



Customized Report Services

Market Overview – Canadian lamb/sheep meat and product trends

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Market snapshot

In 2018, Canada's top five international markets for trade of lamb or sheep related products including meat, live sheep, sheep or lamb skins and wool were the United States (US), China, the United Arab Emirates (UAE), Egypt, and Saint Pierre and Miquelon. Canadian exports of lamb/sheep products to the world totalled C\$7.0 million in 2018. Wool represented 46.5% (C\$3.2 million) of the total export market share, followed by sheep and lamb meat exports at 34.0% (C\$2.4 million), sheep and lamb skins at 13.7% (C\$953,068), and live sheep stood at 5.8% (C\$402,917).

The Canadian lamb meat and related food products is a small, yet important, niche market. In 2018, the lamb industry reached retail sales of US\$725.7 million with volume sales of 23.2 million kilograms within Canada. Lamb represented a sales value market share of 3.9% of the overall retail Canadian meat (US\$18.7 billion) sector (including lamb, beef, chicken, pork, turkey and other similar meat categories), which is equivalent to a retail volume share of 1.6%. This lamb segment category has been increasing at a CAGR of 2.8% from 2014 to 2018 and is expected to continue to expand by a CAGR of 3.3% between 2019 and 2023.

Lamb within the foodservice industry in Canada contributed to an on-trade value of US\$32.9 million in 2018, which consists of lamb varieties such as sausages (24.9%), burgers & grills (9.2%), prepared lamb overall (8.2%), meatballs (3.6%), and other lamb preparations (54.1%). The highest market share for foodservice profit operators of lamb products was mainly distributed within the restaurant services, while institutional non-profit operators mainly distributed lamb products within the educational services in 2018.

The pet food category is a thriving sector, and has introduced 95 new pet food products to the Canadian market that contain lamb meat ingredients between the period of January 2014 and September 2019. Meanwhile, there were 28 new lamb meat products and 77 new sheep milk, cheese/feta and/or sheep's casing food products launched during the same period. There was one new variety/range extension product launched in the Canadian supermarkets in August 2017 that contained frozen mutton (meat of an adult sheep), which consisted of mutton meat to use in a stew and was manufactured by Etnico Foods. Additionally, there were approximately 20 new blended spices, seasonings or sauce products launched that claimed to enhance the flavour or recommended that their product was especially great in lamb dishes.

Production

In 2017, Canadian farmers produced 813,900 sheep. According to the Food and Agriculture Organization (FAO) of the United Nations, the amount of sheep produced has been declining at a CAGR of -2.3%



between 2013 and 2017. Pork has been growing the most at a CAGR of 2.6%, while along with sheep, cattle (-1.5%), horses (-0.5%) and turkeys (-0.1%) have reported a decline over the same period.

Livestock production in Canada (2013-2017)

Selected livestock ('000 head)	2013	2014	2015	2016	2017	*CAGR % 2013-2017
Chickens	166,500.0	167,000.0	167,397.0	170,106.0	170,442.0	0.6
Pigs	12,835.0	13,180.0	13,630.0	13,935.0	14,250.0	2.6
Cattle	12,240.0	12,050.0	11,640.0	11,610.0	11,535.0	-1.5
Turkeys	5,700.0	5,700.0	5,685.0	5,697.0	5,686.0	-0.1
Sheep	892.9	860.7	824.3	815.1	813.9	-2.3
Horses	407.0	408.0	400.6	399.1	398.3	-0.5
Goats	30.0	30.0	30.0	30.1	30.1	0.1
Mules	4.0	4.0	4.0	4.0	4.0	0.0

Source: FAOSTAT Agricultural Production, 2019

Canadian trade of sheep/lamb products

In 2018, Canada's top five international markets for trade of lamb or sheep related products, including meat, live sheep, sheep or lamb skins and wool were the US, China, the UAE, Egypt, and Saint Pierre and Miquelon. Canadian exports of lamb/sheep products to the world totalled C\$7.0 million in 2018. Other smaller markets not included in the table below were Japan, France, Mexico, Belgium and Eritrea, which made up the remaining 0.12% of lamb/sheep related exports.

Canadas top markets for lamb/sheep products – meat, live sheep, skins and wool (C\$ dollars), 2018

Country	Value in 2018 (C\$)	Market share (%) in 2018
Total lamb/sheep products – meat, live sheep, skins and wool	6,958,970	100.0
1. United States	3,276,162	47.1
2. China	3,086,540	44.4
3. United Arab Emirates	306,160	4.4
4. Egypt	101,656	1.5
5. Saint Pierre and Miquelon	97,849	1.4
6. Malaysia	34,904	0.5
7. Trinidad and Tobago	28,691	0.4
8. Netherlands	9,176	0.1
9. Vietnam	5,198	0.1
10. United Kingdom	3,987	0.1
Subtotal lamb/sheep products – meat, live sheep, skins and wool	6,950,323	99.9

Source: CATSNET, Statistics Canada data, 2019

Canada exported C\$2.4 million (789.1 metric tonnes) of meat that consists of sheep cuts, lamb carcasses and fresh or frozen edible offal, including sheep offal in 2018. Over three quarters of the sheep/lamb meat was exported to the US (79.9%), followed by the UAE (12.9%), and Saint Pierre & Miquelon (4.1%). The top commodities in 2018, were fresh sheep cuts (bone in), fresh edible offal of sheep/goats/asses/mules or hinnies, both mainly going to the US, and fresh lamb carcasses mainly exported to the UAE.

Canada's exports to the world of lamb and sheep meat, 2018
measured values in C\$ dollars and volume (kilograms)

Export description	Volume (kg)	Value (C\$)	Top suppliers and market value share %		
			1	2	3
Total meat exports to the world – lamb & sheep	789,100	2,364,915	2,258,231	22,904	15,964
02042200 - Sheep cuts, bone in, fresh or chilled	57,020	1,249,056	United States 99.98	France 0.02	-
02042300 - Sheep cuts, boneless, fresh or chilled	8,352	69,643	Saint Pierre & Miquelon 99.5	Western Sahara 0.5	-
02044200 - Sheep cuts, bone in, frozen	3,794	28,691	Trinidad & Tobago 100.0	-	-
02044300 - Sheep cuts, boneless, frozen	344	2,799	France 100.0	-	-
02043000 - Lamb carcasses and half carcasses, frozen	1,913	12,441	Saint Pierre & Miquelon 100.0	-	-
02041000 - Lamb carcasses and half carcasses, fresh or chilled	55,654	373,570	United Arab Emirates 82.0	United States 13.7	Saint Pierre & Miquelon 4.3
02068000 - Sheep, goats, asses, mules or hinnies edible offal, fresh or chilled	637,826	487,000	United States 92.8	Malaysia 7.2	-
02069000 - Sheep, goats, asses, mules or hinnies edible offal, frozen	24,197	141,715	United States 97.3	Japan 2.7	-

Source: CATSNET, Statistics Canada data, 2019

In 2018, Canada exported 5,745 live sheep solely to the US, which represented a value of C\$402,917. Over half of the raw sheep/lamb skins (with or without wool) was exported to China (60.8%), while 38.1% of raw or pickled sheep/lamb skins (with or without wool) was exported to the United States. Other smaller markets for raw sheep/lamb skins (with wool on) was Vietnam, Mexico, Belgium and Eritrea.

Canada's exports to the world of live sheep and sheep/lamb skins, 2018
measured values in C\$ dollars and quantity (number)

Export description	Quantity (number)	Value (C\$)	Top suppliers and market value share %		
			1	2	3
01041000 - Sheep, live	5,745	402,917	United States 100.0	-	-
Total exports to world – sheep/lamb skins	150,851	953,068	837,596	10,140	5,198
41021000 – Sheep/lamb skins, raw, with wool on, *nes	105,253	622,396	China 87.3	United States 11.7	Vietnam 0.8
41022100 – Sheep/lamb skins, pickled, without wool on	45,219	326,694	United States 88.9	China 11.1	-
41022900 – Sheep/lamb skins, raw, without wool (preserved or further prepared), *nes	379	3,978	China 100.0	-	-

Source: CATSNET, Statistics Canada data, 2019

*nes: nowhere else specified

Canada exported a total of C\$3.2 million (1.3 thousand tonnes) of wool products in 2018. Canada's main market was China exporting C\$2.5 million (1.2 thousand tonnes) of greasy shorn wool, which represented

77.3% of the total market share of wool. The US export market share within all four wool categories represented 19.2%, while the Netherlands was a smaller market player for wool or of fine animal hair waste (other than noils or garnetted stock) at 0.3%.

**Canada's exports to the world of wool, 2018
measured values in C\$ dollars and volume (kilograms)**

Export description	Volume (kg)	Value (C\$)	Top suppliers and market value share %		
			1	2	3
Total exports to the world – wool	1,330,300	3,238,070	2,789,897	343,517	104,656
51011100 - Greasy shorn wool, not carded or combed	1,278,083	2,944,292	China 85.0	United States 11.5	Egypt 3.5
51012100 - Degreased shorn wool, not carded, combed or carbonized	225	4,410	United States 100.0	-	-
51012900 - Degreased wool, other than shorn wool, not carded, combed or carbonized	45,018	273,205	United States 100.0	-	-
51032000 - Waste, other than noils, of wool or of fine animal hair, other than garnetted stock	6,974	16,163	Netherlands 56.8	United Kingdom 24.7	United States 18.5

Source: CATSNET, Statistics Canada data, 2019

Sector overview – meat in Canada

The Canadian meat sector based on retail sales (including lamb, beef, chicken, pork, turkey and other similar meat categories) is expected to grow from US\$18.7 billion in 2018 to US\$22.2 billion in 2023. Beef, chicken, and pork had the highest market share in the meat sector. Lamb represented a retail sales value market share of 3.9% of the overall Canadian retail meat sector in 2018.

In volume terms, the meat sector is expected to grow from 1,461.8 million kg in 2018 to 1,565.6 million kg by 2023, registering a 10-year (2014-2023) compound annual growth rate (CAGR) of 1.7% in Canada. The Canadian meat sector is forecast to register an overall retail value growth of 3.5% and volume growth of 1.3% between the 2019 to 2023 period. In comparison to the United States, the overall value and volume growth within Canada will grow faster, whereby the US holds a significant value (90.7%) and volume (92.3%) share of the meat market in 2018 and the American market is expected to grow by a value of 2.0% and a volume of 1.2% between 2019 and 2023.

In terms of retail sales, purchasing fresh meat from over the counter was the largest preferred consumer choice, followed by chilled raw packaged and processed meat. Furthermore, frozen meat is expected to be the fastest growing category in volume terms with a CAGR of 2.6%, followed by continued growth in the fresh meat – counter (1.7%) and chilled raw packaged and processed meat (1.7%) from 2018-2023.

Per capita consumption of meat in Canada is higher than the global level (16.7kg) standing at 39.4kg in 2018, yet is lower when compared to the American regional level (52.1kg) and is expected to reach 40.7kg by 2023. Per capita expenditure of meat in Canada stood at US\$594 in 2018, which was higher when compared to both global (US\$180.1) and American regional (US\$557.6) averages¹

The top distribution channels in the Canadian meat sector were hypermarkets & supermarkets, accounting for a value share of 72.8% in 2018, followed by food & drinks specialists (20.6%) and convenience stores (4.0%). Key packing material used were rigid plastics by a 65% share.

¹ GlobalData Intelligence Center: Consumer. Country Profile: Meat in Canada, February 2019

**Canadian retail sales of the meat sector, historical & forecast
using 2018 fixed exchange rates, off-trade sales, US\$ millions**

Category	2014	2018	*CAGR % 2014-2018	2019	2023	*CAGR % 2019-2023
Beef	4,968.5	5,439.8	2.3	5,516.2	6,060.3	2.4
Chicken	4,145.5	5,222.9	5.9	5,481.5	6,559.5	4.6
Pork	3,565.4	3,992.8	2.9	4,100.3	4,591.8	2.9
Turkey	1,430.9	1,805.8	6.0	1,896.4	2,272.6	4.6
Other	1,274.2	1,498.8	4.1	1,555.2	1,816.8	4.0
Lamb	649.4	725.7	2.8	747.6	852.2	3.3
Total meat	16,033.7	18,685.9	3.9	19,297.3	22,153.2	3.5

Source: GlobalData Intelligence Center: Consumer, 2019 *CAGR: Compound Annual Growth Rate

Retail market in the lamb industry

In 2018, the lamb industry reached retail sales of US\$725.7 million with volume sales of 23.2 million kilograms within Canada. Lamb represented a sales value market share of 3.9% of the overall retail Canadian meat sector, which is equivalent to a retail volume share of 1.6%. This segment category has been increasing at a CAGR of 2.8% from 2014 to 2018 and is expected to continue to expand by a CAGR of 3.3% between 2019 and 2023.

Fresh lamb from over-the-counter is the largest category with US\$358.3 million in retail off-trade sales in 2018. The 'shelf-stable' (other than canned) lamb category consisting of dried lamb products have shown significant growth by 15.8% between the 2014-2018 period and is expected to grow at a CAGR of 9.0% from 2019-2023.

**Canadian retail sales of the meat sector – lamb, historical & forecast
using 2018 fixed exchange rates, off-trade sales, US\$ millions**

Category	2014	2018	*CAGR % 2014-2018	2019	2023	*CAGR % 2019-2023
Shelf-stable lamb	7.5	8.6	3.6	9.0	10.3	3.5
Canned lamb	6.8	7.4	2.1	7.6	8.4	2.4
Other shelf-stable lamb	0.7	1.2	15.8	1.3	1.9	9.0
Chilled raw packaged lamb – processed	66.8	78.9	4.2	83.0	98.1	4.3
Coated portions – lamb	27.3	32.7	4.6	34.5	40.8	4.3
Burgers & grills – lamb	24.8	29.0	4.1	30.5	35.8	4.1
Sausages – lamb	12.5	14.5	3.9	15.2	18.1	4.4
Meatballs – lamb	2.3	2.7	4.5	2.8	3.4	4.2
Chilled raw packaged lamb – whole cuts	120.4	133.3	2.6	136.4	154.7	3.2
Cooked lamb – counter	11.3	12.8	3.2	13.3	15.1	3.2
Cooked lamb – packaged	71.0	77.8	2.3	79.8	89.4	2.9
Fresh lamb – counter	324.8	358.3	2.5	367.5	414.6	3.1
Frozen lamb	47.5	56.0	4.2	58.7	70.1	4.5
Processed lamb	35.4	41.6	4.1	43.6	51.9	4.5
Whole cuts of lamb	12.1	14.4	4.4	15.1	18.2	4.6
Total meat – lamb	649.4	725.7	2.8	747.6	852.2	3.3

Source: GlobalData Intelligence Center: Consumer, 2019 *CAGR: Compound Annual Growth Rate

Foodservice distribution of lamb (on-trade)

Lamb within the foodservice industry in Canada contributed to an on-trade value of US\$32.9 million in 2018, which consists of lamb varieties such as sausages (24.9%), burgers & grills (9.2%), prepared lamb overall (8.2%), meatballs (3.6%), and other lamb preparations (54.1%). Foodservice profit operators selling lamb products represented 87.7% of the market share distributed mainly in the restaurant services, while institutional non-profit operators held the remaining market share of 13.0% distributed mainly in the educational services in 2018.

Distribution channels of the Canadian lamb sector by outlet type, in 2018 on-trade sales value in US\$ - using last years fixed exchange rate

Distribution channel type	*OBP volume (kilograms)	Sales value (US\$ dollars)	Market share %
Foodservice (profit operators)	3,575,692.7	28,868,538.7	87.7
Accommodation	377,987.5	3,052,605.6	9.3
Leisure	155,543.3	1,245,664.5	3.8
Mobile operator	31,709.8	260,251.4	0.8
Pub, club & bar	10,614.9	85,817.6	0.3
Restaurant	2,804,374.7	22,638,431.5	68.7
Retail foodservice providers	70,617.3	573,640.9	1.7
Travel	40,898.5	330,858.2	1.0
Workplace	83,946.7	681,269.0	2.1
Institutional (cost operators)	503,378.0	4,065,457.4	12.3
Complementary services	4,157.0	34,928.0	0.1
Education	325,069.3	2,616,513.7	7.9
Healthcare	98,272.9	785,407.0	2.4
Military & civil defence	39,627.5	329,137.3	1.0
Welfare & services	36,251.3	299,471.2	0.9
Total foodservice – lamb	4,079,070.7	32,933,995.9	100.0

Source: GlobalData Intelligence Center – Consumer, 2019

*OBP: Operator Buying Price

Competitive landscape in the meat & lamb sectors

Leading brands in the meat sector in 2018 include Maple Leaf (10.3%) value share, Schneiders (5.2%) Marcangelo (2.3%), and Lilydale (2.2%). Private labels held a 4.0% market value share within the overall meat sector at a CAGR of 3.7% between 2013 and 2018, whereas 'name-brand' (trademark) brands registered a CAGR of 3.3%.

As reported in GlobalData between the 2015-2018 period, sales of fresh, and packaged chilled raw whole cuts or cooked lamb categories were driven by 'other' companies that did not fall under the branded (or trademark) category. Private labels represented 2.0% of the market share within the chilled raw packaged lamb (whole cuts) category in 2018.

Leading companies & market shares for beef products in Canada, historical retail value sales in current prices, US\$ millions and % breakdown

Category & company name	2015	2016	2017	2018	Market share % in 2018
Chilled raw packaged lamb – whole cuts	121.7	126.9	129.7	133.3	23.4
Others	111.3	116.1	118.7	122.0	21.4
Private label	10.4	10.8	11.0	11.3	2.0
Cooked lamb – packaged					
Others	72.0	74.7	76.3	77.8	13.7
Fresh lamb – counter					
Others	328.6	342.2	349.7	358.3	62.9
Total – lamb	522.3	543.9	555.8	569.4	100.0

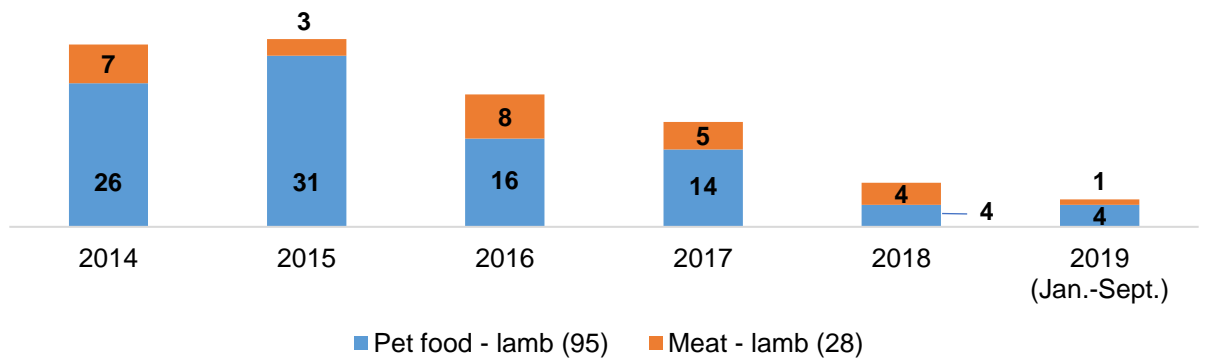
Source: GlobalData Intelligence Center – Consumer, 2019

Product launch and trend analysis of lamb and sheep milk

Lamb meat and pet food products

Mintel indicates that there were 28 new lamb meat products and 95 pet food products launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2014 and September 2019. Notably these lamb products were more an established niche from the years of 2014 to 2017, whereby the number of new product introductions have lowered in 2018 and 2019.

Number of lamb – meat and pet food products launched in Canada, (Jan. 2014 – Sept. 2019) total product item count (123)



Source: Mintel, 2019

The top category containing lamb as an ingredient was found within pet food products. According to Mintel, new pet food and meat brands that contain lamb on the market is 'Purina Beyond Grain Free' natural dog food, 'Spice It Up Foods' lamb curry with rice meal, 'lams Proactive Health' pâté with lamb & rice for adult dogs, and 'Compliments' dog food with lamb & rice. The fastest growing flavours added to lamb products include bacon/lardon/pancetta/speck, Mediterranean, cheddar cheese, unflavoured/plain, and spice/spicy.

Top companies in 2019 include George Weston, Mars, Eat Well Ethnic Foods, Colgate-Palmolive, Sobeys, and Nestlé. The sub-categories displaying lamb meat or pet food products and their corresponding top

brand includes processed meat (Sungold Specialty Meats Lamb Tonight), meals & meal centers (Nirvana Pies), soup (MeccaMeals), baby food (Mother Hen), and pet food category (Nutro).

**Brands of lamb – meat and pet food product launched in Canada, (Jan. 2014 – Sept. 2019)
displaying number of products by sub-categories**

Sub-category	Top brands launched (product item count)	Number of products in sub-category
Processed meat	Sungold Specialty Meats Lamb Tonight (4), Sungold Specialty Meats (3), La Fernandière (2), PG (1), M&M Meat Shops (1), Freden Fine Foods (1), Les Tout-Cuits Du Boucher (1), PC President's Choice (1), PC Free from (1), New Zealand Spring Lamb (1)	16
Meals & meal centers	Nirvana Pies (2), MeccaMeals (1), PG (1), L'Olivier Plats Gourmet (1), Les Fougères Restaurant (1), Spice It Up Foods (1), Nirvana Pockets (1), Vijs (1)	9
Soup	MeccaMeals (1), The Original Soupetc! (1)	2
Baby food	Mother Hen (1)	1
Pet food	Nutro (3), PetKind Pure Kindness (3), Murr of Iceland (2), Nutrience Grain Free SubZero (2), Dick Van Patten's Natural Balance Wild Pursuit (2), Blue Homestyle Recipe (2), PC President's Choice Nutrition First (2), Zignature (2), Merrick Grain Free (2), Dick Van Patten's Natural Balance Delectable Delights (2), Weruva (2), Purina Beneful Prepared Meals (2), Dick Van Patten's Natural Balance L.I.D. (2), Blue Freedom (2), KLN NutriSource (2)	95
Total sample size		123

Source: Mintel, 2019

Lamb-related blended spices, seasonings or sauce products

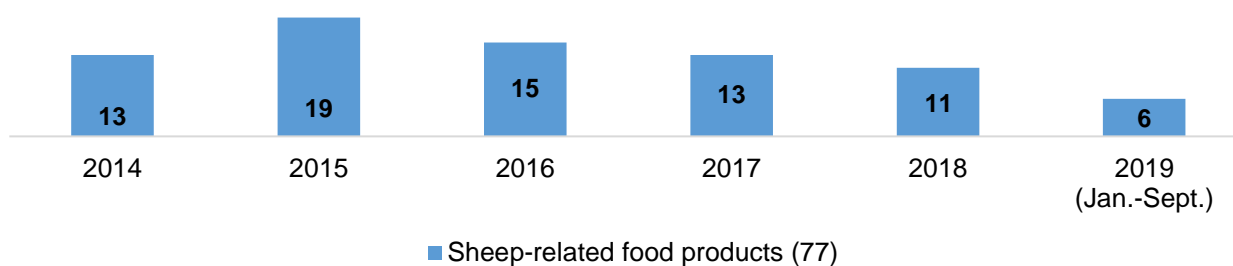
Mintel indicates that between January 2014 to September 2019, there were approximately twenty additional new blended spices, seasonings or sauce products launched that claimed to enhance the flavour or recommended that their product was especially great in lamb dishes. In January 2019, the company 'Paradis Végétarien' launched a new variety/range extension meat substitute product suitable for vegans which is a soy and shiitake mushroom lamb flavoured 'Veg-O-Mix' that is pre-cooked and ready-to-eat and can be heated up by being barbecued, stir-fried, oven cooked or steamed.

These lamb-related blended spices, seasonings and sauces consisted of several varieties of flavours and ingredients including a blue cheese herb mustard to coat leg of lamb before roasting (Mustard Tree from Stonewall Kitchen), cranberry mustard to accompany lamb breast, steak sauces, spicy rubs, sweet & sour maple vinegar to glaze lamb, curry flavours, a coffee seasoning rub and teriyaki sauces. There were also cultural flavours that originated from specific countries such as India's original Tikka Masala sauce, Chimichurri Argentinian-inspired sauce, and a Moroccan seasoning rub.

Sheep milk, cheese/feta or sheep's casing food products

According to Mintel, there were 77 new sheep milk, cheese/feta and/or sheep's casing food products launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2014 and September 2019. There were 70 products or 90.9% that claimed to contain some type of cheese ingredient made from sheep's milk (21 products that contained Pecorino Romano cheese), 2 yogurt products and 1 cream cheese spread containing sheep's milk, and 4 sausage products that contained sheep's casings.

**Number of sheep-related food products launched in Canada, (Jan. 2014 – Sept. 2019)
total product item count (77)**



Source: Mintel, 2019

The top category produced from sheep was found within the dairy category for its sheep milk ingredients. According to Mintel, new brands related to sheep milk ingredients or even advertised as a logo include 'Quesos Rocinante' firm ripened Iberian cheese, 'Maese Miguel' firm ripened Manchego cheese, and 'Splendid Chocolates' that were molded in the shape of a sheep. The new ingredients often found in sheep-related products were butternut squash, kale, herbal preparations, and rhubarb.

Top companies between the end of 2018 and September 2019 include Quesera Cuquerella, A. Zorbas & Sons, Flora Manufacturing & Distributing, Dodoni, Catelli Foods Corporation, and Arla Foods. The top five sub-categories containing sheep milk, cheese/feta or sheep casing food ingredients along with their corresponding top brand includes dairy (Agropur Import Collection), meals & meal centers (Pilaros), sauces & seasonings (Western Family), processed fish, meat & egg products (Piller's), and side dishes category (Western Family).

**Brands of sheep-related food product launched in Canada, (Jan. 2014 – Sept. 2019)
displaying number of products by sub-categories**

Top 5 sub-category	Top brands launched (product item count)	Number of products in sub-category
Dairy	Agropur Import Collection (4), PC Black Label (4), Krinos (2), Roussas (2), Saputo (1), Papillon (1), Biobio (1), La Quesería Selección (1), Maese Miguel (1), Arla Apetina (1), Quality Sheep Milk (1), Tre Stelle Lupa (1), Dodoni (1), Best Baa Dairy (1), Quesos Rocinante (1), Maison Maurice Dufour Famille Migneron (1), Krinos Saganaki (1)	25
Meals & meal centers	Pilaros (4), Western Family (3), PC President's Choice (3), PC President's Choice Loads Of (2), Simply. West Coast (1), Fazion (1), Delissio Pizzeria Vintage (1), Roman (1)	16
Sauces & seasonings	Western Family (2), Cucina Antica (1), Monte Bene (1), Monte Bene Farm Fresh (1), Great Value (1), Milano (1), 4C (1), Kirkland Signature (1), PC Splendido (1), 4C Gluten Free (1), Martelli (1)	12
Processed fish, meat & egg products	Piller's (2), Harvest (2), Western Family (1), PC President's Choice (1), Gourmet Bay (1), Curieux Bégin Produits Fins (1)	8
Side dishes	Western Family (3), PC President's Choice (2), Olivieri Artisan Gigante (1), Duso's (1), Pastificio Temporin Linea Gourmet (1)	8
Total sample size		77

Source: Mintel, 2019

Product examples

Punjabi Lamb Curry

Company:	Vij's Inspired Indian Cuisine
Brand:	Vij's
Sub-category:	Prepared meals
Country:	Manufactured in Canada, not imported
Related claims:	No additives/preservatives, microwaveable, gluten free, low/no/reduced allergen, hormone free
Store name:	Co-op supermarket
Launch type:	New packaging
Date published:	April 2017
Price in CAD dollars:	\$9.99



Source: Mintel, 2019

Product description:

Vij's Punjabi Lamb Curry has been repackaged in a new design. This traditional lamb curry is rich with onions, tomatoes, garlic and ginger and spiced with Vij's own family recipe for garam masala, a spice mixture that is a hallmark of north Indian cuisine. The gluten free product is made with lamb raised without the use of added antibiotics and hormones, and it contains no artificial colors, flavors or preservatives. The fully cooked and microwavable product retails in a 400g BPA-free pack.

Curry Lamb Pocket

Company:	Nirvana Foods
Brand:	Nirvana Pockets
Sub-category:	Pastry dishes
Country:	Manufactured in Canada, not imported
Related claims:	Microwaveable, on-the-go
Store name:	Your Independent Grocer supermarket
Launch type:	New Product
Date published:	March 2017
Price in CAD dollars:	\$6.99



Source: Mintel, 2019

Product description:

Nirvana Pockets Curry Lamb Pocket is fragrantly spiced with masala. The handcrafted and microwavable, grab and go product is described as wholesome and natural, and retails in a 270g pack containing two 135g units.

Algerian Soup with Lamb and Orzo

Company: Orientalys Foods
Brand: MeccaMeals
Sub-category: Wet soup

Market: Canada
Related claims: Microwaveable, Halal
Store name: Adonis supermarket

Launch type: New Product
Date published: December 2014
Price in CAD dollars: \$4.99



Source: Mintel, 2019

Product description:

MeccaMeals Algerian Soup with Lamb and Orzo is a delicious version of the Chorba soup native of Algeria and usually eaten during Ramadan. The microwavable soup is ready in five minutes and has been prepared according to the halal protocol. It retails in a 350ml pack featuring the Canada Inspection logo.

Lamb Ragout

Company: L'Olivier
Brand: L'Olivier Plats Gourmet
Sub-category: Prepared meals

Country: Manufactured in Canada, not imported
Related claims: No additives/preservatives, microwaveable, low/no/reduced sodium, ease of use

Store name: Pharmaprix drug store

Launch type: New Product
Date published: August 2014
Price in CAD dollars: \$13.50



Source: Mintel, 2019

Product description:

L'Olivier Plats Gourmet Lamb Ragout is a homemade gourmet frozen meal that is ready to heat. It contains no preservatives and is low in sodium. The microwavable product retails in a pack containing one portion.

Lamb Tourtière

Company: Les Fougères
Brand: Les Fougères restaurant
Sub-category: Pastry dishes

Country: Manufactured in Canada, not imported
Related claims: No additives/preservatives
Store name: Metro – Pointe Claire (H9R 3J1),
merchandise/hypermarket

Launch type: New Product
Date published: January 2014
Price in CAD dollars: \$18.99



Source: Mintel, 2019

Product description:

Les Fougères Restaurant Lamb Tourtière with red pepper and goat's cheese, is a distinctive natural take home food handmade from Restaurant Les Fougères in beautiful Chelsea, Quebec. The product is free from additives and preservatives, and retails in a 908g pack.

Merquez Lamb Sausages

Company: Sungold Specialty Meats
Brand: Sungold Specialty Meats
Sub-category: Processed meat products

Market: Canada
Related claims: Halal
Store name: Safeway supermarket

Launch type: New Product
Date published: August 2016
Price in CAD dollars: \$11.99



Source: Mintel, 2019

Product description:

Sungold Specialty Meats Merquez Lamb Sausages are spicy, flavourful, uncooked, and halal certified. This product is a North African inspired recipe and retails in a 375g pack bearing a QR code.

Firm Ripened Iberian Cheese

Company: Quesera Cuquerella
Brand: Quesera Rocinante
Sub-category: Dairy/hard & semi-hard cheese

Importer: Agropur
Market: Canada
Store name: Metro merchandise/hypermarket

Launch type: New Product
Date published: September 2019
Price in CAD dollars: \$7.49



Source: Mintel, 2019

Product description:

Quesos Rocinante Firm Ripened Queso Ibérico (Firm Ripened Iberian Cheese) is now available. This Spanish cheese is a blend of cow's, sheep's and goat's milk, contains 32% milk fat and 39% moisture and is said to be aged for 50 days. This product retails in a 150g pack.

Mutton Stew

Company: Etnico Foods, Canada
Brand: Etnico Foods
Sub-category: Processed fish, meat & egg products

Market: Canada
Store name: Sobeys supermarket
Related claims: Halal

Launch type: New variety/range extension
Date published: August 2017
Price in CAD dollars: \$10.00



Source: Mintel, 2019

Product description:

Etnico Foods Mutton Stew contains ingredients for traditional cooking. The halal certified, uncooked product retails in a 0.807kg pack.

Resources

CATSNET, Statistics Canada data, 2019

GlobalData Intelligence Center: Consumer. Country Profile: Meat in Canada, February 2019

GlobalData Intelligence Center: Consumer database, 2019

Mintel Global Data New Product (GDNP) database, 2019

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