the strongest performer of all food stores. There is unlikely to be an easing of competitive pressures and discount formats will continue to be developed in order to maintain sales.



Source: IGD Retail Analytics. (January 2011). *Canadian Food & Grocery Market Update* from Statistics Canada

It is expected that economic growth will be slow in 2011-2012 as a result of increasingly stretched household balance sheets. Canadian households continued to borrow to fund expenditure throughout the 2008-09 global recession and saving rates have remained low throughout 2010. Household debt as a percentage of disposable income has hit record levels and is expected to have a negative impact on private consumption.

1.3 Market Potential[5]

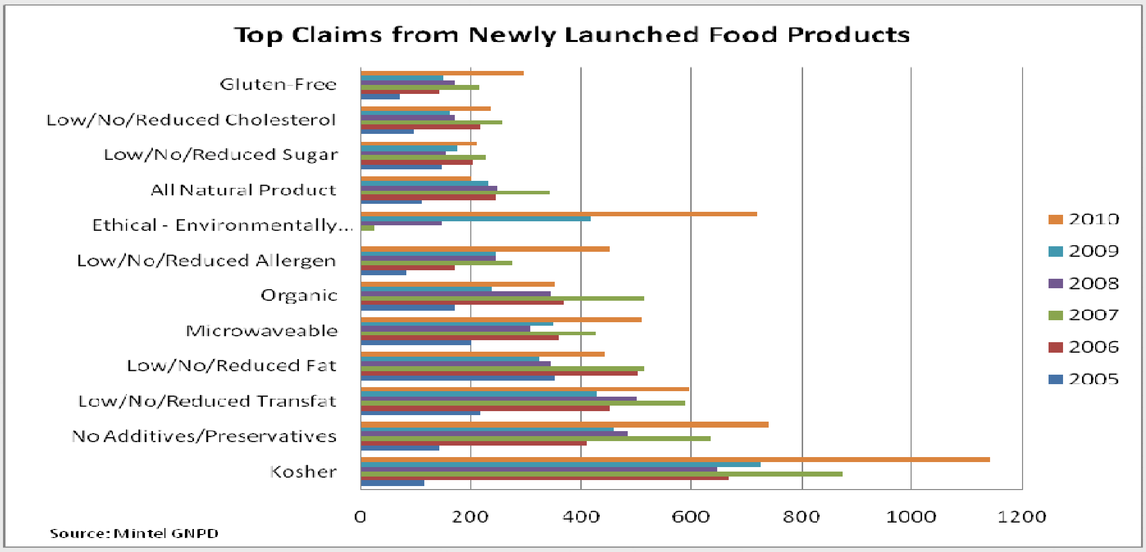
Changing Demographics

The number of immigrants entering Canada has been increasing since the 1940s. At the time of the last census in 2001, 18 percent of the population were foreign born. It is estimated that the proportion of visible minorities will increase to one-third of the total population by 2031. Consequently, there is an increasing demand for broader ethnic ranges in food and beverage to cater for these changing demographics. Specialist retailers in this area are likely to do well.

There are also opportunities for the primary sector in terms of specialty meats and slaughtering methods. There has been an increase in the number of newly launched products claiming to be kosher in the last five years, highlighting possible opportunities for meat exporters.

Healthy Alternatives

The chart below shows the top claims from newly launched products in the Canadian market over the last five years. A key trend in the food and beverage market, is the move towards natural and organic products. In 2010 there was also a significant increase in the number of products claiming to have ethical or environmentally friendly packaging, showing that consumers are becoming increasingly concerned with not only what is in their food but also how it is presented. There is a real potential for New Zealand firms to capitalise on the country's reputation for creating alternatives which meet the health and environmental requirements of consumers.



International

As the Canadian population continues to travel, this has further enhanced the interest and increased demand for international "ethnic" food products and beverages. Canadian consumers are eager to try new products and flavours and this means that there is a growing potential in this area in terms of new product development and also food services. There is also potential for New Zealand exporters to capitalise on this trend as Canadians will be willing to pay a premium price for unique and exciting new products to try at home.

Convenience

There has been a long-term rise in the number of women working outside the home, and single-person households are also becoming increasingly common. This has lead to a rising consumer demand for convenience foods, such as ready meals, and on-the-go snack products. The Canadian convenience market remains relatively underdeveloped and there are few operators in the sector, leading to potential opportunities for greater expansion.

1.4 Import Trends[6]

In the year ended December 2010, New Zealand exported over NZ$362 million worth of food and beverage products to Canada. This was a decrease of 8.4 percent from the previous year. Canada only accounts for 1.54 percent of New Zealand's food and beverage exports. However, this may not be an accurate reflection, as some New Zealand exports enter the Canadian market via the United States.

As shown in the following table, New Zealand's exports to Canada, for a number of key food products, have decreased over the past 12 months. There has been a growth in exports of wine and other alcohol, although New Zealand's market share remains small compared to the United States and Europe.

New Zealand TRADE & ENTERPRISE

New Zealand's Top Ten Food & Beverage Exports to Canada ($NZ millions)

Product	2008	2009	2010	% Change 10/09	Competition (% share of Canada's imports in 2010)
Beef (Frozen)	88.1	122.5	101.4	-17.3	**NZ (42%)**, USA (24%), Uruguay (19%), Australia (15%)
Sheep/Goat Meat	90.4	105.6	96.8	-8.4	**NZ (59%)**, Australia (41%), USA (0.5%)
Wine	45.5	55.4	62.7	13.0	France (22%), Italy (20%), USA (16%), Australia (15%), Argentina (6%), Chile (6%), Spain (5%), **NZ (3%)**
Whey and Other Milk Products	34.2	13.9	23.4	68.5	USA (74%), **NZ (16%)**, Germany (3%), Hungary (3%),
Butter and other fats and oils derived from milk	13.3	22.3	12.7	-42.8	USA (51%), **NZ (44%)**, Australia (3%), India (1%)
Spirits, Liqueurs, Other	7.2	8.3	9.9	19.3	USA (25%), UK (22%), France (15%), Ireland (10%) Mexico (5%), Sweden (4%), Italy (3%) **[NZ accounts for less than 1%]**
Beef (Fresh or Chilled)	5.9	8.7	8.4	-3.3	USA (97%), Australia (1%), **NZ (1%)**
Moluscs	8.8	8.7	7.4	-15.1	USA (43%), China (19%), Chinese Taipei (8%), Thailand (8%), Japan (6%), **NZ (4%)**
Casein	4.0	11.3	7.2	-36.3	**NZ (31%)**, Argentina (23%), Germany (23%), USA (7%)
Apples, Pears And Quinces	6.8	5.9	6.1	3.1	USA (68%), Chile (11%), China (6%), Argentina (5%), **NZ (4%)**

Source of data: Statistics NZ, via The World Trade Atlas

Canada's Top Five Supplying Markets for Food and Beverage Products (% Share)

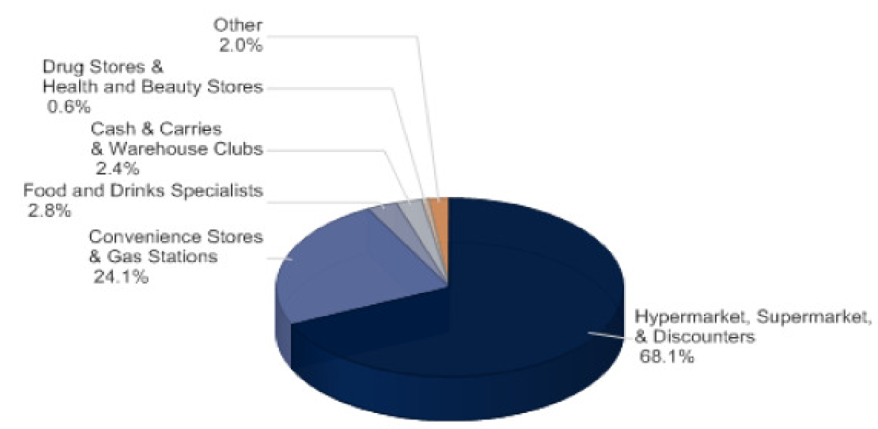
Exporters	% Share of Canada's imports in 2008	% Share of Canada's imports in 2009	% Share of Canada's imports in 2010
United States of America	57.7	57.6	56.5
Mexico	3.6	3.9	4.4
China	3.1	3.2	3.2
Italy	2.9	2.9	2.9
Brazil	2.5	2.8	2.8

Canada receives the majority of its food and beverage exports from the United States. It is the number one market for United States agricultural exports. In 2009, consumer-oriented agricultural products accounted for 76 percent of the United States' food and agricultural product sales to Canada[1]. This is largely due to proximity, but is also a result of the 1989 US-Canada Free Trade Agreement (FTA) and 1994 North American Free Trade Agreement (NAFTA), which resulted in a significant increase in trade between the two countries.

1.5 Key Players in the Market[7]

Hypermarket, supermarket, and discounters are the largest segment of the food retail industry in Canada, with a 68.1 percent share and revenues of $60 billion. The majority of grocery stores are supermarkets. There are currently only a few hypermarket operators in the market. Walmart is the most notable with the expanding presence of its Supercentre format.

Figure 2: Canada food retail industry segmentation I:% share, by value, 2009(e)



Source: Datamonitor DATAMONITOR

Hypermarket/Supermarket Market Share

Top Grocery Retailers	Market Share 2008	Market Share 2009	Market Share 2010
Loblaw	24.8%	24.0%	23.9%
Sobeys	13.7%	13.6%	13.4%
Metro Inc	9.6%	9.7%	9.5%
Safeway	6.7%	6.3%	6.2%
Wal-Mart Canada	4.3%	6.0%	6.7%
Couche-Tard	1.8%	2.0%	2.1%

Loblaw is Canada's leading food and grocery retailer, with a market share of 23.9 percent. In 2009 Loblaw acquired the Asian specialist retailer T&T which has helped to offer new insights, and highlights the move that retailers are now making to meet the needs of an ethnically diverse market.

Sobeys' focus is based on being the "best in food". It is a wholly-owned subsidiary of Empire Company Limited and is the second largest food retailer in Canada. A number of strategic acquisitions, such as Thrifty Foods in British Columbia, have extended the retailer's reach across the country. In June 2010, Sobeys launched a new discount concept called FreshCo which has a focus on fresh food and ethnic ranges, in order to respond to the changing trends in the Canadian food retail market.

Wal-Mart was introduced to the Canadian market in 1994 through its acquisition of the Woolco Canada chain. In October 2006, Wal-Mart opened its first Supercentre stores. These stores take the same form as those in the United States where general merchandise is offered with an assortment of perishable goods, a bakery, a deli, and other fresh food counters. By April 2010, Wal-mart was operating a total of 317 retail outlets across Canada. Going forward, Wal-Mart's strategy involves increasing its food offering, especially in terms of fresh food.

Metro Inc has a market share of 9.5 percent. Its stores are concentrated in Eastern Canada and it is the second largest retailer in Quebec and Ontario. The company's operations are organized into food and pharmaceutical divisions. The food division operates a network of 558 grocery stores under various banners.

Safeway is one of the largest food and drug retailers in North America. In 2010, they roll-out of an aggressive price-cutting programme. Safeway also creates a key point of difference by utilising its private label capability.

Convenience stores account for 24.1 percent of the food retail industry's revenue. Although there are only a small number of convenience operators in Canada, Couche-Tard based in Quebec is a major player in this market. Couche-Tard is North America's second largest convenience store retailer with almost 6,000 stores, of which over 2,000 are in Canada.

1.6 Regulatory

Information provided in this section is for reference only. When negotiating supply contracts and before beginning actual export, companies are advised to consult closely with their importer or distributor.

General Food Law

The Canadian Food Inspection Agency (CFIA) is responsible for all food inspection and quarantine services for domestic and imported foods. Health Canada is responsible for all food safety policy and risk assessments.

A full list of acts and regulations can be found on the Acts and Regulations page here:

www.inspection.gc.ca

Labelling and packaging requirements

Responsibility for Canadian food labelling requirements is shared between Health Canada and the CFIA.

The basic packaging and labelling requirements are:

- Labels must be in both English and French
- Net quantities in metric
- List of ingredients
- Durable life date
- Common name of product
- Company name and address
- Minimum type size specifications
- Conformity to standardized package sizes stipulated in the regulations
- Country of origin labelling

The CFIA has prepared a Guide to Food Labelling and Advertising, which outlines all regulatory requirements for selling packaged goods in Canada. This can be found on the Food Labelling and Advertising page here:

www.inspection.gc.ca

All mandatory information on food labels must be shown in both official languages, French and English. The province of Quebec has additional requirements and all products sold in the province must be labelled in French and the use of French must be given equal prominence with other languages on any packages or containers.

Guidance on these requirements can be found here:

www.oqlf.gouv.qc.ca

Nutritional labelling is voluntary unless nutritional claims are made. The format and information provided must comply with the Guidelines on Nutritional Labelling developed by Health Canada and also with the Food and Drug Regulations. Further information can be found on the Nutrition Labelling pages here:

www.hc-sc.gc.ca

Agricultural and fish products, for which standards exist under the Meat Inspection Act, Canadian Agricultural Products Act and associated regulations, and the Fish Inspection Act may have additional labelling requirements (e.g. grade or country of origin).

There are also important considerations with regard to packaging, in particular with consumer products (especially food) which may be required to be packaged to certain 'standard' sizes. These vary greatly and come under the auspices of the Canadian Food Inspection Agency. Furthermore, exporters must ensure that their packaging meets the government’s standards in terms of explaining the ingredients and nutritional content of their products.

Vitamin and Mineral Fortification

The addition of vitamin and minerals to food in Canada is controlled by the Food and Drug Regulations and only foods fortified with certain nutrients, and to the levels specified in the Regulations may be sold in Canada. Further information can be found on the Food and Nutrition pages here.

www.hc-sc.gc.ca/fn-an/nutrition/vitamin/index-eng.php

Organic Foods

The Organics Products Regulations (OPR) require mandatory certification in accordance with the National Standard for Organic Agriculture for all organic products. The OPR are designed to protect consumers against false and misleading claims. More information can be found on the Organic Products page here:

www.inspection.gc.ca

Organic claims must be printed in English and French. A government logo bearing the official program name “Canada organic” is also available to show compliance with regulations.

Trans Fats

In July 2007, Health Canada adopted the Trans Fat Task Force’s recommendation on trans fats. The industry was asked to voluntarily limit the trans fat content of vegetable oils and soft, spreadable margarines to 2 percent of the total fat content, and to limit the trans fat content for all other foods to 5 percent, including ingredients sold to restaurants. Canada was the first country to require that the levels of trans fat in pre-packaged food be included on the mandatory nutrition label.

Food Additive Regulations

The use of food additives is strictly controlled by Canada’s Food and Drugs Act and Regulations. The use of food additives applies to levels and uses of food colourings and food preservatives. Products containing non-permitted food additives may be refused entry into Canada. Canada’s Food and Drugs Regulations can be found under the Food Acts and Regulations pages here:

www.hc-sc.gc.ca

Novel Foods

Health Canada defines novel foods as:

- products that have never been used as a food
- foods which result from a process that has not previously been used for food
- foods that have been genetically modified

Health Canada is responsible for ensuring that all foods are safe before entering the Canadian food system. The Novel Foods Regulation (under the Food and Drugs Act) requires that notification be made to the Health Products and Food Branch (HPFB) by the company who wants to sell the product prior to the marketing or advertising of a novel food. Pre-market notification is designed to allow Health Canada to conduct a safety assessment of the biotechnology-derived food prior to permitting its sale in the Canadian marketplace.

Further information can be found on the Food and Nutrition section here.

www.hc-sc.gc.ca

Alcohol Regulations

The Canadian market for imported wine and spirits is highly regulated. Alcohol must be imported into Canada through provincial liquor boards or commissions who will then warehouse and distribute it to various retail outlets. The exception is the Alberta Liquor Control Board, which has privatised its entire retail network. Private individuals and restaurateurs may obtain approval from the liquor boards to import unlisted products.

Sales Tax

A federal value added tax (GST) is levied on the provision of most goods and services in Canada. The Province of Quebec levies a Quebec Sales Tax (QST) on the provision of most goods and services in Quebec. The QST is generally harmonised with the GST but is administered separately by the province. The provinces of New Brunswick, Nova Scotia, Newfoundland, Ontario and British Colombia have a harmonised sales tax (HST) with the federal government under a single federal administration. Other provinces may levy a Provincial Sales Tax (PST). More information about current rates can be found here under the Information for Business section here:

www.cra-arc.gc.ca

Tariffs

Goods imported into Canada may be subject to one of 11 separate tariff treatments that Canadian Customs impose. Goods imported into Canada from New Zealand are subject to the Most-Favoured Nation (MFN) tariff. To get the benefits of a particular tariff treatment, imported goods must also meet certification and direct shipment conditions. Failure to comply with this regulation will result in goods being refused entry.

The Australia, New Zealand and NAFTA tariffs are the result of bilateral or trilateral agreements reached with Canada's trading partners. Up-to-date tariff information can be found here:

tariffdata.wto.org

Quotas

There are some industries that are still protected by quotas in Canada. Of particular interest to New Zealand exporters are the quotas that exist in some agriculture sub-sectors and the dairy industry. Imports of some agriculture products into Canada are subject to tariff rate quotas (TRQs).

Under the TRQ system, imports which are within quotas are subject to low or free rates of duty, until the quota limit has been reached. Once quota limits have been reached, over-quota imports are subject to significantly higher MFN rates of duty. The Canadian importer must be in possession of a permit to import TRQ commodities.

The quota system in Canada can be quite complex as certain importers bid for, and are granted, access to the annual import quotas. Only those importers/distributors/retailers holding a quota are able to import controlled products. Contacting the correct importers with access to a quota is essential for products that are still regulated by the quota system. For more information go to:

www.dfait-maeci.gc.ca/trade/eicb/agric/agric-en.asp

1.7 Sustainability[8]

Environmental Policy

In October 2009, the Council of Ministers of the Environment approved in principle a Canada-wide Action Plan for Extended Producer Responsibility (EPR) and a Canada-wide Strategy for Sustainable Packaging.

EPR is an environmental policy approach in which a producer's responsibility for a product is extended to the post-consumer stage of a product's life cycle. Two related features of EPR policy include increasing producer responsibility, by shifting responsibility upstream toward the producer and away from municipalities and/or regional or provincial waste management authorities, and providing incentives to producers to incorporate environmental considerations in the design of their products.

The Strategy for Sustainable Packaging has been developed to reduce packaging waste in Canada and to promote more sustainable choices. To drive further reductions in packaging and improved sustainability, this Strategy sets out nine supporting measures aimed at increasing awareness of sustainable packaging options, providing incentives to make more sustainable choices, and supporting the development of better systems to optimally recover packaging materials.

Further information can be found here:

www.ccme.ca

Sustainable Food Research

Loblaw Companies Limited have enabled the University of Guelph to establish The Loblaw Companies Limited Chair in Sustainable Food Production. The aim of the initiative is to help the university's work on strengthening food production systems and fostering public-private collaborations. It will also help to provide some new insights on best practice and thinking around sustainable food.

2 MARKET ENTRY AND DEVELOPMENT

2.1 Market Entry Strategies

New Zealand food and beverage companies entering the Canadian market will have three major sectors that they can focus on, based on their product type and target customer: alcoholic beverages, grocery and retail, and restaurant and food service. Each sector has specific recommendations on market entry strategy.

Alcohol

Canada has a highly regulated distribution system for all types of alcohol, including wines, beer, spirits and other beverages. All alcohol is sold through provincial liquor boards, one per province. Most importers of alcohol will need an agent or distributor in the province where they wish to sell, or an in-market resource to manage the relationship with the board.

New Zealand wineries should work through New Zealand Winegrowers in Canada, due to their excellent relationships with the major liquor boards, their contacts within the agent and distributor community, and their solid marketing programmes that allow for ease of entry and growth in the Canadian market.

Retail

The Canadian grocery retail market is controlled by three major retailers: Loblaws, Sobeys and Metro. Although there are a dozen or more smaller chains, they tend to be regional, or are already owned by one of the big three. New Zealand companies wishing to work with the large retail chains will need to ensure they have in-market representation, are capable of producing and shipping large volumes, plan for flexible margins and pricing and are Global Food Safety Initiative (GFSI) certified (www.mygfsi.com). Other certifications recognised by retailers include BRC, Dutch HACCP and FSSC 22000. As food safety is one of the primary concerns of Canadian consumers, not having one of the above certifications could seriously hamper entry into the Canadian retail market.

Almost all retail chains in Canada have adopted or are in the process of launching private label brands. Some private label brands are split into no frills, standard and luxury brands. New Zealand products, due to cost and pricing, tend to fit well into the luxury category, so New Zealand food manufacturers will need to ensure they are capable of playing in the premium branding space in Canada.

New Zealand food manufacturers that work in smaller or controlled volumes should consider a Canadian based representative or distributor that can target the boutique or “metro” stores, located in large urban centres. These stores tend to sell products that are considered higher value, to stand out from the major retailers and box stores in the suburbs. Although volumes are lower, it does represent an easier entry into the Canadian marketplace and a more gradual approach to growth.

Restaurant and Food Service

New Zealand foods that are not manufactured or processed for retail (such as seafood, meats, lamb and other fresh products) tend to fit more into the restaurant and food service space, due to pricing, availability, speed to market and premium quality. With tens of thousands of premium restaurants in Canada, the opportunity to expand these products is enormous. However, New Zealand companies should ensure that they have a dependable and capable importer with appropriate contacts into their local food service regions. Without a local presence, it is very difficult to manage the large number of prospects directly, which results in inconsistent volumes throughout the year. Although there are a number of national importers, each province tends to have its own regional distributor for restaurants and food service outlets, which could necessitate more than one importer or distributor.

Canada has two major food service distributors that service retail, restaurants and food service establishments: Sysco Canada and Gordon Food Service (GFS). These companies tend to be the primary choice of larger restaurant chains and retailers, due to their ability to represent many products from a single source. It is possible to work with a local importer and one of these two large distributors, but it typically requires flexibility on pricing and margins.

2.2 Points of Differentiation

The Canadian market appreciates premium products, and although price is key to purchasing decisions, Canadian consumers will tend to pay more for quality, food safety and purity.

The perception of New Zealand and New Zealand products in Canada is positive, although awareness of products other than wine, seafood and meats can be limited. The luxury market is much smaller per capita than the United States market, and can be found in Canada's major urban centres of Vancouver, Toronto and Montreal. However, premium products can still be sold into retail and food service providing pricing is not excessive.

Canada is the fastest growing market for New Zealand wines, with an annual growth rate of over 25 percent. Major retailers are constantly searching for new and innovative products, a good fit for New Zealand food and beverage manufacturers.

New Zealand companies should ensure they have gone through the process of preparing their product for the Canadian market, and treat the market differently from the United States market, including food safety certification, labelling and packaging, an understanding of duties and potential tariffs, regional focus and in-market representation and marketing capability.

2.3 Long Term Strategic Issues for Exporters to Consider

The Canadian market offers New Zealand food and beverage companies an excellent opportunity to start in a more manageable and forgiving market, build capabilities and capacity and ensure revenue in at least one North American market before expanding to the United States. This strategy has been adopted by a number of New Zealand companies, with solid results.

Restrictions on dairy products will continue to be an issue for New Zealand companies with any dairy components in their products for the foreseeable future. New Zealand food and beverage companies that plan to import dairy based products should consider the United States market as an entry point before the Canadian market.

2.4 Distribution Channels

New Zealand food and beverage companies wishing to work through distribution channels in Canada will find a wide range of partners, specific to the sectors that they wish to target.

Similar to the United States market, the Canadian industry structure includes retailers, wholesalers, brokers and other buying groups. Wholesalers or distributors typically buy, take possession of, and resell products. They provide a variety of services to suppliers including warehousing and physical distribution. The top ten food wholesalers control over 80 percent of all food wholesaling in Canada.

Brokers essentially perform the role of a manufacturer's sales force and are paid a commission for their services. Brokers do not take title to the goods. Alcoholic product brokers or agents will help negotiate with the large provincial liquor boards, a necessity in most provinces.

Retail food buyers include large retail chains (supermarkets, convenience stores and mass merchants) with wholly-owned wholesaling arms and independent wholesalers (which generally serve independents and smaller food retail chains). There are also specialty wholesalers who tend to carry limited product lines and specialise in niche markets.

Both the foodservice and retail food sectors in Canada have a sophisticated distribution network that must be understood in order to succeed. A variety of companies, both large and small will do the initial importing. These companies may do the distribution within Canada as well, or they pass it along to another company.

New Zealanders must learn to see Canada as a country of regions. Some of the largest foodservice buyers may only have regional buying authority, while other organizations may do buying at a national level and then distribute the product to the regions.

The major retailers in Canada will work directly with New Zealand companies, and in fact, prefer to do so in many categories. New Zealand companies must always be aware that, as in dealing with any large corporate, they need to have the capability and support required by these large retailers.

2.5 Pricing

As with any international market, New Zealand food and beverage companies must research and identify all applicable costs and margins that become part of the eventual list price to Canadian consumers, including:

- the cost of modifications to the product and labelling to conform to Canadian regulations
- the cost of any certifications, factory inspections or requirements for food safety
- the cost of shipping, insurance, warehousing and potentially cold storage
- the cost of applicable duties or tariffs, as well as a firm understanding of potential quota restrictions which may severely affect costs
- the cost of import agent or handling fees, taxation and filing of applicable forms with Customs Canada
- the cost of placement of products into major retailers, sometimes amounting to over NZ$100,000 NZD or more depending on the category or SKU
- margins required by importers, distributors and/or representatives in market
- margins required by retailers to customers.

New Zealand companies are strongly urged to obtain advice and expertise on these importing and pricing issues from specialists in the Canadian market.

3 MARKET RESOURCES AND CONTACTS

ORGANISATION	WEBLINK
Agriculture and Agri-Food Canada	www.agr.gc.ca
Canadian Food Inspection Agency	www.inspection.gc.ca
Health Canada	www.hc-sc.gc.ca
Canadian Dairy Commission	www.cdc.ca
Canadian Restaurant & Foodservices Association	www.cfra.ca
Canadian Health Food Association	www.chfa.ca
Canadian Federation of Independent Grocers	www.cfig.ca
Food and Consumer Products Manufacturers of Canada	www.fcpmc.com
Canadian Produce Marketing Association	www.cpma.ca
TRADE EVENTS	**WEBLINK**
Grocery Innovations Canada	www.groceryinnovations.com
Grocery Showcase West	www.cfig.ca
SIAL Canada	www.sialcanada.com
CRFA Show	www.crfa.ca
BC Foodservice Expo	www.crfa.ca/tradeshows/bcfse/
ApEx	www.crfa.ca/tradeshows/apex/
Alberta Foodservice Expo	www.albertafoodserviceexpo.ca
OTHER NZTE PUBLICATIONS	
REPORT	**WEBLINK**
Canada Country Brief	http://www.nzte.govt.nz/explore-export-markets/North-America/Doing-Business-in-Canada/Documents/Canada-country-brief-July-2010.pdf
Wine Market in Canada	http://www.nzte.govt.nz/explore-export-markets/market-research-by-industry/Food-and-beverage/Documents/Wine-market-in-Canada-September-2010.pdf

New Zealand TRADE & ENTERPRISE

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[1] Datamonitor. (June 2010). *Food Retail in Canada.*
[2] Datamonitor. (September 2010). *Food Service in Canada.*
[3] IGD Retail Analytics. (January 2011). *Canadian Food & Grocery Market Update*
[4] Economist Intelligence Unit (13 April 2011). *USA/Canada economy: EUI's latest assumptions*.
[5] IGD Retail Analytics. (January 2011). *Canadian Food & Grocery Market Update;* Business Monitor International. (December 2010). *Canada Food & Drink Report Q2 2011*
[6] Statistics NZ via The World Trade Map; Canada Customs via Trademap
[7] IGD Retail Analytics (February 2011). *Canada Country Presentation;* Datamonitor. (June 2010). *Food Retail in Canada.*
[8] Canadian Council of Ministers of the Environment (October 2009). *Canada-wide Action Plan for Extended Producer Responsibility* and *Canada-wide Strategy for Sustainable Packaging.*