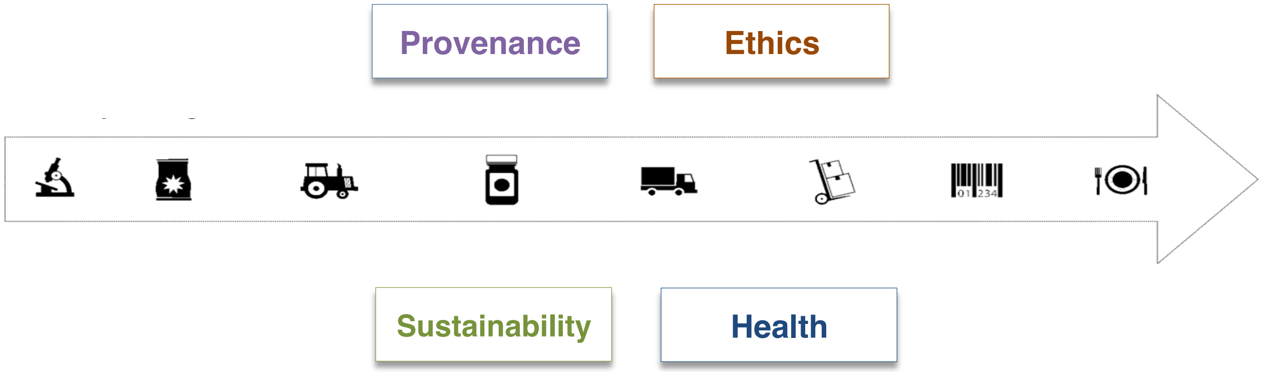
CAPI
THE CANADIAN AGRI-FOOD POLICY INSTITUTE

PROCESSED FOOD SECTOR RESEARCH PROGRAM

PROJECT 5:
CONSUMERS AND MARKETS

Differentiate to Compete: The Consumer Perspective



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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 5: *Differentiate to Compete: the Consumer Perspective:* How can we differentiate Canadian food products so that consumers here at home and abroad drive up demand for what we process? This essay focuses on understanding changing consumer food needs, demands and expectations as a driver to compete and succeed. This is a complex and ever-changing marketplace but Canada is well-positioned to be one of the most trusted foods sources on the planet.

PHASE 1
Diagnosis

- 1a. Diagnosing the trade deficit
- 1b. Reasons for the trade deficit
- 2. Explaining the trade deficit
- 3a. Food manufacturing performance
- 3b. Plant openings, closings & investments

PHASE 2
Inspiring practices

- 4a. Case studies on company success
- 4b. Cross-case study analysis
- **5. Consumers and markets**
- 6a. Capital investment
- 6b. Talent, skills and people
- 6c. Innovation and off-grade food

PHASE 3
Competitive advantage

- 7. Conclusions
- 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**.

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Canada

"Differentiating to compete": Is this the path to achieve success?

How can we differentiate Canadian food products so consumers here at home and abroad drive up demand for what we process? This open essay focuses on understanding "consumer food expectations" as drivers to compete and succeed.[1]

A simple strategy?

On the face of it, the idea of differentiating to compete is based on a simple view of achieving success. In practice it is complex:

Figure 1. The formula for success

The measure of success

The measure of success is getting more consumers to buy Canadian-processed and supplied food, increasing our exports and improving the trade deficit in processed food.

Convincing consumers in Canada and in foreign markets to buy more Canadian processed food is not easily achieved. Canada's processed food imports are rising and our exports are comparatively flat. Given our climate, food self-sufficiency is not the goal. While there are many individual company success stories, this country's trade deficit (see Figure 2)[2] suggests that we might not be fully meeting consumer food needs. Domestic consumption data are required to fill out this picture. However, the core idea remains relevant: is the Canadian processed food sector positioned to succeed in the future and how can a greater consumer focus help?

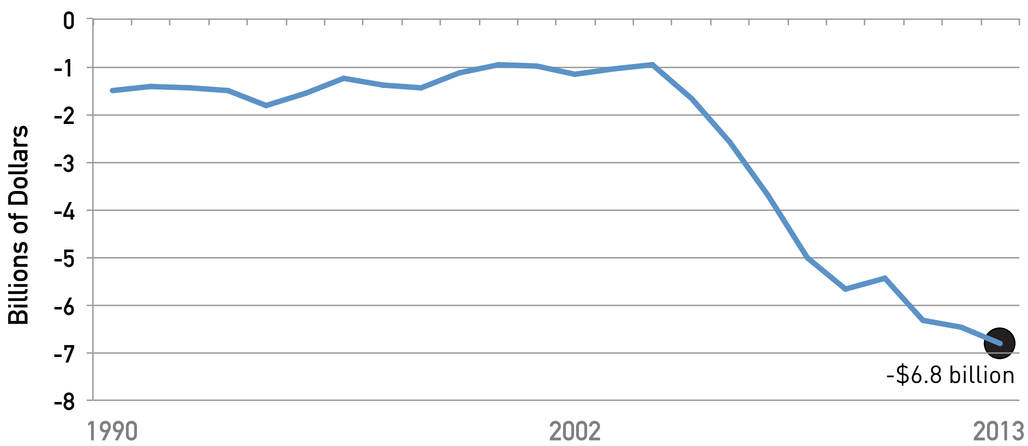

Figure 2. The deteriorating trade balance in Canada's secondary processed food/beverages.

Where are the consumers?

It is important to identify the markets that have the greatest potential for growth. By 2050, 70% of the world's population will live in cities (compared with 49% today).[3] Canada's population is relatively small, making burgeoning export markets vital. Yet, Canada's trade deficit in processed food is rising for both NAFTA and all other countries.[4] There are opportunities in the Canadian market too. In Canada, over the next 10 years, some 70% of the growth in consumer spending will be driven by ethnicity. Are we really identifying and catering to the growth markets in Canada and abroad?

What do they want to eat?

A deep understanding of consumers' tastes and differentiating products that meet their foods needs and expectations is essential. If we don't distinguish what we sell, then price will be the prime determinant — and there are many low-cost food suppliers around the world. Health and nutrition are powerful drivers and companies are responding. Over a five-year period ending in 2010, some 92% of food companies launched (39%) or reformulated (61%) products to improve healthfulness. Are we doing enough to drive consumers (here and abroad) to prefer "Canadian" food (based on specific attributes)?

In short, are we targeting the right markets with the right products? This essay presents some ideas to generate a discussion on what may be required to compete.

Segmenting the "population pyramid"

For hundreds of millions of people, just getting something to eat will remain (unfortunately) the primary concern. Food security is at the foundation of the population pyramid (see Figure 3). With food availability, safety is the issue followed by food affordability. A vast majority of people source their food from regions where soil is polluted, water is contaminated and food manufacturing processes are suspect. With rising incomes, diets diversify — witness the shift to protein-based diets among growing middle classes in Asia. Food nutrition becomes a greater priority. In the wealthiest strata – the top of the pyramid – ethics can drive food decisions: "Is my food grown and supplied in a way that does not denigrate the environment, treat animals inhumanely or farm workers unjustly, etc.?"

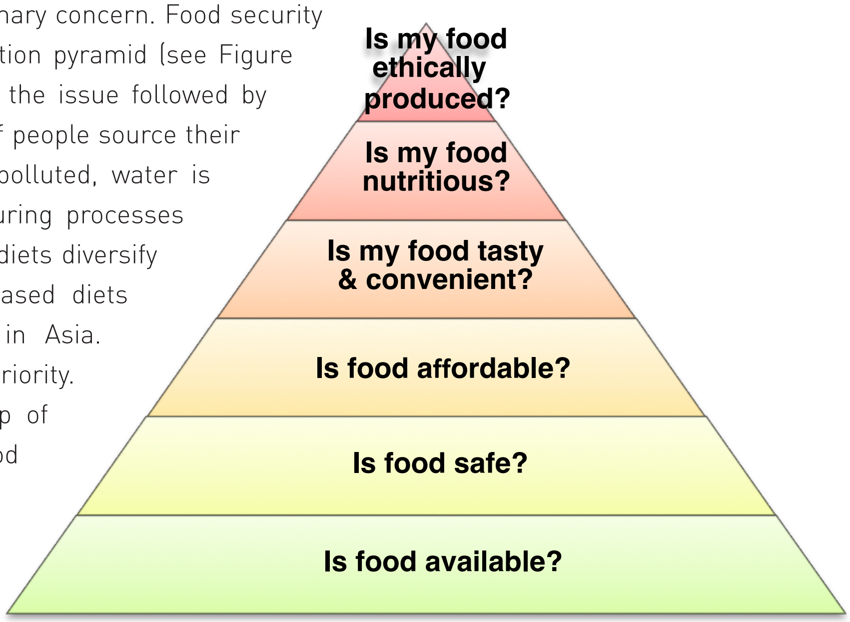

Figure 3. Population pyramid of food needs and wants.

The population pyramid offers a generalization about segmenting the global marketplace. With rising incomes, those middle bands will surely widen and the top end will expand – making for attractive potential markets for Canada. With continued pressure on the world's resources and an expanding global population, food security, a key long-term driver for Canadian commodities, will remain a concern. For food processors, the shifting shape of this pyramid has strategic implications as well. Determining how to best meet the food expectations of growing middle classes or segments will drive markets.

Price. Full stop (for many)

For many consumers, price is king. Consumers want low food prices. The downward pressure on prices seems relentless. Processors are squeezed on costs yet face difficulty passing along those costs to consumers, as the growth of discount retailers and the arrival of new competitors show. Food is sold in hardware and drug stores and there are big new U.S. entrants. Restaurants capture a growing portion (30%) of the consumer's food spending.[7] And food will be increasingly bought online, putting further pressure on price but also presenting new opportunities to market food.

The China Example

Demographic analysis yields important insights. Some 220 million people were born in China in the 1980s and this segment is driving change. This segment, says one premium retailer in China, is "completely opposite their parent's generation in behavior and nowadays most demanding about food safety. This segment alone is leading with more sophisticated buying habits, preferences for quality, authenticity, healthiness, and environmental impact."[8] Among other things, the lesson for food companies' intent on exporting to China is not to assume that this country is one uniform market.

"Value" and "premium"

The choice for companies is not merely to decide to serve the price-conscious (value) or premium (even super-premium) consumer. The challenge, as Rabobank has noted, is positioning the business to respond to the rise of the "hybrid consumer."[9] Consumers are trading down on staples yet can seek out high-end products that satisfy emotional and social needs. The result is that the marketplace is polarizing and food processors and food retailers need to recognize that companies catering to both hard discounters and upmarket retailers are doing well. Those companies serving the mid-range markets are not doing so well. This apparent contradiction in the marketplace has been observed elsewhere. The growth of healthier foods and ethically produced products has been "mirrored" by the growth and viability of less-healthy and so-called indulgence products.[10]

The challenge to differentiate

One of the key challenges to differentiating products is the retailer and consumer focus on price. An additional hurdle relates to private labels. Retailer's private label products (e.g., President's Choice) now occupy nearly 25% of all food products sold in Canada and this share is rising. Private labelling has given food manufacturers a new channel to supply products. But it has essentially made the retailer both the customer and competitor at the same time. Moreover, many private labels are category leaders. In the current retail environment, a differentiation strategy faces real limitations. The unrelenting change in consumer food preferences and expectations (in markets here and all over the world) offers an opportunity to circumvent or mitigate against this challenge over time. That said, food security confronts us here at home as well. Some 1.7 million Canadians rely on food banks and it is estimated that over 2% of the entire retail food market is generally unserved by grocers, including discount grocers. Developing lower-cost models to serve this under-served demographic may be an option for some food processors.[11]

The changing face of the Canadian consumer

> *"Consumers say one thing but do another. Ask them about healthy food, then look at their shopping carts."*
>
> – Quebec processor

Canadian companies have been "caught unprepared" in responding to the changing ethnic make-up of the country and "every retailer needs to address this issue quickly," declares one analyst. How retailers respond may be a matter of degree. Some 70% of the growth in consumer spending will be driven by visible minorities over the next 10 years. In response, independent ethnic grocery stores are registering growth of up to 20% per year with some $5 billion in sales.[12] Retailers are also responding. Loblaw bought T & T Supermarkets, which serves the diverse Asian grocery shopper. The ethno-cultural palate is creating "local food" opportunities. Acres of new vegetable varieties (such as okra) are being cultivated outside our largest cities for grocery outlets and restaurants. If the analyst is correct in that Canada has reached a "tipping point," what are processed food companies doing – or what should they do – to satisfy this burgeoning demand?[13]

Global diet shifts

> *"I think the economy plays to our favour, in that when the economy is difficult, or people are concerned, they tend to be more — how can I put it? — more economic in their spending patterns. And so, they tend to eat in more than eat out, so that favours us. And when they eat in, the preference is for better-quality foods. I think there is also a consumer trend for convenience, which is impacting our industry…. And where we differentiate ourselves is in the SKU types that we have."*
>
> – British Columbia processor

Emerging nations are adopting Western-style diets and paying the price. Deaths from chronic diseases in the developing world now exceed that of communicable diseases. Many factors explain this but poor diets are one cause. Diabetes is a raging challenge for China.[14] Obesity is driving 44% of the global diabetes burden.[15] Closer to home, diabetes plagues Canada's aboriginal population and obesity is an epidemic. Governments are responding to the food-disease link. Canada, for example, has taken action to eliminate trans fats. This issue is drawing many supply-chain players to the same table. Restaurants, retailers, food service companies and processors all have a stake when so many meals are being consumed outside the home.

Demographic shifts

An aging population is propelling food companies and the medical community to learn more about food. The study of epigenetics, for instance, is shaping our understanding of how food compounds affect our genetics and metabolism. Such insights will influence what we eat as we try to minimize foods that trigger disease and embrace those that promise to affect longevity. Such claims need proof. Health claims for food compounds have been allowed on a monogram basis and clinical trials on food compounds are increasing. Only a handful have reached approval or are in the final approval process, although the situation is changing.[16] Becoming known as the country where such proof is solid, coupled with a highly responsive regulatory regime, can be advantageous. Positioning Canada as a testbed for development of global food-health solutions is a potentially attractive way to entice global food companies to carry out R&D here.

"Trustability"

Consumers everywhere want to know: Can I trust my food? Clear answers are elusive. The latest studies can contradict previous research. Aggressive marketing and a lack of scientific literacy among consumers creates uncertainty and confusion about what really is "healthy" food.[17] (We need omega-3, but what about omega-6?) Adding vitamins to "junk food" and continued concerns about sodium reduction deepens the skepticism that food companies are serious about nutrition and consumer health. How we communicate about ingredients is about trust.

Food safety has value

Consumer trust can be shaken by food safety incidents. It is no wonder that countries and companies take this so seriously. In Europe, a 2011 *E. coli* outbreak sickened about 3,000 and resulted in some 30 deaths. The Spanish cucumber industry was devastated while researchers tracked down the source of the contamination, which turned out to be German bean sprouts.[18]

> *The people here are willing to innovate and are always looking for new trends. We look at what goes on in Europe and what goes on in different parts of the world, in the Far East, and we try to introduce those. [Cultural] lines are getting blurred gradually, people are trying all different types of things."*
>
> *– Ontario processor*

In China, several babies died and 300,000 children became ill from melamine-contaminated infant formula (and later other dairy products) in 2008.[19] The scandal prompted major Chinese grocery chains to avoid certain "Made in China" products. Continuing doubts about that country's domestic supply chains' ability to ensure safety[20] forced China to look elsewhere for trusted food suppliers. New Zealand and Australia have become ready suppliers of dairy and meat, respectively. Accountability is needed for consumers to have trust. Accountability has value. The recent move to place the Canadian Food Inspection Agency under the aegis of Health Canada was seen as strengthening food safety for Canadians.[21]

Trust and perception

When a food safety incident occurs, consumers demand factual, clear and timely information. Yet, when it comes to diet choices, perception often determines what consumers do. The rise of gluten-free products is driven, in part, by consumers who don't actually have digestive disorders but are seeking out such foods based on a perception of what is healthy. This diet "craze" is creating a vast new array of gluten-free foods, from potato chips to pickles. It's also prompting many consumers to simply avoid certain foods, such as pasta and bread. This may not actually be resolving genuine health issues, as gluten is found in many food products.[22] The relationship between health and diet is a complex one, but health concerns can easily turn fads into mainstream choices.

Consumer power – social media

Social media shifts power to consumers, who can now turn on a company in an instant. In the U.S., vitriolic reaction to "pink slime" caused the closure of three beef plants. This pejorative term for "Lean Finely Textured Beef" refers to a process approved by the USDA for treating beef with gaseous ammonium hydroxide to kill harmful *E. coli*, Salmonella and other bacteria. A blogger, described as "a mom" by news media, launched an online petition to remove this material from beef served in the country's National School Lunch Program. Major American retailers and processors responded by dropping the use of this lower-cost hamburger filler.[23] Consumer pressure takes many forms, such as a recent (but failed) California campaign to require the labeling of genetically engineered raw and processed foods.[24] A brand can be at stake if food practices are called into question. Suspicion about "what's in my food" fuels social media commentary. This affects processors and the food services/retail sector alike.

Demonstrating authenticity

Demonstrating the authenticity of food will become a requirement to stay in the food business. The information systems being put in place now (initially for food traceability and safety) will eventually allow supply chain players to deliver greater transparency about all sorts of "quality" practices, from ethical production practices to nutrition content. Country reputation counts when it is visible to consumers. One major Canadian seafood company confronts this head on by declaring that no Chinese fishermen or fishing vessels are used to supply its wild species of fish or shellfish.[25]

Measuring transparency

A recent report from Moody's Investors Service on managing water scarcity in the mining sector may foreshadow how food companies will be judged. Because mines in developing countries compete for limited water resources, they may face increased costs and incur a variety of risks.[26] How food companies manage water may come under similar scrutiny. The food sector is now being assessed for contributing (or not contributing) to population health. A new initiative has the sole purpose of assessing the products of the world's largest food and beverage manufacturers. By calculating scores on obesity and undernutrition rankings, the Access to Nutrition Index measures how companies "integrate improved nutrition into their business strategies."[27] Companies will increasingly compete not only for market share but for social responsibility rankings.

> *"For example, lately Russia decided to remove the growth hormone referred to as ractopamine. And we decided, way before many others in the industry, to discontinue its use and we were able to comply far more quickly than slaughterhouses or processors that have to deal with the free market to buy from… In our case, it's all attached. It's all under one roof, which is a major advantage."*
>
> **– Quebec processor**

The transparency bar will only rise. Food contamination may be seen as more "acute" as new technology finds more mycotoxins and micro-contaminants that may present genuine and perceived food safety risks.[28] Concerns about some ingredients and practices, such as use of the growth-promoting chemical (ractopamine) in beef and pork, already shut out certain Canadian foods abroad. Provided such actions are not veiled anti-competitive tactics, how do we stay ahead of changing food expectations? Transparency expectations will increase.

Societal expectations rising

The combined impact of consumer and societal expectations about how food is produced and supplied is profound – and it is ever-changing (see Figure 4). The question for any food player is how to be genuinely responsible and turn these food concerns and desires about provenance, ethics, sustainability and health into opportunity.

> *"But in the last five years, sustainability and the environment have been … I don't want to say a trend. But they have been more of an emphasis with the major retailers. And they're expecting all of our suppliers to participate in improvement projects at their facility to improve the environmental output of the facility. And we must record that with the retailers."*
>
> *– Ontario processor*

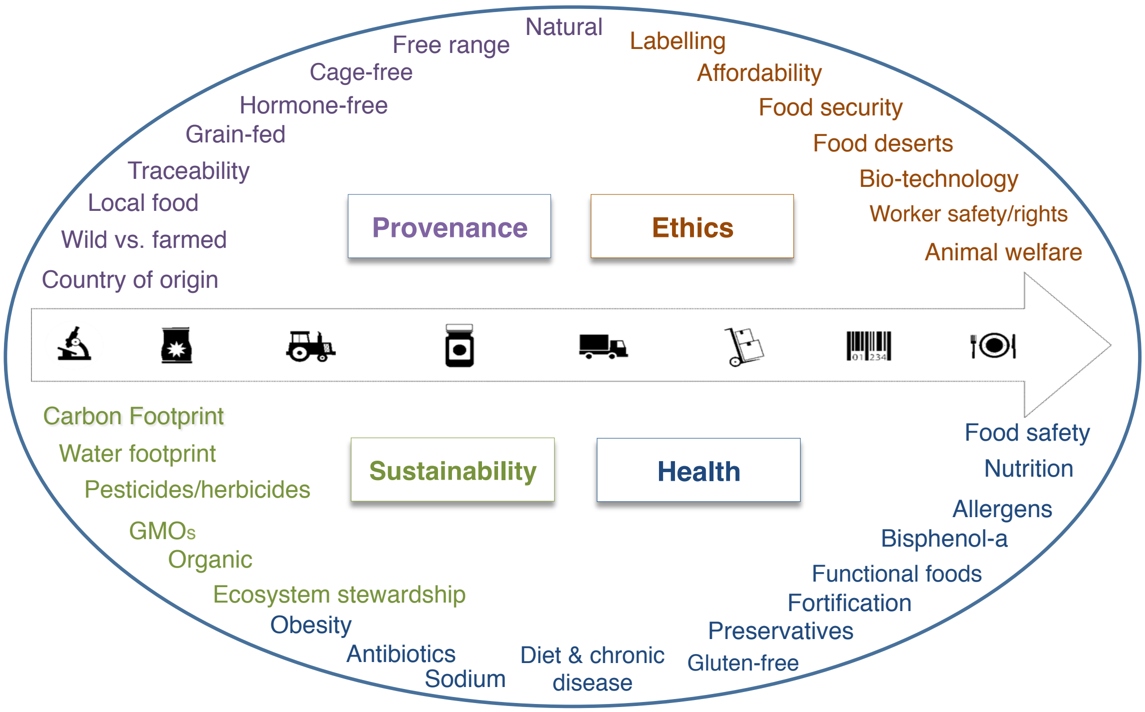

Figure 4. Consumer and societal food issues.

Less is more

The marketplace has signaled that "less is more." Pressed by consumers, many food manufacturers are reducing "unnecessary" ingredients in processed food. How we best manage and minimize chemicals (such as pesticides), hormones and antibiotics is an objective of modern agriculture practices. It is also increasingly important to the market and consumers, who are demanding greater transparency and further reductions in the use of such inputs.

Minimal processing is desired by many. This presents innovation opportunities, as the shift to "all natural" products demonstrates. Can the minimal use of such inputs actually become an advantage, particularly if we can outflank other countries that may use considerably more of these products? Is this desirable?

On the environmental front, many companies are striving to reduce water and carbon footprints. Some are aiming for zero water impacts. Profitability and environmental sustainability are linked. Unilever, for example, seeks to double profitability and halve its environmental impact.[29]

Nutrition density

But when it comes to nutrition, "more is better." Canada's pulse industry has demonstrated that adding its lentil flour to durum wheat pasta can enhance its protein and fibre content.[30] Indeed, in the future, we could be selling ingredients by their nutritional densities (and not by the bushel, as we do with wheat). In such a marketplace, Canada might develop a reputation for healthful food as we lead the world in the ability to "identity preserve" specific types of grain from farm to processing plant.

The steps we take to ensure food's nutritional density spans production, shipping, processing and retail stages. This could be a competitive advantage. What benchmarks are required to ensure nutrition as we move food from farm to plate?

"Consumers have been reading labels of late, which means that they're going for natural colours and natural flavours… So artificial flavours and artificial colours are out. It's all natural flavoured, natural colours. That's one trend that's very, very important. Another one is clean labelling. That's been having a big effect. Consumers don't want to see a lot of stuff on the label, like methyl sulphite…There are a lot of changes that are going on in the food industry now to make the public healthier."

– Ontario processor

Governance

What "guarantees" should be made to stand behind the food we produce? Companies are declaring the need for 100% assurances, such as selling seafood that is 100% sustainably sourced and 100% traceable.[31] Suppliers who fail to meet such requirements will be excluded. If this is where companies are going – and consumers expect them to go – what should we do to make the Canadian brand the most trusted source of food? The marketplace is signaling what is desired: safety, nutrition and sustainability. What could be gained (and what would it cost) by being the first country in the world to provide certain guarantees for the food we produce?

Can we become one of the world's "most trusted food sources"?

The global population is expected to top 9 billion people by 2050. Canada is well positioned to be a major supplier of commodites to the world. But, given the increasing affluence of consumers in large, emerging markets, can we also be a bigger premium supplier of value-added food? What can we offer that will drive consumers to select Canadian food? In a word, "trust." To be known as

"We made our first shipment to India recently, and it's because we have a very clean product. Its purity level is higher than anybody else in the industry at the moment, and the roasting process also destroys any pathogens such as yeast and mould and salmonella, for example. And, food quality from that point of view is becoming more and more of an issue with consumers."

– Saskatchewan processor

one of the most trusted sources of food on the planet (for every ingredient or food we sell here or export), would require demonstrating every aspect of quality across the food system from the inputs used to grow and produce our food to the final ingredients used to put food on the table. The proliferation of global supply-chain quality standards is, in part, already trying to do just that. So how do we brand Canada for achieving such quality across the board?

Competitive advantage

A strategy based on differentiation and trust is likely the key to achieving a competitive advantage – and it touches on every aspect of food production and supply. Production economics also remain critically important. It's the combination that is required to consistently deliver value to the consumer as part of an overall winning business strategy. Differentiation is the way to get more people to buy more of our food. This is surely the means to have a more profitable processed food and agri-food sector. This will require a deeper understanding of markets, consumer trends, and food science and technology. How we collect and manage data here – and do so better than our competitors – will be essential to this strategy.

"Skating to the puck"

Wayne Gretzky's tremendous hockey success is often attributed to his ability to anticipate where the puck will be. Can we be courageous enough as processors, and as an industry and country, to skate to where the puck will be and anticipate what will determine global food success in the future? A critical decision will be whether we choose to play strategically to win.

Differentiating to win

This work presents a simple hypothesis: by excelling at every aspect of differentiation (from ingredient supply to the retail shelf) we can deliver the "right" products for a changing marketplace. We need to get more people to buy our food. But the trade data reveal the challenge: imports are exceeding exports. If Canadian consumers are buying more imported food and exports are stalling, then are we truly differentiating ourselves?

Please offer your views on how Canada's processed food sector can achieve its full potential.

Endnotes

1. See a summary of the CAPI research program on its website: www.capi-icpa.ca/highlights2012/process-food-study_111412.html and http://www.capi-icpa.ca/pdfs/2013/CAPI_Resurgence2013_ENG.pdf

2. An overview of the processed food trade deficit and the methodology used to portray it is outlined in a separate report published by CAPI in October 2013: www.capi-icpa.ca/news/2013/seek-views_131010.html.

3. *How to feed the world, 2050*, Food & Agriculture Organization (FAO), Rome.

4. *The State of Canada's Processed Food Sector: Trade Balance*, November 2012, CAPI website, page 7.

5. Data reflect change from 2005 to 2010 among member companies of the Food and Consumer Products of Canada; *Our Commitment to Health and Wellness*, FCPC, February 2011.

6. As an example, beef consumption is up 3% over the past 5 years in such countries. ("How to feed the world, 2050", FAO: http://www.fao.org/fileadmin/templates/wsfs/docs/expert_paper/How_to_Feed_the_World_in_2050.pdf. Accessed: 2/28/13.)

7. *Drivers of Canadian Food Processing Competitiveness – Macro Factors and Micro Decisions*, George Morris Centre, March 2014.

8. *Charting a Path for Global Growth: 5 reasons why China offers unprecedented opportunities for Canadian agri-food companies*, CAPI, Oct. 28, 2013.

9. Rise of the 'Hybrid Consumer' to polarize the food sector, Press Release, Rabobank, May 23, 2013.

10. *Competing for the Bronze: Innovation Performance in the Canadian Food Industry,* December 2012, The Conference Board of Canada, page iii.

11. Perry Caicco, Managing Director, Equity Research, CIBC World Markets, "The Forgotten Consumer," *Grocery Business*, March/April 2014.

12. *The Ethnic Consumer in Canada, Understanding a Powerful Trend*, Institutional Equity Research, Industry Update, CIBC World Markets, Sept. 13, 2010.

13. McCain's Indian operation has developed two classic Indian prepared foods, aloo tikki and idli, a potato and bread dish, to meet the tastes of that country's population. *The Food Report, 2013*, Blakes, Cassels & Graydon LLP.

14.Non-communicable disease mortality in China is higher than in other leading G-20 countries. The leading chronic diseases are cardiovascular diseases, diabetes, cancer and chronic obstructive pulmonary diseases. (Toward a Healthy and Harmonious Life in China: Stemming the Rising Tide of Non-Communicable Diseases, Feature Story, The World Bank, July 16, 2011. Accessed 3/22/13.)

15. *Obesity at Davos: Forum asks pharma, big food to solve problem 'harder to fight than smoking'*, World Economic Forum, Jan. 24, 2013.

16. See an overview of the health claims approval issue in CAPI's report *Canada's Agri-Food Destination: A New Strategic Approach*, 2011, page 83, which at the time of print noted that only five health claims have been approved. Today, the number of health approvals has increased to 11 and 70 novel foods have been approved (AAFC 2013).

17. 77% of consumers find nutritional messaging "confusing and changing" which is a key reason for consumers not adopting healthy eating habits. *Communication and Food Messaging: The Consumer Disconnect*, Canadian Nutrition Society, 2013.

18. *E. coli*: Germany admits that locally grown bean sprouts are cause of outbreak, *The Telegraph,* June 10, 2011.

19. Questions and answers on melamine; WHO: http://www.who.int/csr/media/faq/QAmelamine/en/index.html; accessed: Feb. 27, 2013.

20. It has been noted that Chinese opinion polls reveal uncertainty about the country's food safety. (*Winning through the Supply Chain*, Rabobank Food and Agribusiness Research and Advisory, February 2013.)

21. Canadian Food Inspection Agency Joins Health Portfolio, Health Canada Press Release, Oct. 9, 2013.

22. Gone Gluten-Free, Cathy Gulli, *Maclean's Magazine*, Sept. 16, 2013, page 55.

23. Despite being considered "safe and wholesome", the campaign against Lean Finely Textured Beef resulted in major media and significant consumer attention in the U.S. (Safeway Drops 'Pink Slime,' Walmart to Offer Consumers Choice," by Helena BotteMiller, March 22, 2012; accessed June 2012: http://www.foodsafetynews.com/2012/03/safeway-drops-pink-slime-walmart-to-offer-consumers-choice/). The case was referenced in CAPI's report, *Canada's Beef Food System,* September 2012, page 39.

24. Proposition 37, "The California Right to Know Genetically Engineered Food Act", was defeated 53.1% to 46.9% by voters in November 2012.

25. Where does High Liner fish come from? Featured article on High Liner Seafood's website; accessed June 2012.

26. Special Comment: Global Mining Industry: Water Scarcity to Raise Capex and Operating Costs, Heighten Operational Risks, Moody's Investors Service, February 13, 2013.

27. http://www.accesstonutrition.org

28. Another example is the attention being given to endocrine disrupting chemicals. (See *State of the science of endocrine disrupting chemicals*, 2012, WHO.)

29. Unilever *Sustainable Living Plan*, 2010.

30. Pulse Canada has calculated (2011) that, when compared with 100% durum wheat flour pasta, pasta with 75% durum/25% lentil flour has double the fibre, 25% more protein and a lower carbon footprint.

31. Loblaw has pledged to source 100% of its seafood from sustainable sources in 2013. (*Loblaw Corporate Social Responsibility Summary*). Other Canadian retailers have similar pledges. Loblaw has also announced 100% traceable Ontario corn-fed beef. Unilever, which sources some 6% of the world's tomatoes and 5% of its onions, has pledged to source 100% of its agricultural raw ingredients sustainably. (John Coyne, Unilever, Conference Board of Canada Webinar, Jan. 30, 2013.)

Partners

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Natasha Apollonova — Director, Economic Development Toronto Region Board of Trade

Ted Bilyea — Chair Canadian Agri-Food Policy Institute

Isabel Dopta — Director of Communications and Stakeholder Relations Vineland Research & Innovation Centre

Jerry Koh — Innovation & Foresight Advisor MaRS Discovery District

Siddika Mithani — ADM, Science & Technology Branch Agriculture & Agri-Food Canada

Paul Paquin — Board member, Canadian Agri-Food Policy Institute; Professor, Department of Food Sciences and Nutrition Laval University; and Investigator with the Institute of Nutrition and Functional Foods

Usha Srinivasan — Director of Market Intelligence BMEP – Market Intelligence, MaRS Discovery District

Wayne Stark — Board member, Canadian Agri-Food Policy Institute CEO, Pursuit Development Labs Inc.

Ilse Treurnicht — CEO, MaRS Discovery District

Rickey Yada — Professor & Canada Research Chair in Food Protein Structure, Scientific Director, Advanced Foods and Materials Canada (AFM Canada) Department of Food Science, University of Guelph