

Required Report: Required - Public Distribution

Date: January 24, 2025

Report Number: CA2024-0061

Report Name: Exporter Guide Annual

Country: Canada

Post: Ottawa

Report Category: Exporter Guide

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Report Highlights:

Canada continues to be the top international market for U.S. consumer-oriented products, accounting for approximately 25 percent of the United States' total global consumer-oriented agricultural exports. Regulatory cooperation, sophisticated transportation logistics and financial markets, geographic proximity, similar consumer preferences, and relatively affluent consumers are the reasons Canada continues to offer excellent export opportunities for new-to-export small- and medium-sized U.S. companies. Contact the USDA Foreign Agricultural Service office in Ottawa at AgOttawa@state.gov to learn more about the promising export opportunities in Canada.

Executive Summary:

Canada is a high-income country and in 2023, Canada’s GDP reached \$2.1 trillion, positioning the country as the 10th largest economy in the world and a strategic regional trade partner for the United States. Canada is a major producer of food and agricultural products and a leading player in the global marketplace. In 2023, Canada was the top market for U.S. agricultural and ag-related exports at \$33 billion.

Consumer-Oriented Agricultural Imports

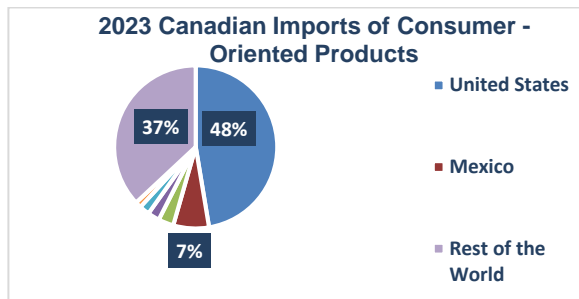


Chart 1: Top Exporting Countries to Canada

Food Service Industry:

Canada’s food service sales reached \$85 billion in 2023. The growth forecast for 2023 is projected to be three percent, which reflects a stabilization of the market after covid-related slowdowns in 2020-2022. Inflation and labor shortages continue to be challenges facing the market.

Food Retail Industry:

Canada’s food retail sales reached \$118 billion in 2023. Canada’s retail market is mature and consolidated with five leading retailers – three traditional grocers and two general merchandisers – commanding 80 percent of the market. The remainder of the market is represented by smaller regional retail chains, including over 6,900 independents and 27,000 small and independent convenience stores.

Food Processing Industry:

Canada’s food processing industry is comprised of 8,500 establishments; approximately 92 percent of them are small companies with less than 100 employees. Food processing value of production reached \$156 billion in 2022.

Quick Facts CY 2023

Imports of Consumer-Oriented Products
\$35 billion

List of Top 10 Growth Products in Host Country

- | | |
|---------------------------|-------------------------|
| 1) Savory snacks | 2) Non-alcoholic bev |
| 3) Ready-to-drink bev | 4) Baked goods |
| 5) Prepared meals | 6) Protein substitutes |
| 7) Nuts, seeds, and mixes | 8) Prepared salads |
| 9) Dried fruits | 10) Frozen fruits & veg |

Food Industry by Channels (U.S. billion)

Retail Food Industry	\$118
Food Service-HRI	\$85
Food Processing	\$156
Food and Agriculture Exports	\$55

Top 10 Host Country Retailers (by sales)

- | | |
|-------------------------|-------------------|
| 1) Loblaws (28 percent) | 2) Sobeys (19) |
| 3) Metro (11) | 4) Costco (9) |
| 5) Walmart (8) | 6) Overwaitea (4) |
| 7) Co-ops (3) | 8) Couch-tard (2) |
| 9) North West Co (1) | 10) Dollarama (1) |

GDP/Population

Population (millions): 38.9
 GDP (billions USD): \$2,140
 GDP per capita (USD): \$53,300

Sources: Canadian Grocer, Trade Data Monitor, Statistics Canada and Euromonitor International

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
- Well-established market with modern distribution channels - Relatively high consumer disposable income levels	- Strong U.S. dollar - Consolidated retail sector - High inflationary pressure
Opportunities	Threats
- Strong consumer demand for value, high-quality - U.S. products enter duty free under USMCA	- High level of competition from U.S., domestic, and third-country suppliers - Strong “buy local” programs

SECTION I. MARKET OVERVIEW

Exports of U.S. agricultural and agriculture-related products to Canada reached \$33 billion¹ in 2023 and is forecast to top \$33 billion again in 2024. The United States and Canada maintain the world's largest bilateral agricultural trading relationship with more than \$241 million worth of food and agricultural products crossing the U.S.-Canada border every day.² In 2023, exports of U.S. consumer-oriented food products³ to Canada reached \$20.4 billion.

Canada and the United States implemented the Canada-U.S. Free Trade Agreement (FTA) in 1989, which provided for the elimination of tariffs on most goods, including agricultural products. The FTA was replaced by the North American Free Trade Agreement (NAFTA) in 1994, when Mexico joined. On July 1, 2020, NAFTA was replaced by the [United States-Mexico-Canada Trade Agreement](#) (USMCA). The USDA Foreign Agricultural Service (FAS) encourages all U.S. exporters interested in exporting to Canada to review the USMCA documents, in particular Chapter 03, to understand how your products may be impacted.

Table 1: Advantages and Challenges

ADVANTAGES	CHALLENGES
Canadian consumers value U.S. quality and safety standards.	A stronger U.S. dollar makes competitive pricing challenging, especially in specialty foods.
Canada's ethnically diverse population provides opportunities for specialty products.	Canada's population is a tenth of the United States and more geographically dispersed, causing marketing and distribution challenges.
Retailers and food service operators have developed efficient supply chains to import fruits and vegetables from the United States year-round.	There is growing competition from other exporting countries, such as Mexico, Peru, South Africa, and others.
Consumers value the strong, diverse, and innovative food culture in the United States.	Established Canadian brokers and distributors have strong leverage in negotiations.
More than 98 percent of U.S. products are imported duty-free, tariff-free treatment under USMCA (entered into force July 1, 2020).	Landing costs (e.g., transportation, taxes, and custom clearance charges) are significant. This makes it challenging to launch a new product with smaller volumes.
U.S. food products are generally aligned with Canadian tastes and are familiar to Canadian consumers.	Strong “buy local” movement across Canada, particularly with fresh products.

¹ All figures are in U.S. dollars (USD), unless indicated otherwise.

² These numbers include Canadian agricultural exports to the United States and U.S. agricultural exports to Canada.

³ “Consumer-oriented food products” refers to ready-to-eat, fresh, and processed products, such as fruits, vegetables, packaged food products, beverages, pet foods, and other items you will find in retail grocery stores.

Canada and the United States food and agricultural regulatory authorities (e.g., FSIS, APHIS, FDA, and CFIA) work closely together, resulting in aligned food safety standards.	Canada’s food product labelling regulations differ from that of the United States, including a different nutrition panel formats and bilingual (French and English) requirements.
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SECTION II. EXPORTER BUSINESS TIPS

U.S. exporters are encouraged to look at Canada as a country of five regional markets and develop market entry strategies for each region: Ontario, Quebec, Atlantic Canada, the Prairies, and Western Canada. Both the retail and food service distribution sectors are highly concentrated in Canada. In 2023, nearly 80 percent of total beverage and food sales in the retail sector were attributed to five companies: Loblaws, Sobeys, Metro, Walmart, and Costco. For smaller, new-to-market U.S. food exporters, FAS Canada recommends working with the more than 7,000 independent grocery stores and 27,000 small and independent convenience stores in Canada to first establish a presence in the Canadian market and then approach the larger retailers (listed above) with demonstrated market experience and market sales. Similarly, distribution in Canada’s food service sector is highly concentrated. Nationally there are only two dominant distributors in the food service sector, but at the regional and provincial levels there is more competition that creates opportunities for U.S. small-to-medium exporters.

A. Entry Strategies

To facilitate initial export success, the Foreign Agricultural Service in Canada (FAS/Canada) recommends exporters study your targeted sector (food retail, food service, or food processing) at both a national and provincial level to get to know the major active stakeholders. Preliminary suggested steps to enter the Canadian market include:

- Review relevant USDA FAS [Global Information Agricultural Network \(GAIN\) Reports](#). These reports are free of charge and can be downloaded from FAS [resources](#). Both the [Exporter Guide \(2023\)](#) and the [Food and Agricultural Import Regulations and Standards \(2023\) \(FAIRS\)](#) outline the required regulations and compliance requirements for food products. The Canadian Food Inspection Agency (CFIA) offers a step-by-step guide on these regulations, particularly on [labelling in Canada](#).
- After studying the Canadian market regulatory and compliance requirements, individual companies are encouraged to inquire about the various export programs supported by USDA and administrated by the [State-Regional Trade Groups \(SRTGs\)](#) and other USDA [Commodity Cooperators](#). The SRTGs provide the needed one-on-one counseling and educational seminars that U.S. businesses need prior to entering the Canadian market.
 - Small-and medium-sized firms (SMEs) may qualify for financial support to promote their brands in Canada under the [USDA Market Access Program](#). This program is administered by the SRTGs via programs such as the: [Branded Program \(Food Export\)/ Cost Share \(SUSTA\) Program / Fund Match Program \(WUSATA\)](#). Many of the SRTGs in Canada have contracted with in-country representatives to conduct additional research or business-to-business matchmaking for an individual company.

- Attending Canadian trade and consumer shows can help U.S. exporters better understand the market. A partial list of Canadian trade shows can be found [here](#). USDA endorses [SIAL Canada](#), the largest food trade show in Canada.
- For more information, please consult the [FAS/Canada Marketing Reports](#) and contact FAS Canada offices in Montreal, Ottawa, and Toronto to obtain customized support and further detailed guidance for targeting the retail, food service, and food processing sectors in Canada.

An important note: U.S. companies need to assess their "export readiness" before entering the Canadian market. This includes determining how well-established their product is in the United States and if the company currently has available resources and staff capacity to export a product in Canada. Once the product is carried by a distributor, all suppliers should focus on achieving realistic targeted volume levels.

Canada is a small and mature market with a relatively small consumer base (i.e., Canada's population is roughly one-tenth of the United States). Accessing a smaller Canadian consumer base can be expensive as major population groups are concentrated in cities that are spread out along the vast U.S.-Canada border. For companies looking to launch on a smaller scale, a more manageable approach would be to focus on one region (or even city) at a time.

SECTION III: IMPORT FOOD STANDARDS, REGULATIONS AND PROCEDURES

There are three authorities responsible for Canada's food safety under the Minister of Health: Health Canada (HC), the Public Health Agency of Canada (PHAC) and the Canadian Food Inspection Agency (CFIA). Agriculture and Agri-Food Canada (AAFC), also through the CFIA, oversees non-food safety agricultural activities such as animal and plant health.

CFIA publishes several regulations that may affect agricultural and food business for Canadian and foreign producers such as the Safe Food for Canadian Regulation (SFCR), and consumer packaging and labelling regulations. For more information on the Canadian import food standards and regulations, please see the latest [Food and Agricultural Import Regulations and Standards \(FAIRS\)](#) GAIN report.

CFIA offers the [Automated Import Reference System](#) online that permits any user to review the importing requirements for various agricultural and food products. There is a labelling checklist and tool for food manufacturers [here](#).

For detailed information on import procedures, please see the [step-by-step guide of importing food](#) on the Canadian Food Inspect Agency website.

A) USMCA Certificate of Origin

CUSMA/USMCA/TMEC, replaced the NAFTA Certificate of Origin that allows for most food products to enter Canada duty free. Importers, exporters, and other producers are to complete and self-certify that they meet the [nine minimum requirements](#) to receive preferential treatment of duties. This is highlighted on [page 29 of the FAIRS Report](#) mentioned earlier.

B) Customs Clearance

FAS Canada suggests familiarizing yourself with the Canadian broker and distributor networks. Several Canadian food and beverage establishments prefer working through a Canadian broker because many U.S. companies are unfamiliar with doing business in Canada and require the additional service a broker can provide. According to the [Canadian Society of Customs Brokers](#), close to 80 percent of Canadian imports are cleared by a customs broker. These companies assist exporters in complying with Canadian import requirements, handling border transactions, and ensuring the release of goods from Canadian Customs. The [Canada Border Services Agency \(CBSA\) licenses customs brokers](#) to carry out customs related responsibilities on behalf of their clients. Retailers, food service entities, and food processors prefer not to guide U.S. exporters through the many aspects of selling food products in Canada such as regulatory compliance, labelling, pricing, shipping and logistics, and possible retailer listing fees.

C) Business Registrations and Food Licenses on Imported Food into Canada

Every shipment clearing the border (no matter the commodity) must have an [importer of record](#). Those exporters responsible for clearing their own products at the border and/or shipping directly to a Canadian distribution center are deemed to be the importer of record and must apply for [Safe Food For Canadian import license](#) (SFC) under the [Safe Food for Canadians Regulations](#). One of the purposes of the SFC license is to ensure proper safety controls are in place and should there be a product recall, the producer/supplier be easily identified. These regulations do not apply to producers shipping directly to a distribution center in the U.S. for a Canadian buyer.

For those U.S. exporters with no physical address in Canada, you must apply as a [Non-Resident Importer \(NRI\)](#). This process requires two steps. The first step is to apply for a 9-digit [Business Number \(BN\)](#) with the Canada Revenue Agency. After the BN is received, you must apply online for the [import license through CFIA](#). This may take up to two to six weeks.

CFIA in coordination with [Canada Border Services Agency](#) has established a [Pre-arrival Review System \(PARS\)](#) allowing importers, NRIs, and [custom brokers](#) to submit, review, and process all required digital documentation.⁴ Submissions must be made to CFIA-PARS with minimum of four hours to a maximum of 30 days' prior notice. It is recommended those products such as fresh, frozen, and live animals be submitted early allowing for the maximum days of review. Once approved by CFIA, the importer or customs broker will be notified. All approvals are listed on CBSA's [Release Notification System](#). To obtain more information contact the [National Import Service Centre \(NISC\)](#) at 1-800-835-4486.

D) CARM Registration

In October of 2024, CBSA implemented [CARM \(CBSA Assessment and Revenue Management\)](#) registration for all NRIs, as well as all commercial shipments clearing the border. The purpose of the registration is to streamline the collection of duties and taxes from all shipments. U.S. exporters need to ensure either the courier firm, customs broker, or NRI is registered and their CARM registration will apply to their goods.

⁴ Documentation includes, commercial invoice, all required certificates, declarations, cargo numbers and other entry requirements.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

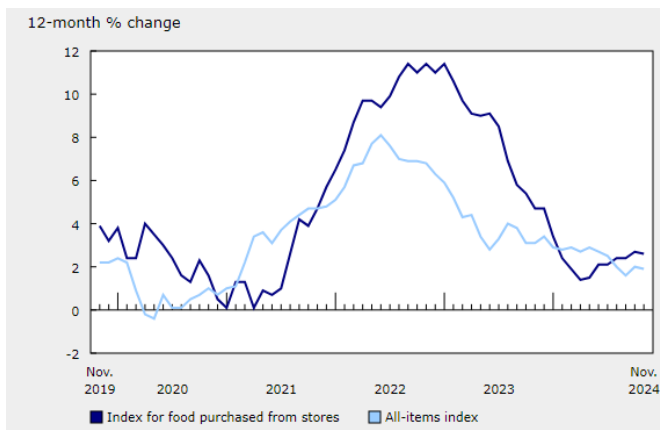
As a mature market with a highly integrated supply chain, much of the competition for Canadian market share is with other U.S. and Canadian food supplies already established in the market.

There is growing sentiment in Canada for maintaining a healthy lifestyle and eating food items high in nutrition and high in protein. Additionally, many young consumers seek sustainably produced items that offer clean nutrition labels (i.e., avoiding ultra-processed food and ingredients). According to Mintel research, 75 percent of consumers would like to include additional plant-based protein products in their diets.

Below is additional demographic information to keep in mind as you consider your strategy for the Canadian market.

- **Aging population**: The median age in Canada is 40 years. There are more Canadians over 65 than under 15. Canadians born between 1944 and 1968 represent 28 percent of the population. Seniors make up the fastest growing age group in Canada and are increasing the demand for healthy food and smaller meal portions, easy-to-open and single-serve packages with easy-to-read labels.
- **Family structure**: the average household size in Canada is on the decline from 4.2 in 1931 to 2.4 in 2021. Additionally, 64 percent of all households are either one or two person households, leading to an increase in single or two portion options in retail.⁵
- **Food inflation**: Inflationary food prices are still top of mind for all Canadians. On an annual average basis, Canada's Consumer Price Index (CPI) rose 2.4 percent in 2024, down from 3.9 percent in 2023. Though the average in 2024 was the lowest it had been since 2020, a year heavily impacted by the pandemic, it remained higher than pre-pandemic annual averages. Cumulatively, since the onset of the pandemic, higher annual inflation rates reflect sustained, elevated prices across Canada.

Chart 2: Consumer Price Index (CPI): Statistics Canada's primary measure of inflation



Source: Stats Canada, 2025

⁵ [Stats Canada](#), reports 28 percent of the population is made of one-person households and another 34 percent are two-person households.

SECTION V: AGRICULTURAL AND FOOD IMPORTS

Table 2: Canadian Imports of Consumer-Oriented (C.O.) Products (Million U.S. Dollars)

	Canada's Consumer-Oriented Imports from World	Canada's Consumer-Oriented Imports from U.S.	U.S. Market Share
2019	\$28,295	\$16,142	57%
2020	\$29,166	\$16,527	57%
2021	\$31,788	\$17,581	55%
2022	\$34,776	\$19,200	55%
2023	\$35,017	\$19,672	56%

Source: Trade Data Monitor⁶

Table 3: 2023 Imports of Leading Consumer-Oriented Products (Million U.S. Dollars)

Description	Canada's Consumer-Oriented Imports from World	Canada's Consumer-Oriented Imports from U.S.	U.S. Market share	Leading Competitors
Bakery Goods, Cereals, & Pasta	3,784	2,724	71%	Italy, China, and Mexico
Fresh Vegetables	3,001	1,712	57%	Mexico, China, and Guatemala
Fresh Fruit	4,490	1,601	35%	Mexico, Peru, And Chile
Soup & Other Food Preparations	2,117	1,716	81%	China, Mexico, and Switzerland
Chocolate & Cocoa Products	1,659	868	52%	Germany, Mexico, and Switzerland
Dairy Products (not incl. Eggs)	1,574	975	62%	New Zealand, Italy, and France
Processed Vegetables	1,462	779	53%	China, Mexico, and Italy
Processed Fruit	1,406	635	45%	China, Mexico, and Turkey

⁶ Data reflected here is varies slightly from previously reported data because it is sourced from Canada's Stats Canada, reflecting Canada's imports. Earlier figures were from U.S. export data.

Beef & Beef Products	1,376	863	63%	Australia, New Zealand, and Mexico
Pork & Pork Products	1,041	849	81%	Germany, Italy, and Denmark
Non-Alcoholic Bev. (ex. juices, coffee, tea)	1,199	831	69%	Switzerland, France, and Italy
Condiments & Sauces	1,073	806	75%	Italy, China, and Thailand
Distilled Spirits	1,035	256	25%	United Kingdom, Mexico and France
Tree Nuts	948	627	66%	China, Turkey, and Lebanon
Wine & Related Products	2,059	435	21%	France, Italy, and ⁷ Spain

Table 4: Best Forecasted Growth Product Categories (2023– 2028)

Product Category	Sales Growth 2022 / 2023	5-year Growth Forecast	Subcategory with Best Prospects	Sales Growth 2022/ 2023 Specific Categories
Fresh Fruits	1.1%	24.7%	Lemons and Limes	4.8%
Cooking Ingredients & Meals	1.5%	27.7 %	Edible Oils	6.1%
			Olive Oils	8.4%
			Rapseed Oils	6.3%
Snacks	3.6%	34.9%	Vegetable, Pulse and Bread Chips and Flat Breads	17.7%
			Plant-Based Ice Cream	11.1%
			Meat Snacks	10.3%
			Nuts, Seeds and Trail Mixes	8.4%
			Seafood Snacks	8.4%
Baked Goods			Mints	7.8%
			Rice Snacks	6.8%
			Gum	6.3%
			Potato and Tortilla Chips	6.1%
			Wafers	5.9%
			Fruit and Nut Bars	5.7%
			Other Savory Snacks	5.0%
Baked Goods	5.4%	25.8%	Cakes	3.9%
			Flat Breads	7.4%

⁷ France and Italy are ranked first and second in Share of Market (SOM)

			Packaged Pastries	7.1%
Processed Fruits & Vegetables	2.9%	10.8%	Frozen Processed Vegetables	5.6%
Pasta, Rice & Noodles	4.2%	26.3%	Instant Noodles	3.8%
			Pasta	4.6%
			Rice	5.6%
Frozen Meat & Seafood Substitutes	4.3%	37.8%	Tofu Derivatives	3.8%
Alcohol and Non-Alcohol Drinks				
Alcoholic Drinks	-1.1%	18.6%	Non-Alcoholic Spirits	77.7%
			Non-Alcoholic Wine	19.6%
			Non- Alcoholic Ready to Drink (RTDs)	14.0%
			RTDs Alcohol	14.0%
			Spirit-based RTDs	9.9%
			Non-Grape Wine	4.8%
Non-Alcoholic Beverages & Drinks	5.8%	26.7%	Reduced Sugar Energy Drinks	13.3%
			RTD Coffee	9.9%
			RTD Tea	9.3%
			Sports Drinks	9.1%
			Energy Drinks	8.2%
			Juice	6.7%
Pet Foods				
Pet Food	5.6%	50.5%	Dog and Cat Foods	1.8%
			Cat Food	4.0%
			Cat Treats and Mixers	6.8%
			Dog Food	6.3%
			Dog Treats and Mixers	9.4%
			Premium Dog Food	7.1%

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

The Foreign Agricultural Service (FAS) in Canada offers a wide variety of services to help develop U.S. agricultural exports to Canada. If you need assistance or have a trade-related inquiry, please contact us:

OTTAWA	MONTREAL	TORONTO
U.S. Embassy, Ottawa Tel.: (613) 688-5267 E.: AgOttawa@state.gov	U.S. Consulate General, Tel.: (514) 908-3761 E. AgMontreal@state.gov	U.S. Consulate General, Tel. (416) 649-8683 E. AgToronto@state.gov

Trade Shows in Canada:

Agriculture and Agri-Food Canada, USDA's Canadian counterpart, maintains a list of trade shows [on this webpage](#).

USDA provides support for U.S. companies interested in participating in the following trade shows:

- [Canadian Health Food Association Trade Show](#)
- [Canadian Produce Marketing Association and Convention Show](#)
- [SIAL Canada, USA Pavilion \(managed by USDA Show Contractor\)](#)
- [Canadian Restaurant and Beverage Show](#)
- [Vancouver International Wine Festival](#)
- [Other Agricultural – Food Processing Trade Shows in Canada](#)

Useful Canadian Websites

The following is a listing of important Canadian institutions and their website:

- [Automated Import Reference System, Canadian Food Inspection Agency \(CFIA\)](#)
- [Bank of Canada. Daily Currency Convertor](#)
- [Canada Border Services Agency \(CBSA\)](#)
- [CBSA's CARM Registration](#)
- [Canadian Revenue Agency \(CRA\) Business Number Registration](#)
- [Canadian Intellectual Property Office](#)
- [Food Labelling Tool, CFIA](#)
- [Estimator of Duties and Taxes](#)
- [Global Affairs Canada \(GAC\)](#)
- [Global Affairs Quota Holders List on Tariff Rate Quota \(TRQs\) Commodities](#)
- [List of Licensed Customs Brokers highlighted on CBSA's Website](#)
- [Global Affairs Canada \(GAC\)](#)
- [Global Affairs Quota Holders List on Tariff Rate Quota \(TRQs\) Commodities](#)
- [Innovation, Science and Economic Development Canada](#)
- [Health Canada](#)
- [Health Canada, Natural Health Product Licensing](#)
- [Safe Food for Canadians Regulations Import Licenses](#)

Market Sector Reports

Listed below are selected reports describing the regulations and the food landscape of Canada, published by the Offices of Agricultural Affairs in Ottawa and Toronto. FAS Canada also offers commodity reports on Canadian production of such sectors as the biofuels annual, fresh deciduous fruit annual, grain and feed update and others, as well on Canadian agricultural policy impacting U.S. Agriculture and Trade. For a complete list of USDA reports from Canada and the rest of the world, please visit the [FAS GAIN webpage](#).

REPORT#	Title of Report	Date
CA2024-0048	Food Service – Hotel, Restaurant, and Institutional Annual <i>(Provides an overview of the Canadian food service landscape, including a list of Canadian food service distributors)</i>	November 5, 2024
CA2024-0051	Retail Foods Annual <i>(Provides an overview of the Canadian retail landscape)</i>	November 4, 2024
CA2024-0047	Dairy and Products Annual <i>(A thorough explanation of the dairy tariff rate quota system in Canada and trade analysis)</i>	October 23, 2024
CA2024-0023	FAIRS Export Certificate Report Annual <i>(List of the most common export certificates required by CFIA)</i>	July 19, 2024
CA2024-0022	Food and Agricultural Import Regulations and Standards (FAIRS) Report <i>(The 30-page report highlights many of the export requirements and regulations set by CFIA)</i>	July 3, 2024
CA2024-0021	Ontario Fast Tracks Allowing Sales of Wine and Beer in Retail Stores	June 5, 2024
CA2024-0002	Starter Guide for Food and Beverage Suppliers <i>(A comparison between the U.S. and Canadian food landscape)</i>	March 13, 2024
CA2024-0001	Canada Proposes a Federal Plastics Registry <i>(A ban took into effect in June of 2024 prohibiting the sale of single use plastics, such as grocery checkout bags, takeout cutlery, etc.)</i>	January 13, 2024
CA2023-0044	CARM Customs Program Mandatory in May 2024	October 18, 2023
CA2023-0041	Quebec Government Passes Legislation Impacting Trademarks - Bill 96 <i>(An explanation and key links on new language laws impacting labelling and signage used in the Province of Quebec)</i>	September 20, 2023
CA2023-0022	Updated Guidance on Front-of-Package Nutrition Labeling <i>(New labelling requirement - enforcement is set for January 2026)</i>	May 11, 2023

Attachments:

No Attachments