

A Pathway to a Healthy & Prosperous Future

July 2010

A Draft Discussion Paper



Can we afford to eat the same way?

No.

What does this mean for the health and agri-food sectors?

What does this mean for the health of Canadians?

Foreword

In February 2010, the Canadian Agri-Food Policy Institute (CAPI) seized upon the growing interest in food and health and hosted a “Leaders Summit on Food for a Healthy and Prosperous Future.”

- ▶ Over 60 leaders came together representing the health community, educators, scientists, producers, food processors/manufacturers, entrepreneurs, farmers, retailers, restaurants, and governments.
- ▶ The Summit generated a sense of purpose and a genuine desire to work collaboratively. It revealed what’s possible by linking agriculture and health priorities. It crystalized for many what is already occurring across Canada: that there is a movement underway to improve health through food.
- ▶ The Summit also raised questions about how an integrated strategy could be developed and work in practice. People wanted to know how this approach will address the challenges they are facing and deliver benefits right across the agri-food supply chain.
- ▶ The Summit revealed that a means is needed to help diverse stakeholders to move forward.

It is very early in the development of “The Pathway” – our response to this need.

In the spirit of bringing in views about what’s working and what we need to consider in developing the way forward to achieve a healthier population and a more prosperous society through better integrating food and health, your participation is important. This document is intended to be a thought-starter. We want to hear your comments, create the dialogue and identify how we can work together.

Please refer to CAPI’s background research on the connections between the agri-food and health sectors: *Finding Common Ground* and *Building Convergence* (see www.capi-icpa.ca).

“A national vision with clear goals is needed now.”

*Ken Knox,
President,
Innovation
Institute
of Ontario*

“The value of linking food and health is self-evident. The hard part is how we make it happen.”

*Laurent Pellerin,
President,
Canadian
Federation of
Agriculture*

The case for change

Consumers face health challenges driven largely by their diets and food habits.

Canada's health and agri-food sectors face strains (see ahead).

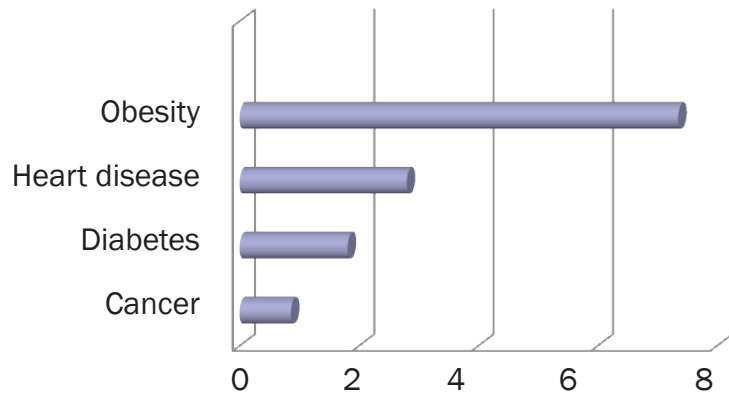
But, the challenges – and prospects – faced by all are intimately linked.

The future well-being of the consumer is at the core.

How these sectors respond together to address this is fundamentally important to Canada.

The case for change: Consumers

Prevalence of chronic disease in Canada
Population (millions)



Consumer lifestyle, food habits and diets are unhealthy.

The World Health Organization indicates that at least 80% of premature heart disease, stroke and type 2 diabetes and 40% of cancer could be prevented through a healthy diet, as part of a healthy lifestyle.

Unhealthy eating is a critical consumer and societal issue.

Food-health “literacy” is an issue

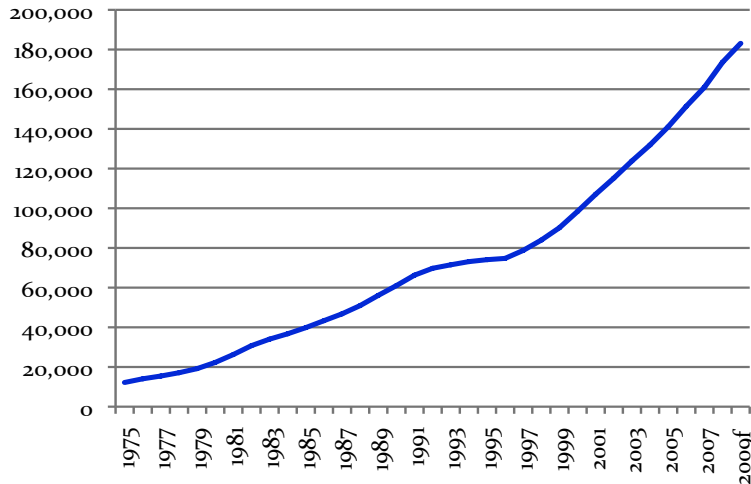
- ▶ Consumers want to eat better (e.g., demand for good-for-you foods and functional foods, demand for organic foods, interest in “100 km” diets, etc.) but many consumers have poor food skills, such as how to shop, prepare and consume foods that are important to their health.
- ▶ Over half of Canadians consume less than 5 fruits and vegetables per day – far short of the required 5-10 servings/day.

Graph: Measured excluding the territories; Source: CCHS 2004, Heart & Stroke Foundation of Canada, PHAC, as reported in: *Building Convergence: Toward an Integrated Health & Agri-Food Strategy for Canada*. (p. 15). CAPI, 2009.

Fruit/vegetable servings for Canadians aged 12 and older; Source: Statistics Canada, 2005, as reported in *Building Convergence* (p.20).

The case for change: Health

Trend in total healthcare expenditures in Canada
(\$ millions, current)



Canada faces critical health problems

- ▶ Cancer, cardiovascular disease, respiratory disease and diabetes account for 32% of hospital admissions.
- ▶ One of the greatest public healthcare challenges is the overweight and obesity “epidemic.”



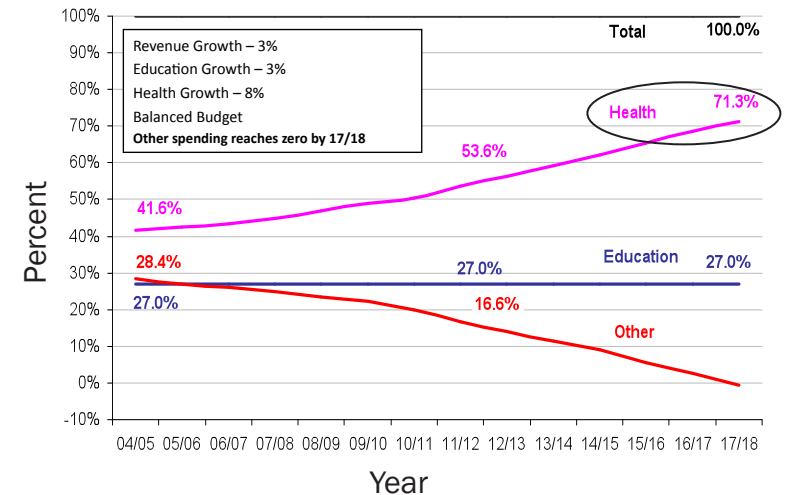
Healthcare costs are unsustainable.

The impact?

Example: British Columbia’s healthcare budget (see chart below) will consume over 70% of provincial spending, if left unchecked by 2017/18, leaving little room for other priorities.

There is a critical need to shift attention toward “prevention.”

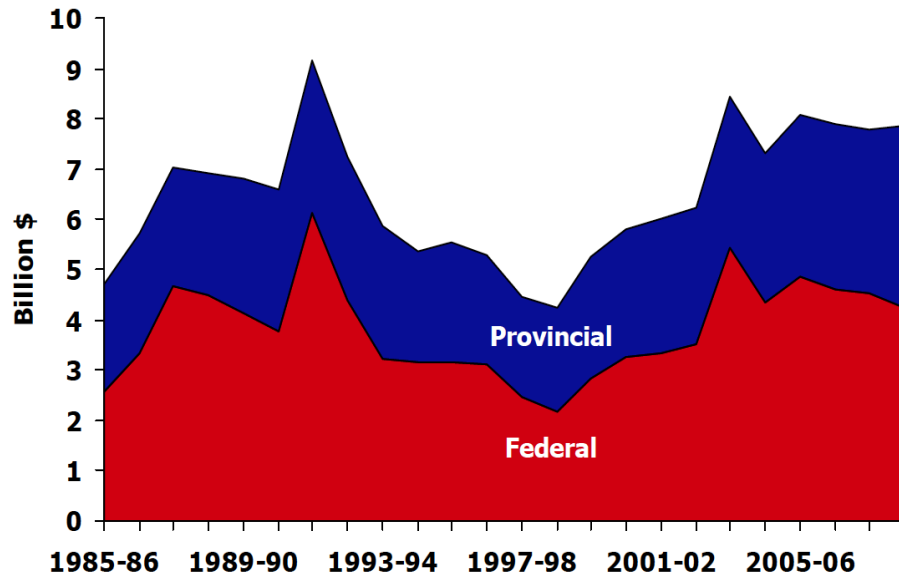
Trends in British Columbia’s provincial budget



Canada healthcare graph source: Canadian Institute for Health Information; B.C. graph source: John Millar, Provincial Health Services Authority, 2010; Ontario’s healthcare consumes 46% of the provincial budget, up from 37% since 2000/01.

The case for change: Agriculture and agri-food

Government Expenditures in Support of the Agriculture and Agri-Food Sector, 1985-86 to 2008-09



→ Program costs are “perpetual” and unsustainable.

In 2008-2009, government support to farmers was estimated at nearly \$8 billion, or about 30% of total agriculture and agri-food sector GDP.

Productivity is one issue. Canadian public investment in R&D has decreased; private sector investment lags competitors.

A strategic shift is needed. Productivity, innovation and economic viability are linked. A new approach is required.

An integrated health and agri-food strategy for Canada is a critical step in this strategic shift.

Canada’s agri-food sector faces critical issues, such as:

- ▶ Since 2002, Canada’s position as a global exporter has fallen from 5th to 9th place.
- ▶ In a ranking of the top 20 food processors in Canada and the U.S., only one is Canadian (17th place).
- ▶ Only one Canadian company is ranked in the top 25 retailers globally, and it is in 24th place.

Graph source: *An Overview of the Canadian Agriculture and Agri-Food System* (p. 134). Agriculture and Agri-Food Canada. 2009. Note: 2008-09 figures are forecasts; Private sector investment data taken from *Building Convergence: Toward an Integrated Health & Agri-Food Strategy for Canada*. (p. 72). CAPI, 2009.

“When people look at the same stars, eventually they take steps to reach the same objectives.”



*Gaetan Lussier,
Chair,
Canadian
Agri-Food Policy
Institute*

Food connects us

“Food” links the agri-food and health sectors.

But the consumer’s diet is the core issue.

This drives consumption. This influences health outcomes.

Can the health and agri-food sectors collaborate to improve consumer health?

What would it take to be the best in the world in doing so?

This is fundamental to creating a healthy, sustainable & prosperous future for Canada.

What are we trying to achieve?

By collaborating, we can improve ...

- ▶ Understanding: Identify what is holding us back from resolving our issues.
- ▶ Engagement: Reach out to those who truly want to create solutions.
- ▶ Alignment: Create common objectives in order to work together.

This creates opportunities for ...

- ▶ **Consumers:** Help Canadians make better food choices.

In turn, this creates opportunities for ...

- ▶ **The Agri-food sector:** To produce and supply healthier and innovative foods.
- ▶ **The Health sector:** To improve population health outcomes.

“The industry just responds to consumers who drive the market 100 percent.”

*John F. T. Scott,
President,
Canadian Federation
of Independent
Grocers*

Healthier food choices creates a win-win-win...

Consumers win

Choice of better-for-you foods

Better food skills

Clear information/better understanding to compare foods

Broader access to affordable healthy foods

Trust in Canada's safe food supply

Agri-food sector wins

New foods ... new markets: e.g.,

- ▶ Ethnic-urban population
- ▶ Exports

Evidence-based decisions creates new opportunities for more nutritious foods

New ways of doing business: e.g.,

- ▶ Farmer & retailer "talk"
- ▶ Availability of local processing
- ▶ Partner with health researchers

Realizing financial returns (ROI)

Health community wins

Availability and consumption of more nutritious foods

Longer-term population health improvements

Increasing attention to disease-prevention aligns governments and health partners

Sound science is the basis for decisions

But we face obstacles

in the Agri-Food Sector

- ▶ Deriving value from products, profitability, across the sector
- ▶ Disconnects in the value chain
- ▶ Adequacy of R&D
- ▶ Capacity to commercialize
- ▶ Regulatory hurdles
- ▶ Burdens of doing business

We need to resolve such challenges to achieve our goal:

- ▶ Focus on disease treatment, not prevention
- ▶ Nutrition and diet information
- ▶ Consumer trust in food supply
- ▶ Consumer knowledge
- ▶ Availability of nutritious foods
- ▶ Consumers' diets and food habits

Healthier consumers

in the Health & Wellness Sector

(Obstacles are indicative)

Collaborations need priorities*

in the Agri-Food Sector

- ▶ Better connections across the value chain to respond to the market
- ▶ Support for evidence-based decisions
- ▶ Regulations that facilitate innovation

Collaborations are needed to create change:

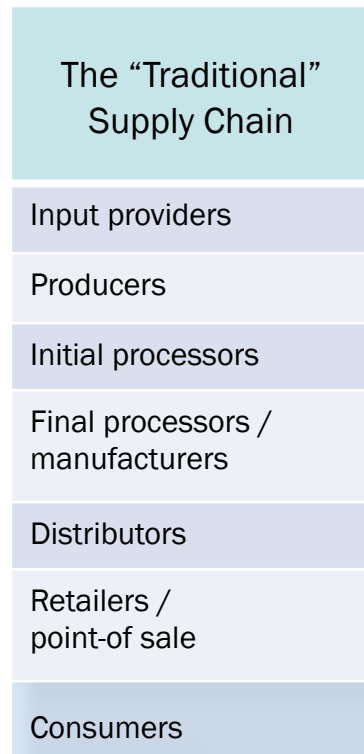
- ▶ Improved consumer nutrition and diet skills
- ▶ Focus on “prevention” advances R&D
- ▶ Innovative ways to improve access to healthier foods and create better choices

Healthier consumers

in the Health & Wellness Sector

* Examples, priorities require validation

How we work today has limitations



The traditional supply chain is linear:

Stakeholders focus on their segment, or an adjacent segment, and rarely work across the chain.

Other potential stakeholders are largely left out (e.g., government which is seen mainly as the regulator).

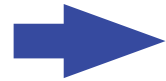
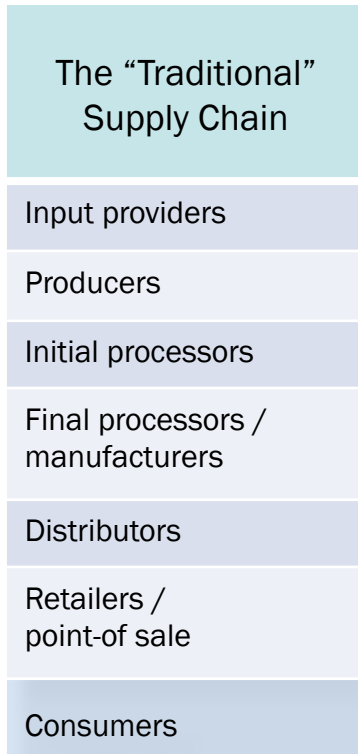
The “consumer” can be a distant connection.

... We need to adopt a better approach.

“Canada is flush with capabilities in agriculture, innovation, research and manufacturing. We need all the players to rally around the vision and be determined to eliminate the barriers and to collaborate... the supply chain is ready and willing to work with government and others to enable real change.”

*Nancy Croitoru,
President & CEO,
Food & Consumer Products of Canada*

We need to change our relationships

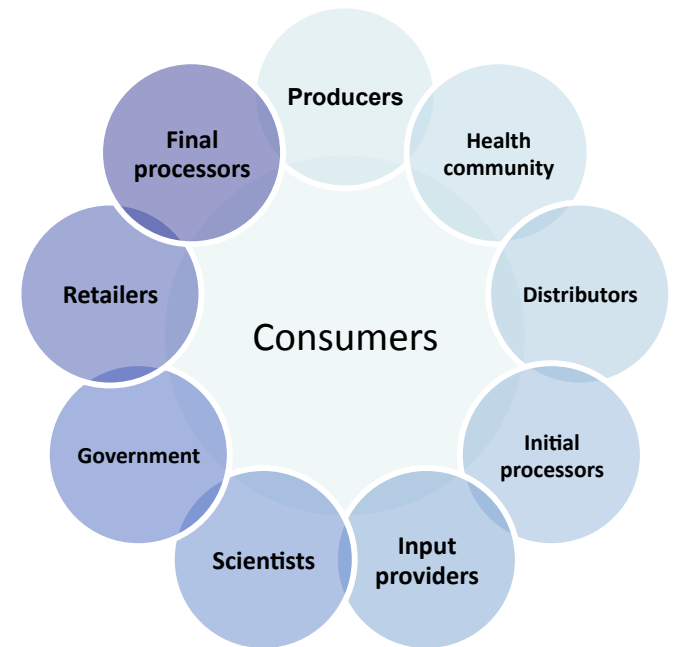


The new approach is collaborative:

Stakeholders reach out to other segments to enable change, overcome barriers and create opportunity.

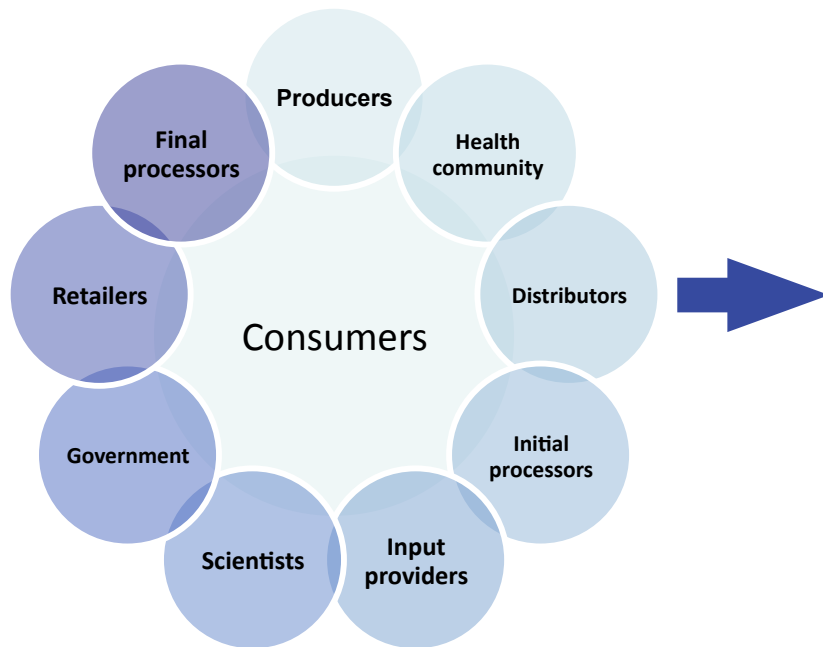
“Scientists”, the “health community” and “government”, among others, are now included as stakeholders.

All seek to better understand the end-user: the consumer.



The New Collaborative Approach

Each stakeholder must be willing to reach out



The new approach is collaborative:

Each stakeholder understands that there will be differences and limitations.

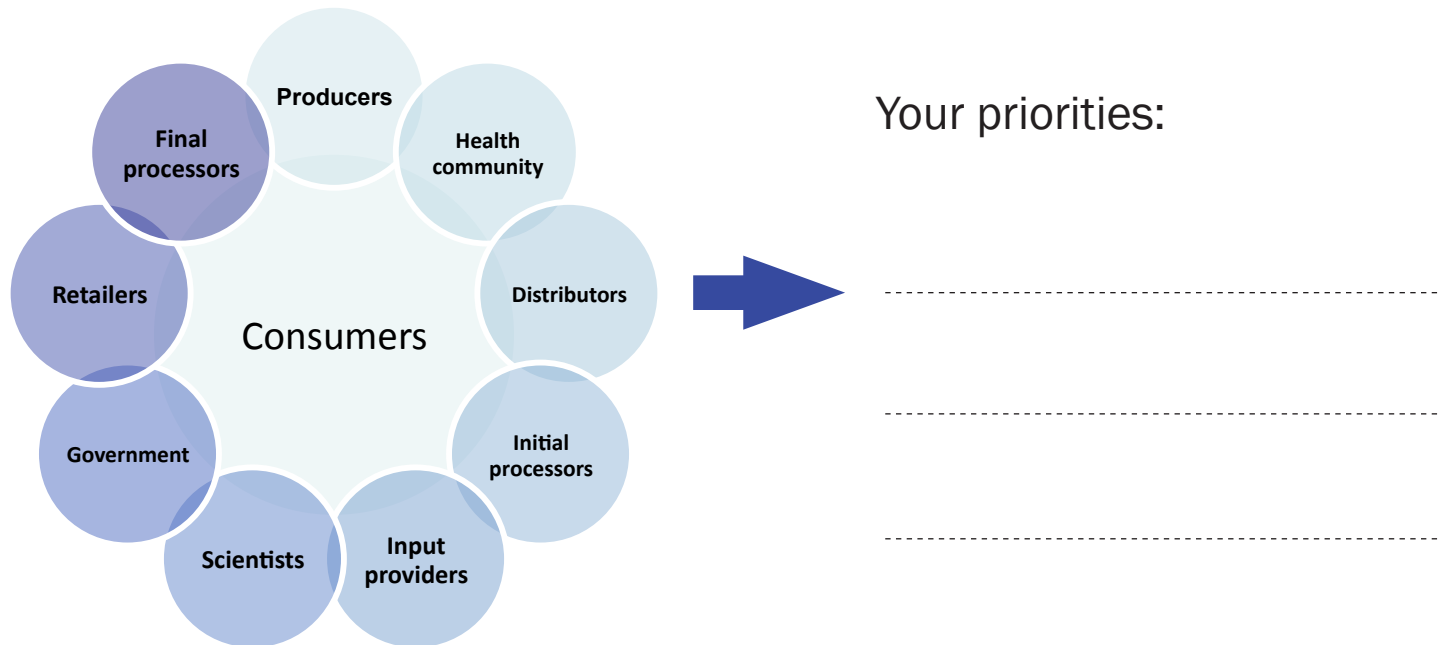
But each understands that more can be accomplished by working together.

“We can help prevent disease by making it easier for consumers to make healthy choices ... from what we grow and consume, not by paying for drugs. Now that would be an accomplishment.”

*Leslie MacLaren,
Co-President &
Vice-President
Academic,
Nova Scotia Agricultural
College*

Each stakeholder can:

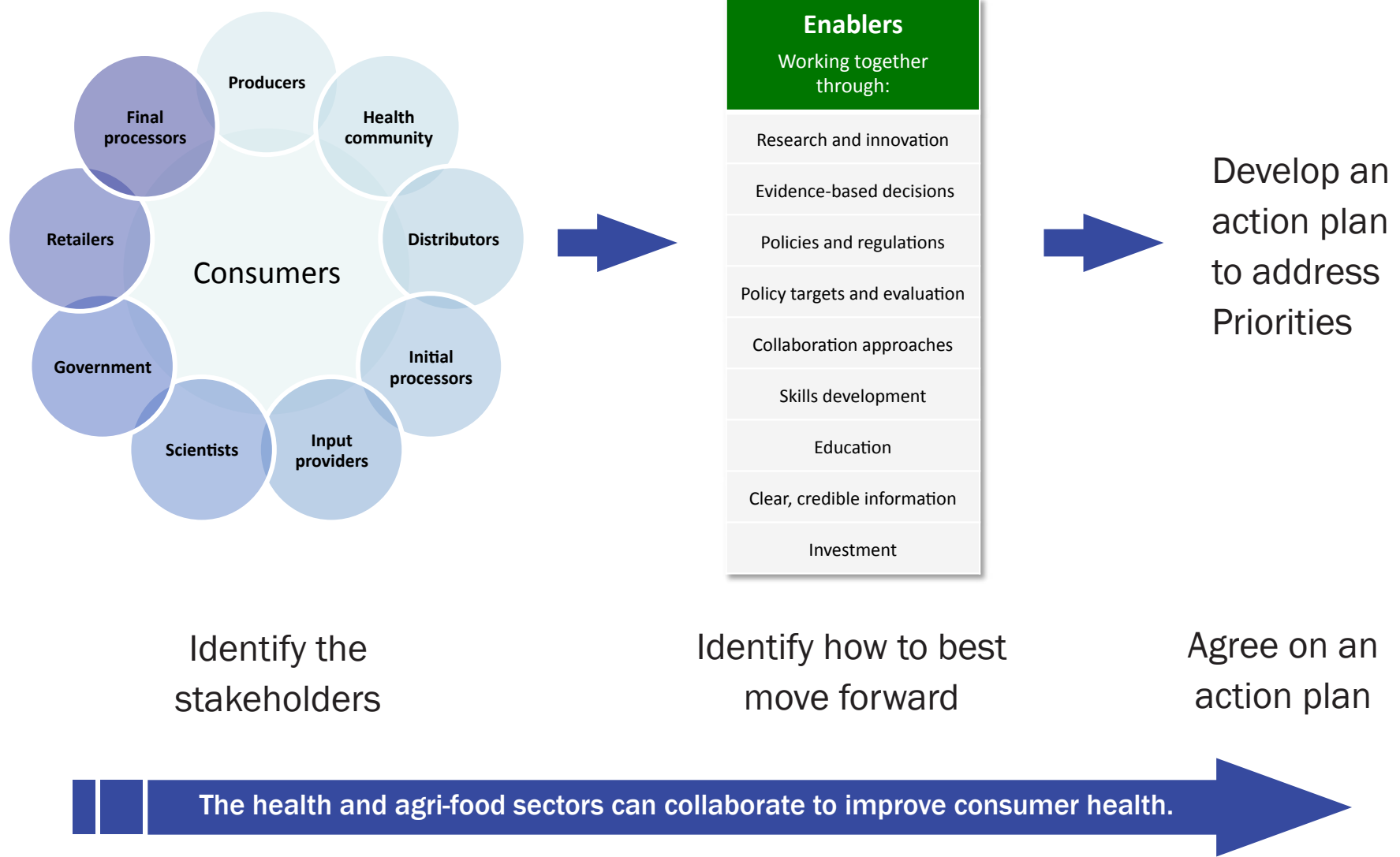
1. Identify their key obstacles



The health and agri-food sectors can collaborate to improve consumer health.

Each stakeholder can:

2. Define an action plan



On healthy food innovation:

“Success depends on government policies and on active industry involvement.”

*David Sparling,
Chair,
Agri-Food Innovation
and Regulation,
Richard Ivey
School of Business*

Our next steps



Reach out

CAPI to reach out to participants of the Leaders Summit on Food for a Healthy and Prosperous Future.

Reach out to others who are exploring agri-food/health linkages.

and



Take action

Take cross-sectoral action:

- ▶ Stakeholders embark upon collaborations.
- ▶ Action inspires decision-makers to join.

Be outcomes-driven:

- ▶ Link to policy-setting processes.
- ▶ Promote success models.
- ▶ Identify missed opportunities.

Steps in the right direction by governments

Examples of various ways that are being undertaken to advance an agri-food/health agenda:

Canada: Looking to collaborations to address specific health/food challenges; e.g., the Trans Fat Task Force is a partnership between Health Canada and the Heart and Stroke Foundation; the Sodium Working Group represents a diversity of interests in academia, business and government. *Growing Forward*, the five-year agricultural policy framework, sets out a priority to contribute to the health and wellness of Canadians.

British Columbia: ACT Now BC Campaign: formed to improve the health of British Columbians through a whole-of-government approach with ministerial oversight; created an agricultural plan to align health and agricultural agendas; goals include: a 20% increase in fruit and vegetable intake and a 20% reduction in overweight and obesity.

Manitoba: The Canadian Centre for Agri-Food Research in Health and Medicine conducts clinical research into health attributes of foods (e.g., flax); funded by Agriculture & Agri-Food Canada, St. Boniface Hospital and the University of Manitoba.

Ontario: As part of a strategy to re-orient healthcare toward prevention, calls for agri-food and health policies and programs to converge. Ontario pilots a northern fruit and vegetable plan by working with growers to supply some 60 schools – 96% of which are sourced from Ontario producers.

Quebec: Strategy to coordinate dietary and nutritional policy based on a vision of a healthier diet, Quebec-sourced foods and elements that influence the population's diet.

“We have healthy living in the palm of our hand. We only need to institute a plan of preventive medicine.”

*Grant Pierce,
Executive Director
of Research,
St. Boniface
General Hospital
Research Centre*

Sources: BC Healthy Living Alliance Secretariat; Canadian Centre for Agri-Food Research in Health and Medicine; Ontario Ministry of Health Promotion; Ontario Ministry of Agriculture, Food & Rural Affairs; Santé et Services sociaux, Québec

“We can make this transformation to a healthier society possible. Our families and our future depend on it.”

*Wayne Stark,
Co-Chair,
Leadership
Panel on
Food & Wellness
Connection*

The way ahead

Can the health and agri-food sectors collaborate to improve consumer health?

We must.

And, we can become the best in the world in doing so.

This is fundamental to creating a healthy, sustainable & prosperous future for Canada.

CAPI's Leaders Summit revealed the need for the agri-food value chain – from producers through to retailers – to seek out new ways of partnering. It pointed to the need for the health and agri-food sector to find new ways to collaborate. It underscored the need for government to foster new ways to support these interactions. Each has a role to create positive change.

The interest in the links between the health and agri-food sectors are more evident and growing. But it is not assured.

Now it is time to translate intent into action.



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