Agriculture and Agri-Food Canada
Agriculture et Agroalimentaire Canada

2025-2026 Strategic Issues Survey of Food and Beverage Processors (Wave V)

Final Report

Prepared for Agriculture and Agri-Food Canada

Supplier Name: Nanos Research

Contract Number: CW2421647

Contract Value: $99,785.79 (including HST)

Award Date: 2025-10-02

Delivery Date: March 27, 2026

Registration Number: POR 032-25

For more information on this report, please contact Agriculture and Agri-Food Canada at:
aafc.info.aac@agr.gc.ca.

Ce rapport est aussi disponible en français.

Canada

Agriculture and Agri-Food Canada Agriculture et Agroalimentaire Canada

2025-2026 Strategic Issues Survey of Food and Beverage Processors (Wave V)

Final Report

Prepared for Agriculture and Agri-Food Canada
Supplier name: Nanos Research

March 2026

Public Affairs Branch
Agriculture and Agri-Food Canada
1341 Baseline Road
Ottawa, ON K1A0C5

Catalogue Number: A22-625/2026E-PDF
International Standard Book Number (ISBN): 978-0-660-99337-9

Aussi disponible en français sous le titre Sondage 2025-2026 sur des enjeux stratégiques touchant les transformateurs d’aliments et de boissons (Vague V) - Rapport final.

Numéro de catalogue : A22-625/2026F-PDF
Numéro international normalisé du livre (ISBN) : 978-0-660-99338-6

Agriculture and Agri-Food Canada   Agriculture et Agroalimentaire Canada

Table of Contents

Executive summary

Nanos Research is pleased to present this report to Agriculture and Agri-Food Canada with findings from the fifth wave of the Strategic Issues Survey of Food and Beverage Processors.

A. Background and objectives

Food and beverage processing is the largest manufacturing sector in Canada and a key stakeholder group for Agriculture and Agri-Food Canada (AAFC). It contributes 1.6% to Canada's GDP and employs about 318,400 Canadians.

This is the fifth wave of AAFC's Strategic Issues Survey of Food and Beverage Processors; previous waves were conducted in 2017-18, 2018-19, 2021-22, and 2023-24. This fifth edition of the survey expands on data from previous rounds while gathering feedback on new and emerging issues. The results will help inform the development of policies, programs, and initiatives, enhance communication efforts, and improve service to clients. The data collected offers AAFC valuable insight into the perspectives, concerns, and challenges faced by Canada's food processing sector. It also presented an opportunity to gather input on food processors' business outlooks, exporting behaviours, views on international and inter-provincial trade, plastic packaging, and labelling.

The research objectives were met through the design and administration of a telephone survey among Canadian adults who are food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.

B. Methodology

The survey is comprised of 427 Canadians, 18 years of age and older, who are food or beverage processors or manufacturers and have responsibility for business strategy and/or operations. This includes CEO, Owner/Operator, President, Vice President, Director, and Operations Manager. Conducted from December 3rd 2025 to March 13th, 2026, the survey took respondents an average of 14 minutes to complete.

The sampling frame for this survey was a list of businesses with relevant NAICS codes, purchased from a commercial supplier (Dun & Bradstreet) which maintains regularly updated lists of Canadian businesses. This is the same sample source used for previous waves. Data was weighted by region and company size to match the composition in the complete Dun & Bradstreet list used for sampling.

Because this is an attempted census of a known population (about 12,297 eligible businesses), a margin of error can be calculated. The margin of error for a sample of 427 on this population is plus or minus 4.8 percentage points (at the 95% confidence level).

The fieldwork was conducted between December 3rd, 2025, to March 13th, 2026. Details on the rate of participation can be found in Appendix A, and the questionnaire is provided in Appendix B.

C. Contract value

The contract value for this project was $99,785.79 (including HST).

D. Political neutrality statement and contact information

This certification is to be submitted with the final report submitted to the Project Authority.

I hereby certify, as a Representative of Nanos Research, that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Government of Canada's Policy on Communications and Federal Identity and Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, party standings with the electorate, or ratings of the performance of a political party or its leaders.

Nik Nanos
Chief Data Scientist and President
Nanos Research
nik@nanos.co
(613) 234-4666 x237

E. Key findings

Business profile

Just over three in five (61%) participating companies reported having their headquarters either in Ontario (34%) or in Quebec (27%), with about seven in ten being smaller companies with fewer than 25 employees (72%). These results are consistent with the company location and size profile of the 2024 wave.

The revenue profile of participating companies who shared revenue information was similar to that observed in previous waves, with 88% of companies reporting revenues of less than $10 million and the remaining 12% reporting revenues of $10 million or more.

Three in four participating companies reported having been in the food or beverage processing or manufacturing business for 10 or more years (75%), which is consistent with the 2024 wave (77%). The remaining 25% of businesses report having been in business for less than 10 years, which is also consistent with the 2024 wave (24%).

Consistent with the 2022 and 2024 waves of research, 34% of participating businesses reported being majority owned by an individual or individuals who identify as a member of at least one equity-seeking group (this figure was 35% in both the 2022 and 2024 waves). The equity-seeking groups most frequently reported as majority owners of participating companies were women (26%, 27% in 2024), youth (aged 35 and under, 7%), members of racialized groups (4%, 7% in 2024), individuals who identify as members of the 2SLGBTQI+ community (3% both in the current wave and the 2024 wave), Indigenous people (2% in both the current wave and the 2024 wave), and people with disabilities (2% in both the current wave and the 2024 wave).

Companies represented in the respondent profile reported operating in a wide range of areas, with alcoholic beverage manufacturing (31%) and bakeries and tortilla manufacturing (9%) being the most common reported areas of operation.

Eighty-one percent of participants completed the survey in English, while the remaining 19% completed it in French. For comparison purposes, in 2024, 73% of respondents completed the survey in English, with 27% completing it in French and in 2022, 76% of participants completed the survey in English, with 24% completing it in French.

Nanos was able to interview more CEO, owners, and presidents compared to previous waves. Just under seven in 10 participants (69%) reported being CEO, Owner or President of their company (up from 54% in the 2024 wave and 56% in the 2022 wave) while 24% reported being at the Director/Operations level (down from 44% in 2024 and 41% in 2022).

International exporting behaviours

About two in five (39%) companies reported either currently exporting to other countries (23%) or planning to do so (16%), while 61% of companies reported not exporting and not planning to export. In the current environment, the proportion of current exporters has marginally declined since this question was last asked (23% in 2026, compared to 28% in 2019 and 34% in 2018). Among those who currently export, the United States is the main country companies reported exporting to (85%), followed by Europe (29%) and Asia (24%).

Among current and planned exporters who are planning on exporting to new countries, frequently mentioned target countries for expansion of exports closely reflected the most frequently cited destinations that exporters currently sell to, with the United States being the main country to which most companies are interested in increasing exports (42%), closely followed by Europe (excluding the UK) (39%) and then Asia (excluding China and Japan) (20%).

Market expansion

Overall, 47% of companies reported having no plans to expand into any new markets. Comparatively, one in five reported already having made changes to expand into new markets (20%) and another three in ten reported planning on doing so (30%), with 4% reporting being unsure. Decided exporters are now more likely to report that they are either planning on expanding to new markets (38%, 19% in 2019) or have already made changes to expand to new markets (32%, 24% in 2019) than they were in 2019.

Among those who have initiated changes to expand into new markets, about nine in ten report changing manufacturing/processing to meet safety standards (91%). This is also the change most commonly planned on being implemented in the next two years among those who are planning on making changes to expand markets, with 76% reporting planning on changing manufacturing/processing to meet safety standards in the next two years.

Trade agreements

Eighty-three percent of all participating food or beverage manufacturers or processors reported being aware of the Canada-United States-Mexico Agreement (CUSMA) (83%). A smaller proportion of respondents reported having heard of the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) (46%). Respondents were more likely to report not having heard of the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) (59%) than they were to report having heard of it (39%).

Consistent with the results in the 2019 wave, a majority of exporters reported having heard of each of the three tested trade agreements, with nearly all exporters reporting having heard of CUSMA (98%, 89% in 2019) and about three in five having heard of CETA (59%, 51% in 2019) and CPTPP (58%, 60% in 2019).

Interprovincial trade

On the interprovincial trade front, roughly half of participating food or beverage processors or manufacturers reported that their company sells to other provinces or territories within Canada other than the province or territory in which their company is headquartered (50%). Noteworthy differences across subgroups include companies with revenues of $5 million or more being more likely to export to other provinces than those with revenues of less than $250,000 over the past year, as well as companies with less than 25 employees being less likely than manufacturers and processors on average to sell out-of-province. Companies in Quebec and those who completed the survey in French were also less likely than food and beverage manufacturers and processors at large to report that their company sells to other provinces and territories within Canada.

Fifty-one percent of all participating respondents reported that their company is not at all impacted by interprovincial trade barriers, while another 15% report that their company is impacted only to a small extent. The proportion of companies reporting being impacted little or not at all (66%) was about three times greater than the combined percentage of respondents who reported that their company is impacted by interprovincial trade barriers to a great extent or to a very great extent (19%). Of note, sugar and maple syrup manufacturers (69%) were more likely than beverage manufacturers (31%) to report being not at all impacted by interprovincial trade barriers, while companies in Quebec were more likely than the processors and manufacturers on average to report not at all being impacted by this (66%).

Frequently reported barriers impacting the ability of companies to sell products in other provinces included regulatory requirements (21%) and logistics and transportation (18%), with regulatory requirements being a reported barrier among 41% of beverage manufacturers. Thirty-five percent reported that there are no barriers impacting their ability to sell product to other provinces, with companies in British Columbia (17%), along with beverage manufacturers (14%) being comparatively less likely than the national average to report this is the case.

Trade with the United States

Current exporters to the United States were much more likely to report that exporting to the United States has become more difficult to one extent or another (29% somewhat more difficult; 29% much more difficult) than easier to one extent or another (2% somewhat easier, with no respondents reporting that this has become much easier) over the past year. These results are consistent across subgroups. Also consistent across subgroups was the reported change in export volume to the United States over the past year among current exporters, with 36% of companies reporting that their export volume to the U.S. has decreased either significantly (16%) or somewhat (20%) over the last year, compared to just under one in four companies reporting that their export volume increased either significantly (6%) or somewhat (16%).

Despite reported difficulties exporting to the United States, companies were about four times more likely to report expecting their exports south of the border to increase (15% increase significantly, 26% increase somewhat) rather than decrease (6% decrease significantly; 6% decrease somewhat) over the next two years, with 37% of companies expecting their export volumes to stay about the same over that period.

In terms of ways the government can assist companies in increasing exports beyond the United States, one in five cited financial assistance as something they would like to have (21%), while just under one in ten each reported wanting the government to help resolve the market access issues or trade barriers (8%) or trade negotiations to lower tariffs (8%). One in three reported no interest in expanding outside of the United States (34%).

Strictly examining the responses of exporters for comparability purposes with the 2019 wave of research, financial assistance remained the top governmental assistance exporters would like to have to increase exports beyond the United States (32%, 40% in 2019). Of note, there was an observed increase in the proportion of exporters who would like to have export insurance (20%, up from 1% in 2019) as a form of government support to assist them with expanding exports outside of the United States.

Business priorities

When asked about five broad priorities, companies were relatively more likely to report making an effort to stabilize food costs for consumers (61%, 66% in 2024) and addressing public perception, image and trust (60%, 67% in 2024) as high priorities than they were to cite improving environmental sustainability (38%, down from 46% in 2024) as a high priority over the past two years. Of note, each of the five priorities was more likely to be viewed as a high priority rather than a low priority for companies over the past two years. However, there was a noteworthy decline relative to the 2024 wave in the proportion of companies rating addressing supply chain issues (50%, down from 62% in 2024) and addressing labour issues (41%, down from 58% in 2024) as high priorities for them over the past two years.

Despite softening views on the importance of the business priorities tested relative to the 2024 wave, it should be noted that companies showed a willingness to invest in major initiatives involving productivity improvements, production expansion, and diversification in the next 12 months in light of current economic conditions. Just under three in five companies reported being likely (38%) or somewhat likely (19%) to invest in these initiatives over the next 12 months, compared to about two in five who report being unlikely (8%) or somewhat unlikely (32%) to do so. Companies with higher revenues were more likely to report willingness to invest than those with lower revenues, while manufacturers of sugar and maple syrup were more likely to report willingness to invest than beverage manufacturers.

Plastic packaging

There was a noteworthy decline in the proportion of companies reporting that they are currently taking or planning to take measures to either reduce or otherwise change their plastic packaging in the current wave (30%) relative to the 2024 wave (50%). Among those who reported reducing or planning to reduce their plastic packaging, reducing the amount of plastic (47%, up from 21% in the 2024 wave), switching to another material (44%, compared to 37% in the 2024 wave), introducing recycled content (42%, up from 12% in the 2024 wave), and introducing reusable packaging (32%, up from 12% in the 2024 wave) were the main measures they have taken or will be taking in the future.

Among companies who use plastic packaging and are taking or planning measures to reduce their use (30%), consistent with the 2024 wave, top barriers include increased cost (24%, compared to 21% in the 2024 wave) and the availability of alternative packaging that offers the same function (22%, compared to 24% in the 2024 wave). Other frequently cited barriers to accomplishing this were related to alternative materials, including their availability (17%, compared to 10% in the 2024 wave) and the ability to use them (14%, compared to 6% in the 2024 wave).

Product Labelling and Sourcing

A majority of companies report having increased their sourcing from Canadian suppliers (58%). Nearly half report that they have been improving or amending product labelling to highlight the product's Canadian production (47%). Just under one in four (23%) report having reformulated products for improved nutrient content to avoid front of package labelling.

Receiving information from AAFC

Respondents were almost twice as likely to report not having looked for information on programs or services on the AAFC website over the past year (60%) than they are to report having done so (35%). Of note, respondents working for companies with higher revenues of $5 million or more were more likely than manufacturers and processors at large to report having looked for information on the AAFC website, with 56% of respondents working for companies with revenues of $5 million or more reporting having done this. Those who have looked for information on programs or services on the AAFC website over the past year were more likely to find it easy than difficult to find what they were looking for, with just under three in five reporting that it was either very easy (13%) or somewhat easy (33%), compared to about three in ten reported that this was either somewhat difficult (23%) or very difficult (7%).

In terms of preferred ways to be informed on latest news and developments from AAFC, companies prefer to be contacted through email (61%). This proportion was approximately double that of the next most cited option, the AAFC website (30%).

About this report

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the quantitative results.

The quantitative results are expressed as percentages unless otherwise noted. Base size is the total sample of n=427 unless otherwise specified.

Detailed findings are presented in the sections that follow. Overall results are presented in the main portion of the narrative and are typically supported by graphic or tabular presentation of results. Results for the proportion of respondents in the sample who either said “don’t know” or did not provide a response may not be indicated in the graphic representation of the results in all cases, particularly where they are not sizable (for example., 10% or less). Net results cited in the text may not exactly match individual results shown in the charts due to rounding. Results may not add to 100% due to rounding or multiple responses. Tracking results, where shown, are based on previous waves of the survey conducted in 2017-18 (n=376), 2018-19 (n=400), 2021-22 (n=501), 2023-24 (n=500). Year-over-year changes are reported in percentage points (ppt). Please note that for comparability purposes with the 2019 wave of data, some tables only report on the subgroup of current exporters.

The bullets under the charts also note any significant differences between sub-groups of respondents in different demographic groups. Key demographic patterns of interest are described throughout the report, in the following order: location of headquarters, number of employees, revenue, length of time in business, language of interview, respondent position in company, equity groups, and type of manufacturing. Only demographic differences that are significantly different are presented.

Details of the methodology and sample characteristics can be found in Appendix A. The final questionnaire can be found in Appendix B.

Notes on sub-group analysis

For the purposes of sub-group analysis, companies are organized into six broad categories by type of product. This grouping creates larger sample sizes that allow for some comparisons between the following groups:

1. Grain-based includes those processing animal foods, grain and oilseed milling, dough and noodle, and bakery products;
2. Fruit and vegetable;
3. Beverage includes alcoholic and non-alcoholic beverage processors;
4. Dairy;
5. Protein includes those processing meat, poultry, and seafood, including rendering; and,
6. Other products include sugar and confectionary products, maple syrup, sauce, and other miscellaneous products not covered by the other five categories.

Detailed findings

F. Business priorities and initiatives

Company priorities over the past two years - Tracking

When asked to rank five broad priorities, stabilizing food costs (61%, 66% in 2024) and public trust (60%, 67% in 2024) remain the most frequently mentioned high priorities for food and beverage processors. Half of companies say addressing supply chain issues (50%, down from 62% in 2025) is also considered a high priority, although the importance of this has softened. As in the previous wave, addressing labour issues (41%, down from 58% in 20245) and improving environmental sustainability (38%, down from 46% in 2024) ranked lowest of the five issues. Addressing labour issues saw the largest decline in priority among Canadian companies, dropping 17 points from 58% in 2024 to 41% this year.

Q5-9 – Thinking about the past two years, please tell me if each of the following has been a high, medium or low priority for your company. ***[RANDOMIZE]***

Priority level over past two years

Priority	High priority	Medium priority	Low priority	Don't know / Prefer not to say	High priority 2024 (chg. ppt)
Making an effort to stabilize food costs for consumers	61%	26%	12%	2%	66% (-5)
Addressing public perception, image, and trust	60%	23%	15%	3%	67% (-7)
Addressing supply chain issues	50%	29%	19%	2%	62% (-12)
Addressing labour issues, such as capacity and retention	41%	30%	26%	2%	58% (-17)
Improving environmental sustainability	38%	38%	23%	2%	46% (-8)

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations

Some sub-groups place more emphasis on some priorities compared to others:

- Companies based in Quebec (38%) were less likely to name addressing supply chain issues as a high priority than companies overall (50%).
- Companies based in Ontario (29%) are less likely than companies overall (41%) to say addressing labour issues is a high priority.
    - Those with higher earnings (67%, $5M+) were more likely to name supply chain issues as a high priority, while those with lower earnings (31%, less than $250K) were less likely.

- Companies with an annual revenue of $1M to under $5M are more likely to say addressing labour issues is a high priority (54%), while lower revenue companies are less likely (20%).
- Addressing labour issues is a lower priority for companies with fewer than 10 employees (35% say it's a low priority compared to 26% overall).
- Companies who are women-owned were more likely to say addressing supply chain issues is a high priority (61%) compared to companies overall (50%).
- Manufacturers of meat/poultry/seafood (59%) are more likely to say addressing labour issues is a high priority, while manufacturers of sugar/maple syrups are less likely (26%).

Investing in programs and initiatives

Despite current economic conditions, over fifty percent (57%) of companies said it was likely (38%) or somewhat likely (19%) that they would invest in major initiatives in the next 12 months. This shows that companies continue to remain more willing (57%) than unlikely (40%) to invest.

Q10 – How likely or unlikely is your company to invest in major initiatives (such as, productivity improvements, production expansion, diversification) in the next 12 months, given current economic conditions?

Likelihood of investing in major initiatives

Investing in major initiatives in next 12 month	Total (n=427)
Likely	38.0%
Somewhat likely	18.8%
Somewhat unlikely	7.8%
Unlikely	31.5%
Unsure	4.0%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations

Some sub-groups are more likely to invest in major initiatives compared to others:

- Companies with higher revenues in the past year (56%, $5M+) are more likely to say they are likely to invest in major initiatives than companies overall (38%).
- Manufacturers of sugar/maple syrup (50%) are more likely to say they are likely to invest in major initiatives, while those who manufacturer beverages (28%) are less likely to say so.

G. Exporting behaviours and awareness of trade agreements

International business strategies

About one in four companies (23%) report they are currently exporting to other countries. An additional 16 percent aren't currently exporting but are planning to, and just over six in ten (61%) don't plan on exporting in the future. The proportion of companies who report being exporters continues to decline, from 34% in 2017, to 28% in 2019 and now stands at 23% in 2026.

United States is the main country companies report exporting to (85%), followed by Europe (29%) and Asia (24%).

Q11 – PQ1. Which of the following best applies to your company…? [READ LIST]

Exporting status – Tracking (Excludes Don't know/no response)

Business strategies	**2026 (n=423)**	**2019* (n=400)**	**2017 (n=376)**
Current exporter	23%	28%	34%
Planning to export	16%	16%	N/A
Non-exporter	61%	56%	66%
NET – Exporter	**23%**	**28%**	**34%**
NET – Non-exporter	**77%**	**72%**	**66%**

Base: Sub sample, n=423 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations. DECIDED ONLY.
Calculations in 2019 based on decided only. About 1% reported "Don't know/no response".

Exporting status – Total sample – Detailed breakdown

Business strategies	**2026 (n=427)**
We currently export	22.3%
We don't currently export but we plan to start in the next few years	9.9%
We used to export **and** we plan to start again in the next few years	6.0%
We used to export but we have no plans to in the next few years	5.6%
We've never exported **and** we have no plans to	55.0%
Don't know/no response	1.2%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations

Some sub-groups are more likely to export compared to others

- Respondents from Alberta (27%) are more likely to say they have plans to begin exports in the next few years than companies overall (10%).
- Companies with fewer than 25 employees (63%) are more likely to say they have never exported and have no plans to (63%, compared to 55% companies overall).
- Companies with higher revenues (61%, $5M+) are considerably more likely to report that they are currently exporting compared to companies with lower revenues (5%, less than $250K; 4%, $250K to less than $500K).
- Comparatively, those with lower revenues (71%, less than $250K; 73%, $250K to less than $500K) are much more likely to report that they have never exported nor have plans to than those with larger revenues (25%, $5M+).
- Companies who are majority owned by women (11%) are less likely to say they are currently exporting compared to companies overall (22%).
- Meat/poultry/seafood manufacturers are more likely to say they are currently exporting (40%), while beverage manufacturers are less likely (11%).

*Q12 – [ASK IF Q11 [PQ1] =1] PQ2. Which markets does your company currently export to? **[DO NOT READ, MULTIPLE RESPONSE]***

Exports market – Current wave

Countries/regions	**2026 (n=91)**
United States	84.6%
Europe (including the United Kingdon)	28.8%
Asia (including China. Japan and South Korea)	24.5%
Mexico	9.2%
Caribbean	4.6%
Africa/Middle East	3.8%
Unsure	2.9%
South America	2.6%
Other (responses under 2%)	10.0%

Base: Sub sample, n=91 Canadian food or beverage processors or manufacturers and have responsibility for business strategy and/or operations, who currently export.

**Total may not add up to 100% as respondents were able to mention more than one country.*

Exports market – Tracking (Exporters only - Excludes Don't know/no response)

Countries/regions	**2026 (n=88)**	**2019 (n=105)**
United States	87%	77%
Europe (including the United Kingdon)	30%	33%
Asia (including China. Japan and South Korea)	25%	40%
Mexico	9%	8%
Africa and the Middle East	4%	1%
South America	3%	4%
Caribbean and Central America	5%	7%
Australia	-	7%
Other	7%	3%

Base: Sub sample, n=88 Canadian food or beverage processors or manufacturers and have responsibility for business strategy and/or operations, who currently export. DECIDED ONLY. About 3% reported "Don't know/no response.

No significant differences are observed between subgroups in terms of export destinations.

Expansion of markets

Most companies who are current exporters or planning on starting in the next few years (61%) are planning on expanding into new markets in the next few years. This compares to over one in four (27%) who are not planning on expanding and an additional one in ten are unsure (11%). Overall, the United States is the main country most companies are interested in increasing exports to (42%). This was followed by Europe (excluding the UK – 39%) and Asia (excluding China and Japan – 22%).

Q13 – [IF Q11 [PQ1] DOES NOT EQUAL 4, 5, 77] Is your company planning on expanding into a new market or market(s) in the next few years?

Expanding into a new market

	Total (n=164)	We currently export (n=91)	We don't currently export but we plan to start in the next few years (n=46)	We used to export and we plan to start again in the next few years (n=27)*
Yes, we are planning on expanding into new markets	61.4%	50.9%	79.1%	71.2%
No, we are not planning on expanding into new markets	27.3%	33.7%	18.1%	18.5%
Unsure	11.3%	15.4%	2.9%	10.4%

Base: Sub sample, n=164 Canadian food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who currently export or are planning on exporting in the next few years.
**The sample size is under 30 and therefore caution should be exercised due to the small sample size.*

Some companies report higher levels of intentions to expand into new markets

- Among companies who are current exporters or are planning on exporting in the near future, those who have been in the food/beverage processing business for 5 to 20 years are more likely to say they are planning on expanding into new markets (75%, compared to 61% of companies overall).

*Q14 - [IF Q13 =1] To which countries are you interested in increasing exports? **[DO NOT READ, MULTIPLE RESPONSES]***

Increasing exports

Top countries/regions	**Total (n=108)***
United States	42.0%
Europe (excluding UK)	38.6%
Asia (excluding China and Japan)	22.4%
United Kingdom	14.6%
China	14.3%
Japan	14.3%
Mexico	9.0%
Africa/Middle East	5.3%
Australia	4.1%
Caribbean	2.4%
South America	1.8%
Unsure	8.9%

Base: Sub sample, n=108 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who are planning on expanding into new markets.
**Total may not add up to 100% as respondents were able to mention more than one country.*

No significant differences between are observed between subgroups in terms of export destinations.

Exporting to the United States

A majority (58%) of current exporters to the United States say that over the past year, exporting to the United States has become more difficult to one extent or another (29% somewhat more difficult, 29% much more difficult). Two in five say that it has stayed about the same (40%), and only two per cent say it has become somewhat easier. When asked what the government could do to assist them in increasing exports beyond the United States, one in five companies would like to have financial assistance (21%). Just under one in ten each want the government to help resolve the market access issues or trade barriers (8%) or trade negotiations to lower tariffs (8%). One in three (34%) have no interest in expanding outside of the United States.

When looking at strictly exporters for comparability purposes with the 2019 wave of research, there is a strong increase in the proportion of exporters who would like to have export insurance (20%, up from 1% in 2019) as one form of government support to assist them with expanding exports outside of the United States. Financial assistance remains the top governmental assistance exporters would like to have to increase exports beyond the United States (32%, 40% in 2019).

When asked about volume of exports, nearly two in five (39%) say their volume has stayed about the same. Those who reported a change are more likely to say their volume has decreased (36%) rather than increased (23%). However, when looking at the next two years, those who currently export to the US are over three times more likely to say they expect their volume of exports to increase (41%) rather than decrease (12%). About two in five expect them to stay about the same (37%).

*Q15 - [IF Q12 [PQ2] =1] PQ3. Over the past year, has exporting products to the United States become...? Over the past year, has exporting products to the United States become...? [**READ LIST]***

Exporting products to the United States

Exporting products to the United States	**Total (n=76)**
Much easier	-
Somewhat easier	1.6%
Stayed about the same	39.6%
Somewhat more difficult	29.3%
Much more difficult	28.6%
Don't know/no response (volunteered)	0.9%
NET - Easier	1.6%
NET – More difficult	58.0%

Base: Sub sample, n=76 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who currently export to the United-States.

No significant differences between are observed between subgroups in terms of difficulty exporting to the United States.

*Q16 - [IF Q12 [PQ2] =1] PQ4. Over the past year, has your volume of exports to the United States...? **[[READ LIST]***

Volume of exports

Volume of exports to the United States	**Total (n=76)**
Increased significantly	6.5%
Increased somewhat	16.0%
Stayed about the same	39.1%
Decreased somewhat	19.8%
Decreased significantly	16.2%
Don’t know/no response (volunteered)	2.5%
NET – Increased	**22.5%**
NET – Decreased	**36.0%**

Base: Sub sample, n=76 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who currently export to the United-States.

No significant differences between are observed between subgroups in terms of volume of exports to the US.

*Q17 - [IF Q12 [PQ2] =1] PQ5. Over the next two years, do you expect that your volume of exports to the United States will...? **[READ LIST]***

Exports Expectations

Volume of exports to the United States expectations	**Total (n=76)**
Increase significantly	14.7%
Increase somewhat	26.4%
Stay about the same	37.3%
Decrease somewhat	5.7%
Decrease significantly	5.8%
Don’t know/no response (volunteered)	10.1%
NET - Increase	**41.1%**
NET - Decrease	**11.5%**

Base: Sub sample, n=76 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who currently export to the United-States.

No significant differences between are observed between subgroups in terms of US export expectations.

*Q18 - PQ8. What, if anything, could government do to assist your company to increase exports beyond the United States? **[DO NOT READ LIST; ACCEPT UP TO 3 RESPONSES]***

Governmental assistance – All companies compared to exporters only

	All 2026 (n=427)	We currently export (n=91)	We don't currently export but we plan to start in the next few years (n=46)	We used to export and we plan to start again in the next few years (n=27)*
No interest in expanding outside the United States	34.3%	3.7%	8.6%	8.0%
Financial assistance	20.8%	27.9%	51.7%	48.7%
Nothing - continue with current supports	9.0%	11.3%	4.2%	-
Resolving market access issues or trade barriers	8.1%	13.2%	4.4%	21.5%
Trade negotiations to lower tariffs	8.1%	19.1%	10.3%	31.8%
Export insurance	6.6%	17.4%	7.7%	4.7%
Risk assessment/analysis	5.9%	9.4%	9.9%	13.7%
Assistance in navigating regulations, permits, labelling or other trade-related requirements.	5.8%	3.3%	8.1%	22.3%
Identification of regional or country-specific export opportunities	5.6%	3.9%	17.2%	4.1%
Funding to acquire certification or meet standards necessary for export	5.5%	5.9%	16.6%	21.1%
Provide data/statistics on export markets/opportunities	5.1%	4.9%	10.8%	8.4%
Development of regional or country-specific export strategies/plans	4.2%	2.3%	6.6%	4.1%
Development of key buyer contacts	4.0%	9.9%	5.3%	5.1%
General export counselling	3.8%	8.4%	6.3%	4.1%
Support to navigate regional or country-specific distribution channels	3.2%	4.9%	11.3%	2.1%
Other	0.9%	1.3%	-	-
Reduce red tape/bureaucracy	0.9%	2.3%	-	-
Unsure	11.4%	12.8%	6.6%	7.0%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.

**The sample size is under 30 and therefore caution should be exercised due to the small sample size.*

Some subgroups have different expectations when it comes to government assistance they would like to have to assist their company to increase exports beyond the United States:

- Companies from Alberta (19%) were less likely to say they have no interest in expanding outside the United States compared to companies overall (34%).
- Companies that have an annual income of over $5M (8%) are less likely to say they have no interest in expanding outside the United States compared to companies overall (34%).
- Half of companies that have plans to export in the next few years (52% that don't currently but have plans to, 49% that used to export and have plans to) believe the government could assist their company by providing financial assistance to increase exports beyond the United States.

Governmental assistance – Tracking (Exporters only - Excludes Don't know or Unsure)

	2026 (n=79)*	**2019 (n=88)***
Financial assistance	32%	40%
Trade negotiations to lower tariffs	22%	20%
Export insurance	20%	1%
Resolving market access issues or trade barriers**	15%	N/A
Nothing; continue with current supports	13%	21%
Development of key buyer contacts	11%	5%
Risk assessment/analysis	11%	1%
General export counselling	10%	1%
Funding to acquire certification or meet standards necessary for export**	7%	N/A
Support to navigate regional or country-specific distribution channels	6%	5%
Provide data/statistics on export markets/opportunities	6%	4%
Identification of regional or country-specific export opportunities	5%	2%
No interest in expanding outside the United States**	4%	N/A
Assistance in navigating regulations, permits, labelling or other trade-related requirements**	4%	N/A
Development of regional or country-specific export strategies/plans	3%	5%
Other	4%	10%

Base: Total sample, n=79 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who export. DECIDED ONLY.
**Data excludes those who selected "Don't know/no response", which represents about 11% of the sample.*
***New response options in 2026 wave of research.*

Market expansion

Overall, almost half of companies say they have no plans to expand into any new markets (47%) rather than having already made changes to expand into new markets (20%). About one in three say they are planning on doing so (30%).

When looking strictly at the subsample of current exporters, they are now more likely to either say they have made changes in order to expand (32%, 24% in 2019 who said they were doing so specifically for Europe) or are planning to (38%, 19% in 2019 who said they were planning to specifically for Europe). Less than a third (29%) of exporters say they have no plans to expand into any new markets.

Among those who have made changes to expand into new markets, the most common change done is to change manufacturing/processing to meet safety standards (91%). Those who are planning on making changes to expand markets also report that this is the change they are planning to implement in the next two years (76% say they are planning to change manufacturing/processing to meet safety standards).

Q19 - PQ9. Which of the following statements best applies to your company? [Read list]

Market expansion plans – All companies

	2026 (n=427)
We've made changes in order to expand into a new market	19.9%
We're planning to make changes in order to expand to a new market	29.6%
We have no plans to expand into any new markets	46.5%
Don't know/no response	4.0%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.

Market expansion plans – Tracking (Exporters only - Excludes Don't know or Unsure)

	2026 (n=87)**
We've made changes in order to expand into a new market	32%
We're planning to make changes in order to expand to a new market	38%
We have no plans to expand into any new markets	29%

Base: Sub sample, n=87 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who export. DECIDED ONLY.
***Data excludes those who selected "Don't know/no response", which represents about 4% of the sample.*

Some subgroups have different market expansion plans, such as:

- Companies based in Alberta are less likely to say they have no plans to expand into new market (29%) compared to companies overall (47%).
- Companies with fewer than 10 employees are more likely to say they have no plans to expand into new market (58%) while companies with 10 to 24 employees are less likely (34%).
- Those with a total revenue between $500K and $1M were more likely to say they are planning to make changes in order to expand to a new market (45%, compared to 30% of companies overall).
- Companies with a revenue under $250K are more likely to say they have no plans to expand into new markets (60%) while companies with a revenue over $5M are less likely (29%).

Q20 - [If PQ9 = "1"] PQ10. What changes have you implemented? [DO NOT READ. ACCEPT UP TO 3 RESPONSES.]

Changes implemented

	2026 (n=91)
Changed manufacturing/processing to meet safety standards	91.4%
Modernized operations (not specified)	5.3%
Updated technology/equipment	2.9%
Corporate acquisitions	2.6%
Increased marketing budget	2.1%
Acquired new supply chain partners	0.8%
Increased production	0.8%
Other	0.6%

Base: Sub sample, n=91 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who have made changes to export to different markets.

No significant differences are observed between subgroups in terms of changes implemented.

Q21 - [IF PQ9 = "2"] PQ11. What changes does your company intend to implement in the next two years? ***[DO NOT READ. ACCEPT UP TO 3 RESPONSES.]***

Changes Intentions

	2026 (n=127)
Changed manufacturing/processing to meet safety standards	76.1%
Invest in operation/expand facilities	3.8%
Don't know/no response	3.7%
Diversified product lines	3.2%
Increased marketing budget	3.1%
Increased production	2.6%
Modernized operations (not specified)	1.7%
More research to determine best market to expand to	1.4%
Updated technology/equipment*	1.0%
Implemented sustainability measures to meet standards in another market	0.5%
Other	2.9%

Base: Sub sample, n=127 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who are planning to make changes to expand to new markets.
*Previous waves the response was Changes to technology/equipment

No significant differences are observed between subgroups in terms of change intentions.

Trade agreements

Just over four in five Canadian food or beverage manufacturers or processors reported being aware of the Canada-United States-Mexico Agreement (CUSMA) (83%). Respondents were substantially less likely to be aware of the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) (39%) and the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) (46%).

Awareness of trade agreements – All respondents

Trade Agreements:	Yes	No	Don't know	No response
Canada-United States-Mexico Agreement or CUSMA	82.9%	14.8%	1.3%	0.9%
Canada-European Union Comprehensive Economic and Trade Agreement or CETA	46.4%	51.7%	0.9%	1.0%
Comprehensive and Progressive Trans-Pacific Partnership or CPTPP	39.0%	59.1%	1.0%	0.9%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations

The following types of companies are more or less likely to report being aware of trade agreements:

- Companies based in Quebec are less likely to be aware of CETA (19%, compared to 46% of companies overall) and CUSMA (67%, compared to 83% of companies overall).
- Companies with a revenue of over $5M are more likely to report being aware of CETA (72%, compared to 46% of companies overall) and the CPTPP (64%, compared to 39% of companies overall).
- Manufacturers of meat/poultry/seafood are more likely to report being aware of the CPTPP (53%, compared to 39% of companies overall).

For exporters, results are consistent compared to 2019, with nearly all exporters reporting having heard of CUSMA (98%, 89% in 2019) and about three in five having heard of CETA (59%, 51% in 2019) and CPTPP (58%, 60% in 2019).

*Q22-24 – PQ12. Are you aware of the following Trade Agreements? **[READ ITEMS, RANDOMIZE]***

Awareness of trade agreements - Tracking (Exporters only, excludes Don't know or Unsure)

Trade Agreements:	2026 (n=90)	2019 (n=105)
Canada-United States-Mexico Agreement or CUSMA	98%	89%
Canada-European Union Comprehensive Economic and Trade Agreement or CETA	59%	51%
Comprehensive and Progressive Trans-Pacific Partnership or CPTPP	58%	60%

Base: Sub sample, n=90 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who export. DECIDED ONLY

Awareness of trade agreements – All respondents

Trade Agreements:	Yes	No	Don't know	No response
Canada-United States-Mexico Agreement or CUSMA	82.9%	14.8%	1.3%	0.9%
Canada-European Union Comprehensive Economic and Trade Agreement or CETA	46.4%	51.7%	0.9%	1.0%
Comprehensive and Progressive Trans-Pacific Partnership or CPTPP	39.0%	59.1%	1.0%	0.9%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations

The following types of companies are more or less likely to report being aware of trade agreements:

- Companies based in Quebec are less likely to be aware of CETA (19%, compared to 46% of companies overall) and CUSMA (67%, compared to 83% of companies overall).
- Companies with a revenue of over $5M are more likely to report being aware of CETA (72%, compared to 46% of companies overall) and the CPTPP (64%, compared to 39% of companies overall).
- Manufacturers of meat/poultry/seafood are more likely to report being aware of the CPTPP (53%, compared to 39% of companies overall).

Just under sixty percent of Canadian food and beverage processors or manufacturers who are exporters believe that CUSMA offers some level of benefit (41% significant benefits; 18% some benefits), increasing from the 2019 wave where 37 percent of food and beverage processors believed it would have some level of beneficial impact on their company. Food and beverage processors and manufacturers in general, regardless of whether they export or not are split on the perceived impact of CUSMA with 30 percent believing it has a beneficial impact to some extent, has no impact one way or another or that it would present challenges to some extent, respectively.

*Q25 – [IF PQ12C =1] PQ13. Thinking about CUSMA, which of the following statements best reflects what impact, if any, it is having, or will have, on your company? It… **[READ LIST]***

Perceived impact of CUSMA

	Total (n=360)
Offers significant benefits	17.1%
Offers some benefits	13.2%
Has no impact one way or another	30.4%
Presents some challenges	20.5%
Presents significant challenges	9.6%
Don't know	7.8%
No response	1.4%

Base: Sub sample, n=360 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who are aware of CUSMA.

Perceived impact of CUSMA – Tracking (Exporters only, excludes Don't know or Unsure)

	Total (n=80)	2019 (n=55)
Offers significant benefits	41%	13%
Offers some benefits	18%	24%
Has no impact one way or another	20%	37%
Presents some challenges	13%	15%
Presents significant challenges	8%	12%
Net benefits	59%	38%
Net challenges	21%	27%

Base: Sub sample, n=80 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who export and who are aware of CUSMA. DECIDED ONLY

Subgroup differences (among those who are aware of CUSMA)

- Companies with total revenues of $5 million or more were more likely than the national average to report that CUSMA offers significant benefits (38%, compared to 17%). They were less likely than Canadian manufacturers on average to report that it has no impact one way or the other (14% compared to 30%).

H. Interprovincial trade

Half of participating food or beverage processors or manufacturers report that their company sells to other provinces or territories within Canada, outside of the province or territory in which they are headquartered. Two in three respondents report that their company has been not at all impacted (51%) or impacted to a small extent (15%) by interprovincial trade barriers, while just under one in five report having been impacted to a very great extent (11%) or to a great extent (8%).

Thirty-five percent of respondents report that there are no barriers impacting their company's ability to sell product in other provinces. Frequently cited barriers include regulatory requirements (21%) and logistics and transportation (18%).

Q26 – PQ15. Outside of the province or territory where your company is headquartered, does your company sell to other provinces or territories within Canada?

Selling to other provinces or territories within Canada

	Total (n=427)
Yes	50.1%
No	49.0%
Don't know/no response	0.8%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.

Subgroup differences

- Companies located in Quebec were less likely to report selling to other provinces or territories within Canada than Canadian manufacturers and producers on average (38%, compared to 50%).
- Companies with less than 25 employees (43%) as well as those with less than 10 employees (41%) were less likely than Canadian manufacturers on average (50%) to report selling to other provinces or territories within Canada.
- Companies with total revenues of $5 million or more (85%) were more likely to report selling to other provinces or territories within Canada than those with revenues of less than $250,000 (37%) or between $500,000 and $1 million (35%).
- Those who completed the survey in French were less likely to report that their company sells to other provinces or territories within Canada (37%) compared to the national average (50%).

Q27 – PQ16. To what extent do interprovincial trade barriers impact your company?

Impact of interprovincial trade barriers

	Total (n=427)	**Those who sell to provinces and territories outside of the one they are headquartered in (n=218)**	**Those who do not sell to provinces and territories outside of the one they are headquartered in (n=205)**
Not at all	51.2%	48.4%	54.0%
To a small extent	14.5%	12.6%	16.7%
To a moderate extent	10.4%	13.7%	6.5%
To a great extent	7.5%	8.2%	7.0%
To a very great extent	11.4%	14.2%	8.7%
Don't know/no response	4.9%	2.8%	7.1%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.

Some subgroups report differences in terms of the impact of interprovincial trade barriers, including:

- Companies based in Quebec were more likely to report being not at all impacted by interprovincial trade barriers (66%), while companies based in Alberta were less likely (32%).
- Those who completed the survey in French were more likely to report that their company is not at all impacted by interprovincial trade barriers (65%) compared to Canadian manufacturers on average (51%).
- Sugar, maple syrup and other manufacturers (69%) were more likely to report being not at all impacted by interprovincial trade barriers, while beverage manufacturers were less likely (31%).
- Beverage manufacturers (26%) are more likely than Canadian manufacturers on average (11%) to report being impacted to a very great extent by interprovincial trade barriers.

Q28 – PQ17. What barriers, if any, impact your ability to sell your product in other provinces? ***[DO NOT READ, MULTIPLE RESPONSE]***

Barriers to selling products in other provinces

	Total (n=427)*
No barriers	35.4%
Regulatory requirements	20.7%
Logistics/Transportation	17.8%
Not interested in interprovincial trade	10.0%
Financial barriers	9.2%
Stiff competition in these markets	9.0%
Product restrictions	7.4%
Language requirements	6.7%
Lack of demand for company's product outside of home province/territory	5.9%
Challenges meeting standards	5.2%
Lack of clear guidance/lack of understanding	5.2%
Interprovincial trade barriers	4.7%
Lack of corporate expertise	4.6%
Capacity issues	0.5%
Other	0.5%
Unsure/no answer	1.5%

*Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations. *Total adds up to more than 100% as respondents were able to provide more than one answer.*

Some subgroups report differences in terms of barriers to selling products in other provinces, including:

- Companies in Quebec were more likely to cite no barriers (58%) while those in British Columbia (17%) were less likely. Conversely those in British Columbia were more likely to cite regulatory requirements as barriers impacting their ability to sell their products in other provinces (36%) while companies based in Quebec were less likely (5%).
- Companies having been in the food and beverage processing business for 5 to 20 years are less likely to cite no barriers than Canadian manufacturers on average (25% compared to 35%).
- Those who completed the survey in French were more likely to cite no barriers (57%) than those who completed the survey in English (28%). Additionally, those who completed the survey in French were less likely to cite regulatory requirements (5%) than Canadian manufacturers on average (21%).
- Animal food, grain, bakery, dough and noodle manufacturers were more likely to cite no barriers (48%), while beverage manufacturers were less likely (14%).
- Beverage manufacturers were more likely to cite regulatory requirements as a barrier (41%), while sugar, maple syrup and other manufacturers were less likely (5%).

I. Changes to labelling, suppliers and nutrition content

A majority of companies report having increased their sourcing from Canadian suppliers (58%). Nearly half report that they have been improving or amending product labelling to highlight the product's Canadian production (47%). Just under one in four (23%) report having reformulated products for improved nutrient content to avoid front of package labelling.

Q29-31 – Switching topics, which of the following has your company implemented? If something doesn't apply to your company, please say so. ***[RANDOMIZE AND READ LIST]***

Changes implemented to labelling, suppliers and nutrition content

	Yes	No	Not applicable
Increased sourcing from Canadian suppliers (n=423)	58.4%	22.4%	19.2%
Improving or amending product labelling to highlight the product's Canadian production (n=426)	47.0%	30.8%	22.2%
Reformulated product for improved nutrient content to avoid front of package labelling (n=424)	22.5%	41.1%	36.3%

Base: Total sample, n=426 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.
**n values may differ because some respondents did not answer the question.*

Some subgroups report differences in terms of changes to labelling suppliers and nutrition content, including:

- Companies based in Quebec were more likely than Canadian manufacturers overall to say they have not improved or amended product labelling to highlight the product's Canadian production (49% compared to 31%).
- Companies based in Quebec were more likely to report not having increased sourcing from Canadian suppliers (39%) or reformulated product for improved nutrient content to avoid front of package labelling (62%), while those based in British Columbia were less likely to report not having done this (10% and 24%, respectively).
- Companies based in British Columbia were more likely than Canadian manufacturers on average to report having increased sourcing from Canadian suppliers (71% compared to 58%).
- Companies with a total revenue of under $250K were more likely than Canadian manufacturers overall to say they have not improved or amended product labelling to highlight the product's Canadian production compared to companies overall (44% compared to 31%) or reformulated product for improved nutrient content to avoid front of package labelling (61% compared to 41%).
- Those who completed the survey in French were more likely to report not having increased sourcing from Canadian suppliers (39%) than Canadian manufacturers on average (22%).
- Those who completed the survey in French were more likely than those who completed it in English to report that their company has not improved or amended product labelling to highlight the product's

Canadian production (50% vs. 24% respectively), while those who completed the survey in French were less likely to report that this is not applicable (6%) than Canadian manufacturers on average (22%).

- Those who completed the survey in French were more likely to report not having implemented reformulated product for improved nutrient content to avoid front of package labelling (63%) than those who complete the survey in English (33%), however those who completed the survey in English were more likely to say that this is not applicable (46%) than those who completed the survey in French (11%).
- Beverage manufacturers (10%) were less likely than Canadian manufacturers overall (23%) to report having implemented reformulated product for improved nutrient content to avoid front of package labelling. Beverage manufacturers were also more likely to say that this is not applicable (50%) than sugar, maple syrup, or other manufacturers (24%).

J. Plastic packaging

The proportion of companies who say they are taking or planning on taking measures to reduce or change their plastic packaging has slid by 20 percentage points, from 50% in 2024 to now 30%. The proportion who say they are not doing so has increased from 27% in 2024 to 43% in this current wave of research. The proportion of those who say their company doesn't use plastic has stayed somewhat consistent (27%, 22% in 2024), mostly driven by beverage manufacturers (50% of them report not using plastic). This may be a result of increasing adoption and an increase in the proportion of companies who report not using plastic. This is in line with results that suggest that companies are more engaged in finding alternatives and recycling.

Among those who are taking steps or planning to take steps to reduce plastic, an increasing proportion report that they are reducing the amount of plastic (47%, up from 21% in 2024), introducing recycled content (42%, up from 12% in 2024) and introducing reusable packaging regardless of material (32%, up from 12%). Switching materials remains one of the most mentioned ways companies are reducing or changing their plastic packaging (44%, 37% in 2024).

The top barriers for companies to reduce single use plastic packaging was similar to what was reported in 2024 with about one in four who say increased cost (24%, 21% in 2024) and the availability of alternative packaging that offers the same function (22%, 24% in 2024) are barriers. Additionally, over four in ten companies report that there are no barriers, which is consistent with the previous wave (47%, 48% in 2024).

Q32 – We'd like to know a bit about how your company addresses plastic packaging. Is your company taking or planning any measures to reduce or otherwise change your plastic packaging?

Taking or planning plastic packaging reduction measures

	2026 (n=426)	**2024 (n=500)**
Yes	**30%**	50%
No	**43%**	27%
Company doesn't use plastic (unprompted)	**27%**	22%

Base: Total sample, n=426 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.
**n values may differ because some respondents did not answer the question.*

Some subgroups report differences in plastic packaging reduction measures, such as:

- Companies based in Quebec (8%) were less likely to report not using plastic while those based in British Columbia were more likely (40%) to report this.
- Companies in the food or beverage processing business for 5 to 20 years were more likely to report not using plastic (39%) while those in the business for 20 years or more (19%) were less likely to report this being the case.
- Those who completed the survey in English were more likely to report that their company does not use plastic (34%) than those who completed the survey in French (8%).

- Beverage manufacturing companies (50%) were more likely to report that their company does not use plastic, while animal food, grain, bakery, dough and noodle manufacturers (16%) as well as meat, poultry and seafood manufacturers (12%) were less likely.
- Beverage manufacturing companies (21%) were also less likely than food and beverage processors and manufacturers on average (30%) to report currently taking or planning to take measures to reduce or change their plastic packaging.
- Meat poultry and seafood manufacturers (58%) were more likely to report that their companies are not taking or planning to take measures to reduce or change their plastic packaging, while beverage manufacturers were less likely (29%).

Q33 - [IF YES to Q32] What measures have you taken and/or will be taking? [DO NOT READ LIST, MULTIPLE RESPONSE]

Measures to reduce plastic packaging

	2026 (n=120)	**2024 (n=251)**
Reduce the amount of plastic	**47%**	21%
Switch to another material	**44%**	37%
Introduce recycled content	**42%**	12%
Introduce reusable packaging (regardless of material)	**32%**	12%
Switch to another type of plastic (such as more recyclable, more biobased or compostable)	**27%**	29%
Eliminate plastic all together	**18%**	18%
Other	**2%**	10%
Don't know/no response	**-**	5%

Base: Sub sample, n=120 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who are taking measures to reduce or otherwise change their plastic packaging. Based on multiple responses.

No significant differences are observed between subgroups in terms of measures to reduce plastic packaging.

*Q34 – [IF YES OR NO IN Q32] What, if any, barriers are there to reducing single use plastic packaging in your company? **[DO NOT READ LIST, MULTIPLE RESPONSE]***

Barriers to reduce plastic packaging

	2026 (n=292)*	2024 (n=500)
Increased cost	24%	21%
Availability of alternative packaging that offers the same function (such as food preservation)	22%	24%
Availability of alternative materials	17%	10%
Lack of ability to use alternative materials	14%	6%
Retailer specifications for packaging	8%	4%
Lack of reuse-refill systems at retail (such as for bulk/dry goods)	4%	1%
Issues with trade	3%	2%
Labour capacity	2%	1%
Lack of supply	1%	-
Regulation	1%	-
Other	1%	4%
No barriers	47%	48%

Base: Sub sample, n=292 Canadian food or beverage processors or manufacturers and have responsibility for business strategy and/or operations whose companies use plastic. Based on multiple responses.
**Please note that in 2024, this question was asked of the entire sample, whereas in 2026, this question was only asked of those who use plastic packaging in their company.*

Some subgroups report differences in barriers to reduce plastic, including:

- Companies in British Columbia were more likely to name availability of alternative packaging that offers the same function (37%) while those in Quebec (8%) were less likely to name this as a barrier to reducing plastic packaging.
- Companies in British Columbia were also more likely to cite lack of ability to use alternative materials (32%) than companies overall (14%).
- Companies in Quebec were more likely to report no barriers (67%) while companies in British Columbia were less likely to cite having no barriers to reducing plastic packaging (21%).
- Respondents having completed the survey in French were less likely to cite availability of alternative packaging (8%) than the national average (22%) and were more likely to say there are no barriers to reducing single use plastics (69%) than those who completed the survey in English (36%).
- Meat, poultry and seafood manufacturing companies (41%) were more likely than companies overall (22%) to cite availability of alternative packaging that offers the same function as a barrier to reducing single use plastic.

K. Receiving Information from AAFC

Thirty-five percent of respondents reported having used the AAFC website over the past year to look for information on programs and services. Among those who looked for information on the website, over two in five found it easy (13%) or somewhat easy (33%) to find the information they were looking for, while about three in ten reported that this was either very difficult (7%) or somewhat difficult (23%). One in four respondents who looked for information on the AAFC website in the past year reported that it was neither easy nor difficult (25%) to find what they were looking for.

Email, including the Agri Info newsletter, is the preferred medium for being informed about the latest agricultural news and developments from AAFC for 61% of participants. This was followed by the AAFC website (30%) and by direct mail (18%).

Q35 – In the last year, have you looked for information on programs or services on the Agriculture and Agri-Food Canada website?

Website use

	2026 (n=426)
Yes	34.7%
No	59.7%
Not sure	5.1%
No response	0.7%

Base: Total sample, n=426 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations.
**n values may differ because some respondents did not answer the question.*

Subgroup differences

- Respondents from companies with total revenue of $5 million or more in the last fiscal year were more likely to report having looked for information on programs or services on the AAFC website in the past year (56%) than companies overall (35%).
- Meat, poultry and seafood manufacturers (46%) were less likely to report not having looked for information on programs or services on the AAFC website than companies overall (60%).

*Q36 – How easy or difficult was it for you to find the information you were looking for on the Agriculture and Agri-Food Canada website? **[READ LIST]***

Information accessibility

	2026 (n=155)
Very easy	12.8%
Somewhat easy	33.2%
Neither easy nor difficult	24.5%
Somewhat difficult	22.6%
Very difficult	7.0%

Base: Sub sample, n=155 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations who have looked for information on programs or services on the AAFC website.

No significant differences are observed between subgroups in terms of information accessibility.

*Q – How would you prefer to be informed about the latest agricultural news and developments from Agriculture and Agri-food Canada, or AAFC? **[RANDOMIZE, READ LIST, ACCEPT UP TO THREE ANSWERS]***

Information preferences

	2026 (n=426)
Email (including Agri Info newsletter)	60.8%
AAFC website	30.1%
Direct mail	17.4%
Social media (such as Facebook, X formerly known as Twitter, LinkedIn, Instagram and/or YouTube)	12.5%
Association news/updates	1.5%
Trade shows	0.6%
Direct contact/text/phone	0.4%
Other channels	0.6%
None of these	6.3%
Don’t know/Prefer not to say	0.9%

Base: Total sample, n=426 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations. Based on multiple responses.
**n values may differ because some respondents did not answer the question.*

Subgroup differences

- Animal food, grain, bakery, dough and noodle manufacturers (49%) were less likely than companies overall (61%) to prefer being informed by email.

L. Profile of food and beverage processors

Company location and size

Just over three in five (61%) companies have their headquarters in Ontario or Quebec. Most are small operations as over seven in ten (72%) have fewer than 25 full-time employees. This is consistent with the company location and size profile of 2024.

Survey data was weighted based on region and broad company size categories from the sample source consistent with the 2024 wave of research.

Region

Q – To start, in which province or territory is your company's headquarters located? ***[DO NOT READ LIST; ACCEPT 1 RESPONSE].***

Location of headquarters	2026 (n=427)	2024 (n = 500)	2022 (n = 501)	2019 (n = 400)	2018 (n = 376)
British Columbia	16%	17%	17%	17%	17%
Alberta	9%	8%	8%	6%	8%
Saskatchewan	4%	2%	3%	4%	4%
Manitoba	3%	3%	3%	2%	3%
Ontario	34%	34%	36%	36%	36%
Quebec	27%	29%	25%	27%	25%
Prince Edward Island	1%	1%	1%	1%	1%
New Brunswick	2%	2%	2%	2%	2%
Nova Scotia	3%	3%	3%	4%	4%
Newfoundland	1%	1%	1%	1%	2%

Company size

Q – How many employees work for your company in Canada? Please include part-time employees as full-time equivalents.

	2026 (n=427)	2024 (n = 500)	2022 (n = 501)	2019 (n = 400)	2018 (n = 376)
NET: Under 100	89%	93%	94%	91%	86%
Up to 24	*72%*	*73%*	*73%*	-	-
25 to 49	*10%*	*14%*	*15%*	-	-
50 to 74	*5%*	*5%*	*4%*	-	-
75 to 99	*2%*	*2%*	*2%*	-	-
100 to 249	4%	2%	3%	5%	3%
NET: 250+	5%	2%	1%	2%	11%
250 to 499	*3%*	*1%*	*1%*	*2%*	-
500 to 999	*1%*	*<1%*	*<1%*	*<1%*	-
1000 or more	*1%*	*<1%*	*<1%*	*<1%*	-
Don't know/no response	2%	2%	2%	<1%	<1%

Revenue and time in business

Revenue results are consistent with the revenue distribution observed in previous waves when excluding respondents who were unsure, with nearly nine in ten who report having a business revenue of under $10M (88%, 85% in 2024). When including those who are unsure, results are consistent with the distribution observed in 2022, but fewer respondents in the current wave conducted by Nanos report being unsure of their business income than in 2024 (18%, compared to 45% in 2024). It is important to note that in 2024, the revenue question was changed to be open-end, rather than having companies indicate their revenue from a list of categories.

Three in four companies (75%, consistent with 77% in 2024) reported having been in business for 10 years or more while one quarter have been for less than 10 years (25%, consistent with 24% in 2024). Similarly to results observed in 2024, companies working in beverage manufacturing are more likely to have been in operation for five to twenty years than other manufacturing types (64%, 58% in 2024) while meat/poultry/seafood companies are more likely to have been in operation for 30 or more years (53%, 55% in 2024).

*Q – In your last fiscal year, what were your company's total revenues? **[READ LIST; STOP WHEN RESPONDENT ANSWERS]**.*

Annual revenue

	2026 (n=426)	2024 (n=500)	2022 (n=501)
NET: Less than $1 million	44%	30%	47%
Less than $250K	20%	11%	18%
$250K to less than $500K	9%	8%	12%
$500K to less than $750K	7%	7%	10%
$750K to less than $1 million	8%	4%	7%
NET: $1 million or more	37%	27%	37%
$1 million to less than $5 million	22%	15%	24%
$5 million to less than $10 million	5%	4%	5%
$10 million to less than $25 million	5%	4%	4%
$25 million to less than $50 million	<1%	2%	2%
$50 million to less than $100 million	2%	1%	1%
$100 million or more	3%	*1%*	*1%*
Don't know/no response	18%	45%	17%

**n values may differ because some respondents did not answer the question.*

Annual revenue – Tracking (Don't know/no response category removed)

Total revenues in last fiscal year	**2026 (n=356)**	**2024 (n = 500)**	**2022* (n = 501)**	**2019* (n = 400)**	**2018* (n = 376)**
Less than $10 million	88%	85%	90%	86%	82%
$10 million or more	12%	15%	10%	15%	19%

Q – Approximately how long has your company been in the food or beverage processing business? ***[DO NOT READ LIST; ACCEPT 1 RESPONSE]***

Years in business

	2026 (n=427)	**2024 (n = 500)**	**2022 (n = 501)**	**2019 (n = 400)**	**2018 (n = 376)**
Less than 1 year	**1%**	1%	1%	<1%	<1%
1 year to less than 5 years	**7%**	7%	15%	11%	9%
5 years to less than 10 years	**17%**	16%	17%	14%	11%
10 years to less than 20 years	**20%**	24%	18%	23%	21%
20 years to less than 30 years	**17%**	20%	19%	23%	25%
30+ years	**37%**	33%	30%	29%	35%
Don't know/no response	**<1%**	0%	<1%	1%	0%

Base: Total sample, n=427 Canadians food or beverage processors or manufacturers and have responsibility for business strategy and/or operations

Type of processing facility

Companies responding to the survey operate in a wide range of areas, with alcoholic beverage manufacturing (31%) and bakeries and tortilla manufacturing (9%) as the most common.

The proportions of companies in most types of manufacturing are consistent from 2024 to 2026; however, there is a slight gradual increase in the proportion of alcoholic beverage manufacturers (31%, 27% in 2024, 25% in 2022).

*Important note: In the 2019 wave, half of all companies (50%) were in an unspecified "Other" category. Since the 2022 wave, categories were expanded, and companies saying "Other" were asked to specify what type of facility they operate. The relatively high proportion of companies in the alcoholic beverage category in 2022 and 2024 were likely contained within the unspecified "Other" category in 2019. This question was not asked in 2017.

Q - What types of food or beverage does your company process or manufacture? ***[DO NOT READ LIST, MULTIPLE RESPONSE]***

Type of food or beverage

	2026 (n=426)	**2024 (n=500)**	**2022* (n=501)**	**2019* (n=400)**
Animal Food Manufacturing (3111)	6%	6%	6%	5%
Grain and Oilseed Milling (3112)	5%	5%	5%	9%
Sugar and Confectionary Product Manufacturing (3113)	6%	8%	8%	8%
Fruit and vegetable preserving and specialty food manufacturing (3114)	6%	9%	5%	Not applicable
Non-alcoholic Beverage Manufacturing (3121)	5%	5%	5%	Not applicable
NET - Alcoholic Beverage Manufacturing**	31%	27%	25%	Not applicable
Alcoholic Beverage Manufacturing [Breweries] (31212)	*12%*	-	-	-
Alcoholic Beverage Manufacturing [Wineries] (31213)	*14%*	-	-	-
Alcoholic Beverage Manufacturing [Distillers] (31214)	*5%*	-	-	-
Dairy Product Manufacturing (3115)	3%	4%	5%	6%
Animal (except poultry) Slaughtering (311611)	5%	4%	6%	4%

	2026 (n=426)	2024 (n=500)	2022* (n=501)	2019* (n=400)
Rendering and Meat Processing from Carcasses (311614)	4%	4%	4%	3%
Poultry Processing (311615)	3%	3%	2%	1%
Seafood Product Preparation and Packaging (3117)	6%	4%	6%	4%
Bakeries and Tortilla Manufacturing (3118)	9%	8%	11%	11%
Maple syrup products production (111994)	6%	7%	3%	Not applicable
Dough, Flour Mixes, Noodle and pasta manufacturing (311824)	6%	3%	1%	Not applicable
Sauce manufacturing (311941)	3%	3%	1%	Not applicable
Other Food Manufacturing	9%	7%	9%	50%

**n values may differ because some respondents did not answer the question.*

Company ownership by members of equity-seeking groups

In total, about one in three (34%) of businesses are majority-owned by an individual or individuals who identify as a member of at least one equity-seeking group. The equity-seeking group most likely to be represented as a majority owned company is women (26%, 27% in 2024), youth (7%), members of racialized groups (4%, 7% in 2024), individuals who identify as 2SLGBTQI+ (3%, also 3% in 2024), Indigenous people (2%, also 2% in 2024), and people with disabilities (2%, also 2% in 2024). These proportions are consistent with 2024 and 2022.

Q – Is this company majority-owned (51 percent or more) by an individual or individuals in any of the following groups? ***[READ LIST, MULTIPLE RESPONSE].***

Ownership identity

	2026 (n=422)	**2024 (n=500)**	**2022 (n=501)**
NET: Owned by a member of at least one equity-seeking group	34%	35%	35%
Indigenous Peoples, that is, First Nations, Inuit, or Métis	*2%*	*2%*	*1%*
People with disabilities	*2%*	*2%*	*1%*
Racialized Groups	*4%*	*7%*	*8%*
Women	*26%*	*27%*	*29%*
Youth (Age 35 and under)	*7%*	-	-
Individuals who identify as 2SLGBTQ2I+	*3%*	*3%*	*2%*
No (VOLUNTEERED, EXCLUSIVE)	61%	61%	60%
Don't Know/Prefer not to say	5%	4%	5%

**n values may differ because some respondents did not answer the question.*

M. Respondents' profile

Characteristics of the individuals who responded to the survey are outlined below; the profile of respondents is generally consistent with results from the 2024 wave, with a slight increase in the proportion of respondents who completed the interview in English (81%, up from 73% in 2024). However, a larger proportion of participants in the Nanos wave reported being CEOs/Owner/President of the companies (69%, compared to 54% in 2024) and a smaller proportion report being at the Director/Operations level (24%, compared to 44% in 2024).

Language of survey

	2026 (n=427)	**2024 (n=500)**	**2022 (n=501)**
English	**81%**	73%	76%
French	**19%**	27%	24%

Q - What is your position within the company? ***[DO NOT READ LIST; ACCEPT 1 RESPONSE]***

Position within the company

	2026 (n=427)	2024 (n=500)	2022 (n=501)
CEO/Owner/President (NET)	**69%**	54%	56%
CEO	**7%**	5%	4%
Owner/Operator	**45%**	39%	38%
President	**17%**	9%	13%
VP Level (NET)	**6%**	2%	3%
VP, Operations	**4%**	1%	3%
VP, Business Strategy	**1%**	0%	<1%
VP, Marketing	**1%**	1%	<1%
Director/Operations/Other (NET)	**24%**	44%	41%
Director (such as finance, marketing)	**6%**	6%	11%
Operations (such as supervisor, manager)	**19%**	37%	28%
Other	**<1%**	1%	2%

Appendix A: Methodology

Nanos Research conducted a telephone survey with 427 Canadian food or beverage processors or manufacturers, drawn from a sample list of 12,297 companies. Specifically, the survey was conducted with adults (18+) at these companies who have responsibility for business strategy and/or operations. The response rate for the survey was 12% and the margin of error for this sample is +/-4.8 percentage points, nineteen times out of 20.

Sample design, weighting and respondent profile

Nanos Research conducted a 15-minute telephone survey from December 3rd to March 13th, 2026. The sampling method was designed to attain interviews with at least 425 companies based on predicted response rates.

The sample frame for this study was a list of food and beverage processors from Dun & Bradstreet Canada. Eligible processors were defined as companies with headquarters in Canada, operating under Standard Industrial Classification (SIC) Code 20. After cleaning the list to remove duplicates and defunct entries, the list contained 10,331 eligible records. A complete list of eligible SIC codes is shown below:

SIC Code	Description
3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionary Product Manufacturing
3114	Fruit and vegetable preserving and specialty food manufacturing
3121	Non-alcoholic Beverage Manufacturing
31212	Alcoholic Beverage Manufacturing [Breweries]
31213	Alcoholic Beverage Manufacturing [Wineries]
31214	Alcoholic Beverage Manufacturing [Distillers]
3115	Dairy Product Manufacturing
311611	Animal (except poultry) Slaughtering
311614	Rendering and Meat Processing from Carcasses
311615	Poultry Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
111994	Maple syrup products production
311824	Dough, Flour Mixes, Noodle and pasta manufacturing
311941	Sauce manufacturing
3119	Other Food Manufacturing

No quotas were set for any business characteristics or region. While the survey was open to respondents from all regions of Canada, the sample did not obtain any respondents from the territories.

The final survey data were weighted to match company size and region proportions in the source list. Note that in the original list, the proportion of companies with no size data was over 15 percent, while the unweighted sample was 2 percent. For weighting purposes, the “no data” proportion was kept at 2 percent and other proportions were adjusted accordingly.

The survey obtained the following distribution:

Variable	Percent of population (source list)	Percent of sample	Actual Unweighted	Actual Weighted*
Headquarters location				
Atlantic	7.1%	9.6%	41	30
Quebec	27.2%	19.2%	82	117
Ontario	33.9%	27.4%	117	145
Manitoba / Saskatchewan	6.8%	9.1%	39	29
Alberta	8.8%	12.6%	54	38
British Columbia	15.8%	22.0%	94	68
Canada	100%	100.0%	427	427
Company Size (number of employees)				
Under 10	45.8%	51.3%	219	192
10 to 24	27.5%	24.1%	103	115
25 to 49	10.2%	11.5%	49	43
50+	16.5%	11.2%	48	69
No Data/Unsure	1.9%	1.9%	8	8
Total	100%	100.0%	427	427

*Results are weighted by region and company size to source list of 12297 food and beverage manufacturers.

Questionnaire design

The Wave V questionnaire was based on the questionnaire from the 2019 wave and the 2024 wave. AAFC provided Nanos Research with some new desired topic areas, which were incorporated into the questionnaire. Upon approval of the English questionnaire, Nanos Research translated the questionnaire into French.

Nanos Research data analysts programmed the questionnaires, then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the surveys' basic logic. The data collection system handles sampling invitations, quotas, and questionnaire completion (skip patterns, branching, and valid ranges).

Prior to finalizing the survey for fieldwork, a pre-test (soft launch) was conducted in English and French. The pre-test assessed the questionnaires in terms of question wording and sequencing, respondent sensitivity to specific questions and to the survey overall, and survey length. Standard Government of Canada pre-testing questions were also asked. As no changes were required following the pre-test, the twenty-one responses have been included in the final data set.

The final survey questionnaire is included in Appendix B.

Fieldwork

The survey was conducted by Nanos Research using a secure, fully featured Computer Assisted Telephone Interviewing (CATI) environment. The average interview length was 14 minutes.

All respondents were offered the opportunity to complete the surveys in their official language of choice. All research work was conducted in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys and recognized industry standards, as well as applicable federal legislation (*Personal Information Protection and Electronic Documents Act*, or PIPEDA).

Following data collection, the data from this survey were statistically weighted by region and company size, to match proportions in the original source list.

Completion results

The completion results are presented in the following table.

Contact disposition

Total Numbers Attempted	**12297**
Out-of-scope - Invalid	**1966**
Unresolved (U)	**5833**
No answer/answering machine	5833
In-scope - Non-responding (IS)	**664**
Language barrier	55
Incapable of completing	0
Callback (Respondent not available)	609
Total Asked	**3834**
Refusal	2639
Termination	0
In-scope – Responding	**1195**
Completed interview	427
NQ - Not a company in the business of food or beverage processing	768
Refusal Rate	**68.83%**
Response Rate	**11.57%**
Incidence (Overall)	**35.73%**

Appendix B: Survey questionnaire

Hello/Bonjour, my name is **[Interviewer's name]**. I'm calling on behalf of Nanos, a public opinion research company. Would you prefer that I continue in English or French? Préférez-vous que je continue en français ou en anglais? We're conducting a survey with food and beverage processors about important issues facing the Canadian agriculture and food sector, on behalf of Agriculture and Agri-Food Canada.

A. Language of interview – **[RECORD, DO NOT ASK]** *Tracking 2021*

English 1
French 2

B. Just to confirm, is this company in the business of food or beverage processing or manufacturing?

IF YES, CONTINUE. REPEAT INTRODUCTION IF NEEDED......................................1
IF NOT, TERMINATE...2

C. May I speak to the person in your company responsible for business strategy and/or operations. Would this be you or someone else?

IF PERSON IS AVAILABLE, CONTINUE. REPEAT INTRODUCTION IF NEEDED. 1
IF NOT AVAILABLE, SCHEDULE CALL-BACK. 2

The survey takes up to 15 minutes. Your participation is voluntary and your decision to participate or not will not affect any dealings you may have with the Government of Canada in any way. Results from this survey will be used by AAFC in the development of policies, programs, and initiatives. Your identity and individual answers will be kept strictly confidential. Any information you provide will be administered in accordance with the Privacy Act and other applicable privacy laws.

May I continue?

- Yes, now **[CONTINUE]**
- No, call later. Specify date/time: Date: Time:
- Refused **[THANK/DISCONTINUE]**

INTERVIEWER NOTES:

NOTE: Should you wish to verify the credibility of this survey, you can utilize the Canadian Research Insights Council (CRIC) Research Verification Service. IF REQUESTED: The registration number is: XXXXXXXXXXXXX.

A. BUSINESS PROFILE

1. To start, in which province or territory is your company's headquarters located? **[DO NOT READ LIST; ACCEPT 1 RESPONSE]** *Tracking 2019*

Newfoundland and Labrador....................................... 1
Nova Scotia 2
Prince Edward Island 3
New Brunswick 4
Quebec 5
Ontario 6
Manitoba 7
Saskatchewan 8
Alberta 9
British Columbia 10
Northwest Territories.. 11
Yukon 12

Nunavut 13
Headquarters are not in Canada .... 14 [THANK/TERMINATE]
Don't know/no response 15

2. What is your position within the company? **[DO NOT READ LIST; ACCEPT 1 RESPONSE]** *Tracking 2019*
VP, Operations 1
VP, Business Strategy 2
VP, Marketing 3
CEO 4
Owner/Operator 5
President 6
Director (such as finance, marketing) 7
Operations (such as supervisor, manager) 8
Other, please specify **[INTERVIEWER TYPE IN] 20**

3. Approximately how long has your company been in the food or beverage processing business? **[DO NOT READ LIST; ACCEPT 1 RESPONSE]** *Tracking 2019*
Less than 1 year 1
1 year to less than 5 years 2
5 years to less than 10 years 3
10 years to less than 20 years 4
20 years to less than 30 years 5
30+ years 6
Don't know/no response 99

4. What types of food or beverage does your company process or manufacture? **[DO NOT READ LIST, MULTIPLE RESPONSE]** *Tracking 2019*
Animal Food Manufacturing (3111) 1
Grain and Oilseed Milling (3112) 2
Sugar and Confectionary Product Manufacturing (3113) 3
Fruit and vegetable preserving and specialty food manufacturing (3114) 4
Non-alcoholic Beverage Manufacturing (3121) 5
Alcoholic Beverage Manufacturing [Breweries] (31212) 6
Alcoholic Beverage Manufacturing [Wineries] (31213) 7
Alcoholic Beverage Manufacturing [Distillers] (31214) 8
Dairy Product Manufacturing (3115) 9
Animal (except poultry) Slaughtering (311611) 10
Rendering and Meat Processing from Carcasses (311614) 11
Poultry Processing (311615) 12
Seafood Product Preparation and Packaging (3117) 13
Bakeries and Tortilla Manufacturing (3118) 14
Maple syrup products production (111994) *Tracking 2023* 15
Dough, Flour Mixes, Noodle and pasta manufacturing (311824) *Tracking 2023* 16
Sauce manufacturing (311941) *Tracking 2023* 17
Other Food Manufacturing (3119), Specify **[INTERVIEWER TYPE IN]** ________________ 20
Don't know/no response 99

Thinking about the past two years, please tell me if each of the following has been a high, medium or low priority for your company. **[RANDOMIZE]** *Tracking 2021*

5. Addressing public perception, image, and trust. Public trust refers to consumers' confidence on issues such as food safety, animal welfare, and the sector's reliability and competence.
6. Addressing supply chain issues
7. Addressing labour issues, such as capacity and retention
8. Improving environmental sustainability
9. Making an effort to stabilize food costs for consumers *Tracking 2023*
   - Low Priority 1
   - Medium Priority 2
   - High Priority 3
   - Don't know/Prefer not to say (Volunteered) 77

10. How likely or unlikely is your company to invest in major initiatives (such as, productivity improvements, production expansion, diversification) in the next 12 months, given current economic conditions? *New 2025*
    - Likely 1
    - Somewhat likely 2
    - Somewhat unlikely 3
    - Unlikely 4
    - Unsure 77

Exporting Behaviours and Awareness of Trade Agreements

We'd like to know a bit about your international business strategy.

11. PQ1. Which of the following **best** applies to your company…? **[READ LIST]** *Asked in 2019*
    - We currently export .... 1 [GO TO Q12(PQ2)]
    - We don't currently export but we plan to start in the next few years .... 2 [SKIP TO Q13]
    - We used to export **and** we plan to start again in the next few years .... 3 [SKIP TO Q13]
    - We used to export but we have no plans to in the next few years .... 4 [SKIP TO Q19]
    - We've never exported **and** we have no plans to .... 5 [SKIP TO Q19]
    - Don't know/no response .... 77 [SKIP TO Q19]

12. [ASK IF Q11 [PQ1] =1] PQ2. Which markets does your company currently export to? **[DO NOT READ, MULTIPLE RESPONSE]** *Asked in 2019*
    - United States 1
    - Mexico 2
    - China 3
    - Japan 4
    - The United Kingdom 5
    - Other **[INTERVIEWER TYPE IN]** 20
    - Don't know/no response 77

13. [IF Q11 [PQ1] DOES NOT EQUAL 4, 5, 77] Is your company planning on expanding into a new market or market(s) in the next few years? *New 2025*
    - Yes, we are planning on expanding into new markets .... 1 [ASK Q14]
    - No, we are not planning on expanding into new markets .... 2 [SKIP TO Q15[PQ3]]
    - Unsure .... 77 [SKIP TO Q15[PQ3]]

14. [IF Q13 =1] To which countries are you interested in increasing exports? **[DO NOT READ, MULTIPLE RESPONSES]** *New 2025*
    - United States 1

Mexico 2
China 3
Japan 4
The United Kingdom 5
Other **[INTERVIEWER TYPE IN]** 20
Don't know/no response 77

15. [IF Q12 [PQ2] =1] PQ3. Over the past year, has exporting products to the United States become...? **[READ LIST]** *New 2025*
Much easier 1
Somewhat easier 2
Stayed about the same 3
Somewhat more difficult 4
Much more difficult 5
Don't know/no response (volunteered) 77

16. [IF Q12 [PQ2] =1] PQ4. Over the past year, has your volume of exports to the United States...? **[READ LIST]** *New 2025*
Increased significantly 1
Increased somewhat 2
Stayed about the same 3
Decreased somewhat 4
Decreased significantly 5
Don't know/no response (Volunteered) 77

17. [IF Q12 [PQ2] =1] PQ5. Over the next two years, do you expect that your volume of exports to the United States will...? **[READ LIST]** *New 2025*
Increase significantly 1
Increase somewhat 2
Stay about the same 3
Decrease somewhat 4
Decrease significantly 5
Don't know/no response (Volunteered) 77

18. PQ8. What, if anything, could government do to assist your company to increase exports beyond the United States? **[DO NOT READ LIST; ACCEPT UP TO 3 RESPONSES]** *Asked in 2019*
Financial assistance 1
Export insurance 2
Risk assessment/analysis 3
Identification of regional or country-specific export opportunities 4
Development of regional or country-specific export strategies/plans 5
Provide data/statistics on export markets/opportunities 6
General export counselling 7
[NEW] Resolving market access issues or trade barriers 8
[NEW] Assistance in navigating regulations, permits, labelling or other trade-related requirements. ... 9
[NEW] Funding to acquire certification or meet standards necessary for export 10
Development of key buyer contacts 11
Support to navigate regional or country-specific distribution channels 12
Trade negotiations to lower tariffs 13
Nothing; continue with current supports 14
[NEW] No interest in expanding outside the United States [EXCLUSIVE] 15
Other **[INTERVIEWER TYPE IN]** ________________ 20
Don't know/no response 77

19. PQ9. Which of the following statements best applies to your company? [Read list]
    - We've made changes in order to expand into a new market ....1 [GO TO Q20 [PQ10]]
    - We're planning to make changes in order to expand to a new market ....2 [GO TO Q21 [PQ11]]
    - We have no plans to expand into any new markets ....3 [SKIP TO Q22 [PQ12]]
    - [Do not read]: Don't know/no response ....20 [SKIP TO Q22 [PQ12]]

20. [If Q19 [PQ9] = "1"] PQ10. What changes have you implemented? **[DO NOT READ. ACCEPT UP TO 3 RESPONSES.]**
    - Changed manufacturing/processing to meet safety standards 1
    - [TWEAKED] Implemented sustainability measures to meet standards in another market 2
    - Updated technology/equipment 3
    - Modernized operations (not specified) 4
    - Changed product labelling..5
    - Adjusted pricing..6
    - Acquired new supply chain partners 7
    - Diversified product lines..8
    - Hired more staff 9
    - Increased production 10
    - Other **[INTERVIEWER TYPE IN] 20**
    - Don't know/no response 77

21. [IF Q19 [PQ9] = "2"] PQ11. What changes does your company intend to implement in the next two years? **[DO NOT READ. ACCEPT UP TO 3 RESPONSES.]**
    - Changes to manufacturing/processing to meet safety standards..1
    - Sustainability measures to meet standards in another market 2
    - Changes to technology/equipment 3
    - Modernize operations (not specified) 4
    - Changes to product labelling...5
    - Pricing changes 6
    - Acquire new supply chain partners 7
    - Introduce new product lines 8
    - Hire more staff 9
    - Increase production..10
    - Other **[INTERVIEWER TYPE IN] 20**
    - Don't know/no response 77

PQ12. Are you aware of the following Trade Agreements? **[READ ITEMS, RANDOMIZE]**

22. Canada-European Union Comprehensive Economic and Trade Agreement or CETA[1]
23. Comprehensive and Progressive Trans-Pacific Partnership or CPTPP
24. Canada-United States-Mexico Agreement or CUSMA
    - Yes 1
    - No 2
    - [DO NOT READ] Don't know 77
    - [DO NOT READ] No response 99

    [1]interviewers: pronounced seeta

25. [IF Q24 [PQ12C] =1] PQ13. Thinking about CUSMA, which of the following statements best reflects what impact, if any, it is having, or will have, on your company? It… **[READ LIST]**
    Offers significant benefits 1
    Offers some benefits 2
    Has no impact one way or another 3
    Presents some challenges 4
    Presents significant challenges....................5
    [DO NOT READ] Don't know 77
    [DO NOT READ] No response 99

Now we'll talk about interprovincial trade.

26. PQ15. Outside of the province or territory where your company is headquartered, does your company sell to other provinces or territories within Canada? *New 2025*
    Yes 1
    No 2
    [DO NOT READ] Don't know/no response ....77 [EXCLUSIVE]

27. PQ16. To what extent do interprovincial trade barriers impact your company? **[READ LIST]** *New 2025*
    Not at all 1
    To a small extent 2
    To a moderate extent....................3
    To a great extent 4
    To a very great extent 5
    [DO NOT READ] Don't know/no response ....77 [EXCLUSIVE]

28. PQ17. What barriers, if any, impact your ability to sell your product in other provinces? **[DO NOT READ, MULTIPLE RESPONSE]** *New 2025 UNPROMPTED*
    Language requirements....................1
    Logistics/Transportation....................2
    Challenges meeting standards 3
    Regulatory requirements [Please specify which regulations_____] 4
    Product restrictions 5
    Lack of clear guidance/lack of understanding 6
    Financial barriers 7
    Lack of corporate expertise 8
    Stiff competition in these markets 9
    Lack of demand for company's product outside of home province/territory......10
    Other **[INTERVIEWER TYPE IN]** ________________ 20
    No barriers....................88 [EXCLUSIVE]
    Not interested in interprovincial trade....................99 [EXCLUSIVE]

Switching topics, which of the following has your company implemented? If something doesn't apply to your company, please say so. **[RANDOMIZE AND READ LIST]** *New 2025*

29. Improving or amending product labelling to highlight the product's Canadian production *New 2025*
30. Increased sourcing from Canadian suppliers
31. Reformulated product for improved nutrient content to avoid front of package labelling
    Yes 1
    No 2
    Not applicable 99

C. Plastic packaging

We'd like to know a bit about how your company addresses plastic packaging.

32. Is your company taking or planning any measures to reduce or otherwise change your plastic packaging? *Tracking 2023*

Yes .... 1 [ASK Q33]
No .... 2 [SKIP TO 34]
Company doesn't use plastic [DO NOT READ] .... 99 [SKIP TO Q35]

33. **[IF YES to Q32]** What measures have you taken and/or will be taking? **[DO NOT READ LIST, MULTIPLE RESPONSE]** *Tracking 2023*

Reduce the amount of plastic 1
Eliminate plastic all together 2
Switch to another material 3
Switch to another type of plastic (such as more recyclable, more biobased or compostable) 4
Introduce recycled content 5
Introduce reusable packaging (regardless of material) 6
Other **[INTERVIEWER TYPE IN]** **20**

34. What, if any, barriers are there to reducing single use plastic packaging in your company? **[DO NOT READ LIST, MULTIPLE RESPONSE]** *Tracking 2023*

Availability of alternative packaging that offers the same function (such as food preservation) 1
Increased cost 2
Lack of reuse-refill systems at retail (such as for bulk/dry goods) 3
Retailer specifications for packaging 4
Lack of ability to use alternative materials 5
Availability of alternative materials 6
Labour capacity 7
Issues with trade 8
Other [INTERVIEWER TYPE IN] 20
No barriers [EXCLUSIVE] 99

AAFC INITIATIVES

35. In the last year, have you looked for information on programs or services on the Agriculture and Agri-Food Canada website? *New 2025*

Yes .... 1 **[ASK Q36]**
No .... 2 **[SKIP TO Q37]**
Not sure .... 3 **[SKIP TO Q37]**
No response .... 99 **[SKIP TO Q37]**

36. How easy or difficult was it for you to find the information you were looking for on the Agriculture and Agri-Food Canada website? **[READ LIST]** *New 2025*

Very easy 1
Somewhat easy 2
Neither easy nor difficult 3
Somewhat difficult 4
Very difficult 5

37. How would you prefer to be informed about the latest agricultural news and developments from Agriculture and Agri-food Canada, or AAFC? **[RANDOMIZE, READ LIST, ACCEPT UP TO THREE ANSWERS]**

Direct mail 1
Email (including Agri Info newsletter) 2
Social media (such as Facebook, X formerly known as Twitter, LinkedIn, Instagram and/or YouTube) .. 3
AAFC website 4
None of these [EXCLUSIVE] 99
Other channels [INTERVIEWER TYPE IN] 20
Don't know/Prefer not to say (VOLUNTEERED) 77

FIRMOGRAPHIC CHARACTERISTICS

Lastly, we have a few questions about your company.

38. How many employees work for your company in Canada? Please include part-time employees as full-time equivalents. *Tracking 2019*

    [Enter number]
    Don't know/no response................99

39. In your last fiscal year, what were your company's total revenues? [**READ LIST; STOP WHEN RESPONDENT ANSWERS**] *Tracking 2022*

    Less than $250K..1
    $250K to less than $500K 2
    $500K to less than $750K 3
    $750K to less than $1 million 4
    $1 million to less than $5 million..5
    $5 million to less than $10 million..6
    $10 million to less than $25 million..7
    $25 million to less than $50 million..8
    $50 million to less than $100 million..9
    $100 million or more 10
    Don't know/no response **[DO NOT READ]** 77

40. Is this company majority-owned (51 percent or more) by an individual or individuals in any of the following groups? **[READ LIST, MULTIPLE RESPONSE]** *Tracking 2021*

    Indigenous Peoples, that is, First Nations, Inuit, or Métis............................ 1
    People with disabilities.. 2
    Racialized Groups 3
    Women 4
    Youth (Age 35 and under) 5
    Individuals who identify as 2SLGBTQ2I+ 6
    No (VOLUNTEERED, EXCLUSIVE).. 7
    Don't Know/Prefer not to say.. 99