



REPORT:

CAPI Processed Food Research Program

Project 3b

The Changing Face of Food Manufacturing in Canada: An Analysis of Plant Closings, Openings and Investments

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About the CAPI Processed Food Research Program

Food and beverage processing is one of the country’s largest manufacturing sectors and an essential channel for Canadian agricultural products. Companies are succeeding yet the sector has been facing challenges, including record trade deficits in secondary processing. Working closely with a variety of partners, CAPI’s research is focused on better understanding the issues and opportunities facing this sector and their implications for policy and strategy, and to generate a dialogue on ways to support the sector’s future growth and competitiveness.

Project 3b: *The Changing Face of Food Manufacturing in Canada: An Analysis of Plant Closings, Openings and Investments*: The primary and secondary food manufacturing sector has been undergoing some profound changes over the past several years. The Ivey Business School provides a more complete picture of the changing face of Canadian food manufacturing and examines plant closings and openings and major announced investments by food companies as well as commenting on some of the ramifications of these developments.

Phase 1 Diagnosis	Phase 2 Inspiring Practices	Phase 3 Competitive Advantage
1a. Diagnosing the trade deficit 1b. Reasons for the trade deficit	4a. Case studies on company success 4b. Cross-Case study analysis	7. Conclusions
2. Explaining the trade data 3a. Manufacturing sector performance 3b. Plant Openings and closures, investments	5. Consumer and markets 6. Innovation insights	8. Implications for policy & strategy 9. Dialogues on outcomes

All completed projects, along with supporting material and data, can be found online at www.capi-icpa.ca

About Agri-food@Ivey at Ivey Business School

Located at the Ivey Business School at Western University, Agri-food @Ivey aims to be Canada’s leading source of accessible and relevant knowledge about agri-food innovation and policy. Ivey (www.ivey.ca) is Canada’s leading provider of relevant, innovative and comprehensive business education. Drawing on extensive research and business experience, Ivey faculty provide the best classroom experience, equipping graduates with the skills and capabilities they need to tackle the leadership challenges in today’s complex business world. Ivey offers world-renowned undergraduate and graduate degree programs as well as Executive Development at campuses in London (Ontario), Toronto and Hong Kong.

Executive Summary

Closing any type of manufacturing plant is always big news in Canada. Job losses are devastating to the employees and often to the entire community where the plant is located. Recent high profile food plant closures in Ontario, like the Heinz plant in Leamington and the Kellogg plant in London, raise concerns about the overall competitiveness of food manufacturing in Canada.

However, food plant closures are only one part of the story. Food companies are also investing in the industry, opening new plants in some cases or making major investments to expand and upgrade existing facilities. These events receive much less attention. To provide a more complete picture of the changing face of Canadian food manufacturing this analysis examines food plant closings, openings, and major investments announced by food companies. This paper is the second from the Ivey Business School and Canadian Agri-food Policy Institute (CAPI) designed to expand awareness and understanding of Canada's food manufacturing industry.

Key Findings

1. Between 2006 and 2014, 143 Canadian food plants closed resulting in job losses of 23,807
2. During that period, 63 new plants opened and 67 companies announced major investments.
3. The industry went through a challenging period of closures in 2007 and 2008 but gradually recovered, with openings and major announced investments exceeding closures.
4. Almost 90% of closures occurred in multi-plant companies. Most were the result of companies reorganizing and consolidating production in fewer large plants in order to achieve higher levels of scale and efficiency.
5. There was a difference between the decisions made by foreign and Canadian multi-national enterprises (MNEs). Foreign MNEs were much more likely to consolidate or restructure while Canadian MNEs were more likely to restructure and invest.
6. At the provincial level, Quebec has been quite successful in balancing openings and investments with closures. Ontario has seen the largest net loss of plants.
7. Job losses from foreign MNE plant closures occurred mainly in Ontario and, to a lesser extent, in Quebec, the two largest concentrations of food processing in Canada. Canadian MNE plant closures were also concentrated in Ontario and Quebec, however unlike foreign MNEs, Canadian MNE closures and job losses were also distributed across Canada.
8. The overall picture is one of an industry that went through tough times in the mid 2000's but in recent years has been looking more positive, in spite of continuing challenges. It is also industry that is more ready to compete than it was in 2006. The recent decline in the dollar presents an opportunity for the industry to compete more successfully against imports but also to expand exports, particularly to the U.S.

Introduction

The environment for Canada's food manufacturing industry has been challenging in recent years. The recession, higher Canadian dollar, increased foreign competition, retail concentration and higher input costs have all squeezed food manufacturing margins and put pressure on the firms. Recent high profile food plant closures in Ontario, like the Heinz plant in Leamington and the Kellogg plant in London, raise concerns about the overall

competitiveness of food manufacturing in Canada. Researchers at the Ivey Business School have undertaken a series of studies to better understand how Canada's food industry has responded to the challenges. The results of these studies are being released in two papers. The first paper¹, *The Performance of Canada's Food Manufacturing Industry*, highlights the importance of food manufacturing to consumers and the Canadian economy. The industry produces over 70% of the food Canadians buy². With revenue of more than \$88 billion in 2011, it is the second largest Canadian manufacturing industry and Canada's largest manufacturing employer. The industry has shown remarkable resilience in the face of recent economic challenges maintaining both revenue and employment.

The industry has been responding to the changing conditions. Many companies have been reorganizing their manufacturing and distribution footprint to better compete in tough domestic and foreign markets. The results have been closures of many food plants, but also some openings and major investments. This paper examines how industry structure has changed in recent years, looking at food manufacturing plant closures, as well as new plant openings and investments.

Methodology

Data collection - This research is an event study that sought to identify all food manufacturing plant closings, openings and major investments across Canada during the period 2006-2014. Much of the data was collected from secondary information sources. These included government websites, newspapers and other media, agricultural and food organizations websites and publications, as well as company press releases, corporate filings and reports. The Factiva databases were also used to identify events and collect data.

Interviews with select government officials, not-for profit community organizations and company executives enabled researchers opportunities to collect additional information on specific events.

Job numbers due to plant closings were relatively easy to obtain from media articles; plant closures tend to be big news. It was much more difficult to identify job numbers associated with plant openings or investments. Investments were the most difficult to identify, since many private companies do not seek to publicize their investments. As food manufacturing employment increased over the period studied, it is apparent that the event searches almost certainly missed some growth in employment numbers due to expansions and investments.

Classification – Events were classified by year, industry sector using Harmonized System (HS) Codes or North American Industry Classification System (NAICS) for the main business line, location, ownership and reason(s) for the event. MNEs were identified as companies which had sales and/or production offices in different countries. Head office location was used to differentiate foreign and Canadian MNEs.

¹ Sparling and Cheney, *The Performance of Canada's Food Manufacturing Industry*, 2014

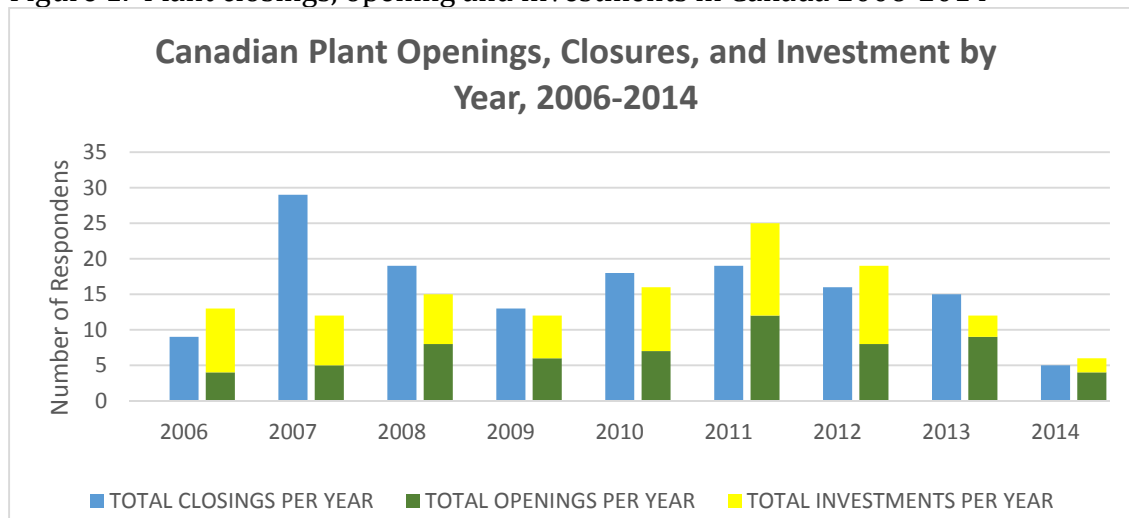
² Statistics Canada, Human activity and the Environment Annual Statistics, 2009

Openings and investments outnumber food plant closings

Canada's food manufacturing industry is an important contributor to the Canadian economy. In 2011, it was the number one manufacturing industry employer and number two in revenue (Sparling and Cheney, 2014). Compared to other manufacturing industries, the food industry has also been remarkably resilient in revenue, employment and profitability. However, it is also an industry under pressure, with rising input costs, consolidation at the retail level, and competition on a global scale. As a result, many food manufacturing companies are restructuring, closing smaller, older plants and consolidating production into larger scale facilities. Others are exiting the industry.

Plant closures receive a great deal of media attention and have created the impression of an industry in decline. Between 2006 and 2014, 143 Canadian food plants closed resulting in the loss of 23,807 jobs, definitely reinforcing the general impression. However, during that period, 63 new plants opened and 67 companies made major announced investments. The trend displayed in Figure 1 shows only the number of events, not the scale of each, but it does show an industry in transition. Closings peaked in the challenging period of 2007 and 2008, likely driven by a combination of a rising Canadian dollar, an increase in commodity prices. However, closing numbers eased subsequently, while openings and announced investments climbed consistently through to 2011.

Figure 1. Plant closings, opening and investments in Canada 2006-2014

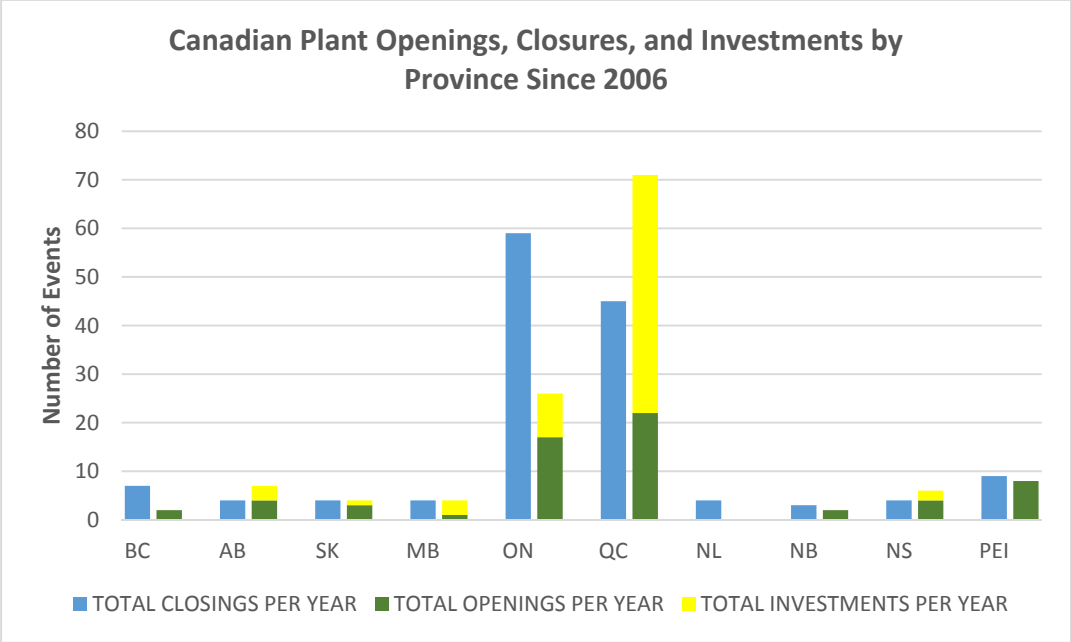


Source: Agri-Food at Ivey Research

Quebec is the winner in terms of numbers of openings and closings

In terms of numbers of events, Quebec has clearly been the winner in recent years with fewer closings, more openings and significantly more investments than neighbouring Ontario (Figure 2).

Figure 2 Plant closings, openings and investments by province 2006-2014



Source: Agri-Food at Ivey Research

Appendix 1 contains a comparison of openings and closings in major municipalities in Ontario and Quebec.

Analyzing plant closings

The analysis begins with plant closings, the most publicly visible events. The job losses associated with plant closures are always a concern for the workers and their families but also for politicians at every level of government. In recent years job losses due to food plant closures have been significant (Figure 3). The pattern of job losses from plant closures by year followed a pattern similar to the pattern of the number of closures observed in Figure 1, with 2007 and 2008 being the worst years for job losses.

Figure 3 Job losses in Canada from food manufacturing plant closures, 2006-2014

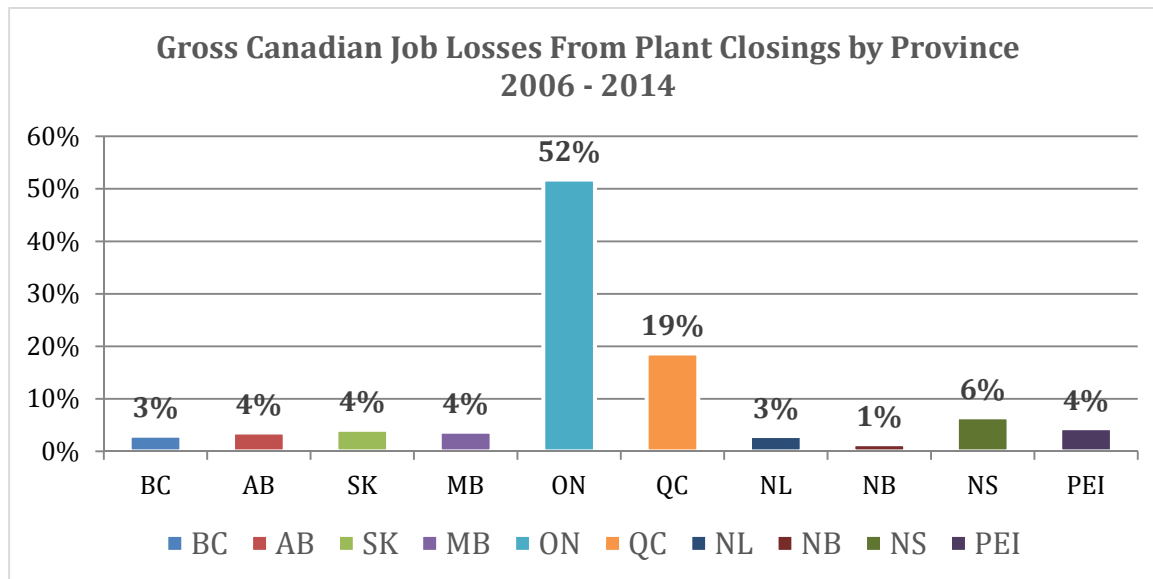


Source: Agri-Food at Ivey Research

Provincial job losses – more than half in Ontario

Ontario's job losses from plant closures were significant with the province being saddled with 52% of the national total from 2006 to 2014 (Figure 4). However, Sparling and Cheney (2014) note that Ontario gained jobs over the period from 2004-2011 suggesting that openings, investments and general business expansion balanced out the losses due to closings.

Figure 4 Provincial job losses from food plant closures, 2006-2014



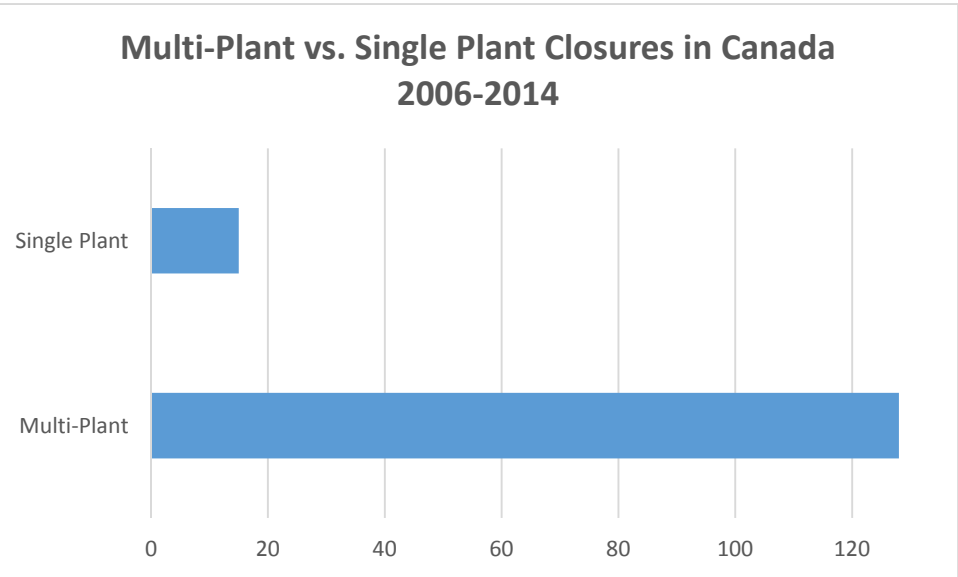
Source: Agri-Food at Ivey Research

Most of plants closed were part of multi-plant organizations

Plants are closing, but not necessarily the corporations behind them. Only 15 of the 143 plants which closed from 2006 to 2014 were part of single plant organizations (Figure 5). The other 128 (89.5%) were part of multi-plant companies. Examining the reasons behind plant closures, it is apparent that many food manufacturing companies in Canada were

restructuring their operations, and in some cases consolidating production into larger plants. Interviews with select company senior executives confirmed this. Companies are reorganizing their manufacturing footprints to be more globally competitive, focusing production facilities, investing in new technologies, automation and new systems and adopting new processing methods.

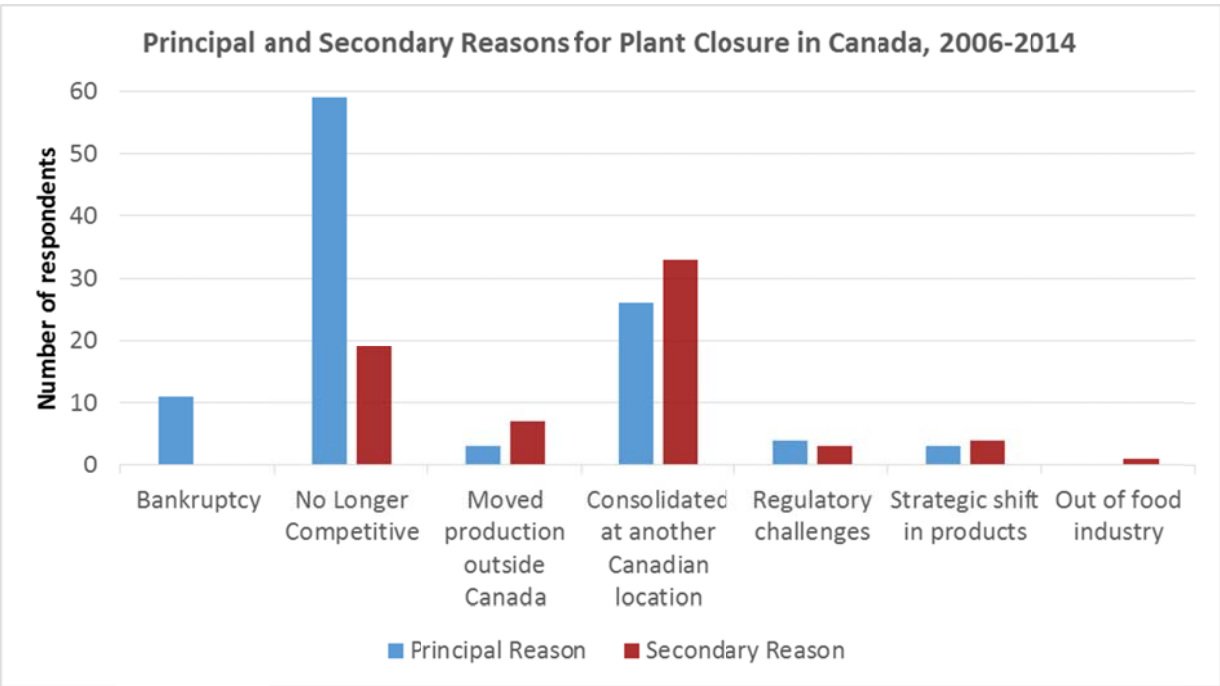
Figure 5 Closures in single plant companies compared to companies with multiple plants, 2006-2014



Source: Agri-Food at Ivey Research

Closings were generally of uncompetitive plants and were often consolidations. The reasons for plant closures were not always publicly available. However, from those where principal and, in some cases, secondary reasons could be determined it was apparent that many firms were restructuring to compete (Figure 6). Uncompetitive plants were being closed and in some cases, production was being consolidated at another Canadian location, or in fewer cases, outside the country. Under the heading of 'no longer competitive' the most common underlying reason was financial infeasibility resulting in loss of competitiveness.

Figure 6 Principal and secondary reasons identified for closing plants in Canada, 2006-2014³



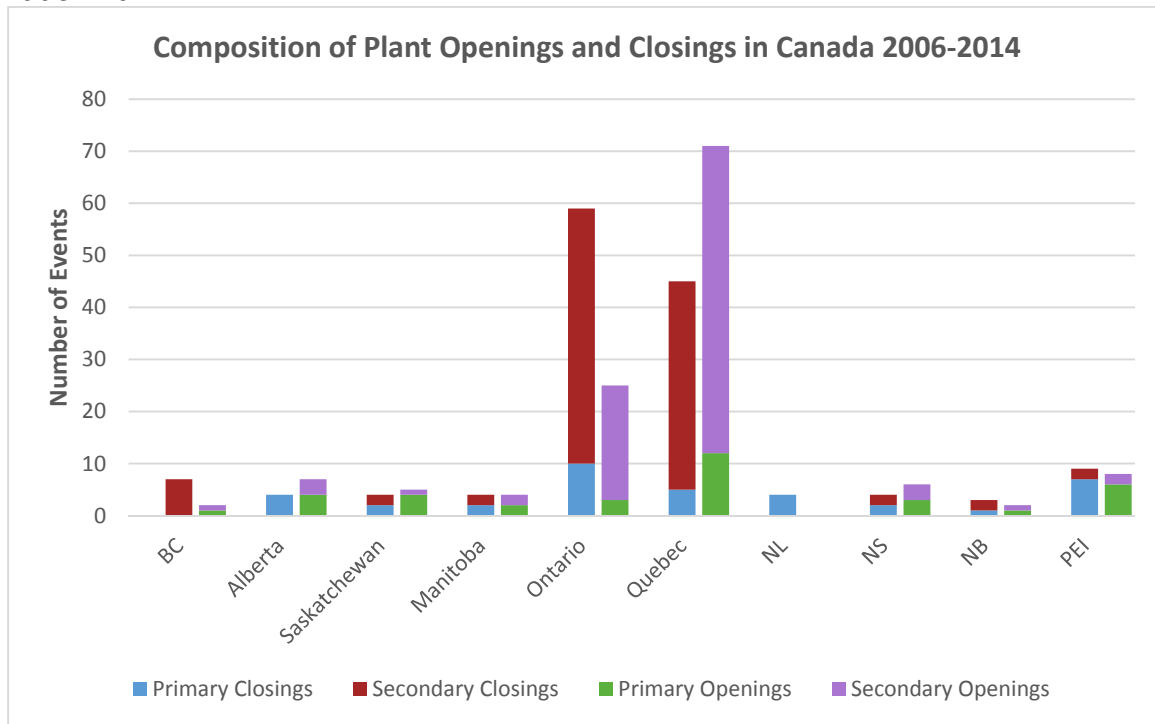
Source: Agri-Food at Ivey Research

Primary versus secondary processing

Primary processing involves the first level of processing for farm gate products. Secondary processors use the output from primary processing and turn it into further processed products. Most of the plant closures and new plants in Canada were in secondary processing rather than primary processing of farm products. This was particularly true in Ontario and Quebec as illustrated in Figure 7.

³ Tallies for Figure 6 will not equal total closings due to data limitations

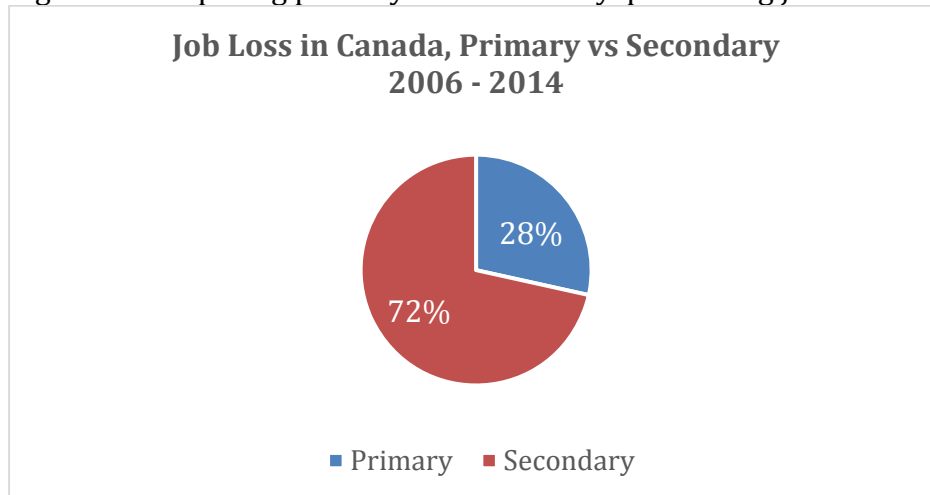
Figure 7 Distribution of plant openings and closing by province and level of processing, 2006 - 2014



Source: Agri-Food at Ivey Research

The resulting job losses were therefore heavily concentrated in secondary processing (Figure 8)

Figure 8 Comparing primary and secondary processing job losses in Canada, 2006-2014



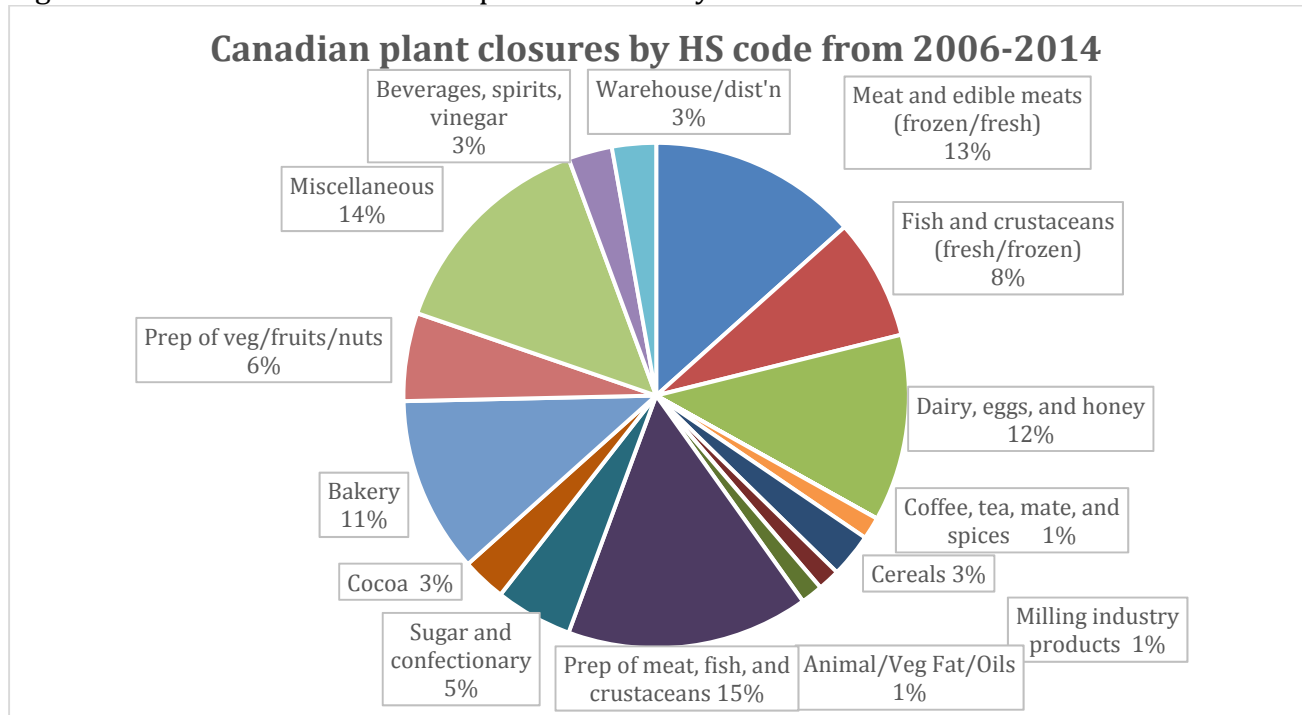
Source: Agri-Food at Ivey Research

Plant closings by industry sub-sector

Using HS Codes the 143 closures were divided into industry sub-sectors. Meats and edible meats, fish and crustaceans and preparations of these accounted for 36% of closures. Both the meat and seafood sectors have experienced very public challenges in recent years due

to larger economic downturns, long term repercussions of border closures and supply chain restructuring. Second to the animal protein market was the dairy sector (combined with eggs and honey) at 12%. Bakery was third with 11% of the closures.

Figure 9 The number of Canadian plant closures by HS codes 2006-2014

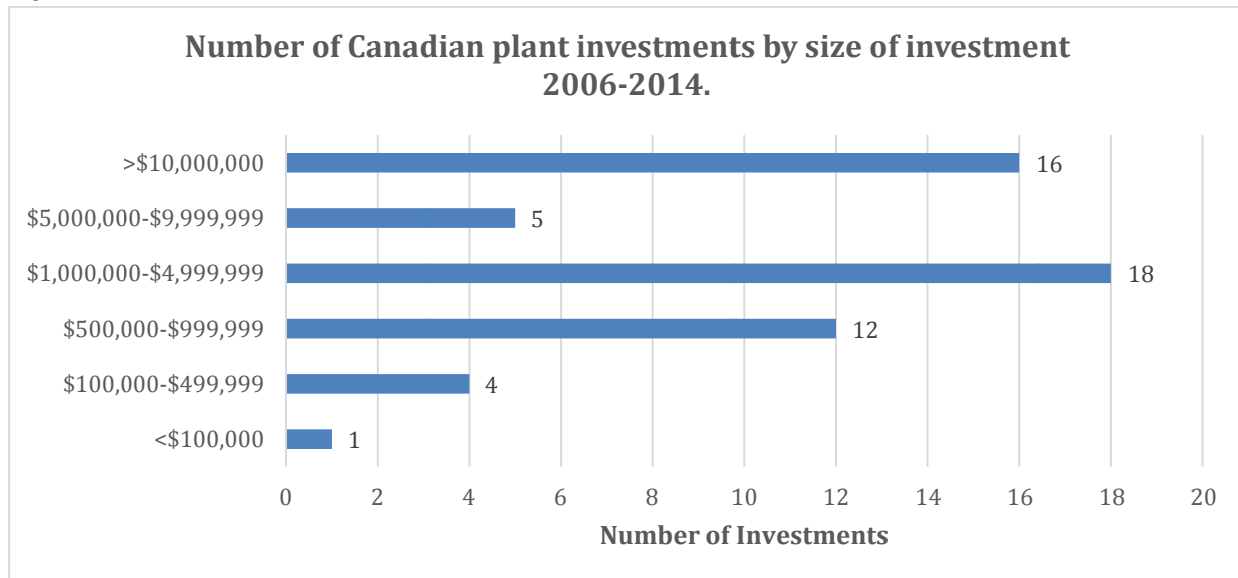


Source: Agri-Food at Ivey Research

Investments

A significant part of the changing face of food manufacturing in Canada does not involve openings or closings, but rather investments in existing facilities. Of the 56 investments where information was available, 39 were over \$1 million dollars and 17 were less than \$1 million (Figure 10). Some high profile investments ran into the hundreds of millions.

Figure 10. The number of investments by Canadian firms by size of investment, 2006 - 2014



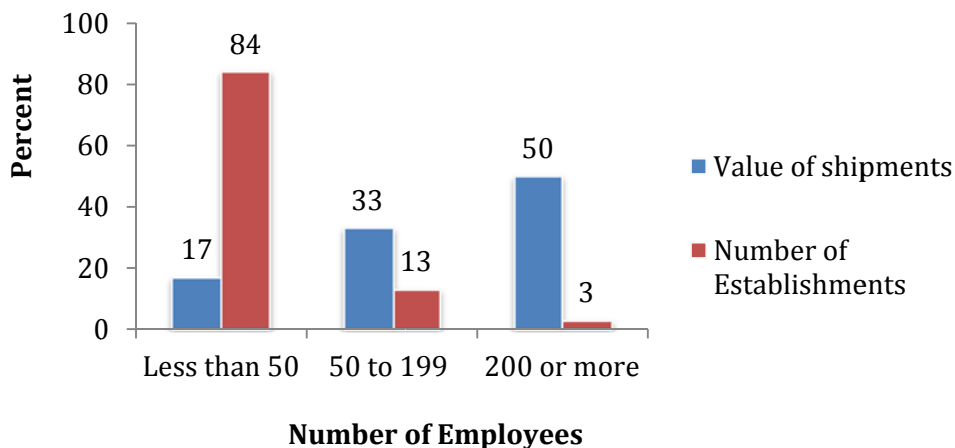
Source: Agri-Food at Ivey Research

Examining structural changes by size and ownership

Industry structure

Numerically, the food manufacturing sector is dominated by small and medium size firms with the smallest firms making up 84% of the industry and providing roughly 17% of the total value of industry shipments (Figure 11). At the opposite end, we see the largest firms represent 3% of establishments and account for 50% of value.

Figure 11 Breakdown of industry by number of employee and percent of total industry shipment value



Source: AAFC, An overview of the Canadian agriculture and agri-food system, 2012

In this study, the differences between multi-national enterprises (MNEs) and the small and medium sized enterprises are significant. The following analysis examines those differences in terms of plant closings, openings and investments and considers the implications for both industry strategies and government policies. For the purpose of this analysis all small and medium sized enterprises were considered non-multinational enterprises and classified as non-MNE.

Multi-national enterprises (MNEs)

Although firms with over 50 employees only account for about 16 % of the establishments in Canada, they account for 83% of revenue, and hence can be considered the driving force of the food manufacturing industry. For this reason, the following section looks exclusively at the activities of larger scale firm, the multi-national enterprises (MNEs⁴). The analysis differentiates between foreign multinationals with headquarters outside Canada and Canadian MNEs and examines the actions of each group over the period of 2006 to 2014. Not surprisingly, the largest firms account for the major portion of closings in Canada (Table 1). Combined Canadian and foreign owned MNEs were 63% of the identified closings⁵. Based purely on numbers (rather than size), non-MNEs had the largest number of openings and investments (announced or completed). While the focus may be on MNEs as an engine of growth and innovation in the economy, there is clearly a great deal of activity among the smaller enterprises which are often innovators and trendsetters. Foreign owned MNEs slightly outpaced Canadian MNEs in the number of openings while investment numbers were higher among Canadian MNEs.

Table 1 Breakdown of openings, closings and investments by size and ownership, 2006-2014

	Canadian Owned MNE	Foreign Owned MNE	Non-MNE	Total
# Closings	47	43	53	143
# Openings	12	14	37	63
# Investments	20	7	40	67

Source: Agri-Food at Ivey Research

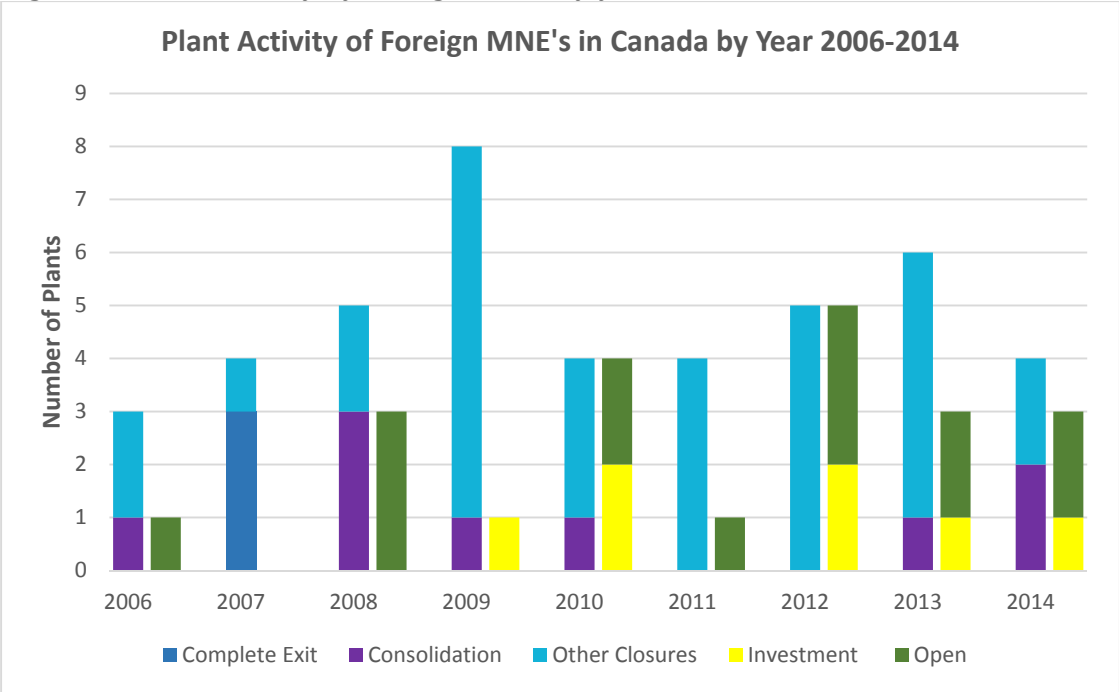
⁴ For the purposes of this paper the term multinational enterprise is used to represent firms with 50 or more employees and having sales or production in a market outside Canada. Small-medium sized enterprises are considered to be firms with less than 50 employees and whose sales may be solely domestic or include other markets and are referred to non-MNEs in this report. All firms fell into one of these categories.

⁵ The authors acknowledge the sampling bias inherent to the event based research and recognize that the closure of a large employer is easier to capture than closures of smaller plants.

Foreign owned MNE activity shifting into better balance

The activities of foreign MNEs were predominantly closings and consolidations⁶ until 2010 when the number of openings and investments began to increase and counter the number of closings and consolidations (Figure 12).

Figure 12 Plant activity by foreign MNEs by year, 2006 - 2014

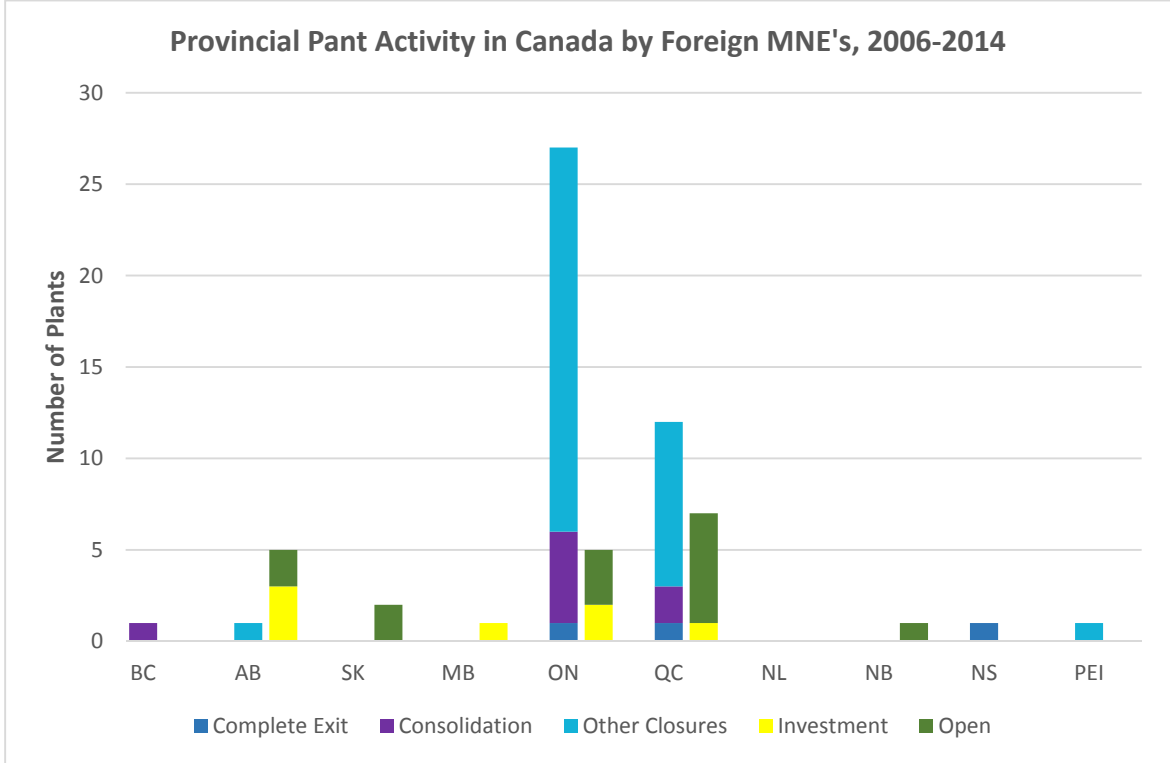


Source: Agri-Food at Ivey Research

On balance, Ontario appeared to fare the worst with foreign owned MNEs, with just under half of all foreign MNE closings and relatively few openings or investments. Quebec came close to break even on event numbers due, to in part to four plant openings or expansions by firms from France.

⁶ 'Consolidation' was considered as the closure of a plant in Canada whose activity was added to another plant in Canada. 'Other closures' captured all other closures for reasons outlined in the figure 6.

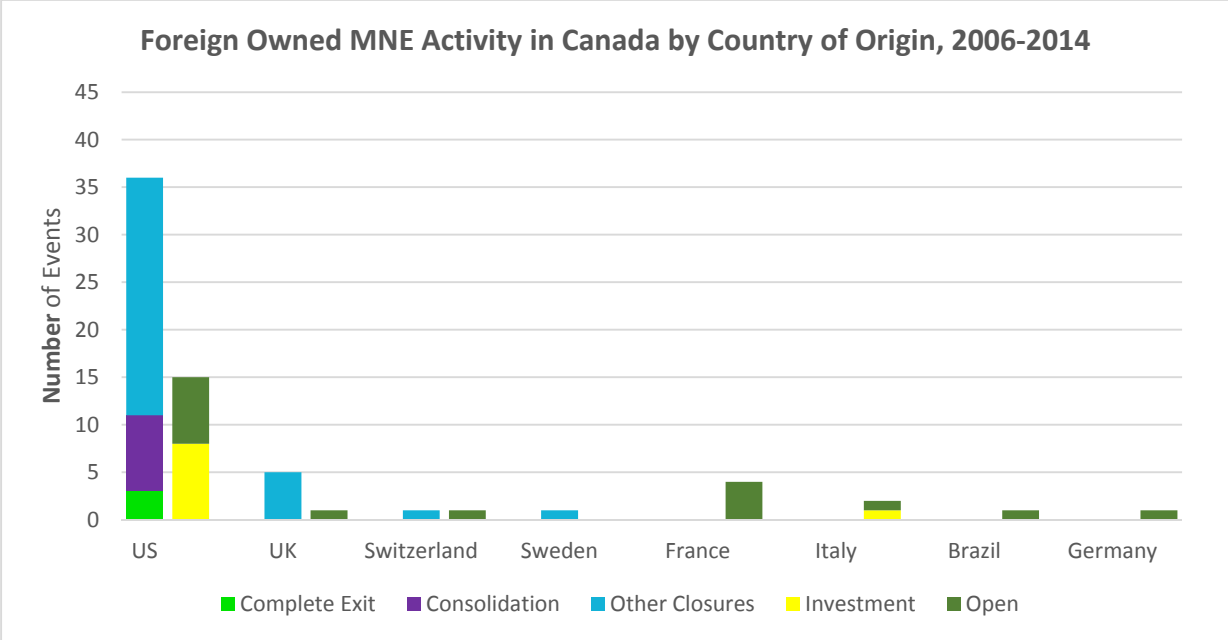
Figure 13 Provincial plant activity by foreign MNEs, 2006 - 2014



Source: Agri-Food at Ivey Research

The majority of the foreign MNE events involved U.S. firms. The majority of the foreign MNE activity in Canada is through U.S. companies, with closures substantially outnumbering openings and investments. The 3 complete exits (Hershey), 25 closings and 8 consolidations outweighed the 7 openings and 8 investments. Other countries had less impact nationally but may have had significant impacts at the provincial or regional level, such as the 4 plant openings in Quebec under French parent companies.

Figure 14 Plant activity by foreign MNEs by country of origin, 2006 - 2014

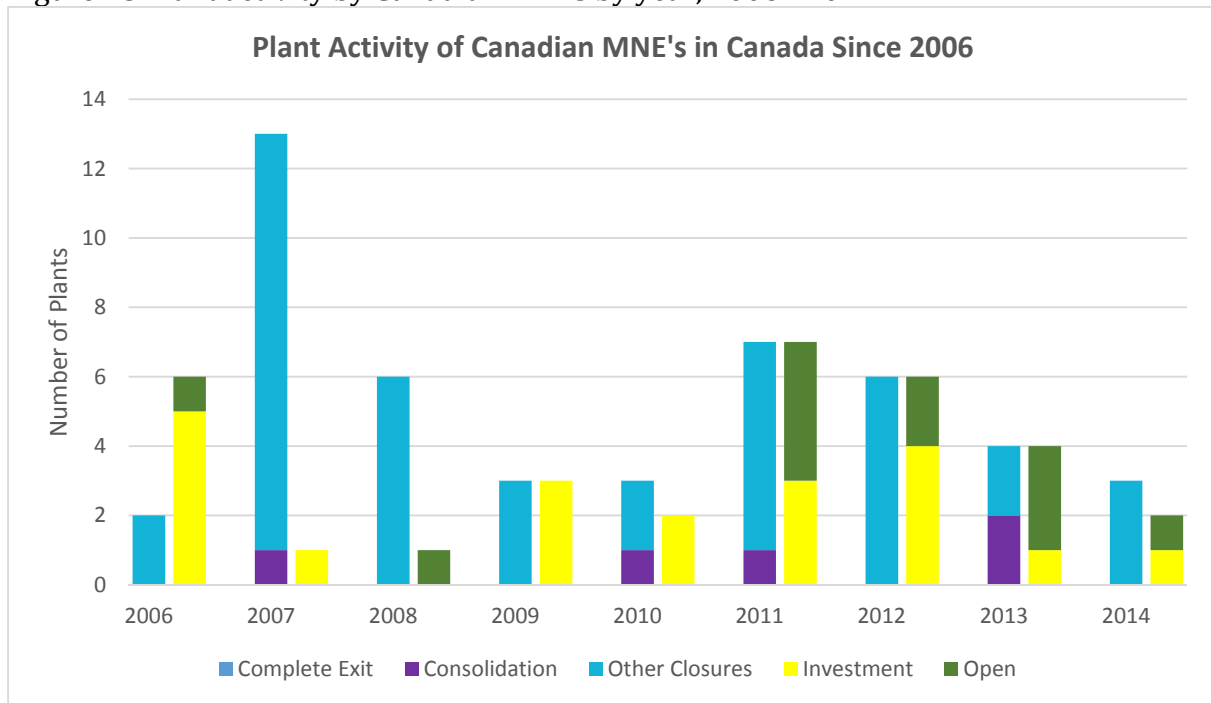


Source: Agri-Food at Ivey Research

Canadian MNEs

One interesting differences between Canadian and foreign MNEs was the greater tendency among Canadian firms to make changes to existing facilities either through consolidations or investments. This is evident in Table 1 and in a comparison of figures 12 and 15. With the exception of a particularly painful year in 2007, Canadian firms have tended to be more positive in terms of investments and openings than their foreign counterparts. This seems reasonable given that domestic companies would see greater value in maintaining domestic assets and keeping investments close to headquarters and primary markets.

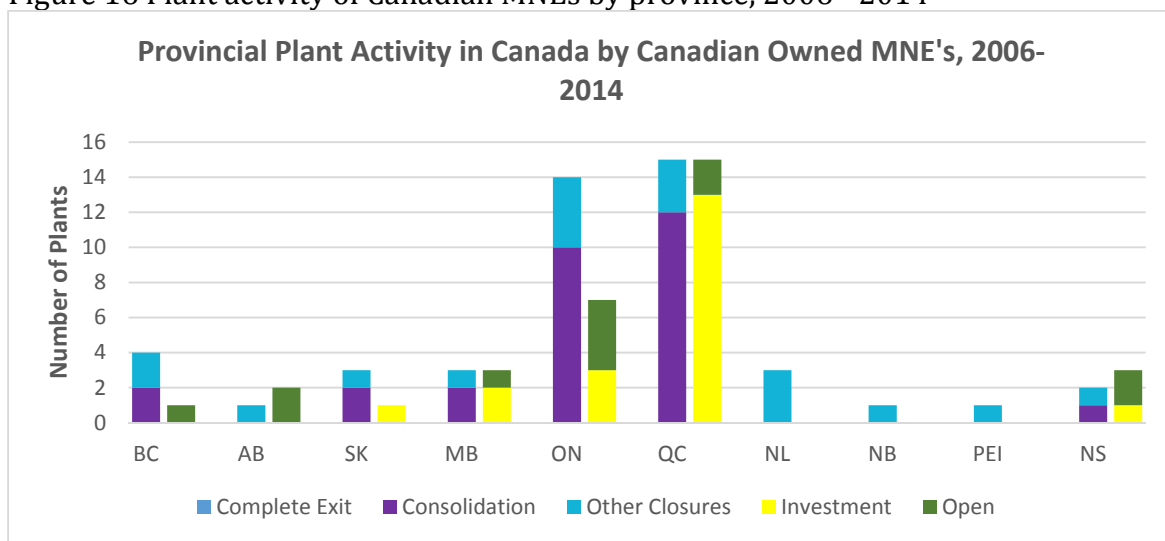
Figure 15 Plant activity by Canadian MNEs by year, 2006 - 2014



Source: Agri-Food at Ivey Research

On a regional level, Quebec experienced the greatest number of events with Canadian MNEs (Figure 16). There was considerable restructuring activity in Ontario while the Prairie Provinces experienced slightly more activity from Canadian MNEs than from foreign firms.

Figure 16 Plant activity of Canadian MNEs by province, 2006 - 2014



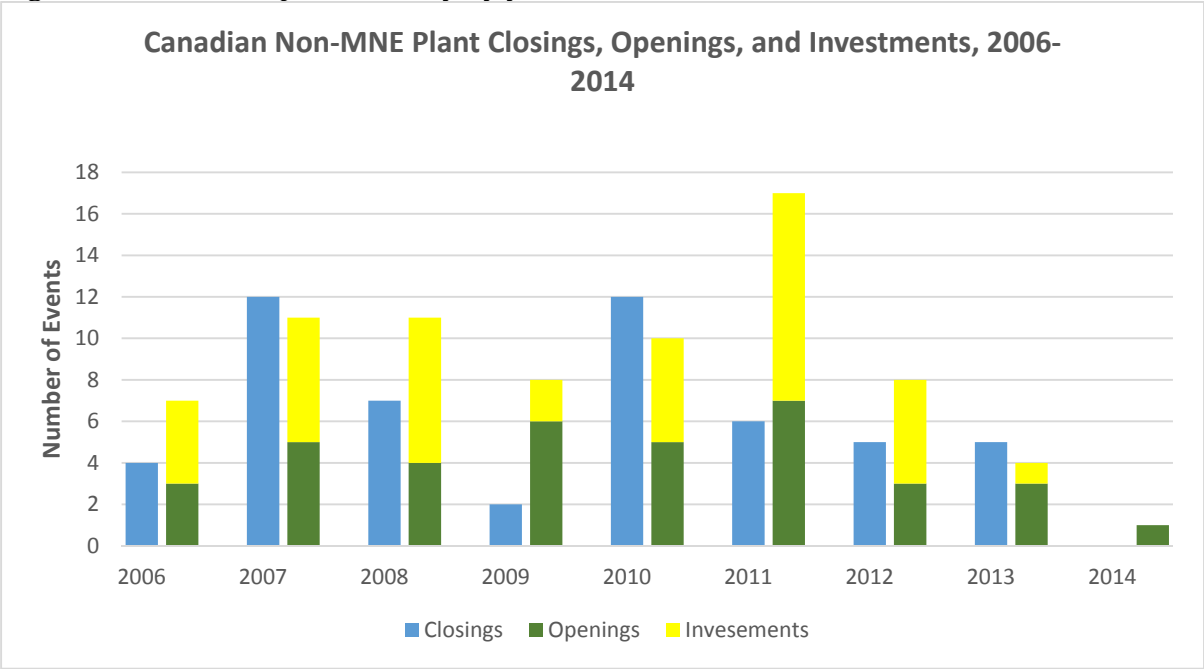
Source: Agri-Food at Ivey Research

Non-Multi-National Enterprises

Non-MNE activity favoured openings and investments

Non-MNEs were the source of almost half of the plant activity (events) in Canada’s food manufacturing industry. Canada’s smallest food manufacturing companies were generally a positive force in terms of plant openings and investments relative to closures. In all but two years, openings and investments outnumbered plant closures (Figure 17).

Figure 17 Non-MNE plant activity by year, 2006-2014

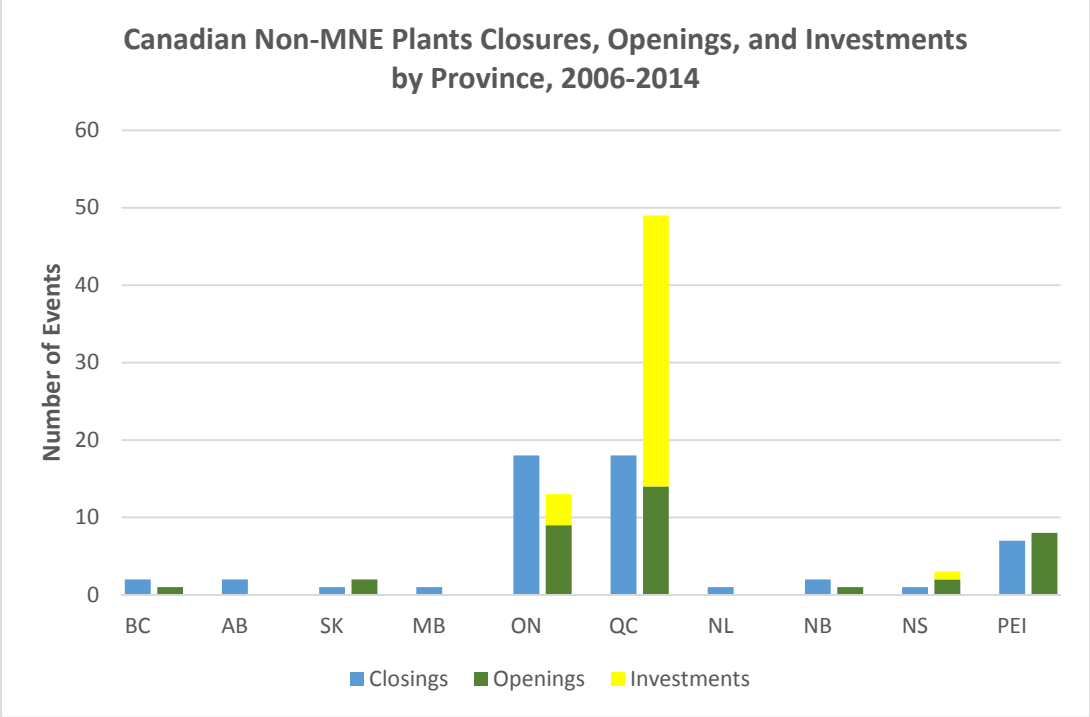


Source: Agri-Food at Ivey Research

Non-MNE activity by province

Quebec had the highest number of events among non-MNEs. Quebec firms were responsible for 35 of the total 40 Non-MNE investments recorded across Canada (Figure 18⁷).

Figure 18 SME activity by province, 2006 - 2014



Source: Agri-Food at Ivey Research

⁷ The authors acknowledge the incomplete nature of the data given that small scale investments are difficult to track and were not often captured by provincial governments or associations.

Implications for policy - results from interviews and working groups

To supplement the research and better understand the factors behind the performance of the Canadian food industry, a number of interviews and working groups were undertaken over the last year. The following policy priorities were gleaned from the research and from the interviews and working groups.

Getting the facts

The results of the Ivey research into food processing competitiveness have been surprising to a certain extent. The challenging economic conditions and competitive pressures facing the industry are well known. Those facts plus the many press articles highlighting food manufacturing plant closures across Canada paint a gloomy picture for the industry. However, the Ivey research into industry performance and plant closings, openings and investments provided a somewhat different story. There is no doubt that the industry is under pressure and, as this research has shown, many firms are restructuring. However, rather than being on the verge of collapse Canada's food manufacturing industry has shown remarkable resilience and many positive signs. Understanding what's actually happening in the industry is an important first step in developing a supportive policy environment.

Creating the right environment

One obvious implication for policy is the need to create an attractive investment environment. In interviews and working group discussions several factors have been raised by senior executives as important to creating an attractive environment for investing in food manufacturing in Canada.

Supporting and facilitating trade

- **Trade agreements** – Canada's food industry relies on exports, particularly for future growth. Trade agreements are seen as a critical first step to take advantage of global opportunities. Companies are often unaware of services available from various government departments and do not take advantage of existing programs or grants to access new markets for the first time.
- **Aligning regulations and policies** with those of major trading partners – A trade agreement simply creates the opportunity for trade. In order to expand trade Canadian regulations and policies must be aligned with those of the trading partner. Current efforts under the Regulatory Cooperation Council were highlighted as good steps but the industry support and enthusiasm is clearly starting to wane as progress is slow.
- **Trade promotion and support** – Accessing foreign markets is a challenge for many firms, particularly smaller ones. Promoting the Canada brand and helping managers understand how to enter and be successful in foreign markets is one role that governments can play. Recent announcements in the 2014 federal budget are intended to target some these activities but the extent and effectiveness of the programs will not be clear for some time.
- **Supporting infrastructure** – Trade depends on supporting infrastructure to facilitate the flow of goods between partners. The strong signal from the federal government in the 2014

budget to see the Detroit-Windsor gateway improved is a good signal to industry that Canada is open for business.

- **Incentives to locate in Canada** – There is a strongly held belief among industry leaders that incentives offered by many U.S. states are much more comprehensive and attractive than those offered in Canada. Past and present case studies have revealed mixed results. Financial incentives can definitely play a role in investment decisions. Incentives should be reviewed and compared to those in competing jurisdictions and adjustments made where appropriate. Quality of life and community were often mentioned by foreign firms establishing for the first time Canada. Many Canadian-owned firms seeking to expand prefer to stay in Canada wherever possible noting comfort with the system and better cross-enterprise opportunities.

Reducing barriers to competitiveness

A number of issues were raised in discussions with food manufacturing executives as factors which reduce the competitiveness of Canadian food manufacturing.

- **Corporate tax rate** – Canada's federal tax rate is an essential factor in making Canada attractive to companies. The current tax rate is viewed as highly competitive with other countries. Provincial and municipal tax rates were also mentioned as being considerations in an investment decision.
- **Small scale, old technology and systems** – Many Canadian plants are small, old and use old technology and equipment. Programs which encourage companies to invest in upgrading plants and equipment to increase efficiency, quality and safety could help firms compete more successfully.
- **Supply management and cost of inputs** – This was a concern for a number of companies, particularly since the gap between U.S. and Canadian milk prices has increased in recent years.
- **SRED program popular but too complicated** – The Scientific Research and Experimental Development program was viewed positively as a means of encouraging R&D and innovation in food companies. However, the program administration was seen as overly bureaucratic, cumbersome and too complicated for many smaller firms. Food companies have experienced particular challenges in accessing the program.
- **Urban transportation infrastructure** – Transportation infrastructure not only affects movements of goods to and from plants located in the cities but also the ability to attract labour to the plants.
- **Electricity costs** - A number of executives expressed concern over the difference between electricity costs in Canada, particularly in Ontario, and the United States. There was a general sense that the difference would continue to widen in the future.
- **Environmental regulations** – These are not always in line with food industry realities and can complicate operations with no environmental benefits.

Human resources

Leaders of Canadian food companies interviewed were essentially unanimous in their concern over the supply of labour for their companies in the future. Of particular note was the competition for labour with the high paying energy sector in the Western Canada. Companies support the use of temporary foreign worker programs to fill short term needs, particularly in the Prairies. However, as a longer term solution they would like the opportunity to convert more temporary foreign workers to longer term status. Companies across Canada are very concerned about meeting the growing need for skilled labour. Greater use of apprenticeships and training programs might help companies address this growing challenge. These programs would be most effective if they are created by government and industry working together.

Municipal approaches make a difference

Municipal regulations and rates often factor into company investment or closing decisions. This is particularly true in investment decisions. Municipalities which take a one-stop, coordinated approach to dealing with companies tend to be much more successful in attracting investment. Executives cited the ability to develop solutions in a reasonable timeframe as one important success factor. Local tax and service rates, environmental regulations and planning approaches all figure prominently into company decisions to invest or to leave.

Conclusions

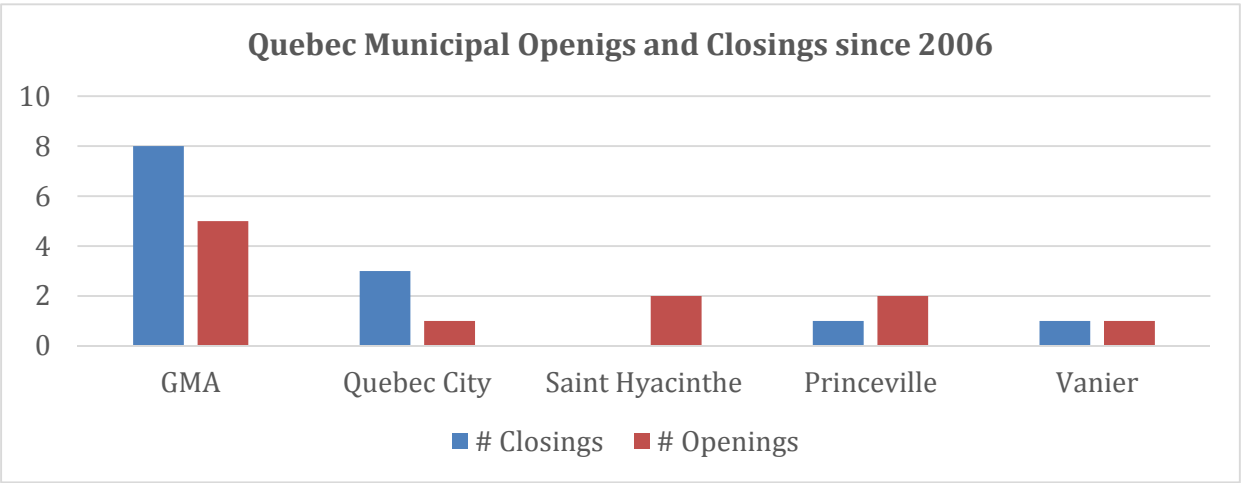
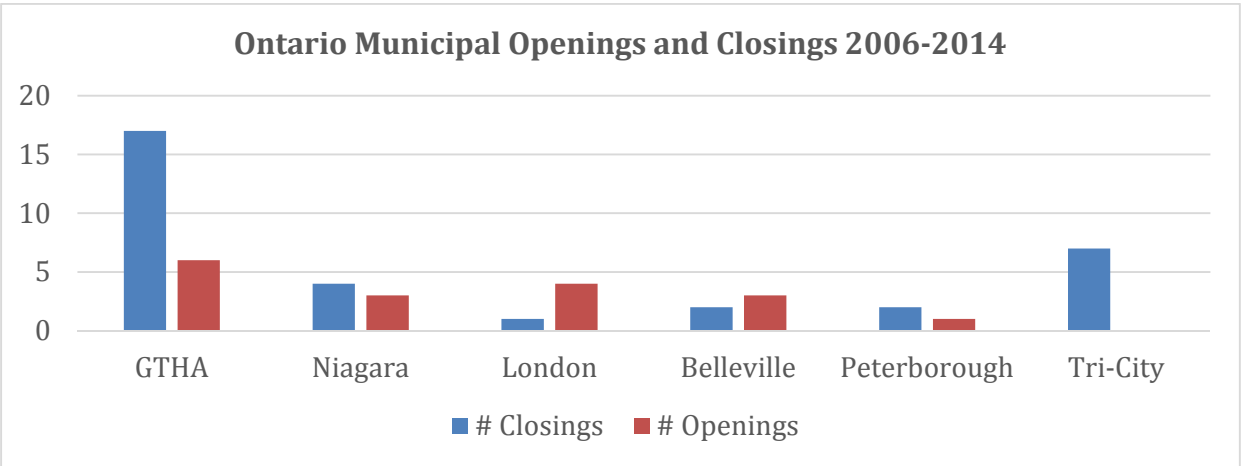
The results of this study reinforce one of the conclusions for the broader industry analysis in the first paper, namely that Canada's food manufacturing industry remains viable and a powerful economic force, in spite of significant challenges and structural change. While much of the attention on the industry has been on plant closures, the overall story of this Ivey research is one of an industry that is changing to better compete in a tough global industry.

Not surprisingly, there are differences between foreign firms and Canadian food companies. However, both groups continue to restructure but also to invest. Non-multinationals tend to be a positive force in the industry, with openings and investments far outweighing the number of closures.

The regional differences are significant and warrant further investigation. Quebec's performance in openings and investments has been surprisingly strong. Understanding the factors and policies behind that performance might provide valuable insights into how to strengthen the industry across the country.

Canada's food manufacturing industry has come through a very challenging time. The industry is leaner than it was when the Canadian dollar began its steep rise and firms continue to restructure and to invest in new plants, technologies and systems. This will continue for some time. The industry still has a great deal to change. However, the recent fall in the Canadian dollar represents a significant change in the competitive environment. Now is the time for both industry and governments to consider how they can best help the industry capitalize on the more favourable environment and build economic growth and new jobs for the industry.

Appendix 1 Food manufacturing plant openings and closures in major municipalities in Ontario and Quebec



Partners & Acknowledgements

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