Canadian consumer expectations: environmental sustainability in food

Research Commissioned by Agriculture and Agri-food Canada

Sustainable Canadian Agricultural Partnership

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CAPI

THE CANADIAN AGRI-FOOD POLICY INSTITUTE

with

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Canadian Centre for Food Integrity

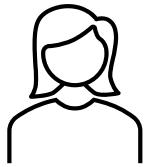
Purpose and methodology

“Inform and engage with agriculture and agri-food producers about the evolving expectations and behaviours of Canadian consumers, particularly as it relates to sustainable agriculture.”

How did we identify consumer expectations and behaviours?

- **One-on-one discussions with industry experts from retail, food manufacturing, food marketing and innovation, agri-food investing.**
- **Econometric analysis of CCFI survey data 2018-2023**
- **Literature review - trend analysis and complementary surveys**

The Concerned Consumer



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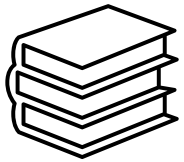

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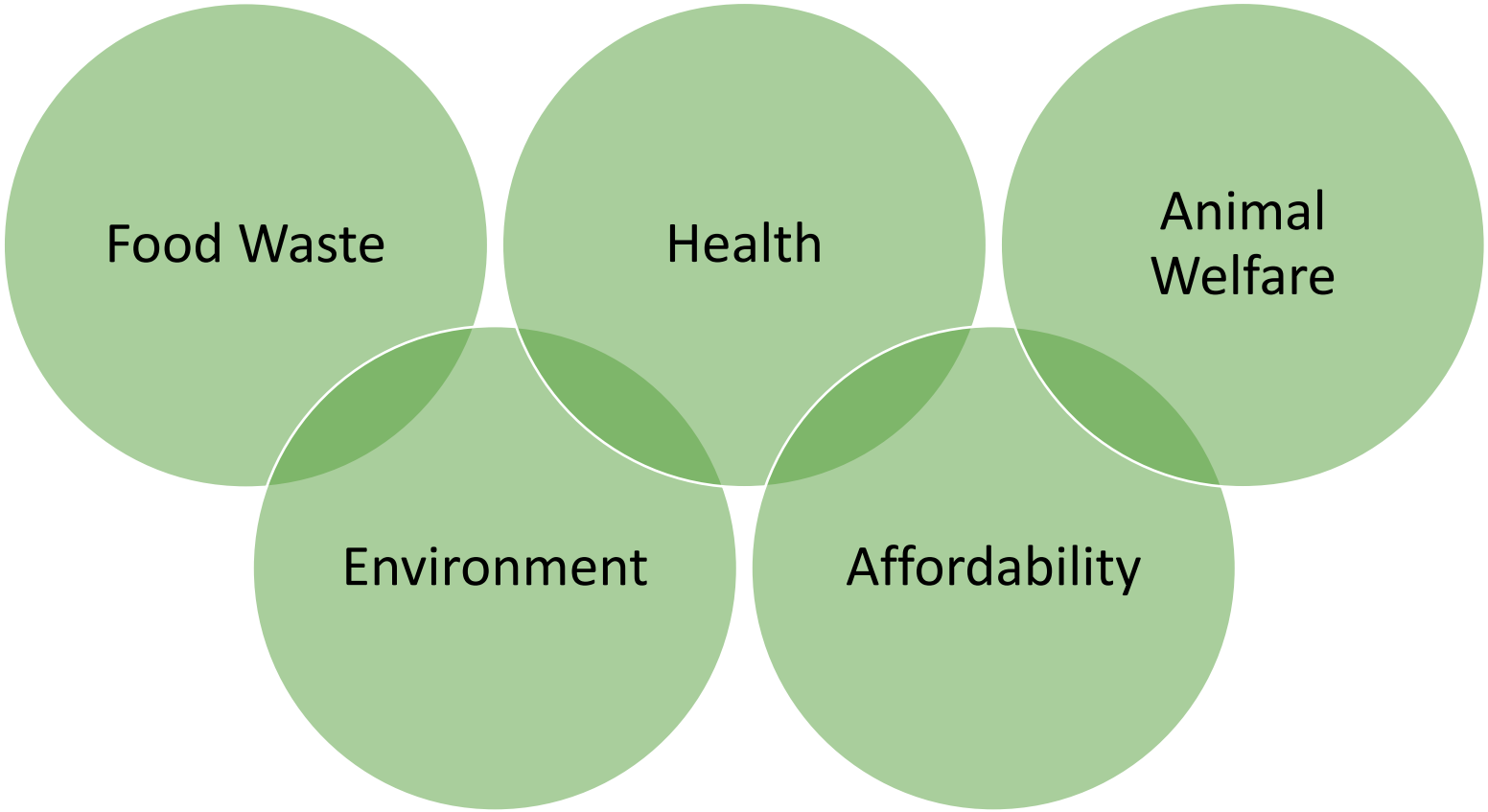

Trend #1 Environmental Sustainability

Anxiety is growing…

- **Concern re climate change on the rise**
- **Sense that we are headed for disaster**
- **Climate change viewed as a threat to food system**
- **“Sustainably grown food” → environmental impact**

… and knowledge is lacking

"I think, unfortunately, that when it comes to environmental sustainability people know that it matters but they don't know what to do. 'Am I doing the right things? Should I be doing something else?' There is a desire to act but there are price constraints and also constraints around knowing what to do."

- Industry expert

Which of the following statements best describe what it means to you when food is grown **sustainably**? Select up to three statements.

Data source: Canadian Centre for Food Integrity. (2020, 2023). Public Trust Research Reports.

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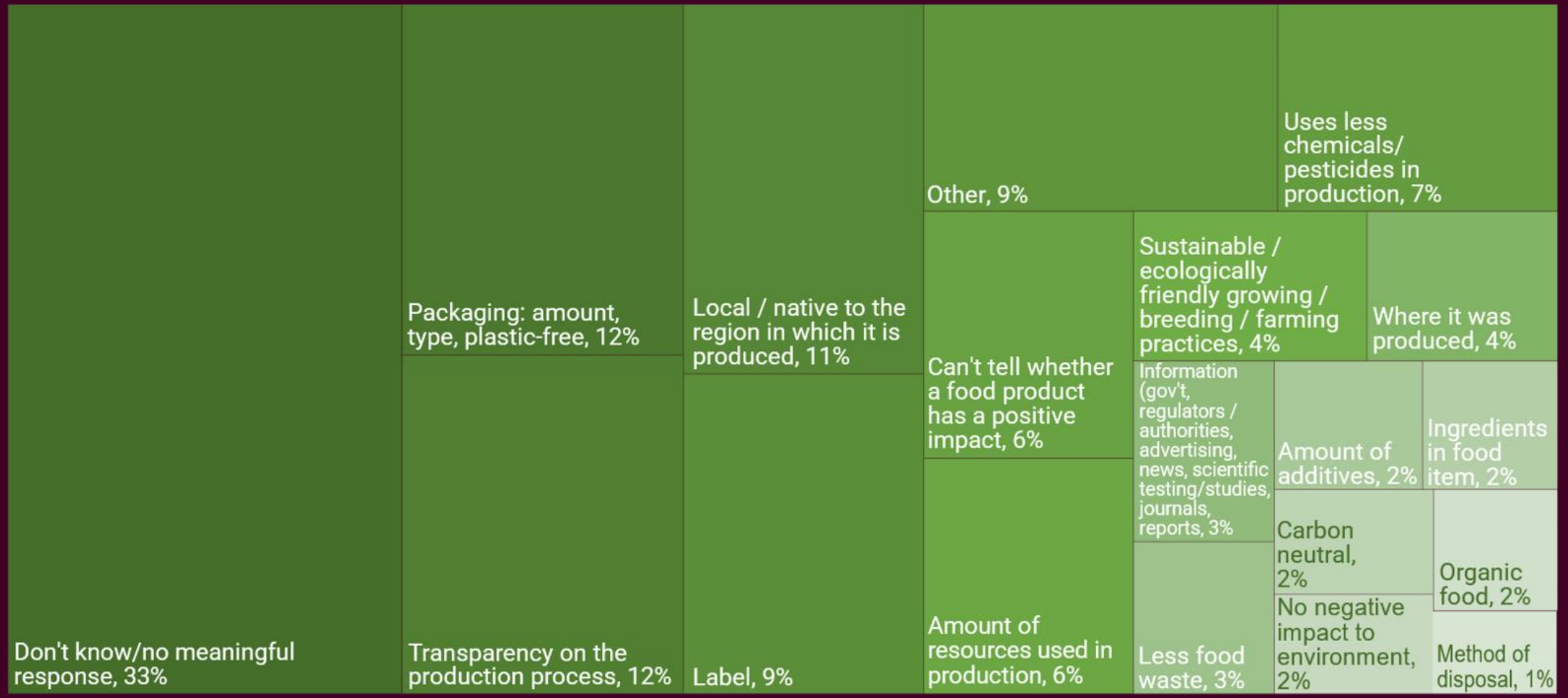
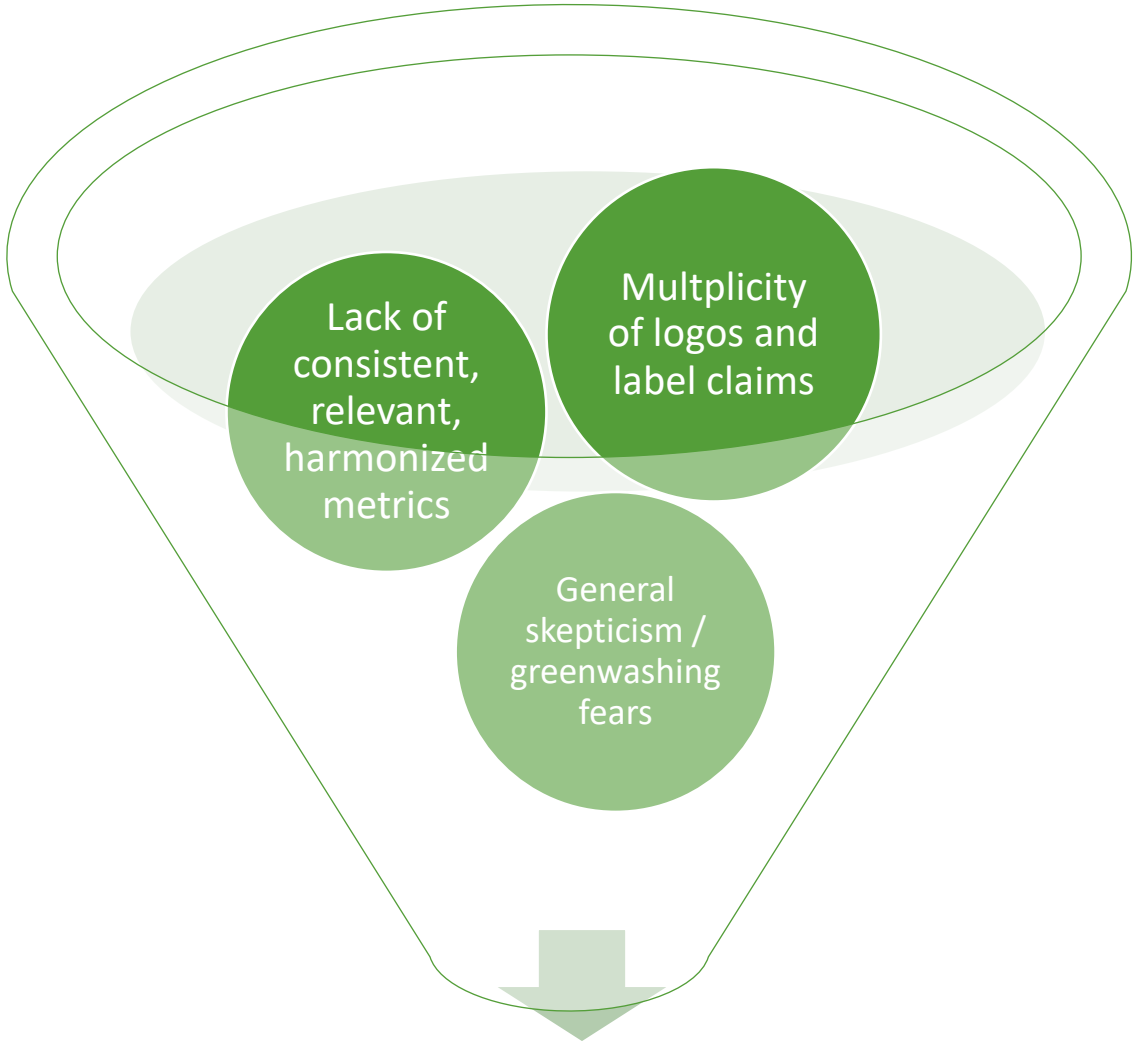
“How do you tell whether a food item has a positive impact on climate change and the environment?”



CCFI, 2023

Concerned consumers are looking for information



Short-hand consumer strategies

Choosing local food

Reducing food and packaging waste

Take-aways

- Canadian consumers have high expectations from the food system: healthy, affordable food that is sustainably produced
- Effective communication on env performance is a major challenge
- Build on existing advantages – Canadian, local
- Focus on credibility and impact