



CANADA



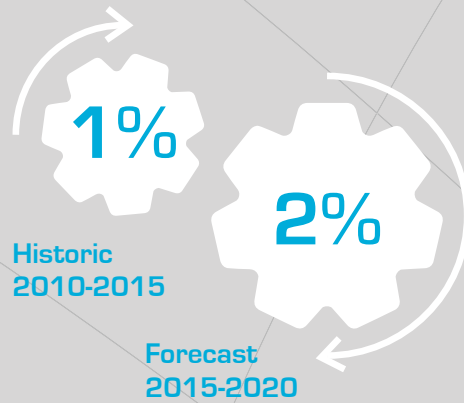
Canada

Retail market size,
in US\$ billion

43 US\$

Canada is the world's 12th largest packaged food market, still ahead of India in 2015.

Retail CAGR (real) fixed US\$



Retail market size,
in US \$billion



15 Staples



11 Dairy



9 Snacks



8 Meals

Share of Modern Grocery



Canada's retail network is very developed and packaged food is predominantly bought in supermarkets and hypermarkets, yet discounters are on the rise.



Canada

MARKET SHARE Top food players in 2015

Saputo

5.4%

Kraft*Heinz*

4.4%



4.2%

GRUPE
LACTALIS

3.7%



Canada

KEY TRENDS

ETHNIC INFLUENCES

- Multinational nature of the country and immigration policy.
- Reflected in federal election.
- Provides inspiration for new product development such as Kefir and broghies.

MILLENNIALS

- Need for Health: Natural, Organic, Free-from, no GMO.
- Need for Convenience: Snacking, On the Go, Packaging.

WEAKER CURRENCY

- Rising ingredient costs.
- Slowdown in premium brands.
- Value for money and rise of discounters.



Canada

FASTEST GROWING CATEGORY

% CAGR growth 2010 - 2015

Savoury Snacks 4.3%

The snacking trend is strong amongst the younger generation who value the convenience of snacks than traditional meals.



Oils and Fats 4.0%

There is a trend towards more unconventional oils, such as coconut oil and palm oil.



Rice, Pasta and Noodles 3.8%

The influence of Indian, Chinese and Japanese cuisine has created more market opportunities.

