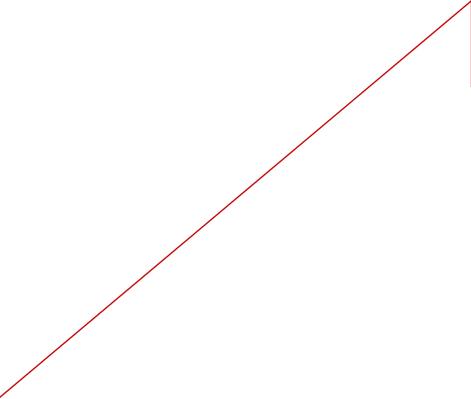
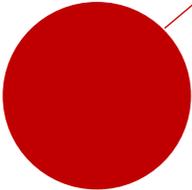


Canada Food Brand Project

Overview



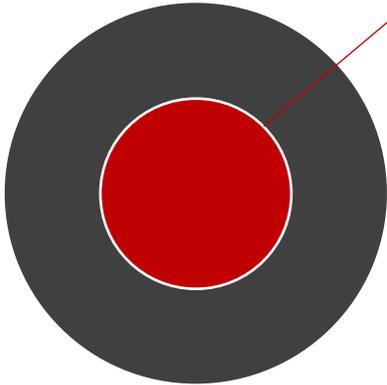
The “what”



Mission: Frame-up the Canada food brand
Be industry-led & highly collaborative with other sectors



The “what”

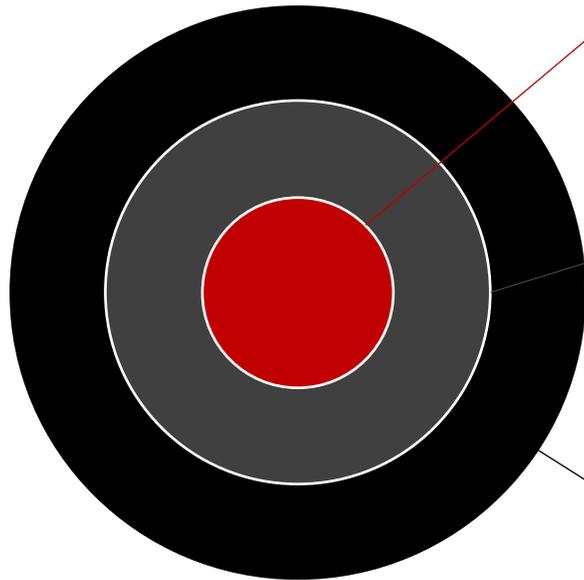


Mission: Frame-up the Canada food brand

Be industry-led & highly collaborative with other sectors

Goal: Industry & government champions adapt work as a *must-do* priority in late 2019 & 2020 – window of opportunity

The “what”



Mission: Frame-up the Canada food brand

Be industry-led & highly collaborative with other sectors

Goal: Industry & government champions adapt work as a *must-do* priority in late 2019 & 2020 – window of opportunity

Catalyst: Elevate the sector’s stature for next policy agenda

Enhance competitiveness & contribute to societal well-being

3 “dividends”: Encourage pre-competitive industry collaboration; align policy & regulation; inform research & innovation priorities



The “why”



Canada
food
brand

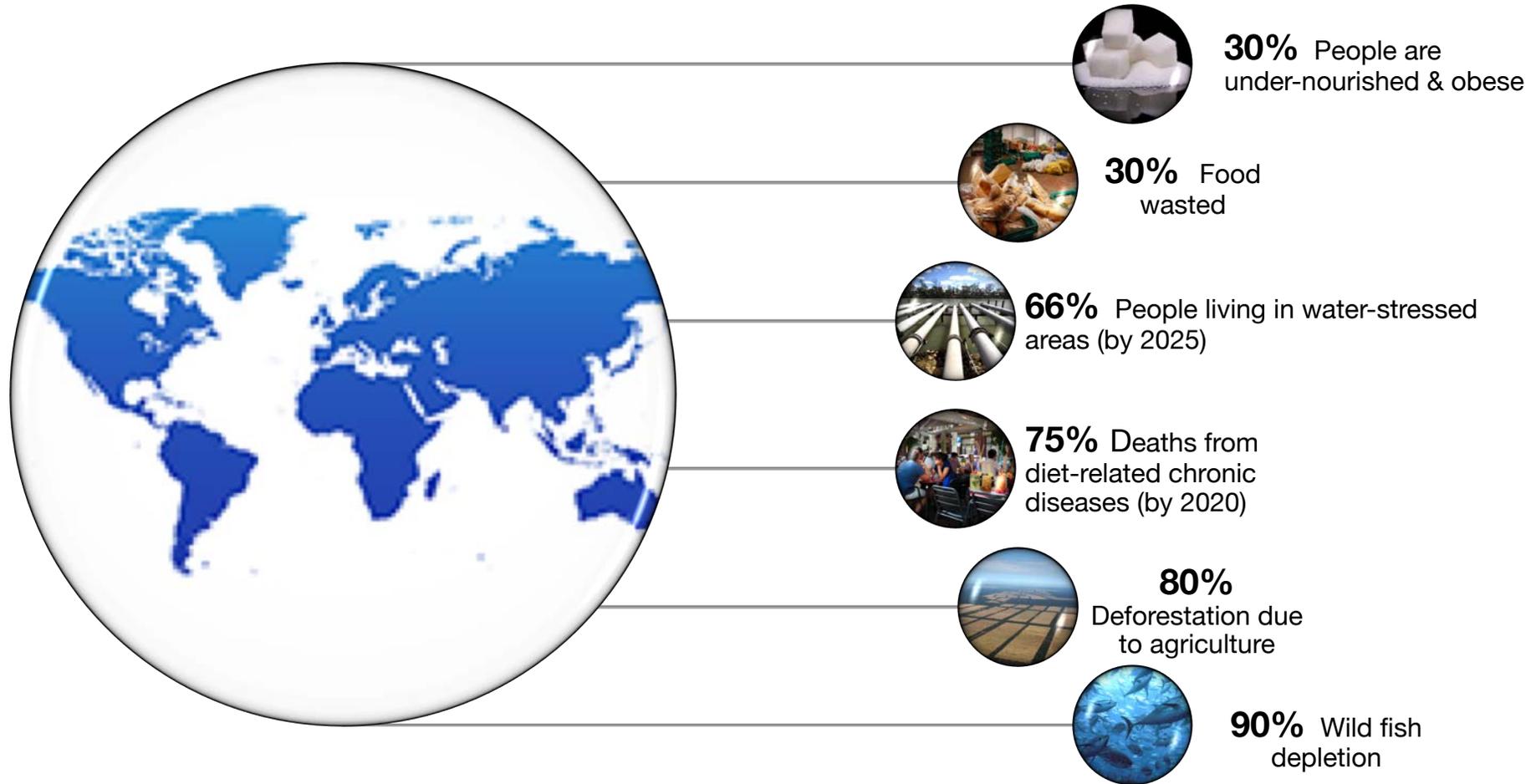
The world is going to **want more Canadian food...**

To compete, we **need “a strong & coordinated brand”...**

(ISED Economic Strategy Tables Report, Sept. 2018)

Our work is about building greater alignment around & articulating **the claims** that support the brand at a high level

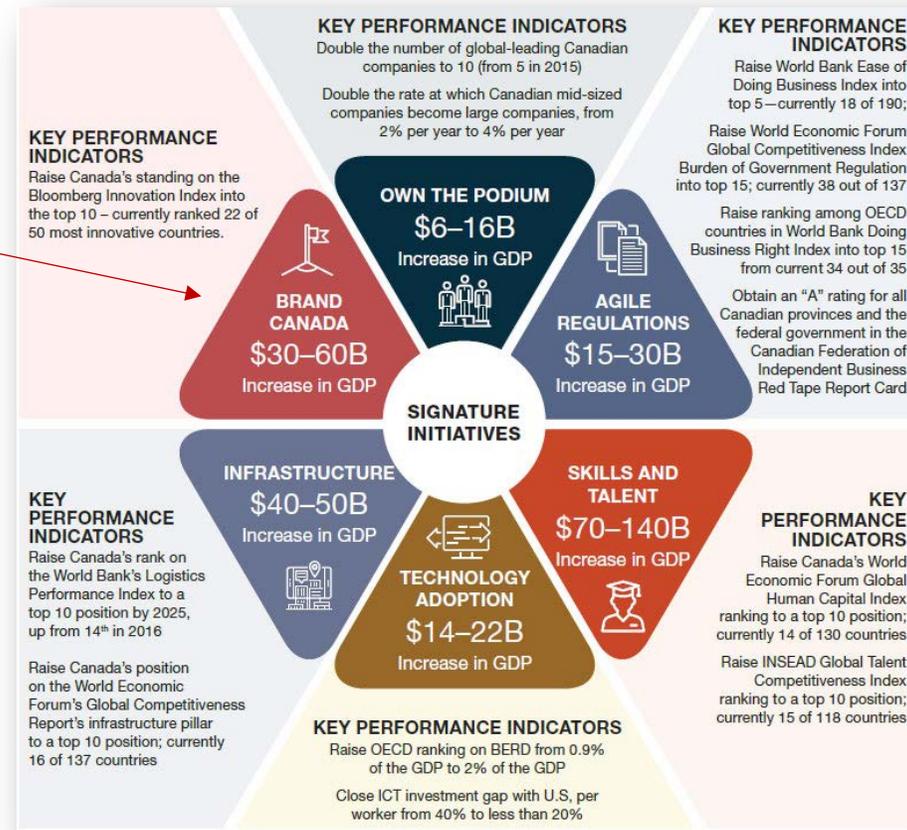
Despite a safe & abundant food supply for many... the global food system is increasingly unsustainable: The world is going to want more Canadian food



“One Brand” for agri-food called for – report from the Canada’s Economic Strategy Tables



“Increase the profile of Canadian agri-food products by advancing a strong and coordinated brand”



How do we differentiate Canada when... other countries are seeking to add value, too?

“By 2025, Canada will be one of the top five competitors in the agri-food sector, recognized as the most trusted, competitive and reliable supplier of safe, sustainable, high-quality agri-food products and an innovator in value-added products to feed the dynamic global consumer. We will have a leading digital and technology-based supply chain and stand out as the world's favoured protein provider.”

“That through Origin Green, Irish food and drink becomes the first choice globally because it is sustainably produced by people who care.”



“The Norwegian aquaculture industry represents the world's most environmentally friendly production of healthy food.”



“Made in China 2025” plan: value-added manufacturing (10 priorities, incl. ag equipment)
+
Belt & Road Initiative: involving > 60 countries & 60% of the world's population

“Over the next 20 years, Australia's F&A [food & agribusiness] sector has the potential to strengthen its position as a small but significant exporter of sustainable, authentic, healthy, high quality and consistent products.”



“New Zealand is the most trusted source of high value natural products in the world.”

Australia: CSIRO; Canada: A Report from Canada's Economic Strategy Tables (2018); Ireland: Bord Bia (the Irish Food Board); New Zealand: Ministry for Primary Industries; Norway: Norwegian Seafood Federation.
China's BRI: “To create the infrastructure, network, financial and policy conditions that will facilitate regional trade and cooperation” (HSBC); Centre for Strategic & International Studies (U.S.)

Brand: is this where we want to be?

TABLE 2 – CUSTOMER ASSOCIATION OF DESIRABLE ATTRIBUTES FOR KEY COUNTRIES PROMOTING A CLEAN AND GREEN BRAND

	AUSTRALIA (%)	MALAYSIA (%)	USA (%)	CHINA (%)	FRANCE (%)	BRAZIL (%)	CANADA (%)
Good value	32	21	30	31	20	24	24
High quality	37	14	41	12	42	18	34
Safe	39	17	34	13	31	19	36
Sustainable	31	15	19	13	20	21	25
Healthy	30	13	21	12	22	18	26

Source: Adapted from Reputation Institute, Country Reprtrak Study, February-March 2013.

“Australia’s clean and green brand is well regarded but is not unique and is poorly differentiated.”

vs.

New Zealand national brand: “100% Pure New Zealand”

Innovation: is this where we want to be?

Are international indices/data portraying an accurate picture & up to date?

Global Innovation Index 2018:

1. Switzerland
2. Netherlands
3. Sweden
4. UK
5. Singapore
6. USA
7. Finland
8. Denmark
9. Germany
10. Ireland
- 18. CANADA**

includes sub-indices...

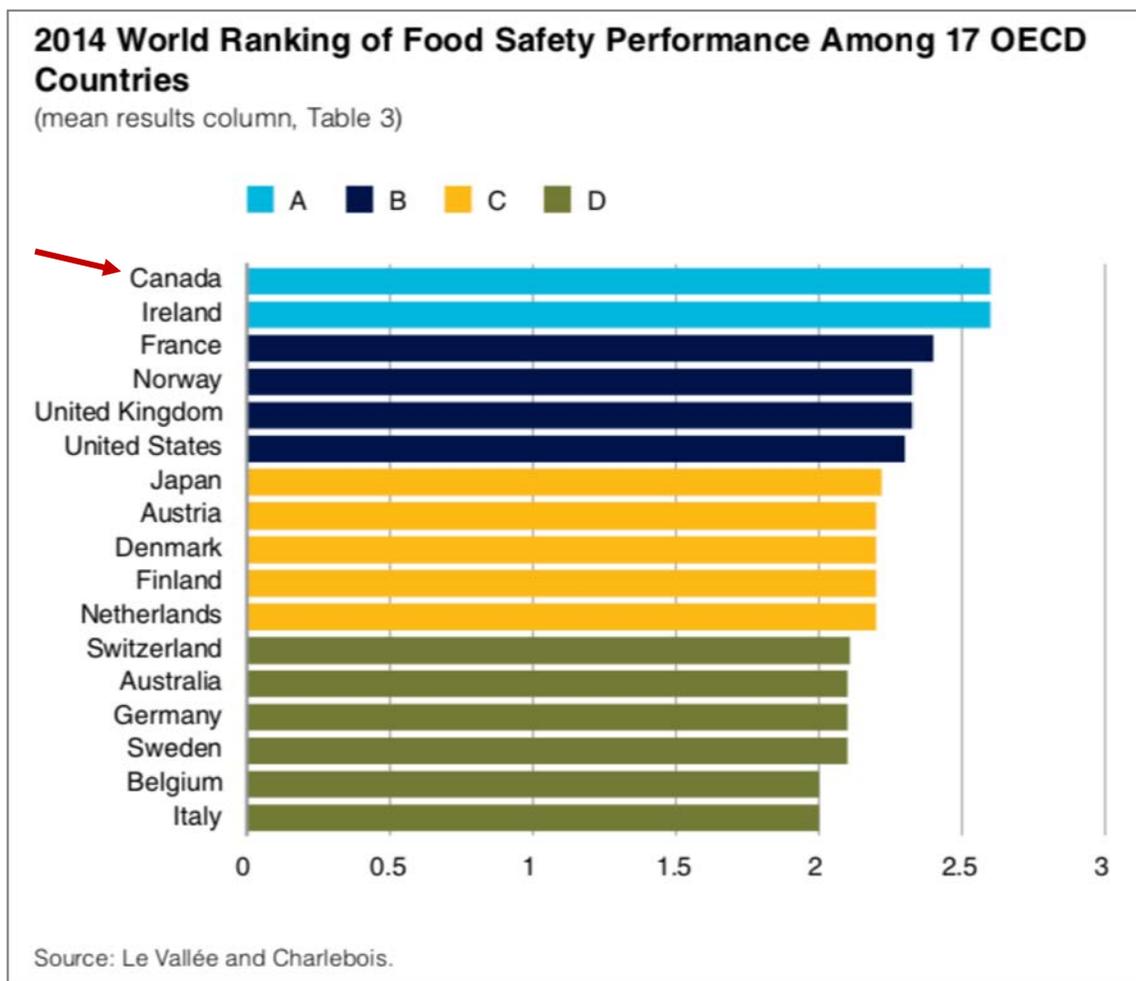
24th
Environmental performance

23rd
University / industry collaborations

23rd
State of cluster development



And Canada leads on food safety & other areas...



...plus leads & lags on a host of agri-food issues; e.g.,

- Soil health: “A”
- Nitrogen balance: “A”
- Water quality: “B”
- Food waste: “D”
- GHGs: “D”

How do we differentiate Canada when... global institutions have defined a change agenda?

UN Sustainable Development Goals – 2030

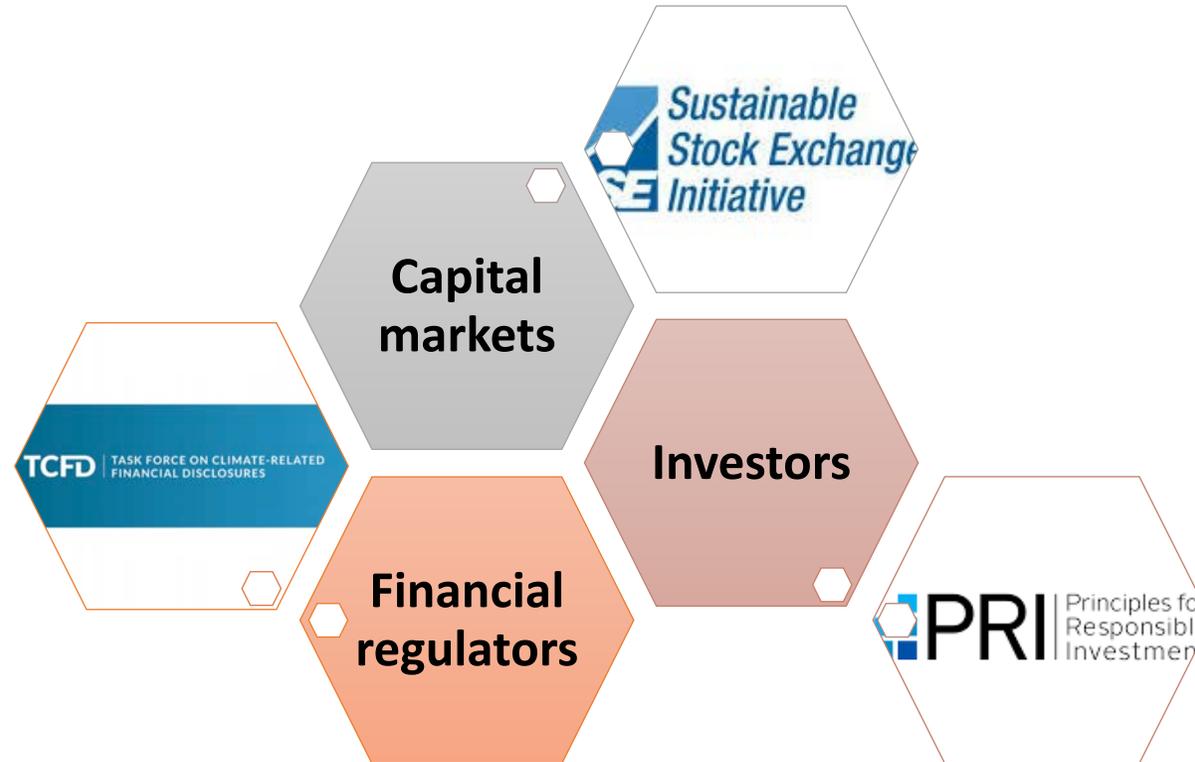


Build “inclusive, sustainable, efficient & nutritious food systems”



... and countries & corporations are being measured on their progress to meet the SDGs

How do we differentiate Canada when...
global investors, financial institutions & capital markets are adopting responsible investment principles based on Environmental, Social & Governance (ESG) performance?



How do we differentiate Canada when...
global & domestic sector-wide platforms are leading change?



Validates responsible beef production practices



Promotes crop fertilizer practices that provide economic, social & environmental benefits



Certified sustainable seafood



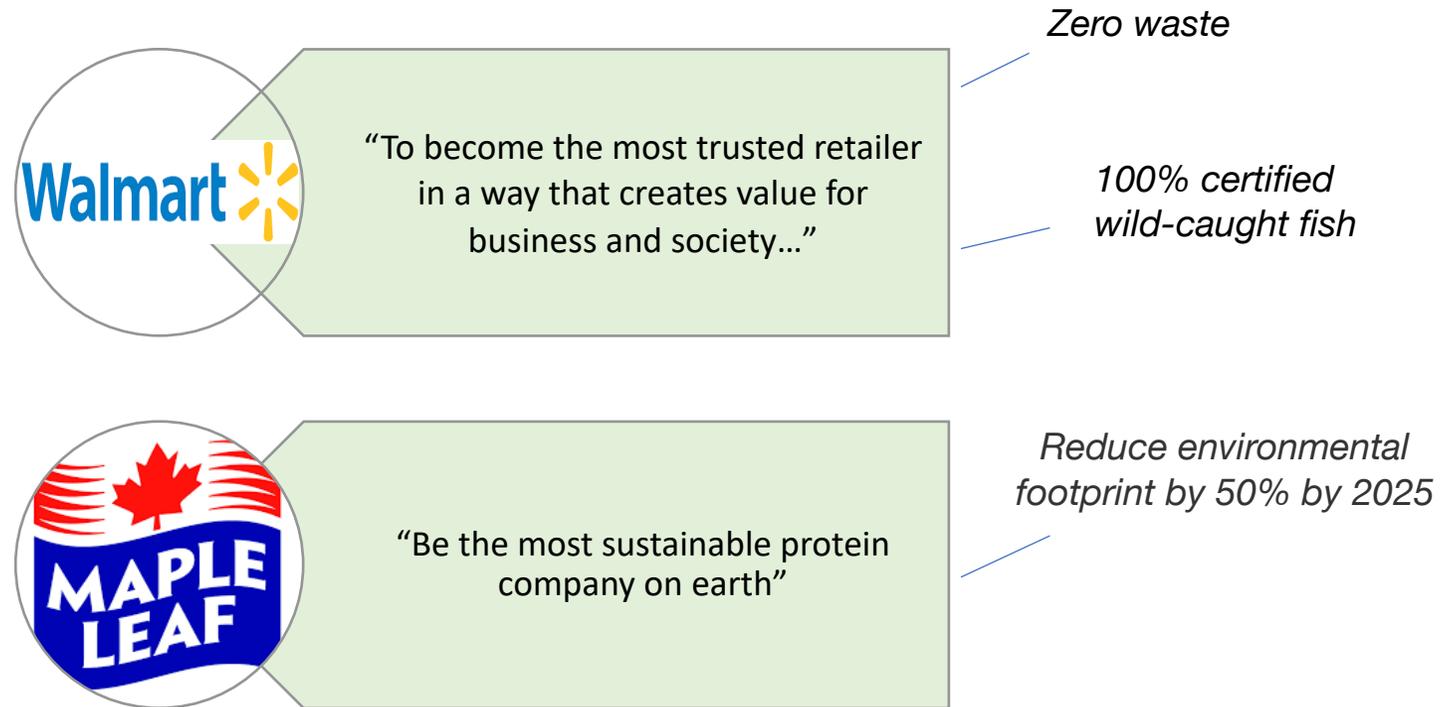
Promotes sustainable agriculture for global food & drink value chains



Standards to report on climate change, human rights, governance & social well-being.

Examples only; many other sectoral initiatives are underway.

How do we differentiate Canada when...
global & domestic companies express proprietary visions & targets?



Over 90% of the world's largest 250 companies disclose their sustainability performance (KPMG 2017)

Examples only; many other company initiatives are underway.

How do we differentiate Canada when...
the race to embrace digital food production is occurring worldwide?



- Artificial intelligence
- Blockchain
- Robotics
- Etc.

How do we differentiate Canada when...
governments worldwide & domestically are legislating change?



How do we differentiate Canada when...
international NGOs are calling on global agri-food companies to lead?



- Ranking how the largest global food & beverage companies contribute to better nutrition
- Leveraging the marketplace:
 - Tie improved nutrition performance to CEO remuneration & board accountabilities

...and other indices rank companies on ethics, human rights, animal care, impact on food security, biodiversity, sustainability, etc.

How do we differentiate Canada and... **keep this balance?**





The “how”

Lab	Lab	Roundtable	Lab	Lab	Lab	Lab	National Forum
Dec. 6, 2018	Feb. 6, 2019	Feb. 7, 2019	Mar. 7, 2019	Apr. 16, 2019	May 22, 2019	Sep. 2019	Nov. 6-7, 2019
“Brand 2.0”	“Digital food”	“Marketplace”	“Quality food”	“Trusted food”	“Sustainability”	“Brand is a promise”	“Competing in a new world order” Final work: Dec. 2019

Thank you **Participants, Presenters & Partners**





Please join us & help frame-up the Canada food brand
Canada2020.ca/canadafoodbrand