CANADA

Brad Gilmour, José Quiroga
International Agri-Food Analysis Section, Agriculture and Agrifood Canada

John Giraldez
Canadian Food Inspection Agency

Canada's economy grew just 1.5 percent in 2001. The economy is expected to rebound with 3.3 and 3.8 percent growth respectively in 2002 and 2003. Inflation was held to 2.5 percent in 2001, and will remain between 2-3 percent in 2002 and 2003. Retail food prices increased by 4.5 percent in 2001, with major price increases for fruits, vegetables, and meat products. Food price increases of 1.7-2.7 percent are expected for 2002 and 2003.

Other things being equal, the value of Canadian agri-food exports will decline slightly in 2002, by 1-5 percent, while imports will rise by 5-10 percent. Grains, oilseeds, pulses, and special crops exports are likely to drop 20-30 percent due to adverse weather. Canadian industry is also becoming increasingly aggravated by difficulties in key economies, high support levels and export competition elsewhere, and the use of technical impediments to trade. Of particular concern is growing budgetary and policy support in the United States, Canada's major agri-food trading partner. Federal and provincial governments are discussing the elements of a new Agricultural Policy Framework (APF) that will result in a major overhaul of agri-food policy programs.

Macroeconomic Situation and Outlook

Canada was affected by the slowdown in the U.S. economy and fallout from the tragic events of 11 September, but both the Canadian and U.S. governments have taken steps to ensure a soft landing. Canada's economy posted real Gross Domestic Product (GDP) growth of 1.5 percent in 2001. Growth will pick up during 2002 and strengthen further in 2003, with increases of around 3.3 percent and 3.8 percent anticipated. Inflation was around 2.5 percent in 2001, and is expected to remain between 2-3 percent in 2002 and 2003.

However, continued high personal-debt-to-earnings ratios, inventory overhangs, erratic stock markets, and growing protectionist sentiment in important economies contribute to downside risk for this prospectus. The almost unprecedented appreciation of the U.S. dollar relative to other major currencies gives pause as to whether a downward re-alignment is due.

Food Prices and Consumption

The CPI for food from stores increased by 4.5 percent in 2001, with substantial increases for meats (8.5 percent), fruits (11.5 percent) and vegetables (7.5 percent) being registered. In 2002, retail beef prices are likely to increase another 2-3 percent while pork, poultry, and egg prices will increase 1-2 percent. Dairy product prices are also likely to rise by around 2 percent. Edible oil prices and cereal-based products will both increase by 2-3 percent. Due to supply side vagaries, especially the extreme weather in producing areas throughout North America, the price outlook for fruits and vegetables is particularly uncertain. Retail price increases of 2-6 percent for fresh fruits and vegetables are anticipated, while processed prices will increase 2-4 percent. Prices for food services and restaurant meals increased modestly in 2001, at around 2-3 percent, and similar price rises are expected in 2002. The overall retail food CPI will increase by around 2.2 percent in 2002.

Food Processing and Marketing

Food processing/manufacturing sales climbed 6.5 percent to an estimated C$62.3 billion in 2001. A recent study by KPMG compared business costs in the agri-food sector and 11 other industries in 86 different international cities (KPMG 2000). In food processing, Canadian cities ranked 1st in North America — with costs roughly 7 percent below U.S. counterparts — and 4th overall, closely following cities in the United Kingdom, Italy, and the Netherlands.

The Canadian Restaurant and Food Services Association reports that commercial food service sales rose by a surprising 6.1 percent in 2001. Growth will slow to 2-3 percent in 2002, strengthening to 5.5 percent in 2003. Full-service restaurants and caterers will continue making gains relative to limited-service restaurants.

The Canadian retail grocery industry increased its sales by a surprising 4.3 percent in 2001 to C$59.06 billion. Increases of around 3.5 to 4 percent are expected in 2002 and 2003. Chain supermarkets and major banner convenience stores increased their sales by around 5.4 percent to C$34.13 billion in 2001, increasing their market share slightly. Sales by voluntary group stores and franchised independents grew by only 2.6 percent to C$22.17 billion. While their sales grew by 3 percent to C$2.74 billion in 2001, unaffiliated grocery stores and unaffiliated convenience stores continue to struggle in the face of competition from the larger chains.

Such competition continues to intensify as Loblaws opened more than 50 new stores under its various banners during 2001. The new additions include a couple 115,000-sq.-ft. Loblaws locations. Sobeys also increased its presence with more than 50 new or rebuilt stores. Sobeys also sold 15 Price Check stores to the PCF Acquisition, who promptly added four stores to the Ontario chain. Wal-Mart opened 15 new outlets during 2001, bringing its nationwide total to 194. Metro added 10 stores to its roster, expanded 20 stores, and renovated another 24 more.

IGA has taken a different approach, looking for flexibility and a market niche for smaller format stores, with HY. Louie transforming 17 of its IGA stores in B.C. to the charming MarketPlace concept, with another 27 slated for conversion in 2002. Co-op Atlantic has taken a similar approach, unveiling a bright, new store format for its recently expanded operations. Convenience store chain 7-Eleven plans to open 15-20 new stores in Ontario, Alberta, and B.C. during 2002, focusing mostly on large urban centres like Vancouver, Calgary, Edmonton, and Toronto. Alimentation Couche-Tard entered the U.S. market when it bought 225 Bigfoot convenience stores. The company also purchased R-Con Centres Inc. and its 31 Mac's stores in Manitoba.

Also worthy of note in 2001 were suppliers' continued mergers and acquisitions. To name just a few, General Mills picked up Pillsbury, Weston bagged the baking division of Bestfoods, and PepsiCo bought The Quaker Oats Company. There were some important broker mergers as well. U.S.-based Acosta Sales and Marketing created Acosta Canada after acquiring the retail branded and food service divisions of four Canadian-based firms: Thomas, Large & Singer Inc., Belgo International, Tees & Persse Brokerage Ltd., and Trebley Atlantic Sales. In addition, the Canadian Association of Food Brokers merged with the U.S. Association of Sales and Marketing Companies and became the Association of Sales and Marketing Companies International. In the spring of 2002, the U.S.-based Food Marketing Institute approved a plan to join its food retail and wholesale members with the grocery wholesale members of Food Distributors International.

Agricultural Production and Trade

Canadian crop receipts are forecast to increase slightly in 2002, in spite of poor growing conditions in western Canada. In eastern Canada, crop receipts declined in 2001 due to poor growing conditions and continued relatively low prices for numerous crops, namely corn, soybeans, and potatoes. Western Canada continues to be plagued by drought and extreme weather, and production and marketing shortfalls will not be fully offset by slightly stronger prices. Alberta and Saskatchewan, in particular, face serious challenges due to a shortage of sub-soil moisture early in the growing season. Low carry-over stocks will further reduce marketings in western Canada in 2002, but price increases triggered by extreme weather and world supply and demand conditions will partially offset lower marketings. However, policy decisions elsewhere — particularly the U.S. Farm Bill — have dampened hopes for commodity prices to strengthen.

Livestock receipts grew in 2001 as hog and cattle receipts rose as a result a combination of marketings and prices. Drought conditions in western Canada led to higher cattle marketings and a slowdown in rebuilding the cattle herd. Prices for these commodities were supported by relatively strong demand, declining supplies, and a depreciating Canadian dollar. In 2002, livestock receipts will increase only modestly. Cattle receipts are expected to stabilize due to lower marketings and moderately higher prices. Hog receipts should decrease slightly as the increase in marketings is more than offset by lower prices. Receipts from all supply-managed commodities are projected to continue to rise in 2001 as both prices and production increase. As 2002 progresses, competition from red meats is expected to result in slightly lower poultry prices.

In 2001, crop receipts rose by 4 percent to C$13.6 billion. Livestock receipts rose to C$18.7 billion, up 10 percent. Overall, market receipts rose to C$32.3 billion, up 7 percent. These improvements in market receipts were accompanied by a 32 percent increase in program payments, to C$3.7 billion. This resulted in a 9 percent increase in total cash income, to C$36.1 billion, and a 26 percent increase in net cash income, to C$8.9 billion.

For 2002, crop receipts are expected to increase again to C$14.2 billion, while livestock receipts will rise incrementally to C$18.8 billion, contributing to a 2 percent overall rise in market receipts to C$33.1 billion. However, total cash receipts will fall to C$35.4 billion and net cash income will drop to $8.0 billion due to a 36 percent drop in program payments to C$2.4 billion.

Canada's agri-food exports expanded by 12.9 percent in 2001, while agri-food products increased by 10.1 percent. Canadian agri-food exports to NAFTA countries increased by 17.5 percent in 2001, while imports grew 11.7 percent. Agri-food exports to non-NAFTA PECC grew by about 12 percent, while imports grew by 14 percent. Exports to PECC constituted 85 percent of agri-food exports, while imports from PECC accounted for 79 percent of agri-food imports.

In 2001, the value of Canada's exports of bulk commodities grew by 6.5 percent, while imports grew by 15.4 percent. Intermediate product exports grew by 13.2 percent, while imports increased 6.7 percent. Higher value, consumer-oriented food product exports rose by 16.4 percent, while imports rose 9.9 percent. In the short term, grains and oilseeds production and exports will continue to be adversely affected by extreme weather on the prairies. In the medium term, bulk exports will decline in importance while increases are expected for consumer-oriented products. Complementarities in production and processing continue to increase bilateral trade with the United States.

Food and Agricultural Policy

Nationwide, government transfers were roughly 15 percent of the adjusted value of agricultural production (AVAP) in 2001. Transfers were highest in Quebec (23.8 percent) and Newfoundland (23.6 percent) and lowest in Alberta (9.4 percent) and Saskatchewan (11.2 percent). Revenue-enhancing transfers are highest in Quebec and Newfoundland. Productivity-enhancing transfers were highest in the Atlantic provinces, while Saskatchewan and Alberta had the highest cost-reducing transfers. Overall, policy developments have been moving toward an increased market orientation, but progress has been unequal across sectors (OECD 2001). The dairy sector remains the least market-oriented and the most heavily supported agri-food sector in Canada, accounting for over one-third of Canada's total producer support and close to three-quarters of market price support.

The Beef Cattle Research, Market Development, and Promotion Agency was created in December 2001, the first promotion research agency under the Federal Farm Products Agencies Act. The agency can conduct primary research, new product development, promotion, nutritional research, and consumer education. The program will be funded by mandatory levies on marketed beef.

The *Canadian Food Safety Adaptation Program* (CFSAP) shares with the food industry the costs of activities that enable national associations or groups who are involved in producing, marketing, distributing, and preparing food to develop risk management strategies, tools, and systems to enhance food safety. The *Canadian On-Farm*

Food Safety Program (COFFSP) is a partnership between the federal government and industry that encourages national agri-food associations to develop the strategies and tools to educate producers and initiate on-farm food safety initiatives that draw upon and are consistent with HACCP principles.

The Canadian agriculture and agri-food sector faces many challenges and opportunities for continued prosperity in the 21st century. Federal, provincial, and territorial Ministers of Agriculture plan to meet these challenges by jointly developing an Agricultural Policy Framework composed of five elements: Food Safety and Food Quality, Environment, Science and Innovation, Renewal, and Business Risk Management. Governments have launched a national dialogue about the policy direction with stakeholders and interested Canadians to develop the proposed policy approach. Resource management and environmental stewardship are among the areas where policy effort is being renewed, with the government considering making certain types of support contingent upon farmers practising progressive environmental and resource husbandry. Consumer and societal concerns regarding food safety and environmental husbandry are also being translated into both regulatory and market-based actions. The new APF approach holds promise of further improving market orientation, moving away from crisis management.

Food Safety

Consumers, industry, and governments are interested in food safety, quality assurance, and product integrity systems for four major reasons: (1) managing food safety and human health risks, (2) addressing biosafety and environmental concerns, (3) meeting consumer quality and product characteristic preferences, and international trade facilitation.

LEGISLATION. At present, the core of Canada's food safety system is the federal *Food and Drugs Act*, which derives its powers from criminal law, and several other agricultural, consumer, and trade statutes. The Food and Drugs Act prohibits the manufacture or sale of dangerous or adulterated food products. Other federal trade and commerce legislation reference the Act and impose additional requirements (i.e., *Canada Agricultural Products Act, Meat Inspection Act, Fish Inspection Act, Seeds Act, Fertilizer Act* and *Feeds Act*, and *Pest Control Products Act*).

Provinces, territories (PT) enact regulations for foods produced or sold within their own jurisdictions. These laws are complementary to federal statutes. There is also legislation to govern animal husbandry, agricultural practices, and the licensing of meat and dairy establishments selling their product intra-provincially. PT inspection programs apply to food processing and food service, retail food, hospitals, nursing homes, community kitchens, and food banks. PT legislation also authorizes municipalities to enact bylaws affecting food inspection.

INSTITUTIONAL ROLES. The success of the Canadian food safety system depends on working partnerships between federal, provincial and territorial authorities, industry, and consumers. Various levels of government collaborate with non-governmental organizations to ensure the integrity and comprehensiveness of the regulatory system and, through improved incentives and inspection processes, encourage industry to voluntarily improve food safety. Nevertheless, government retains the capacity to intervene when necessary, particularly where public health is concerned.

All levels of government in Canada play a role in food regulation. Health Canada (HC) sets policies and standards for food safety and nutrition. The Canadian Food Inspection Agency (CFIA) enforces these standards, and sets and enforces standards for animal health and plant protection. At the provincial and territorial level, health, agriculture, and other ministries enact laws that apply to food produced and sold exclusively within provincial or territorial borders.

The CFIA is responsible for the inspection of food products. At the retail level, the CFIA's Retail Food Program contributes to the effectiveness of the Agency's Safe Food and Consumer Protection mandate. CFIA's regulatory services protect consumers from foodborne illnesses, economic fraud, and product misrepresentation and help them to make informed product choices. Responsibility for food safety at retail is shared with provincial and municipal health units. When violations are encountered in retail stores and restaurants, CFIA inspectors advise the violator of regulatory requirements and, when appropriate, take enforcement action to ensure compliance.

The current cooperative structure has served Canadians well because it retains clear lines of authority and accountability. Equally crucial to the smooth functioning of the system is that food-policy decisions are made within a context that is transparent and science based. Canada has internationally recognized risk assessment procedures that provide consistent, comprehensive, and scientific means to identify, assess, and manage potential health and environmental risks.

The Hazard Analysis at Critical Control Points (HACCP) approach is becoming an international standard for dealing with risks of foodborne illness. A mandatory HACCP system is already in place for Canada's fish processing sector. Canada is in the process of developing a regulated, mandatory HACCP system to be implemented in all federally registered meat and poultry plants. To date, 327 establishments have received HACCP recognition, and another 337 plants operating under HACCP principles are awaiting recognition (most are meat processing establishments). Non-meat industries are encouraged to begin incorporating HACCP principles into processing and food preparation practices as mandatory systems may follow at a later date.

RISK ASSESSMENT. Consistent with international practices, the Canadian risk assessment process has four components: hazard identification, hazard characterization, exposure assessment, and risk characterization. A risk assessment is a scientific and independent evaluation of the likelihood of a specific adverse health event. In making assessments, Canada considers toxicological and epidemiological studies, surveillance information, data from foodborne illness outbreak investigations, and compliance and monitoring data. The assessment of known and potential health risks resulting from exposure to a specific agent also involves the assessment of known and potential health benefits and balancing risks relative to benefits.

During the risk assessment, any uncertainties, assumptions, or

judgments must be identified to determine their potential impact on decision making. In Canada, unknowns and uncertainties are addressed by exercising the concept of "precaution" through a variety of means such as the use of "worst case" scenarios. Risk assessment is a key part of the decision-making process, not only because it provides an estimate of the level of risk, but also because it can help to identify possible risk management approaches and strategies.

COMMUNICATION AND PUBLIC CONSULTATION. The Government of Canada informs and educates Canadians about risks to their health, including risks influenced by lifestyle choices. It also recognizes that the exchange of information is a key element in successfully mitigating health risks and risk communication is a two-way process. In a consolidated effort to reduce foodborne illness in Canada, governments worked with industry associations and consumer, environmental, and health groups to create a program called the "Canadian Partnership for Consumer Food Safety Education." The partnership informs Canadians about safe food-handling processes to reduce the risk of microbial contamination.

Various forms of communication are employed on issues related to food safety, including direct mailing, multimedia, stakeholder meetings, and public consultations. Similar consultations are conducted with trading partners to assess the international impacts of such policies and standards and to mitigate or eliminate unnecessary trade impediments. Canada notifies its trading partners of regulatory changes through the WTO notification system. Publication in the Canada Gazette remains the official government mechanism for notification of domestic regulatory change.

Canada's regulatory framework for food is predicated on the assumption that informed public participation is essential to effective policy formulation and implementation. HC and the CFIA, as well as PT governments, maintain Internet websites that publish information on food safety policies, regulation, programs, activities, and consultations. These websites also provide a means for two-way communication. While consumer confidence in Canada's food safety system remains high, governments recognize that new challenges are emerging. For example, concern about new food technologies has been rising. Canada addresses such concerns by undertaking relevant scientific work, seeking independent expert advice, and engaging in public dialogue.

DRIVERS OF CHANGE AND EMERGING CHALLENGES. Food safety in Canada is driven by the needs and demands of four primary stakeholder groups: consumers, retailers, processors, and producers, as well as the needs of international trading partners. Consumers are more discerning and want more information about product attributes, such as additives, safety, labeling, and health claims. These demands are creating pressures and opportunities at all stages of the food system. The retail and food service industry is on the front line for consumer demands and expectations, and is passing these demands on to processors. International trading partners are also raising their food safety requirements for both domestic and imported products.

Processors, in turn, are looking to farmers for commodities with specific traits and for identity preservation and product segmentation that would meet the highest standards for food safety and quality. For farmers, these demands are translating into requirements for increasing action in food safety, environmental stewardship, innovation, and risk management and for retooling their operations in terms of skills, training, and business management.

Industry and governments are now exploring integrated systems, including farm-based HACCP programs for food safety, quality and product integrity, and progressive environmental husbandry. This will ensure food safety in Canada throughout the continuum — from pitchfork to table. To promote comprehensive and consistent implementation of food safety and quality assurance programs across Canada, the Ministers of Agriculture have committed to work together and with industry to identify a set of common goals. Among the common goals being considered are:

- to protect human health by reducing exposure to foodborne hazards
- to increase confidence in the safety and quality of Canadian foods at home and abroad
- to improve the ability to identify and respond to food safety issues and concerns
- to increase the ability to meet or exceed market requirements for food safety and quality
- to support greater harmonization of regulatory systems, improving market access
- to provide value-added opportunities through the adoption of food safety, food quality, and product integrity systems.

To further encourage consistent implementation and to achieve these common goals, the following are under deliberation:

- to adopt HACCP-type food safety and food quality assurance systems throughout the value chain
- to share critical food safety and surveillance information across all regulatory agencies, regardless of the level of government
- to implement comprehensive product integrity systems throughout the food production and processing chain to meet consumer preference and commercial requirements.

ENDNOTE

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CANADA

	Units	1998	1999	2000	2001	2002E	2003F
FOOD CONSUMPTION PATTERNS *a*							
Per capita caloric intake	Cal/day	3,114	3,111	3,127	3,130	3,130	3,130
From animal products	Cal/day	896	894	906	890	890	890
From vegetable products	Cal/day	2,218	2,217	2,221	2,220	2,220	2,220
Protein (% of calories)	%	14.3	14.1	14.1	14.1	14.1	14.1
Fat (% of calories)	%	33.1	32.9	32.9	33.0	33.0	33.0
Carbohydrates (% of calories)	%	52.6	53.0	53.4	53.4	53.4	53.4
INCOME AND FOOD PRICES							
Per capita income *b/*	US$/capita	11,490	11,805	12,160	12,500	12,750	13,005
% of disposable income spent on food *c/*	%	14.0	14.2	14.3	14.5	14.4	14.3
% spent eating out *c/*	%	4.4	4.7	4.8	4.9	4.9	4.9
Food price index *c/*	1992=100	109.7	111.0	112.9	118.0	120.6	122.7
General price index (CPI) *d/*	1992=100	109.8	112.1	114.6	117.9	120.6	123.3
POPULATION *e/*							
Total population	Million	30.3	30.5	30.8	31.1	31.4	31.6
Urban	Million	23.2	23.4	23.6	23.9	24.2	24.4
Nonurban	Million	7.1	7.1	7.1	7.2	7.2	7.2
Share of population in the following age groups							
0-4 years	%	6.3	6.0	5.8	5.7	5.6	5.6
5-14 years	%	13.5	13.4	13.3	13.3	13.3	13.3
15-19 years	%	6.8	6.8	6.7	6.7	6.7	6.7
20-44 years	%	39.0	38.6	38.2	37.9	37.6	37.6
45-64 years	%	22.2	22.7	23.3	23.8	24.1	24.1
65-79 years	%	9.5	9.6	9.6	9.6	9.7	9.7
80-over years	%	2.8	2.9	3.0	3.0	3.1	3.1
Median age of population *e/*	Years	36.0	36.4	36.8	37.1	37.3	37.3
Female labor force participation *f/*	%	58.1	58.1	58.2	58.3	58.3	58.3
LIFE EXPECTANCY *g/*							
Males	Years	75.9	76.0	76.1	76.1	76.1	76.1
Females	Years	81.6	81.8	81.9	81.9	81.9	81.9
FOOD INFRASTRUCTURE							
Trade capacity							
Grain exports *h/*	1,000 Tons	24,341	27,949	27,615	26,787	19,000	21,000
Grain imports *h/*	1,000 Tons	1,448	1,659	2,855	1,500	2,300	2,000
Total food and agricultural trade *h/*	Million US$	26,294	25,717	27,200	30,381	30,200	28,900
Total food and agricultural exports *h/*	Million US$	15,248	14,643	15,500	17,500	16,500	16,000
Fishery exports *i/*	Million US$	2,162	2,177	2,200	2,300		
Total food and agricultural imports *h/*	Million US$	11,046	11,074	11,700	12,882	13,700	12,900
Perishable products *h/*	Million US$	4,550	4,830	5,120	5,376	5,650	6,050
Fishery imports *i/*	Million US$	1,213	1,283	1,400	1,450		
Port capacity *j/*	Million tons	413	417	420	420	420	420
Road access *k/*	1,000 Kms	912	915	918	918	918	918
Rail access *k/*	1,000 Kms	76	75	74	74	74	74
Telecommunications *l/*	Lines	18,051	18,051	18,051	18,051	18,051	18,051
Power Generation *m/*	Billion Kwh	543	547	552	552	552	552
Percent of population with refrigerators *n/*	%	99.6	99.6	99.6	99.6	99.6	99.6
FOREIGN INVESTMENT IN THE FOOD SECTOR *o/*							
Inward FDI in the food sector, total	Million US$	12,099	12,500	13,000	na	na	na
From other PECC economies	Million US$	6,000	6,200	6,200	na	na	na
Outward FDI in the food sector, total	Million US$	5,800	7,000	7,000	na	na	na
To other PECC economies	Million US$	3,100	3,200	3,200	na	na	na
ROLE OF AGRICULTURE AND TRADE IN THE ECONOMY							
Agriculture as a share of GDP *p/*	%	1.6	1.6	1.6	1.7	1.7	1.7
Self sufficiency in grains	Ratio of Net Production/	1.8	1.8	1.8	1.6	1.7	1.8
Self sufficiency in horticultural products	Consumption	0.9	0.9	0.9	0.9	0.9	0.9
POLICY TRANSFERS							
Consumer subsidy equivalents *q/*	%	-16.0	-16.0	-16.0	-13.0	-14.0	-14.0
Total transfers (subsidy/tax) *q/*	Million US$	4,773	4,800	5,500	5,119	5,400	5,300
Total transfers per capita	US$/capita	145	152	154	147	144	144
MACROECONOMICS INDICATORS *r/*							
GDP (Real at 1992 market prices) growth	%	3.0	4.2	4.7	1.5	3.2	3.5
Interest rate	%	6.6	6.7	7.0	4.3	2.8	3.5
Exchange rate	CAN$/US$	1.48	1.49	1.49	1.55	1.59	1.59

E = estimate F = forecast

a. Basic data from Statistics Canada, conversion ratios from Food and Agricultural Organization.
b. Statistics Canada, Conference Board for Forecasts, KPMG Survey, TD Forecasts.
c. Statistics Canada, Catalogue No 62-555-SPE (Household Surveys Division) and CANSIM Matrix 9957 Agriculture and Agri-Food Canada.
d. Statistics Canada CANSIM Matrices 6544 and 9957, Conference Board for Forecasts.
e. Statistics Canada, CANSIM Matrices 6367-6379, 6231, 6900.
f. Statistics Canada CANSIM Matrix 3472 and Catalogue No 71F0004-XCB.
g. Statistics Canada, Catalogue No. 82-221-XDE.
h. Agriculture and Agri-Food Canada, Agri-Food Trade Highlights, Statistics Canada Merchandise Trade Database, World Trade Atlas.
i. Department of Fisheries and Oceans, Statistics Canada Trade Database.
j. Canadian Transportation Agency, Statistics Canada.
k. Transport Canada, Canada Year Book 1999, Statistics Canada Catalogue No. 52-216-XPB.
l. Statistics Canada, Cansim series D462222.
m. Statistics Canada, Cansim series D372136.
n. Statistics Canada, Cansim series D339998, D339999, D346064, D346065.
o. Statistics Canada, CANSIM Label: 79320, Statistics Canada, Catalogue 67-202-XPB, Agriculture and Agri-Food Canada.
p. Statistics Canada, Cansim 3571, 6548, 6549, 9015-9026, Agriculture and Agri-Food Canada, Medium Term Policy Baseline.
q. OECD Monitoring and Evaluation, Agriculture and Agri-Food Canada.
r. Bank of Canada, Statistics Canada, Conference Board.