



## Customized Report Services

# Market Overview – Canadian lamb/sheep meat and product trends

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### Table of contents

- Market snapshot
- Production
- Canadian trade of sheep/lamb products
- Sector overview – meat in Canada
- Retail market in the lamb industry
- Foodservice distribution of lamb (on-trade)
- Competitive landscape in the meat & lamb sectors
- Product launch and trend analysis of lamb and sheep milk
- Resources

### Market snapshot

In 2019, 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, Egypt, the United Arab Emirates (UAE), Saint Pierre & Miquelon, and the Czech Republic. Canadian exports of lamb/sheep products to the world totalled C\$5.4 million in 2019. Wool represented 43.7% (C\$2.3 million) of the total export market share in Canada, followed by sheep and lamb meat exports at 29.5% (C\$1.6 million), sheep and lamb skins at 8.5% (C\$455,058), and live sheep stood at 18.3% (C\$982,300).

The Canadian lamb meat and related food products is one of the smallest meat markets in terms of retail sales, yet remains a niche consumer market. In 2019, the lamb industry reached retail sales of US\$733.3 million with volume sales of 23.4 million kilograms within Canada. Lamb represented a sales value market share of 4.0% of the overall retail Canadian meat (US\$18.4 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 compound annual growth rate (CAGR) of 5.2% from 2015 to 2019 and is expected to continue to expand by a CAGR of 3.0% between 2019 and 2023.

Lamb within the foodservice industry in Canada contributed to a value of US\$33.0 million (4.2 million kilograms), which consists of lamb varieties such as sausages (24.9%), burgers & grills (9.2%), prepared lamb overall (8.3%), 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 2019.

The pet food category has been a rising sector, and has introduced 58 new pet food products (average: 11.6 launches/year) to the Canadian market that contain lamb meat ingredients between the period of January 2016 and December 2020. Meanwhile, there were 82 new lamb-related products (16.4/yr) and 72 new dairy, cheese/feta containing sheep milk and/or made from sheep's casing food products (14.4/yr) launched during the same period. Within the 82 new lamb-related products, 30 of these launched products consisted of new blended spices, seasonings, sauces or sweet spreads that claimed to enhance the flavour or were recommended that their product was ideal when added in lamb dishes.

### Production

In 2019, Canadian farmers produced 827,800 sheep, representing approximately a growth of 1.7% since 2017. According to the Food and Agriculture Organization (FAO) of the United Nations, the amount of sheep produced has been increasing at a CAGR of 0.1% between 2015 and 2019. Pork has been growing the



most by a CAGR of 2.2%, while cattle (-0.3%), horses (-0.1%), turkeys (0.0%), and mules (0.0%) have either remained the same or have reported a decline over the same period.

### Livestock production in Canada (2015-2019)

Selected livestock ('000 head)	2015	2016	2017	2018	2019	*CAGR % 2015-2019
Chickens	167,587.0	169,869.0	170,120.0	170,759.0	171,398.0	0.6
*Pigs	13,180.0	13,630.0	13,935.0	14,170.0	14,399.3	2.2
*Cattle	11,640.0	11,610.0	11,535.0	11,565.0	11,500.0	-0.3
Turkeys	5,701.0	5,699.0	5,687.0	5,693.0	5,699.0	0.0
Ducks	1,452.0	1,483.0	1,499.0	1,514.0	1,528.0	1.3
*Sheep	824.3	815.1	813.9	829.4	827.8	0.1
Horses	400.1	398.7	397.9	398.3	398.7	-0.1
Goats	30.0	30.1	30.1	30.1	30.1	0.1
Mules	4.0	4.0	4.0	4.0	4.0	0.0

Source: FAOSTAT Agricultural Production, 2020

\*Official data: pigs, cattle, sheep

### Canadian trade of sheep/lamb products

In 2019, Canada partnered with fifteen markets worldwide for the trade of lamb or sheep related products, including live sheep, meat, sheep or lamb skins and wool. Canada's top five international markets were the US, China, Egypt, the UAE, and the Czech Republic. Canadian exports of lamb/sheep products to the world totalled C\$5.4 million in 2019. Other smaller markets were France, Mexico, Argentina, Germany, and Spain, which made up the remaining 0.09% of lamb/sheep related exports. Canada did not trade with Vietnam, the United Kingdom, nor Belgium in 2019, as they did to a small amount in 2018.

Data on 2020 (Jan-Nov): Canada's exports of all lamb/sheep related products (incl. live sheep) to the world were valued at C\$4.5 million in 2020 compared to the same period in 2019 (C\$4.7 million), representing a decline in growth of -6.0%. The top 10 markets in 2019, reported a total export decline of -16.3% with growth only in the US (44.5%) and Saint Pierre & Miquelon (171.1%) markets in 2020. To offset some of the export losses, Canada diversified its supply of lamb/sheep products to new markets including Gambia (C\$382,716), Hong Kong (C\$54,523), and Uruguay (C\$39,580) in 2020 (Jan-Nov).

### Canadas top markets for lamb/sheep products – live sheep, meat, skins and wool, 2019-2020 measured in C\$ dollars

Country	2019 (full year)	Market share (%) in 2019	2020 (Jan-Nov)	% Growth difference (2020/19, Jan-Nov)
<b>Total lamb/sheep products – live sheep, meat, skins and wool</b>	<b>5,362,257</b>	<b>100.0</b>	<b>4,464,096</b>	<b>-6.0</b>
1. United States	2,784,265	51.9	3,428,789	44.5
2. China	1,233,803	23.0	181,554	-85.2
3. Egypt	462,823	8.6	36,836	-92.0
4. United Arab Emirates	391,837	7.3	119,083	-66.9
5. Czech Republic	254,669	4.7	36,126	-65.7
6. Philippines	87,620	1.6	55,522	-36.6
7. Japan	66,959	1.2	24,164	-63.7
8. Saint Pierre and Miquelon	34,467	0.6	93,449	171.1
9. Netherlands	31,007	0.6	3,920	-87.4
10. Chile	9,730	0.2	0	-100.0
<b>Subtotal lamb/sheep products – top 10</b>	<b>5,357,180</b>	<b>99.9</b>	<b>3,979,443</b>	<b>-16.3</b>

Source: CATSNET, Statistics Canada data, 2020

Canada exported C\$1.6 million (196.5 metric tonnes) of meat that consists of sheep cuts, lamb carcasses and frozen edible offal, including sheep offal in 2019. This value represents a decline of -33.1% from 2018 (C\$2.4 million). The majority of the sheep/lamb meat was exported to the US (62.0%), followed by the UAE (24.8%), and Saint Pierre & Miquelon (2.2%) in 2019. The top export commodities were fresh sheep cuts (bone in), frozen edible offal of sheep/goats/asses/mules or hinnies (HS:020690), both mainly going to the US, and fresh or chilled lamb carcasses mainly exported to the UAE.

In 2018, fresh or chilled edible offal of sheep/goats/asses/mules or hinnies (HS:020410) was amongst the top 3 export commodities with no Canadian exports being traded in 2019 and instead, exports of frozen edible offal has taken its place. As well, total exports to the US has decreased from 79.9% in 2018 to 62.0% in 2019, while exports to the UAE have increased from 12.9% to 24.8%, respectively.

Data on 2020 (Jan-Nov): Canada's exports of lamb/sheep meat products to the world were valued at C\$2.3 million in 2020 compared to the same period in 2019 (C\$1.4 million), representing an increased growth of 60.6%. Amongst Canada's top 3 export markets over this period, the US showed a growth of 71.2%, the UAE (-66.9%), and Saint Pierre & Miquelon (+171.1%). Japan, China, and Cuba were new markets in 2020.

**Canada's exports to the world of lamb and sheep meat, 2019  
measured values in C\$ dollars and volume (kilograms)**

Export description	Volume (kg)	Value (C\$)	Top export markets and value share %		
			1	2	3
<b>Total meat exports to the world – lamb &amp; sheep</b>	<b>196,480</b>	<b>1,582,779</b>	<b>United States 62.0</b>	<b>*UAE 24.8</b>	<b>Saint Pierre &amp; Miquelon 2.2</b>
020422 – Sheep cuts, bone in, fresh or chilled	37,762	794,984	United States 100.0	-	-
020410 – Lamb carcasses and half carcasses, fresh or chilled	72,883	498,623	United Arab Emirates 78.6	United States 13.0	Saint Pierre & Miquelon 5.1
020690 – Sheep, goats, asses, mules or hinnies edible offal, frozen	83,488	264,906	United States 41.6	Philippines 33.1	Japan 25.3
020443 – Sheep cuts, boneless, frozen	1,104	15,003	United States 75.1	France 24.9	-
020430 – Lamb carcasses and half carcasses, frozen	1,137	8,398	Saint Pierre & Miquelon 100.0	-	-
020423 – Sheep cuts, boneless, fresh or chilled	106	865	Saint Pierre & Miquelon 100.0	-	-
*020442 – Sheep cuts, bone in, frozen	0	0	*Trinidad & Tobago 100.0	-	-
*020680 – Sheep, goats, asses, mules or hinnies edible offal, fresh or chilled	0	0	*United States 92.8	*Malaysia 7.2	-

Source: CATSNET, Statistics Canada data, 2020

\*HS codes (020442,020680): 2018 positioning

In 2019, Canada exported over double the amount of live sheep than the number in 2018 (solely to the US), which represented a value and quantity of C\$982,300 and 11,862 live sheep, respectively. Canada exported C\$455,058 (73.4 metric tonnes) of sheep/lamb skins in 2019.

In 2019, the largest importer of Canadian sheep/lamb skins was the US by 76.8%, followed by China (22.9%) and Mexico (0.09%). All of the pickled and raw sheep/lamb skins, without wool (sometimes preserved or further prepared) were exported to the United States (HS:410221, 410229). While, 67.6% of raw, with wool

on, n.e.s (HS:410210) was exported to China at a value of C\$104,178 (22,770 skins). Other smaller export markets for raw sheep/lamb skins (with wool on), n.e.s. (HS:410210) were Mexico, and Argentina.

Data on 2020 (Jan-Nov): Canada's exports of live sheep to the world were valued at C\$845,028 (number: 9,608) in 2020 compared to the same period in 2019 (C\$810,202 or 9,734 sheep), representing an increased growth in value of 4.3%. All exports of live sheep were to the US in 2020. Canada's exports of sheep/lamb skins to the world were valued at C\$250,012 in 2020 compared to the same period in 2019 (C\$389,658), representing a decline in growth of -35.8%. Amongst Canada's top 3 export markets (2020/19, Jan-Nov), the US showed a decline of -37.1%, China (-34.1%), and Mexico (+107.3%). Egypt, Denmark, Belgium, and Italy were new export markets of sheep/lamb skins (to a small extent) with a 100% small loss in markets such as Argentina, Spain, and France in 2020.

**Canada's exports to the world of live sheep and sheep/lamb skins, 2019  
measured values in C\$ dollars and quantity (number)**

Export description	Quantity (number)	Value (C\$)	Top export markets and value share %		
			1	2	3
010410 – Sheep, live	11,862	982,300	United States 100.0	*Saint Pierre & Miquelon 0.03%	-
<b>Total exports to world – sheep/lamb skins</b>	<b>73,435</b>	<b>455,058</b>	<b>United States 76.8</b>	<b>China 22.9</b>	<b>Mexico 0.09</b>
410221 – Sheep/lamb skins, pickled, without wool on	40,103	292,624	United States 100.0	*China 11.1	-
410210 – Sheep/lamb skins, raw, with wool on, *n.e.s.	33,330	154,139	China 67.6	United States 31.5	Mexico 0.3
410229 – Sheep/lamb skins, raw, without wool (preserved or further prepared), *n.e.s.	2	8,295	United States 100.0	*China 100.0	-

**Source:** CATSNET, Statistics Canada data, 2020    **\*n.e.s. :** nowhere else specified    **\*Export market:** Positioning in 2018

In 2019, Canada exported a total of C\$2.3 million (968.1 metric tonnes) of wool products, representing a decrease of -27.7% during the same period in 2018 (C\$3.2 million or 1.3 thousand tonnes). Canada's main market was China exporting C\$1.1 million (526.9 metric tonnes) of greasy shorn wool (HS:510111), which represented a loss of C\$1.4 million (54.9%) in Canada's top export wool category since 2018. The US export market share within four out of the five wool categories accounted for 20.1%, while Egypt followed close behind for its imports of Canadian greasy shorn wool, not carded or combed at 19.8%.

In 2019, Canadian exports of carbonized wool, not carded or combed (HS:510130) was introduced into the market (whereby exports from 2015-2018 were at zero and/or never were reported prior), totaling a value of C\$9,730 (1.4 metric tonnes). Additionally, it appears that the price of degreased shorn wool, not carded, combed or carbonized (HS:510121) has been lowered in 2019, as 239kg brought in only C\$739, when 225kg brought in more for less at a value of C\$4,410 in 2018.

Data on 2020 (Jan-Nov): Canada's exports of wool to the world were valued at C\$1.1 million in 2020 compared to the same period in 2019 (C\$2.1 million), representing a decline of -48.7%. Amongst Canada's top 3 export markets of wool over this period, the China showed a decline of -97.2%, the US (+124.8%), and Egypt (-92.3%). Uruguay was a new market, while Chile was no longer a trading partner in 2020.

**Canada's exports to the world of wool, 2019**  
measured values in C\$ dollars and volume (kilograms)

Export description	Volume (kg)	Value (C\$)	Top export markets and value share %		
			1	2	3
<b>Total exports to the world – wool</b>	<b>968,115</b>	<b>2,342,120</b>	<b>China 48.2</b>	<b>United States 20.1</b>	<b>Egypt 19.8</b>
*510111 – Greasy shorn wool, not carded or combed	880,721	2,065,250	China 54.7	Egypt 22.4	United States 10.6
*510129 – Degreased wool, other than shorn wool, not carded, combed or carbonized	52,383	239,711	United States 100.0	-	-
510320 – Waste (other than noils), of wool or of fine animal hair, other than garnetted stock	33,382	26,690	Netherlands 54.2	United States 45.8	*United Kingdom 24.7
**510130 – Carbonized wool, not carded or combed	1,390	9,730	Chile 100.0	-	-
**510121 – Degreased shorn wool, not carded, combed or carbonized	239	739	United States 100.0	-	-

Source: CATSNET, Statistics Canada data, 2020 \*HS: 5101: excludes yarn, fabric \*\*Export market: Positioning in 2018

## 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\$18.4 billion in 2019 to US\$20.4 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 4.0% of the overall Canadian meat sector in 2019.

In volume terms, the meat sector is expected to grow from 1,484.1 million kilograms in 2019 to 1,505.0 million kilograms by 2023, registering a 9-year (2015-2023) CAGR of 1.1% in Canada. The Canadian meat sector is forecast to register an overall retail value growth of 2.0%, which represents a volume decline of -0.4% between the 2020 to 2023 period. In comparison to the United States, the overall growth in terms of value within Canada will grow faster, whereby the US holds a significant value (88.7%) and volume (92.3%) share of the total North American meat market in 2019 and the American market is expected to grow by a value of 1.5% and a volume of 0.5% between 2020 and 2023.

In terms of retail sales in Canada, purchasing fresh meat from over the counter was the largest category, followed by chilled raw packaged & processed meat, and frozen meat. Furthermore, frozen meat is expected to be the fastest growing category in both volume and value terms with respective CAGRs of 0.8% and 3.4%. Meanwhile in volume terms all other meat categories from fresh to chilled whole cuts or processed/packaged, and ambient meat product types are expected to be negatively impacted with CAGRs from -0.05% up to -1.0% between 2018-2023.

Per capita consumption of meat in Canada is higher than the global level (14.2kg) standing at 39.5kg in 2019, yet is lower when compared to the American regional level (53.8kg) and is expected to decline to 38.4 kg by 2023. Per capita expenditure (PCE) of meat in Canada stood at US\$489.80 in 2019, which was lower than the American regional average of US\$560.46 and higher when compared to the global average (US\$144.03). Whereby in 2019, Canadians spent the most on fresh meat over-the-counter at a PCE of US\$202.85, respectively, followed by chilled raw packaged whole cuts or other processed meat (US\$66.12 and US\$116.21).

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.

**Canadian retail sales of the meat sector, historical & forecast  
using fixed 2010 exchange rate, US\$ millions**

Category	2015	2019	*CAGR (%) 2015-2019	2020	2023	*CAGR (%) 2019-2023
<b>Total meat</b>	<b>15,815.5</b>	<b>18,401.5</b>	<b>3.9</b>	<b>19,206.8</b>	<b>20,354.2</b>	<b>2.0</b>
Beef	4,785.9	5,255.8	2.4	5,276.5	5,375.6	0.6
Chicken	4,261.7	5,218.1	5.2	5,633.4	6,103.4	2.7
Pork	3,436.5	3,906.2	3.3	4,054.1	4,277.5	1.8
Turkey	1,471.2	1,806.9	5.3	1,931.3	2,085.9	2.6
Other	1,262.5	1,481.2	4.1	1,544.5	1,674.0	2.7
Lamb	597.7	733.3	5.2	767.0	837.8	3.0

Source: GlobalData Intelligence Center: Consumer, 2021 \*CAGR: Compound Annual Growth Rate

**Retail market in the lamb industry**

In 2019, the lamb industry reached retail sales of US\$733.3 million with volume sales of 23.4 million kilograms within Canada. Retail sales of meat from lamb remained stable when compared to 2018, which represented a value market share of 4.0% and a volume share of 1.6% of the overall Canadian meat sector in 2019. The total value of lamb meat has been increasing at a CAGR of 5.2% from 2015 to 2019 and is expected to continue to expand by a CAGR of 3.0% between 2020 and 2023.

Fresh lamb from over-the-counter is the largest category with US\$359.6 million in retail off-trade sales in 2019. Frozen processed lamb products have historically shown the most growth by a CAGR of 7.6% between the 2015-2019 period after the category 'other shelf-stable' lamb (not incl. canned) that grew by 9.9% and is expected to grow the fastest (perhaps as the cheapest alternative option) at a CAGR of 5.1% from 2019-2023.

**Canadian retail sales of the meat sector – lamb, historical & forecast  
using fixed 2010 exchange rate, US\$ millions**

Category	2015	2019	*CAGR % 2015-2019	2020	2023	*CAGR % 2020-2023
<b>Fresh lamb – counter</b>	<b>296.0</b>	<b>359.6</b>	<b>5.0</b>	<b>364.1</b>	<b>399.1</b>	<b>3.1</b>
<b>Chilled raw packaged lamb – whole cuts</b>	<b>111.8</b>	<b>132.7</b>	<b>4.4</b>	<b>139.2</b>	<b>153.3</b>	<b>3.3</b>
<b>Chilled raw packaged lamb – processed</b>	<b>63.7</b>	<b>82.0</b>	<b>6.5</b>	<b>91.1</b>	<b>97.7</b>	<b>2.4</b>
Coated portions – lamb	26.7	33.6	5.9	37.0	39.4	2.1
Burgers & grills – lamb	23.1	30.5	7.1	33.9	36.4	2.4
Sausages – lamb	11.8	15.2	6.7	17.1	18.7	3.0
Meatballs – lamb	2.2	2.7	5.8	3.0	3.2	1.9
<b>Cooked lamb – packaged</b>	<b>64.1</b>	<b>79.7</b>	<b>5.6</b>	<b>85.2</b>	<b>92.5</b>	<b>2.8</b>
<b>Frozen lamb</b>	<b>43.8</b>	<b>58.0</b>	<b>7.3</b>	<b>65.6</b>	<b>72.5</b>	<b>3.4</b>
Processed lamb	32.4	43.4	7.6	49.2	54.5	3.5
Whole cuts of lamb	11.4	14.6	6.3	16.5	18.0	3.0
<b>Cooked lamb – counter</b>	<b>10.9</b>	<b>12.8</b>	<b>4.1</b>	<b>13.0</b>	<b>13.5</b>	<b>1.4</b>
<b>Shelf-stable lamb</b>	<b>7.3</b>	<b>8.5</b>	<b>3.9</b>	<b>8.7</b>	<b>9.1</b>	<b>1.7</b>
Canned lamb	6.4	7.3	3.0	7.2	7.4	1.0
Other shelf-stable (ambient) lamb	.9	1.3	9.9	1.5	1.7	5.1
<b>Total meat – lamb</b>	<b>597.7</b>	<b>733.3</b>	<b>5.2</b>	<b>767.0</b>	<b>837.8</b>	<b>3.0</b>

Source: GlobalData Intelligence Center: Consumer, 2021 \*CAGR: Compound Annual Growth Rate

**Canadian retail sales of the meat sector – lamb, historical & forecast  
volume sales (million kilograms)**

Category	2015	2019	*CAGR % 2015-2019	2020	2023	*CAGR % 2020-2023
<b>Fresh lamb – counter</b>	<b>11.3</b>	<b>11.8</b>	<b>1.0</b>	<b>11.5</b>	<b>11.2</b>	<b>-0.9</b>
<b>Chilled raw packaged lamb – processed</b>	<b>3.5</b>	<b>3.9</b>	<b>2.5</b>	<b>4.2</b>	<b>4.2</b>	<b>-0.4</b>
Coated portions – lamb	1.4	1.5	2.1	1.6	1.6	-0.5
Burgers & grills – lamb	1.2	1.4	3.0	1.5	1.5	-0.3
Sausages – lamb	0.83	0.92	2.7	1.00	0.99	-0.3
Meatballs – lamb	0.10	0.11	2.0	0.12	0.12	-0.6
<b>Chilled raw packaged lamb – whole cuts</b>	<b>3.6</b>	<b>3.8</b>	<b>1.0</b>	<b>3.8</b>	<b>3.8</b>	<b>-0.4</b>
<b>Cooked lamb – packaged</b>	<b>1.8</b>	<b>1.9</b>	<b>1.0</b>	<b>2.0</b>	<b>1.9</b>	<b>-1.5</b>
<b>Frozen lamb</b>	<b>1.0</b>	<b>1.1</b>	<b>2.7</b>	<b>1.3</b>	<b>1.3</b>	<b>0.8</b>
Processed lamb	0.72	0.81	2.7	0.89	0.91	0.8
Whole cuts of lamb	0.31	0.34	2.7	0.38	0.39	0.8
<b>Cooked lamb – counter</b>	<b>0.48</b>	<b>0.50</b>	<b>0.9</b>	<b>0.50</b>	<b>0.49</b>	<b>-0.6</b>
<b>Shelf-stable lamb</b>	<b>0.36</b>	<b>0.38</b>	<b>1.4</b>	<b>0.38</b>	<b>0.37</b>	<b>-0.7</b>
Canned lamb	0.32	0.32	0.2	0.31	0.29	-1.5
Other shelf-stable (ambient) lamb	0.04	0.06	8.8	0.07	0.07	3.0
<b>Total meat – lamb</b>	<b>22.2</b>	<b>23.4</b>	<b>1.3</b>	<b>23.7</b>	<b>23.2</b>	<b>-0.7</b>

Source: GlobalData Intelligence Center: Consumer, 2021 \*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\$33.0 million (4.2 million kilograms) in 2019, which consists of lamb varieties such as sausages (24.9%), burgers & grills (9.2%), prepared lamb overall (8.3%), meatballs (3.6%), and other lamb preparations (54.1%). Foodservice profit operators selling lamb products represented 87.6% of the market share distributed mainly in the restaurant services, while institutional non-profit operators held the remaining market share of 12.4% distributed mainly in education services institutions in 2019.

As sampled from GlobalData Menu Intelligence, there are as many as 739 restaurants within 31 cities and a total of 4,808 menu items containing lamb as an ingredient throughout Canada. The most popular cities with the most amount of restaurants serving lamb include Toronto (230), Montréal (101), Vancouver (97), Ottawa (64), and Calgary (59). The majority of servings came from full-service restaurants (FSRs) by a share of 57.2% with an increased number of FSRs going from 279 in 2018 to 423 in 2019. Approximately, 39.9% of servings came from quick service & fast food restaurants (QSRs) with an increased number of QSRs going from 187 in 2018 to 295 in 2019. The 3<sup>rd</sup> largest restaurant type serving lamb was bars (1.5%), which often served Mediterranean cuisine dishes (18.2%). Top cuisine types serving lamb from within both FSRs and QSRs were Indian, American, Italian, Chinese, and Greek cuisine. Main dish or lamb ingredient types included meat mains, curry, kebabs, meal deals and combinations, sharing platters & tapas, and sandwiches & wraps. Lastly, the majority of menu items (2,580) had a price range between (US\$10.01-15.00), while 1,436 items fell between (US\$5.01-10.00), and 361 items fell between (US\$15.01-20.00) price range.

**Foodservice distribution channels – Canadian lamb sector by outlet type, 2019  
measured values (US\$M) and volume (Mkg) – using fixed 2010 exchange rate**

Distribution channel type	*OBP volume	Sales value	Market share % in 2019
<b>Foodservice (profit operators)</b>	<b>3.7</b>	<b>28.9</b>	<b>87.6</b>
Restaurant	2.9	22.7	78.4
Accommodation	0.4	3.1	9.3
Leisure	0.2	1.2	4.3
Workplace	0.09	0.68	2.4
Retail foodservice providers	0.07	0.57	2.0
Travel	0.04	0.33	1.1
Mobile operator	0.03	0.26	0.9
Pub, club & bar	0.01	0.09	0.3
<b>Institutional (cost operators)</b>	<b>0.52</b>	<b>4.1</b>	<b>12.4</b>
Education	0.33	2.6	64.0
Healthcare	0.10	0.79	19.2
Military & civil defence	0.04	0.33	8.1
Welfare & services	0.04	0.30	7.3
Complementary services	0.01	0.06	1.4
<b>Total foodservice – lamb</b>	<b>4.2</b>	<b>33.0</b>	<b>100.0</b>

Source: GlobalData Intelligence Center – Consumer, 2021

\*OBP: Operator Buying Price

### Competitive landscape in the meat & lamb sectors

In 2019, leading brands in the meat sector included Maple Leaf (11.8%) value share, Schneiders (5.0%) Lilydale (2.7%), Marcangelo (2.6%), and Tyson meats (2.5%). Private labels held a 3.9% market value share at US\$883.5 million in 2019 within the overall meat sector.

As reported in GlobalData between the 2016-2019 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 remained at 2.0% of the market share within the chilled raw packaged lamb (whole cuts) category in 2019.

**Retail sales of private versus other company labels for lamb products in Canada, historical  
using fixed 2010 exchange rate, US\$ millions & market share (%)**

Category & company label	2016	2017	2018	2019	Market share % in 2019
<b>Fresh lamb – counter</b>					
Others	402.0	414.4	439.9	463.3	62.9
<b>Total – Chilled raw packaged lamb, whole cuts</b>	<b>151.9</b>	<b>156.7</b>	<b>163.6</b>	<b>171.0</b>	<b>23.2</b>
Others	138.6	143.2	149.8	156.6	21.2
Private label	13.3	13.6	13.9	14.5	2.0
<b>Cooked lamb – packaged</b>					
Others	86.1	89.5	95.5	102.7	13.9
<b>Total – lamb</b>	<b>640.1</b>	<b>660.7</b>	<b>699.0</b>	<b>737.0</b>	<b>100.0</b>

Source: GlobalData Intelligence Center – Consumer, 2021

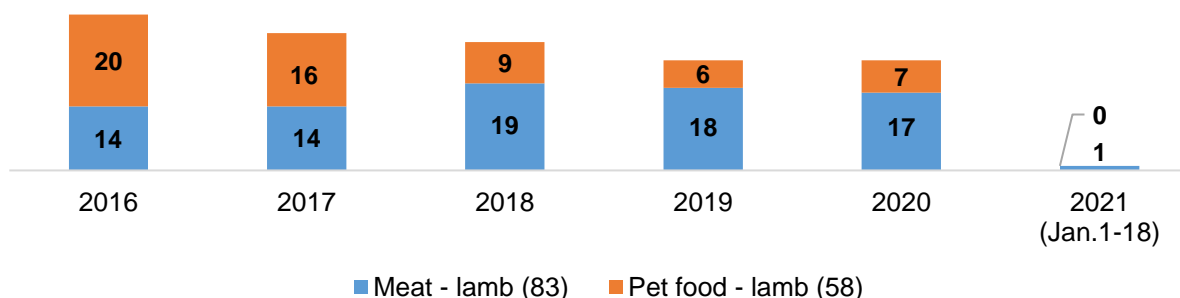


## Product launch and trend analysis of lamb and sheep milk

### Lamb meat and pet food products

Mintel indicates that there were 83 new lamb meat, sauces, seasonings & sweet spread products and 58 pet food products launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2016 and January 18<sup>th</sup>, 2021.

**Number of lamb – meat and pet food products launched in Canada, (Jan. 2016 – Jan. 18, 2021)  
total product item count (141)**



Source: Mintel, 2021

According to Mintel, the top category containing lamb as an ingredient was found within pet food products. However, the number of new meat food products that contain lamb on the market follows closely behind the pet food category with top brands such as New Zealand Spring Lamb (7), Sungold Specialty Meats Lamb Tonight (5), Kirkland Signature (4), Agneau du Québec (4), and PC Free From (3). The fastest growing flavours added to lamb products include Juniper, Italian and allspice/Jamaican Pimentos. New ingredients added in these lamb meat products include yeast, veal, cardamom, spearmint, and maize protein.

Top lamb-related parent companies in 2020, include George Weston (3), Loblaw's (3), The Lamb Company (3), Les Filles Fattoush (2), and Les Aliments Rose Hill Foods (2). The categories containing lamb meat and their corresponding top brand over the 5-year period includes pet food (KLN NutriSource), processed fish, meat & egg products (New Zealand Spring Lamb), meals & meal centers (Nirvana Pies), and baby food (Mother Hen).

### Lamb-related blended spices, seasonings or sauce products

Mintel indicates that between January 2016 to January 18<sup>th</sup> 2021, there were 30 additional new blended spices, seasonings, sauces or sweet spread products launched that claimed to enhance the flavour or were recommended that their product was ideally used in lamb dishes. The two categories and its top brands advertised to add to its flavor or is served best with lamb include sauces & seasonings (Dion, McCormick Gourmet, Les Filles Fattoush) and a sweet Mint Jelly spread (Le Petit Chaperon Rouge).

Over the last five years, new lamb-related 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), a cranberry mustard to accompany lamb breast, and sweet chilli, curry sauces/marinades. New flavorful blends recommended to be rubbed onto lamb or to be added in lamb stews/dishes included spices such as dry mint, rosemary, juniper berry blend, curry, Italian seasoning, allspice, garlic salt/powder, cumin, oregano, cloves, nutmeg, mustard & cardamom seeds, onion powder and smoked paprika. There were also, cultural sauce flavours that were inspired from specific cuisine types such as India's original Tikka Masala sauce, Chimichurri Argentinian-inspired sauce, Old Delhi Nihari cooking sauce, two Indian & Caribbean curry sauce & marinades, Mediterranean seasonings, and an Aleppo Dakka spice blend used in Syrian Aleppo dishes.

**Brands of lamb or related products– meat & pet food launched in Canada, (Jan. 2016 – 2021)  
displaying number of products by category**

Category	Top brands launched (product item count)	Number of products in category
Pet food	KLN NutriSource (3), Nutrience Grain Free SubZero (2), Western Family (1), PC President's Choice Nutrition First (2), Dick Van Patten's Natural Balance Delectable Delights/Wild Pursuit/Original Ultra (4), Milk-Bone Farmer's Medley (2), Weruva (2), Crave (2), FirstMate (1), Halo Purely For Pets Spot's Stew (1), Iams Proactive Health (1), Dog for Dog Dogsfood (1), Holistic Blend My Healthy Pet (1), Good Natured (1), Blue Blue Stew's (1), Compliments (1), Gourmet Satisfaction (1), Halo (1), Instinct (1), Castor & Pollux Natural Petworks Pristine Grain Free (1), Lick Your Chops (1), Hill's Prescription Diet (1), Blue Earth Essentials (1), Cesar (1)	58
Processed fish, meat & egg products	New Zealand Spring Lamb (7), Sungold Specialty Meats/Lamb Tonight (8), Agneau du Québec (4), Kirkland Signature (4), PC Free From (3), Western Family (2), PC Plaisirs Gastronomiques (2), Etnico Foods (2), La Fernandière (2), Paradis Végétarien (2), IGA Extra (1), Lalumière Bonanza (1), Alimentation Dynamic (1), Cochonnailles (1)	47
*Sauces & seasonings	Dion (11), McCormick Gourmet (3), Les Filles Fattoush (2), Rose Hill (2), Marché Adonis (2), Aroy-D (1), Pommery (1), Kohinoor (1), Altius Spice House Collection Méditerranée (1), The Spice Tailor (1), PC President's Choice (1)	29
Meals & meal centers	Nirvana Pies (1), Spice It Up Foods (1), MeccaMeals (1), Nirvana Pockets (1), Vijs (1)	5
*Sweet spreads	Le Petit Chaperon Rouge – Mint Jelly best served with lamb, terrine or cheese (1)	1
Baby food	Mother Hen – Strained Lamb Purée (1)	1
<b>Total sample size</b>		<b>141</b>

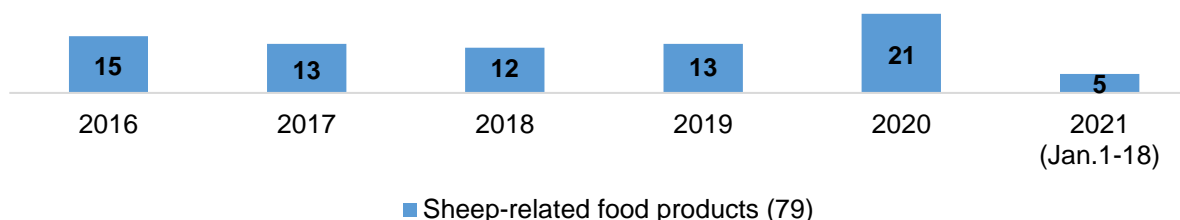
Source: Mintel, 2021

\*Blended spices, seasonings, sauces or sweet spreads: Product claims can be used within lamb dishes

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

According to Mintel, there were 79 new sheep milk, cheese/feta, sheep sorrel, and/or sheep's casing food products launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2016 and January 18<sup>th</sup>, 2021. There were 76 products or 96.2% that contained sheep's milk, which consisted of 35 dairy products: 33 products specifically from the soft/hard/semi-hard or curd & Quark cheese categories (3-4 mixed cheeses, Parmesan/Parmigiano Reggiano, Pecorino, Romano, Mozzarella, Ricotta, Feta & cheddar cheese blends), and 2 yogurt products. In addition, there were pesto or Vodka/cheese pasta or meat sauces (9), seasoned bread crumbs (3), cheese-filled pastry bites/pastry snacks (2), hummus savory spreads (2), pizza/lasagna/flatbread products (11), Cod fillets/chicken parmesan/meatloaf/meatballs/Atlantic Salmon products (5), ravioli/tortelloni/tortellini/Girasoli (9) that contained pasteurized sheep milk and/or sheep milk cheese blends. Lastly, there was one Kabanosy smoked sausage product that was contained in natural sheep casing and there were two Flora products (Turmeric & Cinnamon Flavoured Apple Cider Vinegar Wellness Shot & an Elderberry Apple Cider Vinegar wellness drink) made with sheep sorrel.

**Number of sheep-related food products launched in Canada, (Jan. 2016 – Jan. 18, 2021)  
total product item count (79)**



Source: Mintel, 2021

Over the 5-year period, the top category produced from sheep-related ingredients was found within the dairy category for its sheep milk. According to Mintel, new brands related to sheep milk ingredients include 'Lalumière Bonanza' Spanish/ Moliterno Pecorino/ Romana Lupa hard cheeses (4), 'PC Black Label' hard ripened Manchego/Iberica Reserva & Tapas de Queso fine cheeses (3), and 'Krinos Foods' Greek Town' firm ripened/Greek Feta cheeses (4). The new ingredients often found in these sheep-related products were wine vinegar, buffalo milk, balsamic vinegar sauce, grape must, buffalo mozzarella, and lime juice.

Top parent companies in 2020, mostly for the introduction of new cheese products made with sheep milk (15 out of 21), were Biobio (2), Lactalis Forlana (2), Pastificio Rana (2), Lalumière (2), and Fromagerie Nouvelle France (2). The seven sub-categories over the 5-year period containing sheep milk within cheese/feta or sheep casing food products, along with their corresponding top brand includes dairy (Lalumière), meals & meal centers/sauces & seasonings/side dishes/processed fish, meat & egg products (Western Family), snacks (Pilaros), and savory spreads category (Royal Gourmet Foods).

**Brands of sheep-related dairy/meat food product launches in Canada, (Jan. 2016 – Jan. 18, 2021)  
displaying number of products by category**

Category	Top brands launched (product item count)	Number of products in category
Dairy	Lalumière Bonanza (4), PC Black Label (3), Krinos Foods (4), Biobio (2), Don Bernardo (2), Roussas (2), Fromagerie Nouvell France (2), Dodoni (2), Kirkland Signature (1), PC Splendido (1), Saputo (1), Gran Capitan (1), Maese Miguel (1), PC (1), Quality Sheep Milk (1), Divanis (1), Best Baa Dairy (1), Quesos Rocinante (1), Duero (1), L'Ancêtre (1), Garcia Baquero (1)	35
Meals & meal centers	Western Family (3), PC President's Choice (3), Roman (2), Simply West Coast (1), Dr. Oetker Momenti Made For Me! (1), Panache (1), PC President's Choice Loads Of (1)	12
Sauces & seasonings	Western Family (1), Kirkland Signature (1), PC Splendido (1), Cucina Antica (1), Allessia (1), Monte Bene (1), Milano (1), Le Grand Power of Plants (1), Campagna (1), 4C Gluten Free (1), Martelli (1), Longo's Curato (1)	12
Side dishes	Western Family (3), Giovanni Rana (2), Olivieri Artisan Gigante (1), Duso's (1), Olivieri (1)	8
Processed fish, meat & egg products	Western Family (1), PC President's Choice (1), PC President's Choice Easy Cook! (1), Piller's (1), Curieux Bégin Produits Fins (1), Gourmet Bay (1)	6
Snacks	Pilaros (2)	2
Savory spreads	Royal Gourmet Foods (2)	2
<b>Total sample size</b>		<b>77</b>

Source: Mintel, 2021

## Product examples

### Sous Vide Cooked Lamb Shanks with Gravy

<b>Company:</b>	Save-on-Foods
<b>Brand:</b>	Western Family
<b>Sub-category:</b>	Processed fish, meat & egg products
<b>Country:</b>	Manufactured in Canada, not imported
<b>Related claims:</b>	No additives/preservatives, gluten free, low/no/reduced allergen
<b>Store name:</b>	Save-On-Foods supermarket, Burnaby ON
<b>Launch type:</b>	New variety/range extension
<b>Date published:</b>	January 2021
<b>Price in CAD dollars:</b>	\$12.99



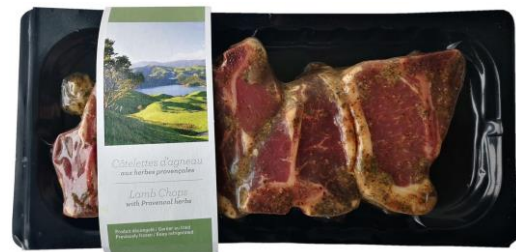
Source: Mintel, 2021

### Product description:

The fully cooked, ready-to-serve product is free from gluten and added preservatives, and can be prepared in 25 minutes. It is made in Canada from domestic and imported ingredients.

### Lamb Chops with Provençal Herbs

<b>Company:</b>	Alimentation Dynamic
<b>Brand:</b>	Alimentation Dynamic
<b>Sub-category:</b>	Processed fish, meat & egg products
<b>Country:</b>	Market – Canada
<b>Store name:</b>	Sobeys supermarket, Toronto ON
<b>Launch type:</b>	New Product
<b>Date published:</b>	December 2020
<b>Price in CAD dollars:</b>	\$10.98



Source: Mintel, 2021

### Product description:

Alimentation Dynamic Lamb Chops with Provençal Herbs is now available. The product retails in a 502g pack.

## Australian Lamb Skewers

<b>Company:</b>	Loblaws
<b>Brand:</b>	PC Free From
<b>Sub-category:</b>	Processed fish, meat & egg products
<b>Market:</b>	Manufactured in Canada, not imported
<b>Related claims:</b>	Halal
<b>Store name:</b>	Provigo supermarket, Montréal East
<b>Launch type:</b>	New variety/range extension
<b>Date published:</b>	October 2020
<b>Price in CAD dollars:</b>	\$24.99



Source: Mintel, 2021

### **Product description:**

This traditional Italian-style appetizer is halal certified and is made with tender meat raised without antibiotics. It retails in a 480g pack, containing 24 skewers.

## Reserva Manchego Cheese

<b>Company:</b>	Jan K. Overweel
<b>Brand:</b>	Duero
<b>Sub-category:</b>	Dairy/hard & semi-hard cheese
<b>Country:</b>	Manufactured in Spain, market Canada
<b>Related-ingredients:</b>	Pasteurized sheep's milk
<b>Store name:</b>	Bonanza supermarket, Montréal-Saint Leonard
<b>Launch type:</b>	New Product
<b>Date published:</b>	January 2021
<b>Price in CAD dollars:</b>	\$18.95



Source: Mintel, 2021

### **Product description:**

Duero Reserva Manchego Cheese is described as smooth and mellow with a gentle sweetness. This product said to have been aged for three years, contains 25% of milk fat and 36% of moisture, and retails in a 782g pack.

## 4-Cheese Pasta Sauce

<b>Company:</b>	Longo Brothers Fruit Markets
<b>Brand:</b>	Longo's Curato
<b>Sub-category:</b>	Sauces & seasonings/pasta sauces
<b>Country:</b>	Manufactured in Italy, market Canada
<b>Related-ingredients:</b>	PDO Pecorino Romano cheese (sheep's milk, rennet, salt)
<b>Store name:</b>	Longos supermarket, Brampton ON
<b>Launch type:</b>	New Product
<b>Date published:</b>	January 2021
<b>Price in CAD dollars:</b>	\$6.99



Source: Mintel, 2021

### **Product description:**

The product is free from added sugar, and retails in a 650ml pack.

## Pico de Gallo Crusted Atlantic Cod

<b>Company:</b>	Loblaws
<b>Brand:</b>	PC President's Choice Easy Cook!
<b>Sub-category:</b>	Processed fish, meat & egg products
<b>Market:</b>	Manufactured in UK, market Canada
<b>Related-ingredients:</b>	Manchego style crumbs (sheep's milk hard ripened cheese)
<b>Store name:</b>	Fortinos supermarket, Brampton ON
<b>Launch type:</b>	New variety/range extension
<b>Date published:</b>	January 2021
<b>Price in CAD dollars:</b>	\$8.99



Source: Mintel, 2021

### **Product description:**

This product comprises of sustainably sourced, wild, skin-on, boneless cod fillets crusted with a combination of semi-dried tomato, sourdough and sharp Manchego cheese. The uncooked, mildly spiced product is prepared in a ready-to-cook tray, and contains no artificial flavours or synthetic colours. It retails in a 320g pack with two servings.

## Resources

CATSNET, Statistics Canada data, 2020

GlobalData Intelligence Center: Consumer database, 2021

Mintel Global Data New Product (GDNP) database, 2021

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