

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" reports¹ both declared that Canada can be one of the most trusted, safest, sustainable, nutritious and reliable food suppliers for the 21st 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 players² 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

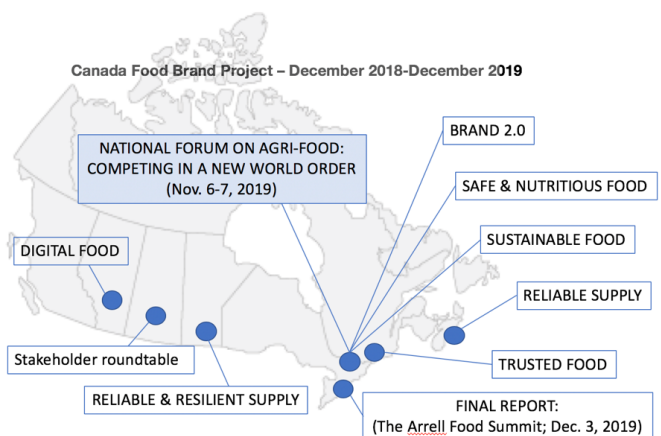
¹ The Advisory Council on Economic Growth, 2017; Canada's Economic Strategy Tables: Agri-Food, 2018.

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.

David McInnes,
Senior Fellow, Canada 2020



² 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.

This document does not imply endorsement by partners or participants

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Scrutiny is staggering.

There is a widening view that the current global food system is “unsustainable.”³ A plethora of global and corporate goals are trying to shift behaviours – even transform – how food systems respond.⁴ 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 21st 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.”

³ *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.

⁴ 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).⁵ 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).⁶ 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 \$80 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.

⁵ Canadian Centre for Food Integrity, 2018.

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

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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 2nd 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.

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.

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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
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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