

# Canada Food Brand Project

Synthesis Report | What We Heard, Dec. 2018 – Sept. 2019  
Backing-up the Canada food brand to enable the country's food ambition

**This work is about stewarding Canada's food brand, using it to drive strategy and conferring benefits from doing so.**

The "Barton" and "Economic Strategy Table" reports<sup>1</sup> both declared that Canada can be one of the most trusted, safest, sustainable, nutritious and reliable food suppliers for the 21<sup>st</sup> century. But Canada is not the only one with big aspirations. Fine food suppliers elsewhere have similar ambitions (see p. 2). As well, societal and marketplace expectations are rising for everyone in response to profoundly challenging food issues facing the planet. People want reassurances that their food is safe, authentic and responsibly produced. Yet, many in this country believe that Canada's strong food brand is unmatched in meeting this bar. So what exactly stands behind Canada's food brand? And, can stewarding these claims change the way we compete, collaborate and regulate?

Canada 2020 embarked on a process from Dec. 2018 to Sept. 2019 to engage food system players<sup>2</sup> on these questions. We heard from nearly 300 stakeholders in a series of discussions across the country. It is apparent that the country's agri-food system faces an essential choice.

***Is protecting and leveraging Canada's food reputation a strategic priority or not?***

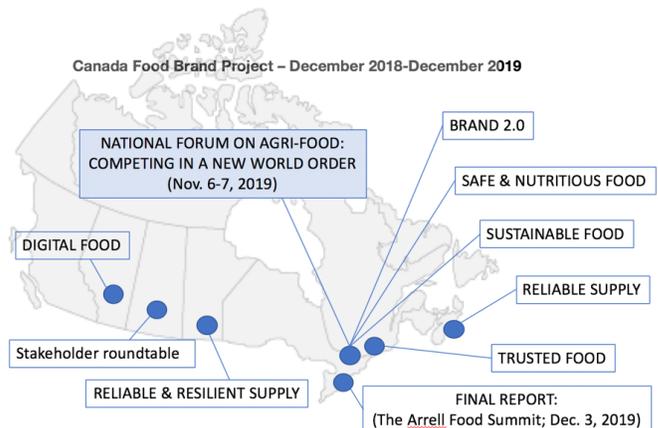
Answering this could mean the difference between remaining as a quality food producer and, indeed, becoming one of the world's most trusted suppliers. Based on what we heard, substantiating food brand claims is essential for a highly-responsible, global-leading, performance-driven food system. Achieving

Trusted  
Safe Quality  
Sustainable  
Nutritious Reliable  
Clean

this requires shared leadership and four connected ideas (addressed below) could make this possible.

Stakeholders will have to decide if this issue merits being a feature of the next policy agenda. (This report is not about telling anyone how to market food brands.) The dialogue continues in Ottawa at the *National Forum on Agri-Food: Competing in a New World Order*, November 6-7, 2019, where priorities for taking action will be identified.

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<sup>1</sup> The Advisory Council on Economic Growth, 2017; Canada's Economic Strategy Tables: Agri-Food, 2018.

<sup>2</sup> Food system: supply chains (food, beverage, fish & seafood) and a diversity of support sectors, including academia, scientists, technology providers, input providers, shippers, financial services, governments.

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## Backing-up the Canada Food Brand to Enable the Country's Food Ambition

### Scrutiny is staggering.

There is a widening view that the current global food system is “unsustainable.”<sup>3</sup> A plethora of global and corporate goals are trying to shift behaviours – even transform – how food systems respond.<sup>4</sup> A new language is being introduced as commodity sectors, food companies, NGOs, and others, seek to produce food differently, such as embracing *regenerative agriculture*, the *circular economy* and *true cost accounting*. But the scrutiny will only increase.

### Competing on reputation.

While price continues to drive many food purchase decisions, customers (i.e., retailers, processors), consumers, investors and others also want reassurances that ingredients and foods are safe and authentic, ethically and sustainably produced, nutritious and can be reliably supplied. Competing in the future will depend in part on how quality food systems demonstrate such responsibility – and countries are positioning themselves to do so:



#### The Barton Report (2017)

“Canada will become the trusted global leader in safe, nutritious and sustainable food for the 21<sup>st</sup> century – would reflect the strength of our starting position, as well as the global trends we can exploit”



#### Economic Table report (2018)

“By 2025, Canada will be one of the top five competitors in the agri-food sector, recognized as the most trusted and reliable supplier of safe, sustainable, high quality agri-food products to feed the dynamic global consumer.”



#### National food policy report (2018)

“The Canadian food system provides a sustainable food supply so that all people in Canada, no matter where they live, have the ability to access a sufficient amount of safe, nutritious, and culturally-appropriate food, that in turn contributes to their health, and that of our environment and our economy.”



#### Senate Committee on Agriculture (2019)

“...[government] develop and fund an effective global marketing program that explicitly focuses on increasing the value of the Canada Brand in the minds of global consumers.”



#### USDA

“Do right. Feed everyone.”



#### Bord Bia, Ireland

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



#### Norwegian aquaculture industry

“... the world's most environmentally friendly production of healthy food.”



#### New Zealand Ministry for Primary Industries

“... the most trusted source of high value natural [food] products in the world.”



#### Australia's food and agribusiness sector

“... to strengthen its position as a small but significant exporter of sustainable, authentic, healthy, high quality and consistent products.”

<sup>3</sup> *Innovation with a Purpose: The role of technology innovation in accelerating food systems transformation*, World Economic Forum, 2018; World Business Council on Sustainable Development; World Resources Institute, 2019.

<sup>4</sup> E.g., the 17 UN Sustainable Development Goals by 2030. One Planet Business for Biodiversity (OP2B) pledges to “take bold action to protect and restore cultivated and natural biodiversity within their value chains” (Canadian companies are members).

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## Canada's opportunity.

Stewarding a nation's food brand is critical – and Canada can, if it chooses, respond to this.

Many are confident about Canada's food future because of the country's relative strengths (e.g., good governance, regulatory reputation, innovative people) and natural advantages (e.g., good soil, climate, water). But this is insufficient and cannot be taken for granted. There are no assurances that Canada will attract the investment and talent required to leverage what we possess, nor necessarily win the premiums in and access to desired markets. We also heard about what the food system is not delivering. Food security remains elusive for many Canadians. While sustainability practices have advanced, significant environmental pressures persist, including on biodiversity. Some are frustrated that the country revisits the same issues. Still, we were encouraged.

Based on what we heard, Canada can develop the metrics and processes needed to **verify** the claims being made about its food. It can rely on deeper collaborations across the food system to **protect** the Canada food brand. And, it can **project** what stands behind this to build greater trust at home, inform decision-making and advance our interests abroad. Being a recognized global food leader appears to be within reach. From what we heard four ideas can help make this happen (below).

## Four ideas for change

### 1. Steward food claims to steward the brand.

Despite Canada's quality food reputation (such as for food safety and sustainability), better metrics and benchmarks are required to demonstrate performance. Consumers are

signalling this (e.g., some 54% of Canadians are concerned about food safety).<sup>5</sup> Global indices and NGO report cards track national performance and, for Canada, they are not always glowing (e.g., underperforming on environmental sustainability and shipment reliability).<sup>6</sup> Methodologies may deserve scrutiny and may not be specific enough but transparency is ramping up. We heard that regularly benchmarking of Canadian food safety vis-à-vis other countries is unavailable, zoonotic disease risks require real-time surveillance and there is no national measure of transportation reliability (across all modes).

Moreover, a prevailing global interpretation of what is *sustainable farming* seems to discount Canada's leading agricultural practices and its sustainability record which is helping to "justify" veiled protectionist actions against Canada (e.g., Italy blocking imports of Durum wheat despite CETA). As well, investors are being guided by globally adopted environmental, social and governance ("ESG") principles. Some US\$ 23 trillion assets under global management subscribe to ESG investing; e.g., pension funds are investing in lower carbon footprint companies. Growing interest in the agri-food sector by such players could lead for calls for better sustainability data and broader risk assessments (e.g., coping with climate change).

**ACTION** Substantiating Canada's food claims on a precompetitive basis needs to be a deliberate strategy. Validating food claims could include a "sustainability index" and a scorecard showing industry progress on meeting U.N. Sustainable Development Goals (SDGs). Metrics should be jointly developed (e.g., industry, academia, gov't) and be used as a tool for stepping-up proactive discussions between the food industry and key sectors, such as transport, environment and health.

<sup>5</sup> Canadian Centre for Food Integrity, 2018.

<sup>6</sup> E.g., Canada's average corporate sustainability score is C- (CDP); the World Bank's Logistics Performance Index ranks Canada 20<sup>th</sup>.

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## 2. Leverage 'collaborative discipline'.

By setting targets on sustainable and responsible sourcing of ingredients and promoting more nutritious foods, a new leadership model is emerging across domestic and global supply chains. It is industry-led and is becoming intensely collaborative, data-enabled, more transparent and accountable. Canada is a global leader in some (certified sustainable beef; 4-R fertilizer program), is a top-tier performer (pork has the 2<sup>nd</sup> lowest carbon footprint; food-grade soy traceability; sustainable wild caught seafood) and is conforming to global best practices in others (certified sustainable canola; horticultural food safety). But retailers struggle with varying quality and rigour of commodity sustainability certifications. Data is lacking to assess Canada's overall *food print*. Plus, improving *nutrient quality* could become a greater value-added driver but food-health sector collaborations and research are not being fulfilled.

**ACTION** If sustainability is “the differentiator of the future”, as noted by one commodity sector leader, then industry needs to deepen its collaborations, link-up its initiatives and present a consolidated picture of national performance (and gaps).

## 3. Accelerate digital advantages.

Technological, scientific and data system innovation boost productivity and profitability on-farms and across supply chains (e.g., reporting on and optimizing inputs and reducing GHGs) and this is vital to remain as a reliable food supplier. Importantly, digital advantages generate a financial ROI and enable a “return on responsibility” for society; e.g., improving and measuring soil health is good for productivity and sequestering more carbon. For some, establishing product provenance is a differentiator (we heard about Canada's first *blockchain beer*) and demonstrating claims is a value-added driver in the marketplace. In the U.S., Walmart requires all products to be traced, a requirement to get shelf-space. The race to trace and demonstrate care requires good data systems. But

advanced technologies are still emerging, access to rural broad-band is a hurdle, and there are issues with data-ownership, privacy.

**ACTION** Accounting for practices from farm to plate is becoming so fundamental to operating in the marketplace that data and technology innovators need to be an essential part of supply chain and policy dialogues.

## 4. Create a new policy lens.

Embedding *brand claims thinking* into public policy discussions and choices is becoming essential to meet competitiveness and societal goals. Good data (see above) can be used to credibly accelerate regulatory assessments and approvals. The importance of protecting Canada's food reputation should encourage accountability for policy coherence across departments and improve how Canada attracts and retains investment.

**ACTION** Protecting the country's food brand needs to be a pillar of the next policy agenda.

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*Canada 2020 thanks its food lab partners:* Arrell Food Institute (University of Guelph), Food & Consumer Products of Canada, Genome Canada, GS1 Canada, National Research Council, Nutrien, Olds College, Protein Industries Canada, Syngenta

*... and thanks its national forum partners:* Agriculture & Agri-Food Canada, Arrell Food Institute (University of Guelph), Dairy Farmers of Canada, Enterprise Machine Intelligence & Learning Initiative (EMILI), Food & Beverage Canada, Genome Canada, Fisheries Council of Canada, Global Institute for Food Security, Lakeland College, Syngenta, TrustBIX Inc.

(Revised December 2019)

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## Canada 2020 food dialogues – participants

\* This list does not include all consultations. For lab notes and other background, [click here](#)

ACOA  
Ag-West Bio  
Agriculture & Agri-Food Canada  
Alberta Agriculture  
Alberta Diabetes Foundation  
Alberta Innovates  
Alberta Machine Intelligence Institute  
Arrell Food Institute, University of Guelph  
Association of Canadian Faculties of  
Agriculture & Veterinary Medicine  
Association of Equipment Manufacturers  
Atlantic Food & Beverage  
Atlantic Provinces Trucking Association  
AVAC  
Bayer  
Beyond Agronomy  
Bioscience Association of Manitoba  
Calgary Economic Development  
CDP  
Canada Organic Trade Association  
Canada West Foundation  
Canada Roundtable for Sustainable Crops  
Canadian Agri-Food Sustainability Initiative  
Canadian Aquaculture Industry Alliance  
Canadian Canola Growers Association  
Canadian Cattlemen's Association  
Canadian Centre for Food Integrity  
Canadian Chamber of Commerce  
Canadian Federation of Agriculture  
Canadian Food Inspection Agency  
Canadian Foodgrains Bank  
Canadian Food Processors Institute  
Canadian Horticulture Council  
Canadian Meat Council  
Canadian Nutrition Society  
Canadian Produce Marketing Association  
Canadian Public Health Association  
Canadian Roundtable for Sustainable Beef

Canadian Supply Chain Food Safety Coalition  
Canadian Vintners Association  
Canadian Wildlife Foundation  
Canola Council  
Canola Growers of Canada  
CAPI  
Carleton University  
Cargill  
Caisse de dépôt et placement du Québec  
Cavendish Farms  
Cereals Canada  
Chamber of Digital Commerce Canada  
Chicken Farmers of Canada  
City of Guelph  
City of Ottawa  
City of Toronto; St.Lawrence Market  
CN  
Compute Canada  
Conference Board of Canada  
Conseil de la Transformation Alimentaire  
du Québec  
Cornell University  
Corteva  
CropLife Canada  
Culinary Tourism Alliance  
Dalhousie University  
Danone Canada  
Développement international Desjardins  
DOT Retail Ready  
Ducks Unlimited  
EAT Forum  
Egg Farmers of Canada  
Emerging Ag Inc.  
EMILI  
Enns Brothers  
Environment & Climate Change Canada  
Farm Credit Canada  
Farmers Edge Inc.  
Fertilizer Canada  
Field Agent Canada  
Fisheries Council of Canada  
Food & Consumer Products of Canada  
Food & Beverage Canada  
Food Island Partnership

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Food Secure Canada  
Feedlot Health  
Gay Lea Foods  
Genome Alberta  
Genome Canada  
Global Advantage Consulting Group  
Global Affairs Canada  
Global Alliance for Improved Nutrition  
Global Institute for Food Security  
Gowlings  
Grain Growers of Canada  
Grain Farmers of Ontario  
GS1 Canada  
Halifax International Airport Authority  
Health Canada  
Ideovation  
Innovation, Science and Economic  
Development Canada  
Innotech Alberta  
InfraReady Products  
Inter-American Institute for Cooperation  
on Agriculture  
ISM/IBM Canada  
Keystone Agricultural Producers  
Lakeland College  
Laval University  
Les Éleveurs de porcs du Québec  
Livestock Research Innovation Corporation  
Loblaw Companies Limited  
Maple Leaf Foods  
Manitoba Agriculture  
McConnell Foundation  
MSCI World Index  
National Cattle Feeders  
National Research Council  
Natural Products Canada  
Nestle Canada  
Nova Scotia Business Inc.  
Nova Scotia Federation of Agriculture  
Nutrien  
Nutrition International  
Olds College  
Ontario Federation of Agriculture  
Orion Global Business Sustainability Consultants  
PAMI  
Passmore Group  
POS  
Port of Halifax  
Premium Ag  
Protein Industries Canada  
Provision Analytics  
Pulse Canada  
Red Shed Malting  
Restaurants Canada  
Richardson International Ltd  
Saik Management Group Inc.  
Sift Every Thing  
Smart Prosperity Institute, University of Ottawa  
Statistics Canada  
Standards Council of Canada  
Syngenta  
TD  
TELUS  
TrustBIX  
University of British Columbia  
University of Lethbridge  
University of Ottawa  
University of Saskatchewan  
University of Toronto  
Viresco Solutions  
Western Economic Diversification  
Wild Blueberry Producers Association of  
Nova Scotia