

Barton Forward: Optimizing Growth

What We Heard from Stakeholder Workshops

by

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The Vision of the *Advisory Council on Economic Growth (ACEG)* set us on this path



“A vision statement—such as ‘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.” (ACEG report, February 2017);

and

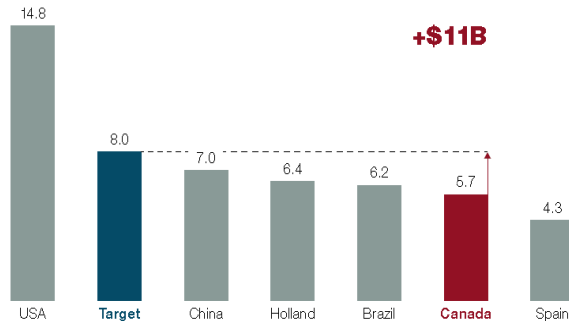
“...the Innovation and Skills Plan has set an ambitious target to grow Canada’s agri-food exports to at least \$75 billion annually by 2025” (2017 Federal Budget, March 2017)

We have set some ambitious growth targets

- Agriculture and Agri-food exports to reach \$75 billion by 2025
- Canada's share of global agriculture exports to rise to 8% from 5%, (from 5th to 2nd)
- Canada's agri-food exports to double (from 11th to 5th)

Exhibit 2 Canada could target an 8 percent global market share in agricultural products by 2027.

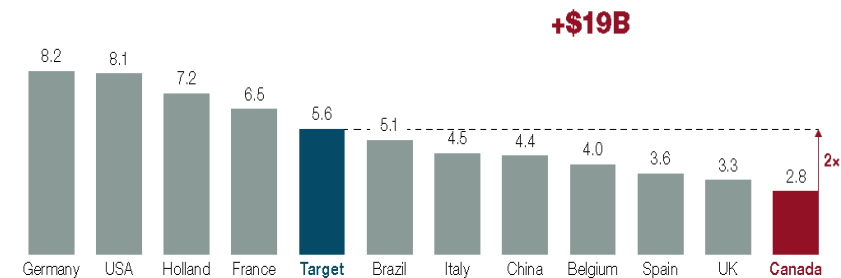
Exports of agricultural products, 2015
Share of global exports



Source: World Trade Organization

Exhibit 3 Canada could aim to double its global market share in agfood products by 2027.

Exports of agri-food products, 2015
Share of global exports



Source: World Trade Organization

Putting flesh on the bones - What was next?

1. Governments

- Intra-departmental, Inter-departmental, Inter-governmental
- Federal Agri-food Economic Strategy Table

2. Producer and Processor Associations

- Projections and Growth Plans

3. Think Networks

- CAPI's "Barton Forward" Project
 1. November 2017 FMC Workshop
 2. December 2017 Saskatoon Workshop
 3. March 2018 Guelph Workshop
 4. May 2018 Ottawa National Conversation

CAPI initiated a dialogue with agri-food stakeholders to discuss “Barton growth targets” - What we heard fell under 4 major themes

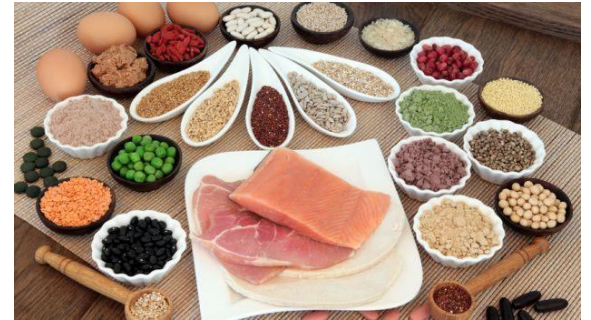
1. Are these growth targets realistic given trade and market access prospects?
2. Can Canada improve natural capital while achieving these growth targets?
3. Is this growth compatible with other policy initiatives like the National Food Policy (NFP) & Canadian Ag Partnership (CAP)?
4. Does Science and Innovation hold the key to meeting these targets?

What CAPI heard - YES, BUT...

1. Are these growth targets realistic given trade and market access prospects?

YES

- Increasing worldwide demand for protein; and
- Volume and quality advancements as well as new investments in Canadian agri-food



What CAPI heard - YES, BUT...

1. Are these growth targets realistic given trade and market access prospects?

BUT:

- Stiff international competition for sales; and
- No trade agreements yet with the largest potential growth markets and trade uncertainty in traditional export markets.



What CAPI heard - YES, BUT...

2. Can Canada improve natural capital while achieving these growth targets?



YES

- Canada has natural capital advantage; and
- Canada has a strong track record of environmental improvement.



What CAPI heard - YES, BUT...

2. Can Canada improve natural capital while achieving these growth targets?

BUT:

- True costs are not reflected in production which limits enhancement of natural capital; and
- No consensus on how to encourage or monetize best practices for enhancing natural capital.



What CAPI heard - YES, BUT...

3. Are other policy initiatives compatible with these growth targets?

YES

- Optimism for policy coordination and “desiloification”; and
- Focus on the middle- to longer-term so that coordination will facilitate growth.



What CAPI heard - YES, BUT...

3. Are other policy initiatives compatible with these growth targets?

BUT:

- Funding is spread very thin to support each initiative; and
- Traditional silos and interest groups may find it difficult to all pull in the same direction.

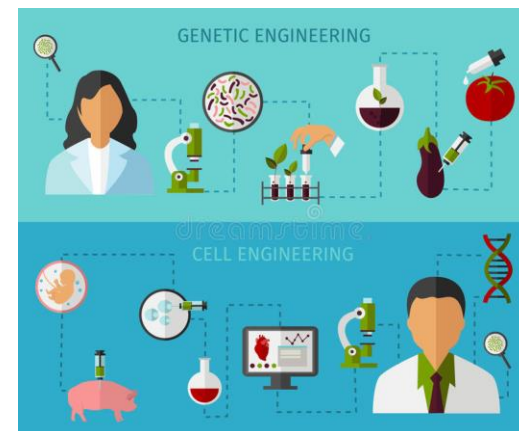


What CAPI heard - YES, BUT...

4. Does Science and Innovation hold the key to meeting these growth targets?

BUT:

- Science and innovation will “disrupt” agri-food making new leaders & partnerships; and
- Maintaining public trust will be paramount in commercializing scientific innovation in agri-food.



The Way Forward

1. Today's Conversation
2. CAPI's Report
3. Agri-food Players Leading the Charge to Optimizing Canada's Agriculture Growth to Barton Targets by 2027