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## Canada

### Market Development Reports

### Packaging & Retailing Trends for Fresh Produce in Canada

### 2003

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**Report Highlights:**

Canadian's consumed C\$6 billion worth of fresh produce in 2002. 75% of the fresh produce sold in Canada is imported. 66% of all imports of fresh fruits and vegetables are from the United States

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Includes PSD Changes: No  
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## Industry Profile

### Overview

In a recent Study<sup>1</sup> among a sample of Canadians, 47 factors that influence the shopping experience were evaluated, and the factor with the single greatest influence on consumer behavior was fresh and appealing fruits and vegetables.

### Industry Size

Canadians consumed C\$6 billion worth of fresh produce<sup>2</sup> in 2002. Retail channels sold 82% of this total, or C\$4.9 billion.

#### **Total Retail Sales<sup>3</sup> of Fresh Produce (C\$ Millions)**

	1999	2000	2001	2002	2003 Est.
Vegetables	\$1,962	\$2,178	\$2,358	\$2,523	\$2,736
Fruit	\$1,797	\$1,940	\$2,109	\$2,383	\$2,539
Total <sup>4</sup>	\$3,759	\$4,118	\$4,467	\$4,906	\$5,275
% annual growth		10%	8%	10%	8%

Fully 75% of the fresh produce sold in Canada is imported. Two thirds of the imports are from the United States. However, during the summer and autumn, Canadian producers supply 65%-75% of the market.

### Retail Sales by Type of Outlet

The majority of consumers purchase fresh produce in the standard style grocery store, as is the case in the United States.

Warehouse style stores, also referred to as "club" and "discount" outlets, supply fresh fruit and vegetables as well. Besides consumers, this segment services the smaller restaurants and institutions in the foodservices sector.

Another critical element in the market is the small independent retailer that specializes in fresh fruits and vegetables. These stores focus on price and have successfully segmented the market geographically (service consumers who live within a 10 mile radius).

A 1%-to-1.5% market share is held by open-air markets, which are holdovers from the days of the pushcarts of the 1940's. These open-air markets are usually located in ethnic areas of urban centres.

<sup>1</sup> Study by ACNielsen for the Canadian Council of Grocery Distributors (CCGD) 2002

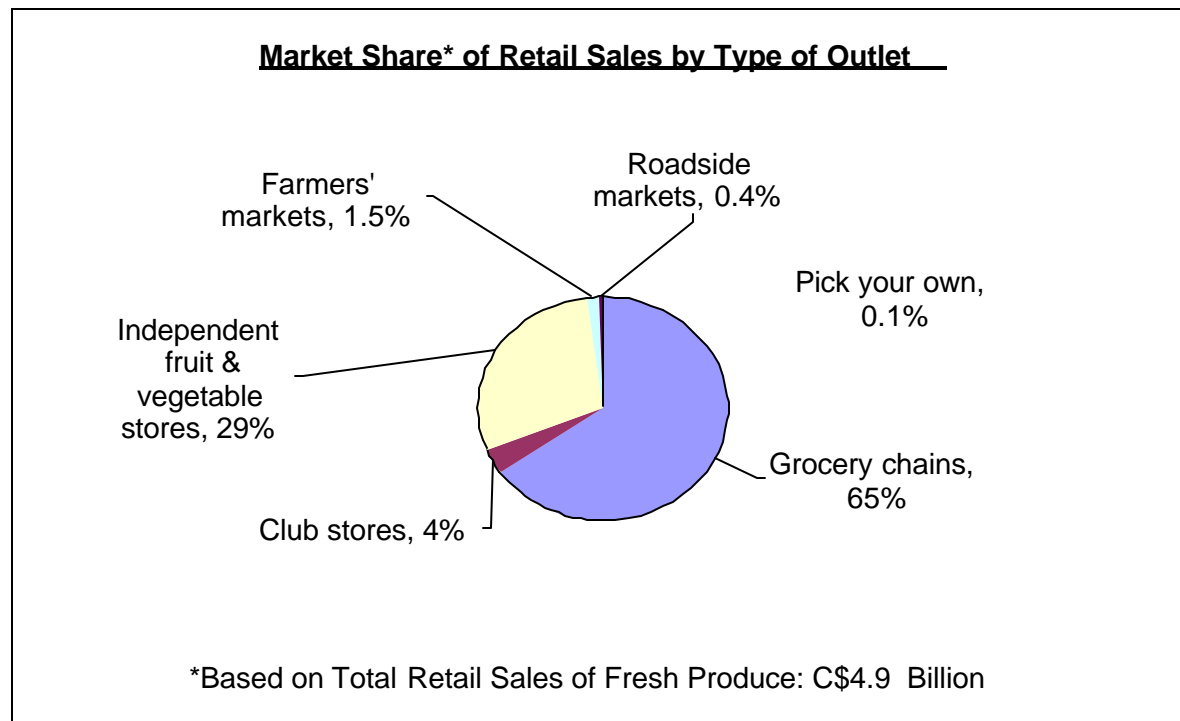
<sup>2</sup> Fresh produce is defined as fruits and vegetables that either *has or has not* been altered from their original form, but remain in a fresh state. It is irrelevant to this definition whether the commodity is washed, peeled, cut, bagged or prepackaged, as long as the vegetables or fruit have not been processed or canned (i.e. remain fresh).

<sup>3</sup> ACNielsen, Retail Sales Consumer Expenditure

<sup>4</sup> [http://www.agr.gc.ca/food/consumer/mrkreports/acnielsen/introduction\\_e.html](http://www.agr.gc.ca/food/consumer/mrkreports/acnielsen/introduction_e.html)

In an effort to capture a larger percentage of consumers spending, farmers have added two more avenues of retail distribution; "roadside markets" and "pick your own".

The proportion of fresh produce retail sales held by each type of outlet<sup>5</sup> is illustrated in the following pie chart:



### Fruit & Vegetable Distribution

The system of distributing fresh fruit and vegetables in Canada has changed over the years such that the traditional channels overlap considerably. The key factors contributing to these changes are:

- The North American Free Trade Agreement (NAFTA)
- Increased consumer demand for fresh fruit and vegetables
- Technology (global sourcing a reality)

According to Christian Bourbonnière, Vice-President, Fruits and Vegetables, for Metro-Richelieu Grocers of Montreal, "Produce buyers have never had it so good. Mr. Bourbonniere says that product quality has never been better, distribution channels are faster and more efficient than ever before and the number of fruit and vegetable SKU's is skyrocketing, as is the number of countries Canada imports from.

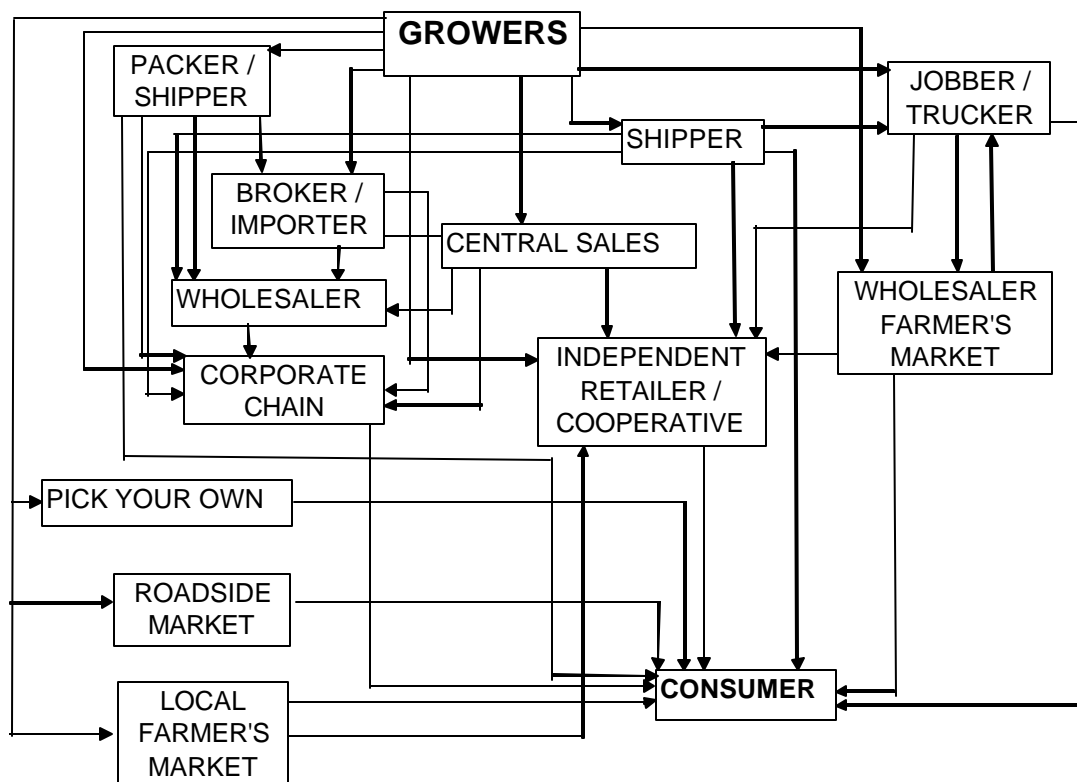
James Milne, marketing director of the David Oppenheimer Group of Vancouver, British Columbia, a company that sources produce for major Canadian retailers, feels that the changes in the fresh produce market are creating new challenges for middlemen, as grocers ponder increasing direct contact with growers and buying through large contracts.

<sup>5</sup> Canadian Produce Marketing Association (CPMA)

Wholesalers and middlemen have to add value. Otherwise there is no reason for them.  
[www.oppyproduce.com](http://www.oppyproduce.com)

The present distribution system of the Canadian Produce Market is illustrated<sup>6</sup> in the following diagram:

### Canadian Produce Marketing System



### Retail Benchmarks and Trends

Produce represents approximately 16% of a typical grocery store's profits<sup>7</sup>, and 16% of all transactions in Canadian grocery stores relate to sales of produce.

According to the Trade Facilitating Office Canada (TFOC) retailers of fresh fruit and vegetables usually operate on a 40% gross margin. On the other hand, Produce Department Managers claim the average gross margin for produce is about 27%. The difference between these figures is believed to reflect the effect of spoilage on targeted gross margin.

The average size of the produce department in a Canadian grocery store is 2,785 square feet; whereas in an American grocery store, the average size of the department is 3,005 square feet<sup>8</sup>.

<sup>6</sup> Source: Canadian International Trade Tribunal, *An Inquiry into the Competitiveness of The Canadian Fresh Fruit and Vegetable Industry*

<sup>7</sup> Produce Trends 1998 by the Canadian Produce Marketing Association

<sup>8</sup> *Fresh Track*, 1997

Produce retailers report that approximately 20% of their departments' sales originate from specialty items. This breaks down as follows:

9%	Prepackaged salads
5%	Fresh cut vegetables
2%	Fresh cut fruit
2%	Organic products
1%	Home meal replacements
1%	Fresh herbs

On average, almost two thirds (63.4%) of all fresh produce sold in Canada is sold in bulk, i.e. where consumers personally select the quality and quantity of fresh produce items desired.

The proportion of bulk to packaged sales is inversely proportionate to the size of the grocery store; that is, the larger the outlet, the more packaged fresh produce is available.

### Retail Packaging Trends

Some of the retail packaging innovations that have appeared in Canadian grocery stores relatively recently include:

1. Peeled and washed mini carrots packaged in individual serving-sized containers with a peel-off top
2. Washed and cut celery sticks and/or rutabaga strips, approximately 4 inches long; six units per pack.
3. Garlic bulbs packaged in mesh strips, 4 bulbs per pack.
4. Bean sprouts washed and presented in clear plastic round containers (six inch diameter), about 3-to-4 servings.
5. Baskets, constructed of thin, lightweight wood with a handle that is approximately 12 inches long by 6 inches wide by 4 inches deep used to merchandise grapes, cherries, peaches, pears and plums.
6. Sturdy wooden crates approximately 12 inches square, 4 inches deep for tangerines, nectarines, clementines, etc.
7. Bags of apples, about 12 to 15 apples in the bag, usually presented in the fall.
8. Asparagus sold by the bunch – usually a serving for two people per bunch
9. Individually wrapped English cucumbers
10. Watermelon, cantaloupe and honeydew are often sold by the unit, half or even in some areas by quarters.
11. Corn husked, with ends cut and packaged in groups of 4 and 5 units
12. Potatoes in bags; various varieties.

## Marketing of/by Brand Name

Very little branding (marketing of a brand name associated with fresh produce) takes place in Canada. When retailers advertise, price is generally the focus of the ad. Occasionally, the region where the product was grown is presented and, from time to time, the generic variety is advertised<sup>9</sup>. Examples from print advertising include:

Royal Gala Apples from USA	Local corn
Pink Grapefruit from Florida	Grapes from Niagara
English Cucumbers	Blueberries from Lac St-Jean
Avocados from Mexico	Size 120 pears
Tangerines from Hungary	Hothouse red or yellow peppers

There are, however, a few examples where branding of produce has been successful such as Chiquita<sup>10</sup> and Turbana Bananas, Sunkist and Valencia Oranges, and Dole Pineapples. Furthermore, the Canadian Grocery Retailer, Loblaws, is trying to brand organically grown produce under the company's private label, President's Choice.

## International Trade

Due to the varied climate in Canada and a short growing season, imports play a critical role in the fresh produce industry. This, coupled with the high demand for fresh produce, makes Canada a net importer of fresh fruits and vegetables.

Canada ranks among those countries with the highest levels of imports per capita. Exporters from all over the world are present in Canada competing for a share of the lucrative fresh produce market. In the last five years, Statistics Canada reports that fruits and vegetables sold in Canada have come from over 150 different countries. In total, 66% of the imports to Canada (fruits and vegetables) are from the United States.

A number of these countries supply niche markets; however, the mainstream fruits and vegetables come into Canada from a handful of places. The United States is the number one source for the fruit and vegetables that Canada imports<sup>11</sup>.

Since the Canadian harvest season generally runs from July to October, the main import period is from November to June. About 75% of Canada's annual fresh fruit and vegetable importing activity takes place during these seven months of the year.

The following table presents the value of the imports by leading countries for the year ending December 31, 2001:

<sup>9</sup> as is often the case with apples

<sup>10</sup> <http://www.chiquita.com/>

<sup>11</sup> Not only does Canada import more fresh fruit & vegetables from the United States than from any other Country in the world, but the United States also accounts for 95% of the fresh fruit & vegetables that Canada exports.

Top Ten Countries from which Canada Imports Produce (2001) <sup>12</sup>  
(Values in C\$ millions)

Country	Vegetables	Country	Fruit
USA	\$1,252	USA	\$988
Mexico	\$138	Chile	\$151
Netherlands	\$29	Mexico	\$113
Spain	\$21	Costa Rica	\$105
China	\$12	Ecuador	\$70
Peru	\$8	South Africa	\$60
Jamaica	\$7	Columbia	\$60
Guatemala	\$6	Morocco	\$48
Israel	\$5	Argentina	\$41
Belgium	\$3	China	\$32
Total	\$1.5 billion		\$1.9 billion
Past 5 years	35% increase		19% increase

The fastest growing supply countries for fresh vegetables in the past five years have been Peru, China and the Netherlands. Countries that have increased trade with Canada in fresh fruit are China, Guatemala, Iran and Brazil.

Interestingly, during the same time period, the value of exports from Canada has increased at a rate of 32% per year; much higher than the 4.4% per year rate calculated for imports. The result is that even though the balance of trade in the category remains negative, the net position has changed considerably. In 1992 the ratio of imports to exports was 10 to 1. A decade later, the import to export ratio is only 3 to 1. This is due primarily to exponential growth of the greenhouse industry in Canada.

### Organic Fresh Produce

The retail sales of organically grown fresh fruit and vegetables in Canada are approximately C\$100 million. The industry in Canada has been growing since its inception by an annual rate of approximately 15% and, in 2002, the total retail sales of organic food sold in Canada was estimated to be just over one billion dollars<sup>13</sup>. Other sources<sup>14</sup> suggest a somewhat lower value, more in the range of C\$700 million.

Retailers are not sure which way the consumer will go. There are indications that organically grown food is the way of the future, yet recent reports from England<sup>15</sup> suggest that the consumer is not completely sold on the idea!

A market research study commissioned by The Toronto Globe and Mail, Report on Business, April 26, 2002 reported that 39% of Canadians trust the term "organic"; 35% do not, and 26% are not sure.

The driving force behind organic food is the younger (under 25 years old) segment, and in particular, those young people who are slightly better educated than the norm, have a higher than average income and are concerned about what they eat. The fastest growing target group is new and expectant mothers.

<sup>12</sup> Trade Data On Line – Trade by Product, Industry Canada 2002

<sup>13</sup> Canada's Organic Industry; <http://ats.agr.ca>

<sup>14</sup> Agriculture and Agri-Food Canada, <http://www.atn-riae.agr.ca/info/us/e3219.htm>

<sup>15</sup> CPMA, Mark Drouin



Retailers in major urban markets are dedicating complete sections within the produce department to organic products. Loblaws is very active, with approximately 300 products in its President's Choice line. Three other major chains, A&P, Sobey's and Safeway are following with similar approaches to the category. Yet, most independent retailers, including small Fruit & Vegetable stores, do not sell organically grown produce at all.

Whole Foods, a major American organic food retail chain has opened one store in Toronto. When contacted at their offices in Detroit, a spokesperson for the franchising department said that there are no plans for other stores (or even other franchise opportunities) in any of the other major urban centers in Canada - even though some of Canada's urban centers are larger than those cities in the United States where new stores are being opened.

### Fresh Cut Produce

Fresh cut produce is one of the fastest growing segments of the food industry. Popular in both retail outlets and in foodservice, it is estimated that packaged vegetables sales will reach 25% of fresh produce sales within the next five years. A fresh cut produce facility was built in Laval, Quebec in 1999 to service both Eastern Canada and the New England markets.

The success and estimated exponential growth of this segment is related to the need for:

- smaller servings due to smaller household sizes, and
- fast and convenient<sup>16</sup> solutions for meals.

In foodservice, packaged fresh produce offers a considerable savings in labor cost and reduces the amount of food wasted.

Washed potatoes have been available in Canada for a very long time. Marketers have gone to the next level and now present this fresh vegetable washed, peeled and cut.

Washed and packaged lettuce (iceberg and romaine, sometimes mixed with red cabbage), spinach, cut cabbage with carrot, and coleslaw is also generally available. A limited variety of package sizes may be offered. The sales of bagged salads alone increased 23% between March 2001 and March 2002 to C\$127 million<sup>17</sup>.

"Salad Time" brand is processed in Boisbriand, Quebec and distributed throughout the eastern seaboard for Tanimura & Antle<sup>18</sup>, one of the largest growers in the United States.

Consistently stocked in all grocery and club stores for many years are the packages of cleaned and sliced mushrooms. The most popular SKU is washed, peeled and packaged mini carrots, which are available in large, small and individual serving-size packages.

Few stores carry the full variety of washed, cut, and packaged vegetables. Cauliflower, broccoli, celery sticks, romaine lettuce leaves, various varieties of mushroom and bags of mixed fresh cut vegetables are available in the warehouse grocery chains and at the wholesale level.

Pride Pak Canada, the Ontario Apple Sales Group, and the Province of Ontario's Ministry of Agriculture and Food have produced a new packaging system for fresh fruit that promises to

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<sup>16</sup> 70% of Canadians plan dinner same day, 10% on the way home from work, 17% last minute are results of a survey commissioned by The Canadian Council of Grocery Distributors (1999)

<sup>17</sup> Food In Canada; [www.foodincanada.com](http://www.foodincanada.com)

<sup>18</sup> [www.taproduce.com](http://www.taproduce.com)

make packaged, prepared fruit an attractive proposition for consumers. There is a possibility that the new system will be in test market this fall (2003). For more information, see:

<http://www.packaging-technology.com/informer/breakthrough/break334/>

## Nuts

In the produce departments in major grocery chains, usually towards the end or back of the department, is a section for "produce" sold in bulk. This is where one finds various varieties of nuts, seeds and dried fruit. There are nuts and seeds available in the shell and unshelled, the selection of which is dependent upon the size of the store, its location, demand for these products, and the season.

From time to time, and dependent upon the individual store's management, nuts and seeds are available loose and pre-packaged.

As well, packaged nuts are sold in grocery stores, usually next to products used for baking. In the Nielsen Report on Retail Grocery Sales these nuts are referred to as "baking nuts". The retail market for this category of nuts is about C\$30 million.

Packaged, shelled nuts are also sold along with snacks such as pretzels and popcorn. These products are categorized and referred to by Nielsen as "shelled nuts", valued at approximately C\$75 million.

Retail sales of nuts sold in the produce section of grocery stores in Canada are grouped in an "other produce" category but not reported separately, and therefore cannot be presented in this report.

Independent fresh fruit and vegetable retailers carry a variety of nuts as well. Most of the time, a limited variety of nuts in bulk are presented and sold by weight.

The standard presentation in all grocery and independent vendors across Canada includes:

- Walnuts, shelled and unshelled
- Almonds unshelled, salted and plain, roasted and plain
- Almonds shelled
- Peanuts in the shell (especially in October)
- Pistachios, red and/or white in shells
- Filberts unshelled
- Pumpkin seeds shelled and unshelled
- Sunflower seeds shelled and unshelled
- Cashews unshelled
- Brazil nuts unshelled
- Dried papaya
- Dried banana

## Opportunities and Threats

### Opportunities

*Keep it coming*<sup>19</sup>...

- *produce is key to a healthy diet*
- *give consumers quality and variety*
- *give them nutritional tips and cooking tips, especially for some of the exotic produce*
- *give them convenience; fresh cut produce, bagged salads and prepared products*

1. Demographics: The changing Canadian demographics are creating opportunities in the fresh produce market. The size of the traditional household is getting smaller. There are 3 million Canadians living alone<sup>20</sup>. The food industry has addressed the issue in a limited way, by offering e.g. frozen dinners, catering counters in grocery stores, sushi bars and salad in a bag.

Fresh produce marketers must address the demands of the Generation Y, those people born between 1980 and 1995. Research indicates that this group seems to have a great influence on household buying choices, particularly in food. Some members of this age segment are very ecology-minded, and are strong advocates of vegetarianism, natural products and animal rights.

The baby boomers are reaching or approaching retirement. This segment of 40-to-55 year old Canadians is weight conscious and focused on nutrition. Those in the upper end of the segment, who are by now empty nesters, are living longer<sup>21</sup> and keep fit by being quite active. By 2016 approximately 44% of Canadians will be over 45 years of age.

The increase in demand for ethnic diversity in food has entered a new level. What was once considered ethnic cuisine is now often considered mainstream. Consumers want international products at their local grocery store. This includes ethnic produce especially foreign fruits.

2. Exotic Produce: Canadians are getting more sophisticated in their consumption of fruits and vegetables. Although potatoes, carrots, apples and oranges are still the most popular vegetables and fruit, there is both a demand and a market for more exotic<sup>22</sup> fare. Mangoes, papayas, star fruit, plantain, avocado, and bok choy are in demand, and not only in season, but year round.
3. Health Conscious: Canadians are concerned with what they eat. 85% of Canadians are concerned with the effect chemical additives in food could have on their health. In particular, among women, 95% of those surveyed<sup>23</sup> admitted that they are concerned, as are 91% of those in the 45- to-54 year old age group. The level of concern is greater than average among those respondents who live in the provinces of Ontario and British Columbia.

<sup>19</sup> Canadian Grocer; January 31, 2002

<sup>20</sup> 2001 national census

<sup>21</sup> September 26, 2002, The Montreal Gazette, Page 1; Byline: Aileen McCabe , Edition: National Post; reference Statistics Canada.

<sup>22</sup> Novel fruits must be approved by Health Canada and the CFIA prior to import to Canada.

<sup>23</sup> Canadian Press / Léger Marketing – Report on How Canadians Feel About their Health and Food.

4. Value Added Vegetables: In the washed, cut, peeled and packaged market, only lettuce, mushrooms and carrots occupy regular shelf space in the local grocery stores in Canada. Packaged cauliflower, broccoli, mushrooms and squash do well in warehouse-style retail outlets, and are carried by most wholesalers supplying the foodservice industry. Consumers have accepted these cut and prepared vegetables in the frozen food section, and it seems reasonable to assume that they will accept these same products if/when they are presented fresh.  
  
A recent report published in Food In Canada, an online magazine<sup>24</sup> stated that significant profits could be made with high margin, high value-added, minimally processed fruits and vegetables. The key to success is convenience, such as is found in ready to serve salads.
5. Value Added Fruit: Prepared packaged fruit is widely available in the fresh produce section of grocery stores in the United States, where e.g. prepared apples, papaya halves, pineapple, star fruit and fruit salads are offered. By contrast, only 20% of grocery stores in Canada carry even cored, fresh pineapple - and that is seen in the fresh fruit section of the local grocery store only from time to time.
6. Consumers are willing to pay more for quality. For many, freshness is a synonym for quality. An example is the success of "red, stemmed tomatoes", where tomatoes which remain attached to their calyx are sold at a higher price; presumably because the consumer regards this presentation of the product as proof of freshness.
7. Branding costs more. A serious campaign promoting freshness with a particular brand name, even at a higher price, will likely succeed.
8. Organic: There is a trend towards organically grown food. Fruits and vegetables are at the core of this movement. There is an opportunity in Canada for marketers of branded organic fruits and vegetables.
9. Exchange rate: The Canadian dollar, compared to the United States currency is at its highest rate of exchange (October 2003) since 1976. This is an opportunity for U.S. exporters and a problem for Canadian exporters.
10. Small potatoes in bags: Potatoes are routinely sold in plastic and paper bags. Most varieties are available in bags, PEI, Yukon Gold and Idaho. Perhaps there is an opportunity to sell the small potatoes, regular or red, in bags?
11. Ready to cook beans: The consumer wants added value. He or she is too busy to do the mundane chores anymore, and is constantly looking for an easier and quicker way to cook. Canadians insist on high quality fresh fruits and vegetables. It stands to reason that the consumer prefers to hand-choose green and/or yellow beans, but no one likes the task of trimming off the ends of the bean! Perhaps there is an opportunity for processed but not yet cooked beans – high quality beans, in a bag ready to be cooked.
12. Carrots: Washed and peeled mini carrots are selling well. Perhaps there is a market for washed and peeled regular sized carrots?

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<sup>24</sup> <http://www.foodincanada.com/>

## Constraints

1. Organic: Organically grown produce is not selling as well in Quebec as it is in English Canada. This may be a function of time (and the category will eventually take off), or a function of cultural differences. Further research in Quebec is warranted before one invests in the sales, either wholesale or retail, of organically grown produce.
2. Internet: All grocery store chains and a few independent retailers have invested in e-commerce. It is expected that Canadians do not/will not order fresh fruit and vegetables on-line but there is no data to support that theory at this time.
3. Greenhouse: The Canadian greenhouse industry production of tomatoes, cucumbers and peppers is on the increase.
4. Direct Sourcing: In consideration of free trade and the power of large organizations, some of the larger retailers are participating in direct international buying.
5. Per Capita Consumption: According to Statistics Canada the per capita consumption of fresh fruit and fresh vegetables has declined slightly. It peaked in 1995 at 64.6 kg of fruit per person, and 142.5 kg of vegetables per person. The data released quotes the 2001 per capita consumption at 63.4 kg of fruit and 143.9 kg of vegetables. This very slight decline is attributed to the improved processing of fresh produce, much of which is processed in Canada from imported fresh produce.
6. Size: It is important to keep in mind that although Canada is significantly larger in size than the United States the population is only 31 million; or, 10% as many people.

## COSTS AND PRICES

All fresh fruits and vegetables from the United States enter Canada duty free.

The margins within the channel of distribution vary, dependent upon the season, the supply, the number of links in the chain of distribution, and competition. Traditionally, wholesalers use a 30% margin. Retailers like to operate at a 40% margin and most importers take only 10%.

In the case of problem loads, a commission that ranges between 12.5%-18.5% of the selling price may be charged. On the other hand, large shipments allow exporters to negotiate special terms, such as having warehousing and/or inventory costs paid by the retailer.

The actual price varies relative to the balance between supply and demand, and supply is related to the local growing season. This imbalance in the timing of supply of locally grown produce is offset slightly by the success of the greenhouse industry and advances in technology in warehousing that help keep produce fresh.

Produce retailers indicate that the greatest increases in the sales of fresh produce occur in response to a 25% reduction in price combined with a demonstration and or sampling of the product. A 25% price reduction, advertised in print, generates about half as much activity. The lowest response comes from retail sales coupons. These findings are consistent with those reported by American produce retailers.

Simply reducing price, without any promotional activity, usually boosts sales. A 10% price cut will generate an equal (10%) increase in sales. As well, department managers agree that a 50% increase in shelf space, without a price cut will generally result in 5% sales growth. Also, an advertised item at full price will generate an 8% increase in sales.

## Market Access

1. The Canadian Government recognizes that fresh produce imports are vital to the year round availability of fresh produce for Canadians. As a result, the Federal Government assists imports by publishing a report by the Trade Facilitation Office Canada, entitled Fresh Fruits and Vegetables Canada. The report is available on line at [www.tfoc.ca](http://www.tfoc.ca).

The most recently published Report includes a section entitled "Tips for Exporters to Canada". This section is presented in the Appendix of this Report.

2. The Canadian Produce Marketing Association (CPMA) is a not-for-profit organization representing companies that are active in the marketing of fresh fruits and vegetables in Canada. CPMA members include major grower/shippers/packers, importer/exporters, carriers, brokers, wholesalers, retailers, fresh cuts and foodservice distributors; i.e. the membership integrates all segments of the fresh produce industry.

The association provides relevant data and links to required information on their web site: [www.cpma.ca](http://www.cpma.ca) for companies interested in supplying the Canadian consumer with fresh produce.

A sub-section of the site, entitled *Trade and Regulations*, lists the documents and specifications required if one is to import fresh fruit and/or vegetables into Canada.

Information and on-line links relating to the following issues are provided:

- A. Licensing & Registered Warehouses (see Appendix of this Report for a section on Licensing)
- B. The Canadian Government has established the limits for pesticide maximum residue. A listing of the allowable limits by fruit and/or vegetable-type can be found at the following web address:  
<http://www.cpma.ca/en/trade/pesticide.html>
- C. Details pertaining to the fresh fruit and vegetable chemical residue program of the fresh and processed plant product division of the Canadian Food Inspection Agency are summarized by the CPMA and presented at:  
<http://www.cpma.ca/en/trade/chemicalresidue.html>
- D. A Guide to Importing Food into Canada commercially is presented at:  
[http://www.inspection.gc.ca/english/corpaffr/publications/com\\_import/toce.shtml](http://www.inspection.gc.ca/english/corpaffr/publications/com_import/toce.shtml)  
An excerpt from the Guide that is directly applicable to fresh Fruits and Vegetables is presented in the Appendix of this Report.
- E. Labelling: An overview of the regulations is presented in the Appendix of this Report.

- F. Nutrition labeling: On January 1st, 2003, the Canadian government released new regulations regarding nutrition labeling of food products. Fresh fruits and vegetables, whether pre-packaged or sold in bulk, are exempted from mandatory nutrition labeling. However, they lose their exempt status if:

1. Other ingredients are included in the package, or
2. Nutrient content or health claims are made

In such cases, the new labels must list calories and information on 13 nutrients, including e.g. grams of fat, cholesterol, sodium, carbohydrates and protein. Nutrients must be expressed both as an actual number and as a percentage of their recommended daily intake.

Although food producers usually display the nutritional values of their products voluntarily, the aim is to establish uniform labeling practices in the prepared and packaged food industry. Specific details with respect to the new Canadian proposed law on nutritional labeling are presented on the CPMA web site.

- G. Pesticide Registration and Requirements: Canadians are more and more health conscious and pay greater attention to diet, exercise and preventative medicine. A growing recognition of the nutritional attributes of fruits and vegetables has resulted in rapidly increasing consumption of fresh produce.

Despite these trends, many people are becoming concerned about the safety of eating fresh produce. Media reports abound on the issue of pesticide residues in food. Understandably, consumers react with fear when they read such reports. They wonder if the health benefits of increased consumption of fruit and vegetables are outweighed by the potential risk of ingesting pesticide residues.

The answers to these concerns are complex. They require a good understanding of the Canadian regulatory environment relating to food, and a perspective on making decisions involving risks and benefits.

- H. Produce Shipment Load Compatibility Chart data is available at:

<http://www.cpma.ca/en/trade/shipmentsload.html>

## Activities

- An understanding of the subtle differences between Canadians and Americans can make the difference in a successful exporting experience.

- Membership in the Canadian Produce Marketing Association (CPMA) would be an asset. This organization is aware of 90% of the activity involving fresh fruits and vegetables in Canada.

The CPMA annual convention will take place in Calgary, Alberta February 4–7, 2004. Information on the conference, topics to be presented and companies registered is available on the association's web site. [www.cpma.ca](http://www.cpma.ca)

- The metric system of weights and measures is used in Canada. All food packaging that requires a presentation of weight must be labeled in metric units.

- Canada is bilingual; English and French. Although English-only packaging will often be accepted on the West Coast, it is officially illegal. All packaged food goods must be labeled in both English and French.

- In order to enter the Canadian market, exporters must be aware of Canadian standards and regulations. Canadian agents, distributors, brokers, and/or importers are often the best equipped to assist exporters with the regulatory aspects of the import process.
- Canada is divided into five distinctly different regions; the Maritimes, Quebec, Ontario, the Prairies and British Columbia. Each region has its own peculiarities. It is suggested that the assistance of a Canadian Wholesaler be secured, especially if a marketing plan involves a "value-added" component. Selection of an appropriate wholesaler is critical if the objective is to penetrate more than one region.
- Other possibility includes hiring a Canadian market research firm; visiting urban centers (see following table); calling on the major chains that are in control in that particular regions and visiting the discount and club stores.

Maritimes	Quebec	Ontario	Prairies	B.C.
Halifax	Montreal	Toronto	Calgary <sup>25</sup>	Vancouver

- Observe and record department layout, shelf space allotment for the category or products of interest and competitive products. Notice the in store displays (or lack thereof). Notice that store sampling is not routine as in U.S. grocery stores. Observe how Canadians shop.
- Collect a sample of advertisements from the region.
- One of the major grocery store chains, Safeway, has established guidelines for suppliers. These guidelines are presented in a handbook for suppliers available at: <http://www.safeway.com/suppliers/canada/hbook/hbook>
- Consult one of the four non-profit organizations in the United States that exist to help promote the export of food products from specific geographical regions of the United States. Interested potential exporters should begin by reviewing the information provided herein, and then communicate with the association located in the appropriate region. Details regarding these agencies are presented in the Appendix.

## Contacts

A list of the current members of the CPMA by category or by type of operation (for those categories pertinent to this report) is presented in the Appendix. The contact information and specific coordinates are available on line in the CPMA web site, sub heading "membership directory".

<sup>25</sup> or Edmonton, Saskatoon, Regina or Winnipeg.



## Appendix

### License

Every dealer requires a license for import into Canada; export from Canada, or market inter-provincially (ship or receive) fresh fruit and vegetables, or edible fungi, and for anyone brokering such a deal. Licensing is necessary to ensure the fair and orderly marketing of fresh fruit and vegetables. The Canadian importer should contact the regional Canadian Food Inspection Agency officer for further information well in advance of placing the first order. Further information is available at:

[www.inspection.gc.ca/english/plaveg/fresh/cdnrege.shtml#lic](http://www.inspection.gc.ca/english/plaveg/fresh/cdnrege.shtml#lic)

### Dispute Resolution Corporation (DRC)

Many U.S. suppliers of produce to Canada choose to join the DRC. The DRC is a private, non-profit organization of produce companies trading in North America dedicated to providing fair, efficient, affordable and enforceable dispute resolution services. The DRC has two categories of membership. Regular Members are those companies whose place of business is in North America (Canada, Mexico and the United States). Associate Members are those companies whose place of business is in a country outside of North America. Further information is available at: [www.fvdrc.com](http://www.fvdrc.com)

### Guide to Importing Fruits & Vegetables

[http://www.inspection.gc.ca/english/corpaffr/publications/com\\_import/toce.shtml](http://www.inspection.gc.ca/english/corpaffr/publications/com_import/toce.shtml)

Importing Food Products Commercially - Fall 1998 revised December 2002

Section E; Subsection "Fruits and Vegetables"

Fresh Fruits and Vegetables

Fresh fruits and vegetables, including nuts and edible fungi, are regulated by the *Fresh Fruit and Vegetable Regulations* under the *Canada Agricultural Products Act*. These regulations cover quality, labeling, packaging, grading, and health and safety requirements.

In addition to the produce license mentioned above, commercial importers of fresh fruits and vegetables require a Confirmation of Sale form for each shipment of fresh produce to prove a firm purchase agreement is in place. This form is reviewed by a Customs officer at the products' point of entry, and relayed to the Canadian Food Inspection Agency.

To ensure compliance with Canadian standards for safety, quality, labeling, packaging and grading, all shipments of fresh produce are subject to examination upon entry into Canada by an inspector of the Canadian Food Inspection Agency.

Special requirements also exist for the importation of products shipped in bulk.

To prevent the introduction and spread of plant diseases and pests, fresh fruits and vegetables are subject to the *Plant Protection Act and Regulations*. Consequently, the Canadian Food Inspection Agency requires import permits and/or phytosanitary certificates for certain fresh fruits and vegetables from specific countries or states.

For detailed information regarding Canadian import requirements for fresh fruit and vegetables, refer to the Canadian Food Inspection Agency (CFIA) website at: <http://www.inspection.gc.ca/english/plaveg/fresh/cdnrege.shtml>

Fresh fruit and vegetables derived from a plant with a novel trait (i.e., derived from biotechnology) are considered novel foods (see section on novel foods).

## Labeling Information

The following information is a brief resume of the Canadian Fresh Fruit and Vegetable Regulations with respect to labeling requirements in Canada. For more information, contact CPMA national office.

### Prepackaged Products

Prepackaged products are packaged in a container that is ordinarily sold to the consumer (consumer packages).

The information items regulated by the Fresh Fruit and Vegetable Regulations must appear on a principal display panel for prepackaged products. They are:

- (a) common name of the product, English and French, (if the product is not readily visible);
- (b) net quantity of the product, English and French, in imperial and metric units;
- (c) complete name and address including postal code of the responsible party, either English or French.
- (d) grade name, English and French; and
- (e) country of origin, English and French.

### Master Containers

Master containers are where a container is packed in another container. The information items regulated by the Fresh Fruit and Vegetable Regulations must appear on a principal display panel. They are as follows:

- (a) common name of the product, either English or French;
- (b) name and address of the responsible party, either English or French;
- (c) the grade name of the produce, either English or French;
- (d) country of origin, in the case of imported produce, either English or French; and
- (e) net quantity, either English or French.

NOTE: The above information is not required if it is easily and clearly discernible in or on the inner container.

### Shipping Containers

Shipping containers are where unpackaged products are packed in a container. The information items regulated by the Fresh Fruit and Vegetable Regulations must appear on a principal display panel for prepackaged products. They are:

- (a) common name of the product, either English or French;
- (b) name and address of the responsible party, either English or French;
- (c) except for imported produce, the grade name of the produce, either English or French;
- (d) net quantity, either English or French; and
- (e) country of origin, in the case of imported produce, either English or French.

NOTE: The common name is not required if the container is open or is transparent.

### Additional Information/Requirements

1. The address must be such that it ensures a consumer inquiry reaches the responsible party based on the address obtained from the label.
2. Every label applied to a container must have the variety name of apples or pears. The same requirement used to apply for pears but there is a test market underway deregulating this requirement.
3. Every label applied to a container of untiered apples must have the diameter range of the apples. This requirement does not apply if the container is transparent, is an open basket of not more than 11 quarts, or contains apples of the Canada Commercial Cooker grade.

4. A test market is underway to deregulate the requirement concerning the peach diameter. ("Every label applied to a basket or a container of untiered peaches must be marked with the minimum diameter for the grade of peaches packed within.").

5. Every label applied to a container of yellow-fleshed potatoes must bear the words "yellow fleshed" or "yellow fleshed potatoes" in a letter size corresponding to the principal display surface.

6. The country of origin declaration must be in close proximity to either the grade name or the declaration of net quantity. "Close proximity" has been defined to mean that the country of origin declaration must be directly above or below the grade and separated by not more than two line spaces or directly beside the grade (before or after) and separated by not more than two type spaces with no intervening print. The two type spaces or line spaces shall be of the same size as the letter size in the grade, net quantity and country of origin declarations.

Example 1: U.S. No. 1 Produce of U.S.A./É.-U. No. 1 Produit des É.-U.A.

Example 2: U.S. No. 1 É.-U. No. 1/Produce of U.S.A Produit des É.-U.

7. Minimum letter height requirements apply to all required markings on all types of packages, master containers, shipping containers and consumer packages (prepackaged products).

The general requirement for letter height is a minimum 1/16-inch, however, there are special requirements for minimum letter height for the following markings:

Net Quantity  
Grade Name  
Country of Origin.

The height of letter refers to the height of an upper case letter if upper case is used or the height of the letter "o" if a combination of upper and lower case letters are used.

The minimum letter height for these three declarations, when shown, is governed by the total area of the principal display surface of the package as follows:

#### PRINCIPAL DISPLAY SURFACE LETTER HEIGHT

5 sq. inches or less 1/16 inch  
5 to 40 sq. inches 1/8 inch  
40 to 100 sq. inches 1/4 inch  
100 to 400 sq. inches 3/8 inch  
more than 400 sq. inches 1/2 inch

The principal display panel is the part of the label attached to the principal display surface. The principal display surface, in the case of an apple box, is the total area of the side or surface of the box that is displayed or visible under normal or customary conditions of sale.

8. The weight abbreviations for pounds, ounces and kilograms should be in lower case letters with no "s", brackets or periods as demonstrated: oz lb kg

Acceptable one-line presentations for the net quantity statement are as follows:

NET WT 12 oz 340 g POIDS NET or POIDS NET WT 12 oz 340 g

9. The phrases "treated with Thiabendazol... or resin to maintain freshness... or to maintain freshness this product is coated with food grade vegetable..." do not require translation.

10. Nutritional information, although is not required, should it appear on a label it must be in both official languages (English and French). The nutritional information must also respect the Canadian Guidelines on Nutritional Labeling and the Food and Drug Regulations, regarding the format, nutrient content information, nomenclature, and units of measurement, per serving basis, Canadian rounding rules and declaration of serving size.

**Agencies to Assist Exporters**

<b>Region</b>	<b>Web Site</b>	<b>States</b>
North-east	<a href="http://www.foodexportusa.org">http://www.foodexportusa.org</a>	Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont
Mid-USA	<a href="http://www.miatco.org">http://www.miatco.org</a>	Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin
South	<a href="Http://www.susta.org">Http://www.susta.org</a>	Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia and West Virginia and the Commonwealth of Puerto Rico.
West	<a href="Http://www.wusata.org">Http://www.wusata.org</a>	Alaska, Arizona, American Samoa, California, Colorado, Guam, Hawaii, Idaho, Montana, New Mexico, Oregon, Utah, Washington, Wyoming

The Foreign Agricultural Service at the United States Embassy in Canada can also provide assistance in the form of a program designed to help match prospective exporters with suitable Canadian businesses. Information about this program and other relevant facts can be reviewed on the Internet at: [www.fas.usda.gov](http://www.fas.usda.gov) and [www.fas.usda.gov/itp/us-canada.html](http://www.fas.usda.gov/itp/us-canada.html)

The primary federal agency in Canada involved with the importing of food is the Canadian Food Inspection Agency (CFIA). The CFIA maintains and enforces 14 inspection programs related to food sold in Canada. Activities range from inspecting federally registered meat-processing facilities, to border inspections, to label-fraud investigations.

In addition, the CFIA provides the most up-to-date information on to the specific laws and regulations that an importer of food to Canada must follow. This information is presented in the agency's web site located at: <http://www.inspection.gc.ca>

## Web Sites

<a href="http://www.inspection.gc.ca/">http://www.inspection.gc.ca/</a>	Guide to Importing Food Products Commercially
<a href="http://www.cpma.ca">http://www.cpma.ca</a>	Canadian Produce Marketing Association
<a href="http://www.ccgd.ca">www.ccgd.ca</a>	Canadian Council of Grocery Distributors
<a href="http://www.tfoc.ca">www.tfoc.ca</a>	Trade Facilitating Office Canada
<a href="http://www.agr.ca">www.agr.ca</a>	Agriculture and Agri - Food Canada

## Tips for Exporters

The Canadian market is extremely competitive. Exporters should note that any failure on their part to give buyers excellent service will result in the buyer quickly turning to other suppliers. The following are some issues to keep in mind.

1. It is important to provide same day response to every communication, preferably by e-mail. Use e-mail as the primary tool for disseminating your marketing material. It immediately shows the potential buyer, who gets many of these offers each week, what you are capable of. In addition, always keep your fax machine switched 'on'. Be aware that Canada is divided into different time zones, as is the situation in the United States. Communication with a buyer might be at unusual hours. Buyers who cannot readily contact an exporter will quickly turn to other sources of supply. Send an interim note if information is not immediately available. Give a reasonable date for when all the information would be ready and honor that date.
2. The buyer looks at your sample and how you handle the request to provide one as concrete proof of your capability and an example of how you would handle a potential business relationship. Ensure that you provide the sample well within the requested time frame and that the sample is of impressive quality and value. This will assure the buyer that you are a viable alternative source of supply. Follow-up orders must match the quality of this sample.
3. No surprises. Canadians expect delivery of the product they purchase. Unavoidable delays should be immediately reported and justified to the buyer; ask the buyer to accept the delay.
4. Provide accurate information and follow up key sales calls in person as soon as possible.
5. Enclose a certificate of analysis of the produce and photographs of the production/processing facilities with the letter of introduction to the importer. This certificate may be needed to show conformity with Canadian health and food safety requirements and should be obtained from the appropriate authorities in your country.
6. Get to know the Canadian market and your importer. Read trade publications and visit trade shows and retail stores in Canada to get a feel for the market.
7. Establish contact with trading companies or import agents since they may be the most

promising channel for new entries. Hire an agent/broker/importer to represent you in Canada.

8. If you are asked for exclusive rights to your product, you should include a clause in the contract for a minimum level of annual purchases. Be flexible and solicit feedback from your buyer on your product and trade relations. Put all verbal agreements in writing.

9. Use English (or French in Quebec) in all correspondence and provide information on the product range, capacities and price list, quoting prices in Canadian or U.S. dollars. And specify if you are using US dollars.

Source: Trade Facilitation Office

**CPMA Membership by Operation**

(For contact coordinates and information see the CPMA member's directory; available on-line)

**COMPANIES THAT TRANSPORT FRESH PRODUCE**

Amco Produce Inc.  
 C.H. Robinson Co. (Canada) Ltd.  
 Carrier Transcold  
 Explorer Distribution Inc.  
 H & R Transport Ltd.  
 H.Y. Louie  
 Heyl Truck Lines Inc.  
 Knight's Appleden Fruit Ltd.  
 Kurtz Produce Inc.  
 S & S Forwarding Ltd.  
 Schenker International  
 Star Van Systems Inc.  
 Steve Nelson Trucking, Inc.  
 Traffic Tech Inc.  
 Transport George Leger Inc.  
 Transport L.F.L. Inc.  
 Transport Xtra B Inc.  
 Verger Belliveau Orchard Wholesale Produce Supply Co.  
 Woodstock Transport (1992) Ltd.  
 Zavcor Trucking Limited

**DISTRIBUTORS/WHOLESALERS**

Alpimex  
 Amira Enterprises Inc.  
 Anderson Watts Ltd.  
 Atlantic Wholesalers  
 Bounty Fresh, Llc.  
 Bradford & Dist. Produce Ltd.  
 Canada Garlic, A Division Of Canadian Garlic Distributing Inc.  
 Canadawide Fruit Wholesalers Inc.  
 Chiovitti Banana Co. Ltd.  
 Compass Food Sales Co. Limited  
 Coosemans Worldwide, Inc.  
 Country Fresh Packaging Co.  
 Courchesne, Larose Ltee.  
 Crescent Multi Foods  
 Delfrutti  
 Deltason Trading Ltd./ Veggie Depot Produce  
 Distrobel Inc.  
 Dominion Farm Produce Co.  
 E.V. Logistics  
 Emperor Specialty Foods Ltd.  
 Essex Continental Inc.  
 F. G. Lister & Co. Ltd.  
 Faba-Aiba Federated Cooperatives Ltd.  
 Fisher Capespan  
 Flynn Produce Ltd. Food Supplies  
 Fortino's Supermarket Ltd.  
 Fred's Fruit Company  
 G.D.P. Champignons Inc.  
 Gambles Ontario Produce Ltd.  
 Greenfield Produce Ltd.  
 Grocery People Ltd. (The)  
 H.Y. Louie  
 Ippolito Fruit & Produce Ltd.  
 J. B. Laverdure Inc.  
 J. Quattrocchi & Co. Ltd.  
 J.E. Russell Produce Ltd.  
 Krown Produce

Kurtz Produce Inc.  
 L & H Smith Fruit Co. Ltd.  
 Larocque Et Fils Inc.  
 Les Cultures De Chez Nous  
 Les Fruits & Legumes Eric Frechette Inc.  
 Lid Company (The)  
 Limapro Distributeurs Inc.  
 M & M Pre-Pak Sales Ltd.  
 Mackay & Hughes (1973) Ltd.  
 Mastronardi Produce Ltd.  
 Melissa's/World Variety Produce, Inc.  
 Mex Y Can Trading (East) Inc.  
 Minnaar Canada/Temptale  
 Misty Mountain Specialty Mushroom And Produce  
 Morris Brown & Sons Co. Limited  
 Ontario Potato Dist (Alliston) Inc. 1991  
 Orleans Fresh Fruit P.K. Importers  
 Pacific Produce Co. Ltd.  
 Pak-4-U Inc.  
 Premier Fruits & Vegetable Bbl Inc.  
 Priority Brands  
 Pro Organics Marketing Inc.  
 Produce People Ltd. (The)  
 Produce Terminal (The)  
 Provigo Distribution Inc.  
 Provincial Fruit Company  
 R & R Fresh Fruits & Vegetable, Inc.  
 R D K Distributing Co., Llc.  
 Richard E. Ryan & Associates Ltd.  
 Rite Pak Produce  
 Samson Produce Inc.  
 Silveira Produce Sales Inc.  
 Silverstein Produce Co. (Adolf's Produce Co. Ltd.)  
 Sobey's  
 Sodifruit Inc.  
 Southern Produce  
 Star Produce Ltd.  
 Stronach & Sons Inc.  
 Sysco Food Services Of Ontario  
 Tally Tropicals  
 The Lockett Group Of Companies  
 Thomas Grossiste En Legumes 2944715 Canada Inc.  
 Van-Whole Produce Ltd.  
 Veg-Pak Produce Co. Ltd.  
 Verger Belliveau Orchard  
 Westbrook Floral Ltd.  
 Western Grocers  
 Wholesale Produce Supply Co.  
 Worldwide Specialty Foods Ltd.  
 Z & S Distributing Co. Inc.

**PRODUCE BROKERS**

Amerifresh  
 Access Sales & Merchandising Ltd.  
 Bay Area Produce Inc.  
 Bayside Produce  
 Bellemont Powell Limitee  
 C.H. Robinson Co. (Canada) Ltd.  
 Cds Brokers Inc.  
 Cf Fresh  
 Charles E. Gilb Company  
 Compass Food Sales Co. Limited

Ed Given Inc.  
 Explorer Distribution Inc.  
 Foodsource, Inc.  
 Fred's Fruit Company  
 Fresh Start Produce Sales Inc.  
 George Deslauriers (1976) Inc.  
 Groenewegen & Sons Produce Sales Ltd.  
 JI International Kinetic Sales & Marketing Ltd.  
 Kurtz Produce Inc.  
 Landmark Sales & Marketing Inc.  
 Lid Company (The)  
 Misty Mountain Specialty Mushroom And Produce  
 Monroe & Sons Produce Dist.  
 National Produce Marketing Inc.  
 Nevard, Van Benthem & Wakeman Brokerage Co.  
 P.D.G. Produce Inc.  
 Pacific Rim International Brokerage Inc.  
 Pommes Philip Cassidy Apples Inc.  
 Pro Organics Marketing Inc.  
 R D K Distributing Co., LLC.  
 Richard E. Ryan & Associates Ltd.  
 Robling & Catalani Inc.  
 S & S Forwarding Ltd.  
 Skyfruit International Inc.  
 Southern Produce Star Produce Ltd.  
 Tom Lange (Canada) Inc.  
 Warren Hinz & Associates  
 Watson Distributing Inc.  
 Wespak Distributors, Inc.

**RETAILERS**

Canada Safeway  
 Colemans Food Centres  
 Commisso's Food Markets Ltd.  
 Co-Op Atlantic  
 Great Atlantic & Pacific Co. Of Canada Ltd. (The)  
 H & W Produce Corporation  
 H.Y. Louie  
 Highland Farms Inc.  
 Loblaws Supermarkets Limited  
 Loeb Canada Inc.  
 Longo Bros. Fruit Markets Inc.  
 Maison Sami T.A.  
 Fruits Inc. (La)  
 Market Fresh  
 Market Produce  
 Metro Richelieu Inc.  
 Michael-Angelo's Market Place Inc.  
 Overwaitea Food Group  
 Skicam Holdings Ltd. (Thrifty Foods)  
 Sobeys  
 The Lockett Group Of Companies  
 Wal-Mart Stores, Inc.

**MARKETING ORGANIZATIONS / TRADE ASSOCIATIONS**

Advance Planning/Ms&L  
 Amerifresh  
 Association Des Emballeurs De Pommes Du Quebec  
 Association Des Jardiniers Maraichers Du Quebec  
 Atlantic Fresh Produce Association  
 B.C. Produce Marketing Association  
 B.C. Vegetable Mktg. Comm  
 Brownsey & Associates  
 Calgary Produce Marketing Association  
 California Agricultural Export Council  
 California Grape & Tree Fruit League

California Kiwifruit Commission  
 California Pear Advisory Board  
 California Strawberry Commission  
 California Table Grape Commission  
 California Table Grape Commission  
 California Tomato Commission  
 California Tree Fruit Agreement  
 Canadian Corrugated Case Association  
 Chilean Fresh Fruit Association  
 Compass Food Sales Co. Limited  
 Enzafruit New Zealand  
 Florida Fruit & Vegetable Association  
 Florida Tomato Committee  
 Fresh Produce Association Of The Americas  
 H.J.P. Inc.  
 International Fresh-Cut Produce Association  
 Jamaican Trade Commission  
 Japan Fruit Growers Assn.  
 Jersey Fruit Cooperative Assn., Inc.  
 JI International  
 Labrecque Marketing Inc.  
 Maroc Fruit Board  
 Murphy's Food Sales & Marketing  
 N.B. Potato Agency  
 Nebs Business Products  
 New Jersey Blueberry Industry Advisory Council  
 Northern Plains Potato Growers Association  
 Oceanside Produce, Inc.  
 Ontario Fruit And Vegetable Growers' Association  
 Ontario Potato Board Ontario Produce Marketing  
 Assoc. Ontario Tender Fruit Producers' Marketing  
 Board  
 P.E.I. Potato Board  
 Pear Bureau Northwest  
 Potato Growers Of Alberta  
 Prince Edward Island Business Development  
 Pro-Fresh Marketing International Ltd.  
 Quebec Produce Marketing Association  
 R.E.P.S. Inc.  
 South Carolina Department Of Agriculture  
 Southern U.S. Trade Association  
 State Of Florida Department Of Citrus  
 Sunkist Growers, Inc.  
 Texasweet Citrus Marketing Inc.  
 The Oppenheimer Group  
 Vidalia Onion Committee  
 Washington Apple Commission  
 Washington State Fruit Commission  
 Zespri International Limited