



Global Agri-Food

Most Influential Nations Ranking

Prepared by the Agri-Food Analytics Lab, Dalhousie University
Commissioned by MNP



MNP's summary

Canada's agri-food sector stands at a critical juncture, balancing significant potential with pressing challenges that must be addressed to maintain and expand its global influence and competitive position. *The Global Agri-Food – Most Influential Nations Ranking* assesses current strengths and growth areas for this critical domestic industry — and highlights several actionable takeaways to make Canada more globally competitive.

By leveraging its abundant natural resources, advanced agricultural technologies, and political stability, Canada has the foundation to lead in global food and beverage markets. Further success will require targeted investments in research, innovation, and technology to accelerate entrepreneurial growth. Moreover, increased collaboration would help to improve the regulatory environment, while continuous strategic planning could address other challenges such as food affordability and inflation.

Canada's ability to innovate, adapt, and collaborate will determine its role in the future of the food and beverage industry. By prioritizing R&D, embracing advanced technologies, and addressing systemic gaps, the agri-food sector can strengthen its domestic footprint and position Canada as a global leader. These efforts will ensure sustainable growth, resilience against climate and geopolitical disruptions, and a prosperous future for generations.^{1,2}

This summary serves as a foundation for future progress, highlighting the shared responsibility to improve data practices and strengthen the global agri-food landscape.

Closing the Gap: Canada's Agri-food Challenge

Canada's agri-food industry plays an invaluable role in our country. From farmers to factory workers to grassroots entrepreneurs, all are essential to ensuring Canadians are fed and employed and contributing to an economy that can thrive.

So, how competitive is Canada — and where do we fit among other nations?

MNP reached out to Dr. Sylvain Charlebois and his team at the Agri-Food Analytics Lab at Dalhousie University to ask a simple question with a complex answer: Is Canada as competitive as we could be?

The 'Global Agri-Food Most Influential Nations' report is the first of its kind to categorize G20 countries by competitiveness using a three-tiered scale: High Performance (tier one), Moderate Performance (tier two), and Low Performance (tier three).

The findings suggest that the U.S., Japan, China, and Germany are in tier one. Canada, meanwhile, ranks in tier two, trailing slightly behind Australia and Russia, in eleventh place, overall.

Canada's evaluation presented mixed results. While Canada has high performance in areas such as food security and political stability, opportunities for improvement include greater innovation, grants and strategic planning to address exports. The report also highlights Canada would also benefit from increased capital investment and training. Coupling these entrepreneurial growth strategies with investment in R&D could assist in driving a more competitive marketplace.

The report, developed by the Agri-Food Analytics Lab at Dalhousie University, provides valuable firsthand data that pinpoints opportunities for improvement. It also underscores how increased transparency and accountability, and a strong relationship among industry peers, policymakers, and consumers will continue to build a more sustainable, competitive, and innovative agri-food sector.

Supporting the entrepreneurial drive

A key factor highlighted in the index is the need to stimulate entrepreneurial growth. Intricate regulatory policies can be tricky to navigate, especially when coupled with the evergreen challenges owner-managers face. Too often, small businesses are forced to look to larger corporations for financial support before having the opportunity to realize the founder's vision.

This issue contributes to restricted growth and prevents local enterprises from realizing their full potential. The most effective regulatory environment is one that balances safety and quality. By aligning policy objectives, together we can improve market competition, and advance Canada's place in the global food and beverage sector.

The findings also emphasize a clear need for growth within innovation, capital investment, and training. Investing in the development of new products and processes can improve productivity, optimize competitiveness, and support Canadians in the fight against food inflation. Additionally, it can reinforce the agri-food sector's credibility and encourage investment while streamlining the path to market.

Canada is currently secure in its food production. Still, climate change, geopolitical tensions, and supply chain disruptions are rapidly reshaping the global landscape. Canada's agri-food industry must proactively address these challenges.

With a coordinated effort, we can secure a prosperous future for Canada's Agri-food sector and the broader economy.

Key findings

The following is an overview, from the report, of the most relevant observations and recommendations for Canadian business leaders and policymakers. By proactively confronting these issues head-on, Canada has significant potential to rise in the global rankings and generate significant economic growth.



\$13.3
BILLION

Canada's agricultural
trade surplus

Agriculture and commodities are key to future prosperity

Countries must invest domestically in the future of agriculture and commodities, and support those that would create wealth through agricultural technology, food science, and food retail.



Regulatory obstacles for small businesses

Local businesses and ventures often encounter challenges, such as navigating regulatory frameworks, which can influence their growth and success.



3rd

Canada's 2024
Ranking

Food security matters

Canada's food security stands among the highest in the world, bolstered by its abundant agricultural resources and advanced farming technologies. Countries that prioritize food security through explicit improvement strategies have enhanced productivity in all sectors.



Reckoning with Canada's geography

The distribution of goods across such a large and diverse landscape incurs high costs, which tend to increase with rising energy prices.



65%

of Canada's grocery market
share consists of 3 retailers

Opportunities to create value

The concentration of market power among a few major players stifles competition, innovation, and competitiveness within the agri-food sector. While Canada excels in producing raw materials, the benefits of transforming these commodities into high-value products are frequently realized by other countries.



What's next for Canada?

Canada can gain valuable insights by investigating what top-performing countries do differently to encourage and incentivize industry / post-secondary education collaborations.

Learn how evolving agri-food dynamics can open new opportunities for your business. Our report highlights critical findings that shape the future of agriculture, and food and beverage businesses. For more information or to discuss how these trends may affect your operations, connect with our team today.

Matt MacDonald | National Leader, Food & Beverage Processing | matt.macdonald@mpn.ca



Appendix 1

Global Agri-Food

Most Influential Nations Ranking: Analysis and Findings

1. Introduction

The pandemic disrupted global food supply chains, altering consumer behaviour³ and exposing vulnerabilities in import and export systems.^{4 5} Years of food price inflation⁶ and geopolitical conflicts⁷, have further exacerbated these challenges. These issues underscore the need for nations to prioritize domestic food security and invest in agricultural innovation and sustainability.^{8 9}

For Canada, benchmarking against leading nations provides critical insights. Adopting proven strategies can address gaps such as fragmented policies, incomplete data collection, and limited access to resources.^{10 11 12} These actions will enhance Canada's food sovereignty, competitiveness, and ability to capture greater value in global markets.

Purpose

This report is a comparative study that measures and ranks the performance of 19 countries considered to be in the G20: Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russia, Saudi Arabia, South Africa, South Korea, Turkey, the United Kingdom, and the United States.

By establishing clear benchmarks supported by reliable, objective indicators, it highlights critical factors that drive success in international food markets. While data transparency and collection capacity vary across nations, the report identifies best practices in managing commodities, fostering market entrants, and mitigating risks from regional conflicts. More importantly, it aims to inspire dialogue on enhancing global influence and improving outcomes in the agri-food market within Canada.

Methodology

The three-tiered output benchmarking scale used in this report's rankings is intended to convey the relative competitive advantage of each country's food system:

- **Tier 1 (High Performance):** Metrics in this category represent outstanding performance or conditions that significantly exceed average industry standards or expectations.
- **Tier 2 (Moderate Performance):** Metrics in this category reflect performance or conditions that meet industry standards or expectations, with room for improvement.
- **Tier 3 (Low Performance):** Metrics in this category indicate areas needing improvement, falling below industry standards or expectations.

The rankings reflect both success and areas for improvement. These evaluations offer a chance to identify countries that implement effective policies and practices that emphasize global competitiveness in commodities and agri-food. The evaluations focus on five areas of influence:

- Support for entrepreneurship
- Food security and nutrition
- Environmental sustainability
- Retail and fiscal regimes
- Trade/geopolitics.








Data was sourced from reputable national and international organizations, including the World Bank, the Organisation for Economic Cooperation and Development, and the Economist Intelligence Unit. Indicators were selected based on reliability, availability, and ability to support objective benchmarking across time and regions.

Figure 1: Pillars of influence and associated indicators

Entrepreneurial Ecosystem Support, Technology and Innovation	Access to managerial training for agri-food businesses Investment in agri-food research and innovation
Food Security and Nutrition	Access to affordable and nutritious food National strategies for improving food security
Retail and Fiscal Regime	Market share and influence of major agri-food retailers Concentration and coordination in the supply channel
Trade and Geopolitics	Value of agri-food exports and imports Political stability and policies impacting agri-food trade
Sustainability and Environmental Impact	Adoption of sustainable farming practices Biodiversity and conservation efforts in agriculture Methane and nitrous oxide impact of agri-food production





Overall Performance		
Country	Overall score	Tier
 United States	1.19	Tier 1
 Japan	1.40	Tier 1
 China	1.44	Tier 1
 Germany	1.50	Tier 1
 United Kingdom	1.51	Tier 2
 India	1.53	Tier 2
 South Korea	1.53	Tier 2
 France	1.58	Tier 2
 Brazil	1.61	Tier 2
 Mexico	1.68	Tier 2
 Australia	1.69	Tier 2
 Russia	1.69	Tier 2
 Canada	1.72	Tier 2
 Italy	1.75	Tier 3
 Saudi Arabia	1.89	Tier 3
 Turkey	2.03	Tier 3
 Indonesia	2.07	Tier 3
 South Africa	2.11	Tier 3
 Argentina	2.15	Tier 3

Limitations

Data transparency enables market players to authenticate information, make informed decisions and therefore cultivate an atmosphere of reliability in markets. The index found that this is an issue within all categories and cannot be attributed to any country specifically, as all countries experienced some degree of lack of transparency. By prioritizing transparency, market participants and policymakers alike can work towards a more resilient, informed, and competitive global food system.

Where secondary data was unavailable, limitations are noted in the report. To reduce subjectivity, criteria were vetted by international experts in food economics, business, and policy, resulting in the selection of 12 indicators. These metrics prioritize measurable outcomes to ensure meaningful comparisons and actionable insights.



2. Food security and nutrition indicator

Food security and comprehensive food policies are essential for a nation's health, economic growth, and global competitiveness. Countries with high food security experience greater productivity, higher agriculture value, and stronger job creation, all of which drive economic resilience and trade opportunities.¹³

The pandemic exposed vulnerabilities in global food systems, causing significant disruptions in agricultural trade and supply chains due to regulatory constraints on the movement of goods and workers.^{14 15} Combined with rising food prices driven by climate events and geopolitical conflicts, these challenges have heightened concerns about affordability and accessibility for vulnerable populations.

This chapter evaluates food security levels, national food policies, and public confidence in food supply, with a focus on opportunities for Canada to strengthen its position as a global leader.

2.1 Food security and policy

Food security refers to the state of having an adequate and accessible supply of healthy food in a country.¹⁶ Nations with strong food security enjoy improved efficiency, better public health, and greater economic contributions from both individuals and enterprises through enhanced trade and productivity.¹⁷

Canada ranks among the most food-secure nations globally, supported by vast agricultural resources, advanced farming technologies, and a highly efficient supply management system. These factors ensure stable food prices and reliable supply chains, contrasting with the volatility seen in many nations.

Following the outbreak of the COVID-19 pandemic, several countries have faced challenges in ensuring their own domestic food security. However, as rising costs, climate change, and affordability challenges continue — they threaten long-term food security. Countries that prioritize food security through strategic innovation and policy improvements enhance productivity across all sectors, boost GDP, and foster global competitiveness.

Opportunities for Canada

- Leverage advanced techniques like agronomy and predictive analytics to lower costs, boost productivity, and improve sustainability.
- Develop a national food strategy to align domestic production with consumption, ensuring both economic and environmental goals are met.
- Strengthening food security through innovations addressing climate change and affordability challenges, particularly for vulnerable populations.

Country	Global food security ranking	Access to affordable and nutritious food
 France	80.20	High Performance
 Japan	79.50	High Performance
 Canada	79.10	High Performance
 United Kingdom	78.80	High Performance
 United States	78.00	High Performance
 Germany	77.00	High Performance
 Australia	75.40	High Performance
 China	74.20	High Performance
 Italy	74.00	High Performance
 South Korea	70.20	High Performance
 Saudi Arabia	69.9	Moderate Performance
 Mexico	69.10	Moderate Performance
 Russia	69.1	Moderate Performance
 Turkey	65.3	Moderate Performance
 Brazil	65.10	Moderate Performance
 Argentina	64.80	Moderate Performance
 South Africa	61.70	Moderate Performance
 Indonesia	60.20	Moderate Performance
 India	58.90	Low Performance

Table 1 presents the global food security rankings for the G20 countries in 2022. This metric includes food access, affordability, safety, and sustainability. France is the top-ranked country since less than 20 percent of its population faces food insecurity. Unsurprisingly, Western countries with well-established trade relations and wealth are the most food secure.

2.1.1 National food strategy

A national food strategy offers a roadmap to maximize technological benefits, address environmental challenges, and guarantee food security. Countries with robust food strategies achieve higher productivity, foster innovation, and elevate their global competitiveness.

Compared with other nations, Canada can benefit from a more comprehensive food strategy. The current inflationary environment for food prices has undergone substantial changes compared to the pre-pandemic period. By implementing a clear, unified vision, Canada can empower its agri-food sector to meet its full potential.






















Table 2: Countries with an explicit and comprehensive strategic plan for food policy¹⁹

Country	Year strategy released	National strategies for improving food security
 Brazil	2024	High Performance
 China	2024	High Performance
 Germany	2024	High Performance
 India	2024	High Performance
 South Korea	2024	High Performance
 Australia	2023	High Performance
 France	2023	High Performance
 Indonesia	2023	High Performance
 Mexico	2023	High Performance
 Saudi Arabia	2023	High Performance
 United States	2023	High Performance
 Japan	2021	Moderate Performance
 United Kingdom	2021	Moderate Performance
 Canada	2020	Moderate Performance
 Italy	2020	Moderate Performance
 Argentina	2020	Moderate Performance
 Russia	2019	Moderate Performance
 South Africa	...	Low Performance
 Turkey	...	Low Performance

Key actions for Canada

- Establish a coherent national food policy to address food security challenges exacerbated by the pandemic and inflationary pressures.
- Invest in crop diversity and sustainable practices to mitigate risks from climate variability and ensure long-term resilience.
- Benchmark successful strategies from other nations to refine policies and maintain Canada's leadership in food security and sustainability.

Table 3: Overall scores food security and policy

Country				
	Australia	1.00	High Performance	High Performance
	China	1.00	High Performance	High Performance
	France	1.00	High Performance	High Performance
	Germany	1.00	High Performance	High Performance
	South Korea	1.00	High Performance	High Performance
	United States	1.00	High Performance	High Performance
	Brazil	1.50	High Performance	High Performance
	Canada	1.50	High Performance	Moderate Performance
	Indonesia	1.50	High Performance	High Performance
	Italy	1.50	High Performance	Moderate Performance
	Japan	1.50	High Performance	Moderate Performance
	Mexico	1.50	Moderate Performance	High Performance
	Saudi Arabia	1.50	Moderate Performance	High Performance
	United Kingdom	1.50	High Performance	Moderate Performance
	Argentina	2.00	Moderate Performance	Moderate Performance
	India	2.00	Low Performance	High Performance
	Russia	2.00	Moderate Performance	Moderate Performance
	South Africa	2.50	Moderate Performance	Low Performance
	Turkey	2.50	Moderate Performance	Low Performance

The scores of G20 countries for Food Security and Policy are presented in Table 3. Naturally, countries with high incomes are ranked higher. Changes in these rankings will be contingent upon the capacity of these nations to adjust to a shifting climate and the evolving global political environment.

Canada's abundant resources and advanced technologies position it well to lead on food security. By addressing policy gaps and leveraging innovations, Canada can reinforce its global competitiveness, secure its food systems, and strengthen economic opportunities.

3. Trade and geopolitics (TAG) indicator

3.1 Value of agri-food exports and imports

Trade is vital for wealth creation and food security, attracting investment and fostering economic growth in the agri-food sector. A strong export sector not only supports innovation and sustainability but also signals global competitiveness, while imports diversify domestic diets.²⁰

Table 4: Agriculture balance of trade²¹

Country	Trade balance value (Billions - USD)	Value of agri-food exports and imports
 Australia	47.5	High Performance
 Brazil	29.4	High Performance
 Mexico	21.4	High Performance
 India	17.9	High Performance
 Canada	13.3	High Performance
 France	7.9	High Performance
 Russia	7.8	High Performance
 Turkey	6.8	Moderate Performance
 South Africa	5.5	Moderate Performance
 Italy	2.4	Moderate Performance
 United States	-3	Moderate Performance
 Argentina	-6.9	Moderate Performance
 United Kingdom	-7	Moderate Performance
 Indonesia	-10.6	Low Performance
 Saudi Arabia	-25.3	Low Performance
 Japan	-30.5	Low Performance
 Germany	-32.3	Low Performance
 South Korea	-36.3	Low Performance
 China	-137.4	Low Performance

Table 4 shows the aggregate trade surplus or deficit in the agriculture sector of a country, measured in USD. A negative score indicates a trade deficit, meaning that the country's imports exceed its exports. This survey suggests that a trade deficit may indicate a country's control of its agri-food fortunes is compromised, increasing its dependency relative to other nations.

Canada's trade surplus highlights its strong position, but underscores missed opportunities. Many of its exports consist of raw materials, with value-added benefits often realized abroad. Through investing in domestic processing and innovation, Canada can capture more economic value, create jobs, and strengthen its global influence.

Opportunities for Canada












- Expand value-added processing to boost exports of high-value agri-food products.
- Attract foreign and domestic investment to modernize supply chains and enhance trade competitiveness.

Political Stability

Political stability is essential for agriculture productivity and investment. Conflict disrupts supply chains, creates price shocks, and hinders innovation by shifting the focus from growth to survival. Canada's stable parliamentary system promotes a reliable environment for investment, growth and advancement, enhancing its reputation as a dependable global partner.²²



Table 5: Political stability²³

Country	Political instability	Political stability and policies impacting agri-food trade
 Canada	95.3	High Performance
 Australia	94.9	High Performance
 Germany	91.5	High Performance
 Japan	90.1	High Performance
 United Kingdom	87.2	High Performance
 France	85.1	High Performance
 Italy	82.2	High Performance
 United States	82.1	High Performance
 South Africa	79.1	Moderate Performance
 South Korea	72.7	Moderate Performance
 China	72	Moderate Performance
 Argentina	70.1	Moderate Performance
 Brazil	64.4	Moderate Performance
 Saudi Arabia	61.4	Moderate Performance
 Mexico	59.6	Moderate Performance
 Indonesia	55.3	Moderate Performance
 India	50.5	Moderate Performance
 Turkey	43	Low Performance
 Russia	28.6	Low Performance

While geopolitical tensions disrupt global food systems, Canada's stability positions it to lead in mitigating these challenges. Investing in climate-resilient infrastructure and conflict-resistant supply chains can further solidify Canada's role as a global agri-food leader.



4. Retail and fiscal regime

4.1 Grocer market share

Ongoing consolidation in Canada's grocery sector continues to disincentivize innovation and make it difficult for smaller producers and to thrive. A few major players dominate the Canadian market, with acquisitions strengthening their market power while leaving food manufacturers and independent grocers struggling to compete.^{24 25} Producers face reduced autonomy and lower returns on investment (ROI), making it difficult to scale operations or invest in modernization and innovation.

Internationally, countries like Australia and the U.K. have addressed similar challenges through the implementation of grocery codes of conduct. These frameworks have successfully promoted fair practices, supported smaller market players, and improved supply chain transparency.

In Canada, the recently introduced Grocery Code of Conduct, set to take effect on June 1, 2025, represents a significant step toward addressing these issues. Major retailers have committed to adopting the code, which aims to create a more equitable marketplace.²⁶

Table 6: Market share of top three major retailers²⁷

Country	Market share of top 3 major retailers	Market share and influence of major agri-food retailers
 Italy	31.1	High Performance
 United States	33.4	High Performance
 Japan	34.8	High Performance
 Mexico	42.4	Moderate Performance
 Germany	45.4	Moderate Performance
 France	51	Moderate Performance
 Saudi Arabia	55.1	Moderate Performance
 Russia	55.7	Moderate Performance
 Argentina	58.1	Moderate Performance
 Brazil	59	Moderate Performance
 United Kingdom	60.9	Low Performance
 Indonesia	62.7	Low Performance
 Canada²⁸	65.2	Moderate Performance
 South Korea	65.3	Low Performance
 China	69.4	Low Performance
 South Africa	77.1	Low Performance
 Australia	78.4	Low Performance
 Turkey	80	Low Performance
 India	89.2	Low Performance

Key provisions of the Grocery Code of Conduct

- Establishes guidelines for fair negotiations between grocers and suppliers, reducing the misuse of penalties and fees.
- Introduces a formal dispute resolution process, with sanctions for systemic violations and mechanisms to ensure accountability.
- Aims to balance market power by increasing transparency and supporting equitable practices in the supply chain.

While international examples demonstrate the benefits of such measures, Canada's success will depend on effective enforcement and broad industry commitment. Experts suggest the code may not directly affect consumer prices but will provide stability for suppliers, particularly in rural and underserved communities.

Comparative insights

- **Australia and the U.K.:** Their grocery codes of conduct have improved relationships between retailers and suppliers, reduced unfair practices, and increased competition.
- **Canada:** By adopting similar measures, the country has an opportunity to create a more competitive, sustainable agri-food market that supports smaller players while maintaining supply chain efficiency.

Opportunities for Canada

- Use the Grocery Code of Conduct to support innovation, improve market access for smaller producers, and enhance supply chain competitiveness.
- Monitor the implementation and outcomes of the code to refine and expand its impact across the agri-food sector.
- Benchmark progress against international standards to ensure long-term improvements in fairness and competitiveness.

By aligning with global best practices and addressing domestic challenges, Canada can foster a more balanced and competitive grocery sector. These efforts will ensure a healthier agri-food ecosystem and contribute to the sector's long-term growth.

4.1.1 Logistics

Canada's vast geography and high transportation costs create significant logistical challenges. Rising energy prices and labour disruptions further strain supply chains, affecting trade reliability and domestic market stability.^{29,30}



Table 7: Planning and logistics ranking³¹

Country	Planning and logistics ranking	Concentration and coordination in the supply channel
 Germany	80.0	High Performance
 Japan	75.8	High Performance
 United Kingdom	74.8	High Performance
 United States	72.3	High Performance
 France	71.0	High Performance
 South Africa	69.5	Moderate Performance
 China	69.3	Moderate Performance
 Australia	68.8	Moderate Performance
 Italy	68.5	Moderate Performance
 Canada	68.3	Moderate Performance
 South Korea	65.3	Moderate Performance
 Saudi Arabia	64.2	Moderate Performance
 Indonesia	53.8	Moderate Performance
 Turkey	53.8	Moderate Performance
 India	51.5	Moderate Performance
 Mexico	51.2	Moderate Performance
 Brazil	49.8	Low Performance
 Argentina	47.3	Low Performance
 Russia	44.0	Low Performance

Planning and logistics rankings from the World Bank's Logistics Performance Index are presented in Table 7.

To remain competitive, Canada should consider addressing inefficiencies in supply chain management and investing in resilient transportation infrastructure.

The distribution of goods across such a large and diverse landscape incurs high costs, which tend to increase with rising energy prices. This geographical complexity requires extensive transportation networks, further driving up operational expenses.

Table 8: Overall retail and fiscal regime score

Country	Score	Market share and influence of major agri-food retailers	Concentration and coordination in the supply channel
 United States	1.00	High Performance	High Performance
 Germany	1.67	Moderate Performance	High Performance
 France	1.67	Moderate Performance	High Performance
 Italy	1.67	High Performance	Moderate Performance
 Japan	1.67	High Performance	High Performance
 Australia	2.00	Low Performance	Moderate Performance
 United Kingdom	2.00	Low Performance	High Performance
 Canada	2.00	Moderate Performance	Moderate Performance
 Saudi Arabia	2.00	Moderate Performance	Moderate Performance
 Mexico	2.00	Moderate Performance	Moderate Performance
 Indonesia	2.33	Low Performance	Moderate Performance
 South Africa	2.33	Low Performance	Moderate Performance
 Russia	2.33	Moderate Performance	Low Performance
 China	2.33	Low Performance	Moderate Performance
 Argentina	2.67	Moderate Performance	Low Performance
 Brazil	2.67	Moderate Performance	Low Performance
 India	2.67	Low Performance	Moderate Performance
 Turkey	2.67	Low Performance	Moderate Performance
 South Korea	2.67	Low Performance	Moderate Performance

Table 8 presents the overall score of the retail and fiscal regime for agri-food for the G20. The U.S. scores high in each category, given its friendly trade conditions and competitive grocery retail environment. The U.S. agricultural industry is very competitive globally and they are part of many free trade agreements and partnerships worldwide.



5. Entrepreneurship ecosystem support

5.1 Research and development

Strong R&D systems drive agri-food innovation and ensure competitiveness. While Canada has a solid foundation, limited funding and fragmented partnerships hinder progress, reducing the sector's ability to achieve breakthroughs.³²

Canada's focus on short-term, practical applications often limits its ability to lead in high-risk, transformative innovations. By bridging funding gaps and enhancing collaboration between academia, government, and industry, Canada can strengthen its global standing in agri-food research.

Opportunities for Canada

- Increase funding for cutting-edge research in agri-tech and sustainability.
- Foster partnerships to accelerate innovation and enhance the commercialization of new technologies.

6.2 Education

Accessible and affordable education is critical for developing a skilled agri-food workforce. However, post-secondary institutions are challenged with limited budgets. While industry-academic collaborations could help, these are currently the exception, rather than the norm. As a result, Canadian graduates often enter the workforce with evergreen skills, but not necessarily those needed to navigate contemporary global challenges.^{34 35}

Table 9: Research and development ranking³³

Country	R&D ranking	Investment in agri-food research and innovation
 South Korea	100	High Performance
 Japan	100	High Performance
 China	93.3	High Performance
 United States	60.7	High Performance
 South Africa	48.9	Moderate Performance
 Germany	44.4	Moderate Performance
 Canada	44.4	Moderate Performance
 India	39.3	Moderate Performance
 United Kingdom	36.3	Moderate Performance
 Turkey	30.4	Moderate Performance
 Australia	23	Low Performance
 Saudi Arabia	22.5	Low Performance
 Indonesia	21.5	Low Performance
 Russia	19.3	Low Performance
 Mexico	19.3	Low Performance
 Italy	18.5	Low Performance
 France	17	Low Performance
 Brazil	11.9	Low Performance
 Argentina	5.2	Low Performance

Table 10: Access to education and resources ranking³⁶

Country	Access to ag-tech education and resources ranking	Access to managerial training for agri-food businesses
 Argentina	81.6	High Performance
 Saudi Arabia	70.5	High Performance
 Russia	65.5	High Performance
 South Korea	62	High Performance
 United Kingdom	60.5	High Performance
 Germany	57.4	Moderate Performance
 Canada	57	Moderate Performance
 France	55	Moderate Performance
 Turkey	54.7	Moderate Performance
 Japan	52.5	Moderate Performance
 India	52.2	Moderate Performance
 Indonesia	52.2	Moderate Performance
 China	50	Moderate Performance
 Mexico	50	Moderate Performance
 Brazil	50	Moderate Performance
 South Africa	43.1	Low Performance
 Italy	42.2	Low Performance
 United States	38.1	Low Performance
 Australia	28.7	Low Performance

Enhancing industry-academic partnerships and expanding practical training opportunities will ensure Canada's workforce is prepared to meet the demands of a competitive agri-food sector.

Opportunities for Canada

- Promote agri-tech education to attract diverse talent and meet industry demands.
- Increase funding for internships and co-op programs to bridge the gap between academic training and practical application.



7. Canada's Performance

Canada ranks eleventh within Tier 2 (Moderate Performance) among G20 nations, reflecting strong resources but gaps in policy and innovation. A lack of a cohesive national food strategy limits the sector's ability to address food security and maximize its global influence.

Moreover, the country could benefit from investing in research and development (R&D) to help upskill its domestic labour force, bridge the innovation gap and drive breakthroughs in precision agriculture, AI-driven supply chain management, and advanced food processing systems.^{37 38} These technologies can enhance productivity, improve sustainability, and create new opportunities for wealth generation. However, structural issues (such as inconsistent tax policies, limited data transparency, and inadequate collaboration) risk hindering progress.^{39 40 41}

Enhanced data transparency and collaboration across all stakeholders, including government, industry, and academia, are essential for fostering trust and creating a robust domestic agri-food ecosystem.^{42 43 44} Policies that balance taxation and subsidies can attract investment, stimulate innovation, and ensure a resilient and diverse agricultural portfolio.^{45 46}

Key Actions for Canada

- Develop a unified food policy to align domestic production and consumption goals.
- Provide greater financial support to startups to drive innovation and economic growth.
- Implement an industry-led grocer's code of conduct to ensure fair market practices and encourage competition.

By addressing these gaps and leveraging its strengths, Canada can secure its position as a leader in the global agri-food market.



Appendix 2

Global Agri-Food

Most Influential Nations Ranking: References

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Matt MacDonald, MBA

National Leader, Food & Beverage Processing
matt.macdonald@mnp.ca

