



Customized Report Services

Market Overview – Canadian lamb/sheep meat and product trends

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Market snapshot

In 2022, 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), Romania, China, Czech Republic and United Kingdom. Canadian exports of lamb/sheep products (including live sheep) to the world totalled C\$5.8 million in 2022. Live sheep stood at 39.2% (C\$2.2 million), followed by lamb meat exports at 30.2% (C\$1.7 million), wool exports at 23.3% (C\$1.3 million) and skins at 7.3% (C\$ 401,496) of the total export market share in Canada,

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 2022, Canada produced 17,900 tonnes of mutton and lamb. The CAGR growth was 2.7% from 2018 to 2022.

In 2022, Canada's exports of all lamb/sheep related products (incl. live sheep) to the world were valued at C\$5.8 million compared to US\$8.2 million 2021, representing a decline in growth of -29.2%.

Lamb, mutton and goat at the retail value of US\$103.4 million (29.4 thousand tonnes) in 2022 represented a retail sales value market share of 0.9% of the overall Canadian meat sector in 2022.

There were 87 new lamb meat and 29 pet food products launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2018 and December, 2022.

According to Mintel, there were 87 new sheep milk, launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2018 and December, 2022.

Production

In 2021, Canadian farmers produced 791,300 sheep, representing approximately a growth of -0.7% since 2017. According to the Food and Agriculture Organization (FAO) of the United Nations, the amount of sheep produced has been decreasing at a CAGR of -0.7% between 2017 and 2021. Chicken has been growing



the most by a CAGR of 0.4%, while pigs (0.2%), horses (0.1%), turkeys (-0.1%), and mules (0.0%) have either remained the same or have reported a decline over the same period.

Livestock production in Canada (2017-2021)

Selected livestock ('000 head)	2017	2018	2019	2020	2021	*CAGR 2017-2021
Chickens	170,120.0	170,759.0	171,398.0	172,420.0	173,199.0	0.4%
*Pigs	13,935.0	14,170.0	14,399.3	13,970.0	14,030.0	0.2%
*Cattle	11,535.0	11,565.0	11,500.0	11,265.0	11,057.9	-1.1%
Turkeys	5,687.0	5,693.0	5,699.0	5,655.0	5,658.0	-0.1%
Ducks	1,499.0	1,514.0	1,528.0	1,486.0	1,501.0	0.0%
*Sheep	813.9	829.4	827.8	797.7	791.3	-0.7%
Horses	397.9	398.3	398.7	399.1	400.0	0.1%
Goats	30.1	30.1	30.1	30.0	30.0	-0.1%
Mules	4.0	4.0	4.0	4.0	4.0	0.0%

Source: FAOSTAT Agricultural Production, 2023 *Official data: pigs, cattle, sheep *CAGR: Compound Annual Growth Rate

In 2022, Canada produced 17,900 tonnes of mutton and lamb. The CAGR growth was 2.7% from 2018 to 2022.

Canada's production of mutton and lamb in thousand tonnes, 2018-2022

Production	2018	2019	2020	2021	2022	*CAGR 2018-2022
Mutton and lamb	16.1	17.0	16.8	17.8	17.9	2.7

Source: Euromonitor 2023 *CAGR: Compound Annual Growth Rate

Canadian consume very limited lamb every year: 0.5 kg per capita in 2022 and 1.2 kg per household in 2022.

Canadian consumption of lamb per capita & per household, in kilogram, 2018-2022

Consumption (kilogram)	2018	2019	2020	2021	2022	*CAGR 2018-2022
Per Capita	0.4	0.5	0.4	0.5	0.5	5.7%
Per household	1.1	1.2	1.1	1.2	1.2	2.2%

Source: Euromonitor 2023 *CAGR: Compound Annual Growth Rate

Canadian trade of sheep/lamb products

In 2022, 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. That same year, Canada's top five international markets were the United States (US), Romania, China, Czech Republic and United Kingdom. Other smaller markets were France and United Kingdom which made up the remaining 0.3% of lamb/sheep related exports.

In 2021, Canada's exports of all lamb/sheep related products (incl. live sheep) to the world were valued at C\$5.8 million compared to \$5.2 million in 2022. This represents a decline in growth of -29.2%. The top 10 markets in 2021, reported a total export decline of -25.6% with growth only in China (46.5%), United Kingdom (1,019.1%) and Saint Pierre and Miquelon (8.5%) markets in 2022. To offset some of the export

losses, Canada diversified its supply of lamb/sheep products to new markets including New Zealand (C\$148,102) and Bahamas (C\$181,179).

**Canadas top export markets for lamb/sheep products – live sheep, meat, skins and wool,
2021-2022 measured in C\$ dollars**

Country	2021	Market share (%) in 2021	2022	% Growth difference (2022/2021)
Total lamb/sheep products – live sheep, meat, skins and wool	8,179,009	100.0	5,793,038	-29.2%
United States	7,179,161	87.8%	5,230,734	-27.1%
China (People's Republic of)	185,569	2.3%	271,941	46.5%
Czech Republic	115,523	1.4%	90,058	-22.0%
United Kingdom	6,478	0.1%	72,496	1,019.1%
Saint Pierre and Miquelon	61,362	0.8%	66,605	8.5%
United Arab Emirates	216,793	2.7%	39,746	-81.7%
Qatar	-	0.0%	11,728	N/C
France	15,514	0.2%	5,571	-64.1%
Romania	0.0	0.0%	2,926.0	N/C
Mexico	0.0	0.0%	550.0	N/C
Subtotal lamb/sheep products – top 10	7,780,400	95.1	5,792,355	-25.6%

Source: Global Trade Tracker 2023

N/C: Not calculable

Canada exported C\$1.7 million (94.7 metric tonnes) of meat that consists of sheep cuts, lamb carcasses and frozen edible offal, including sheep offal in 2022. This value represents a decline of -32.1% from 2018 (C\$2.4 million). The majority of the sheep/lamb meat was exported to the US (92.5%), followed by Saint Pierre & Miquelon (4.0%), and the UAE (2.4%) in 2022. The top export commodities were fresh sheep cuts (bone in), frozen edible offal of sheep/goats/asses/mules or hinnies (HS:020690), both going to the US, and fresh or chilled lamb carcasses mainly exported to the UAE.

In 2022, 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 2022.

**Canada's exports to the world of lamb and sheep meat, 2022
measured values in C\$ dollars and volume (kilograms)**

Export description	Volume (kg)	Value (C\$)	Top export markets and value share %		
			1	2	3
Total meat exports to the world – lamb & sheep	94,680	1,657,880	United States 92.5	Saint Pierre & Miquelon 4.0	*UAE 2.4
020422 – Sheep cuts, bone in, fresh or chilled	53,834	1,402,597	United States 100.0	-	-
020410 – Lamb carcasses and half carcasses, fresh or chilled	12,951	83,640	United Arab Emirates 47.5	Saint Pierre & Miquelon 38.5	Qatar 14.0
020690 – Sheep, goats, asses, mules or hinnies edible offal, frozen	21,776	131,633	United States 100.0	-	-
020443 – Sheep cuts, boneless, frozen	31	248	France 100.0	-	-
020430 – Lamb carcasses and half carcasses, frozen	5,169	33,606	Saint Pierre & Miquelon	-	-

			100.0		
020423 – Sheep cuts, boneless, fresh or chilled	0	0	-	-	-
020442 – Sheep cuts, bone in, frozen	919	6,156	France 86.5	Saint Pierre & Miquelon 13.5	-
020680 – Sheep, goats, asses, mules or hinnies edible offal, fresh or chilled	0	0	-	-	-

Source: Global Trade Tracker 2023

*UAE: United Arab Emirates

Canada imported C\$359.9 million (30.1 thousand metric tonnes) of meat that consists of sheep cuts, lamb carcasses and frozen edible offal, including sheep offal in 2022. The majority of the sheep/lamb meat was imported from the Australia (53.1%), followed by New Zealand (37.6%), and Ireland (4.2%) in 2022. The top import commodities were frozen sheep cuts (bone in) mainly from New Zealand, frozen boneless sheep cuts mainly from Australia, fresh or chilled (bone in) sheep cuts mainly Australia.

**Canada's imports from the world of lamb and sheep meat, 2022
measured values in C\$ dollars and volume (kilograms)**

Import description	Volume (kg)	Value (C\$)	Top export markets and value share %		
			1	2	3
Total meat imports from the world – lamb & sheep	30,064,852	351,859,753	Australia 53.1	New Zealand 37.6	Ireland 4.2
020422 – Sheep cuts, bone in, fresh or chilled	4,621,660	80,359,412	Australia 64.7	New Zealand 34.7	United States 0.5
020410 – Lamb carcasses and half carcasses, fresh or chilled	7,303	43,817	Australia 99.5	New Zealand 0.5	-
020690 – Sheep, goats, asses, mules or hinnies edible offal, frozen	1,906,231	6,298,214	Australia 67.1	New Zealand 18.1	Ireland 7.6
020443 – Sheep cuts, boneless, frozen	8,209,267	100,670,981	Australia 64.1	New Zealand 19.7	Uruguay 7.0
020430 – Lamb carcasses and half carcasses, frozen	686,511	6,608,168	New Zealand 68.2	Australia 31.2-	Ireland 0.2
020423 – Sheep cuts, boneless, fresh or chilled	2,032,079	29,780,556	Australia 85.5	New Zealand 12.4	United States 2.1
020442 – Sheep cuts, bone in, frozen	12,553,885	128,050,643	New Zealand 58.7	Australia 29.9	Ireland 6.9
020680 – Sheep, goats, asses, mules or hinnies edible offal, fresh or chilled	47,916	47,962	New Zealand 98.6	Australia 1.4	-

Source: Global Trade Tracker 2023

In 2022, Canada exported C\$2.2 million and 31,613 live sheep solely to the US, respectively. Canada exported C\$401,496 (70,228 skins) of sheep/lamb skins in 2022.

In 2022, the largest importer of Canadian sheep/lamb skins was the US by 77.3%, followed by China (22.5%) and Mexico (0.14%). 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, 74.8% of raw, with wool on, n.e.s (HS:410210) was exported to China.. Other smaller export markets for raw sheep/lamb skins (with wool on), n.e.s. (HS:410210) were the US and Mexico.

**Canada's exports to the world of live sheep and sheep/lamb skins, 2022
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	31,613	2,151,339	United States 100.0	-	-
Total exports to world – sheep/lamb skins	70,228	401,496	United States 77.3	China 22.5	Mexico 0.14
410221 – Sheep/lamb skins, pickled, without wool on	34,800	280,981	United States 100.0	-	-
410210 – Sheep/lamb skins, raw, with wool on, *n.e.s.	35,428	120,515	China 74.8	United States 24.5	Mexico 0.5
410229 – Sheep/lamb skins, raw, without wool (preserved or further prepared), *n.e.s.	0	0	-	-	-

Source: Global Trade Tracker 2023

*n.e.s. : nowhere else specified

*Export market: Positioning in 2018

In 2022, Canada imported C\$3.4 million and 18,248 live sheep solely from the US, respectively. Canada imported C\$192,528 (4,173 skins) of sheep/lamb skins from the US (98.6%), Italy (1.2%) and China (0.14%) in 2022.

**Canada's imports to the world of live sheep and sheep/lamb skins, 2022
measured values in C\$ dollars and quantity (number)**

Import description	Quantity (number)	Value (C\$)	Top export markets and value share %		
			1	2	3
010410 – Sheep, live	18,248	3,467,732	United States 100.0	-	-
Total import from world – sheep/lamb skins	4,173	192,528	United States 98.6	Italy 1.2	China 0.14

Source: Global Trade Tracker 2023

In 2022, Canada exported a total of C\$1.3 million (620.2 metric tonnes) of wool products. Canada's main market was the US (72.9%), China (14.2%) and Czech Republic (7.0%).

In 2022, Canadian exports of carbonized wool, not carded or combed (HS:510130) was exported to the United Kingdom at the value of C\$32,539 (4,384 kilograms). Additionally, it appears that the price of degreased shorn wool, not carded, combed or carbonized (HS:510121) has been increased in 2022, as 773 kg brought in C\$5,787, when 225 kg brought in at a value of C\$4,410 in 2018.

**Canada's exports to the world of wool, 2022
measured values in C\$ dollars and volume (kilograms)**

Export description	Volume (kg)	Value (C\$)	Top export markets and value share %		
			1	2	3
Total exports to the world – wool	620,162	1,282,323	United States 72.9	China 14.2	Czech Republic 7.0
*510111 – Greasy shorn wool, not carded or combed	452,726	697,909	United States 55.3	China 26.0	Czech Republic 12.9

*510129 – Degreased wool, other than shorn wool, not carded, combed or carbonized	59,622	352,122	United States 100.0	-	-
510320 – Waste (other than noils), of wool or of fine animal hair, other than garnetted stock	102,657	193,966	United States 98.5	Romania 1.5	-
**510130 – Carbonized wool, not carded or combed	4,384	32,539	United Kingdom 100.0	-	-
**510121 – Degreased shorn wool, not carded, combed or carbonized	773	5,787	United States 92.7	Portugal 7.3	-

Source: Global Trade Tracker 2023

*HS: 5101: excludes yarn, fabric

**Export market: Positioning in 2018

In 2022, Canada imported a total of C\$1.9 million (605.9 metric tonnes) of wool products. Canada's main supply market was the New Zealand (38.6%), United Kingdom (15.6%) and Germany (10.8%).

In 2022, Canadian imports of degreased shorn wool, not carded, combed or carbonized (HS:510121) was imported from New Zealand at the value of C\$862,331 (255,616 kilograms).

**Canada's imports from the world of wool, 2022
measured values in C\$ dollars and volume (kilograms)**

Import description	Volume (kg)	Value (C\$)	Top export markets and value share %		
			1	2	3
Total imports from the world – wool	605,916	1,852,118	New Zealand 38.6	United Kingdom 15.6	Germany 10.8
*510111 – Greasy shorn wool, not carded or combed	2,411	14,370	United States 100.0	-	-
*510129 – Degreased wool, other than shorn wool, not carded, combed or carbonized	80,642	365,444	New Zealand 74.7	Germany 12.9	Uruguay 11.4
510320 – Waste (other than noils), of wool or of fine animal hair, other than garnetted stock	207,561	236,891	United Kingdom 60.1	United States 37.5	China 1.4
**510130 – Carbonized wool, not carded or combed	59,686	373,082	Australia 52.0	Germany 29.4	Belgium 17.7
**510121 – Degreased shorn wool, not carded, combed or carbonized	255,616	862,331	New Zealand 51.7	United Kingdom 16.4	Argentina 13.3-

Source: Global Trade Tracker 2023

*HS: 5101: excludes yarn, fabric

Sector overview – meat in Canada

The Canadian meat sector based on retail sales (including lamb, beef, chicken, pork, and other similar meat categories) is expected to grow from US\$11.2 billion in 2022 to US\$14.2 billion in 2027. Beef, chicken, and pork had the highest market share in the meat sector. Lamb, mutton and goat at the retail value of US\$103.4 million in 2022 represented a retail sales value market share of 0.9% of the overall Canadian meat sector in 2022.

**Canadian retail sales of the fresh meat sector, historical & forecast
using fixed 2022 exchange rate, US\$ millions**

Category	2018	2022	*CAGR 2018-2022	2023	2027	*CAGR 2023-2027
Meat	10,021.6	11,887.0	4.4%	12,557.1	14,217.5	3.2%
Pork	3,433.8	4,300.2	5.8%	4,545.1	5,319.2	4.0%
Poultry	3,214.8	3,774.6	4.1%	4,185.3	5,077.7	5.0%
Beef and Veal	3,274.0	3,690.1	3.0%	3,704.0	3,683.8	-0.1%
Lamb, Mutton and Goat	80.6	103.4	6.4%	103.5	116.7	3.0%
Other Meat	18.5	18.7	0.3%	19.2	20.2	1.3%

Source: Euromonitor 2023 *CAGR: Compound Annual Growth Rate Note: table not including turkey

In volume terms, the meat sector grew from 2,671.1 thousand tonnes in 2018 to 2,972.8 thousand tonnes in 2022, registering a 5-year (2018-2022) CAGR of 2.7% in Canada. The Canadian meat sector is forecast to register an overall retail value growth of 2.1% from 2023 to 2027. The lamb, mutton and goat registered 29.4 thousand tonnes in 2022 and is expected to reach 32.9 thousand tonnes in 2027 at the CAGR growth of 2.3% from 2023 to 2027.

**Canadian retail sales of the fresh meat sector, historical & forecast
using fixed 2022 exchange rate, thousand tonnes**

Category	2018	2022	*CAGR 2018-2022	2023	2027	*CAGR 2023-2027
Meat	2,671.1	2,972.8	2.7%	3,064.6	3,328.4	2.1%
Pork	1,284.0	1,455.3	3.2%	1,528.8	1,749.4	3.4%
Poultry	654.0	775.0	4.3%	799.5	865.3	2.0%
Beef and Veal	706.2	711.5	0.2%	704.7	679.2	-0.9%
Lamb, Mutton and Goat	25.5	29.4	3.6%	30.0	32.9	2.3%
Other Meat	1.4	1.6	3.4%	1.6	1.5	-1.6%

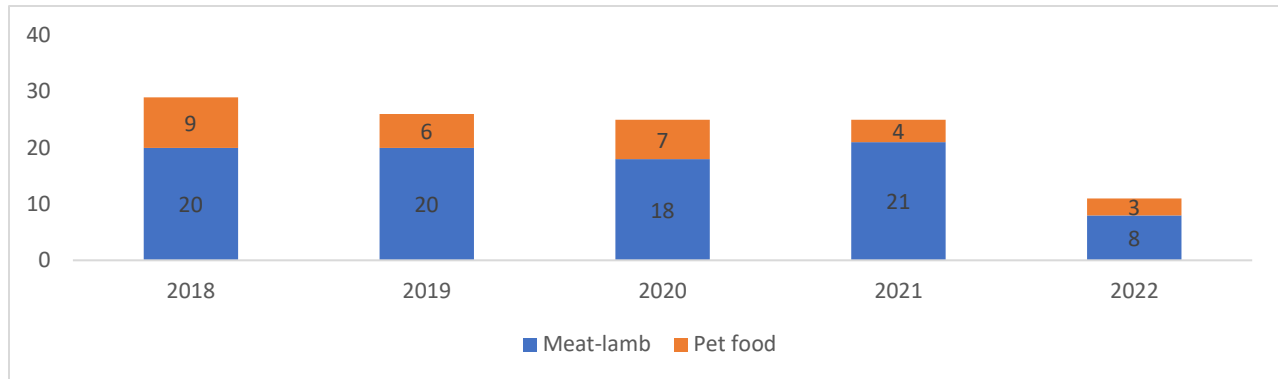
Source: Euromonitor 2023 *CAGR: Compound Annual Growth Rate Note: table not including turkey

Product launch and trend analysis of lamb and sheep milk

Lamb meat and pet food products

Mintel indicates that there were 87 new lamb meat and 29 pet food products launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2018 and December, 2022.

Number of lamb – meat and pet food products launched in Canada, (Jan. 2018 – December, 2022) total product item count (116)



Source: Mintel, 2023

Top brands were Dion (11), New Zealand Spring Lamb (5), Kirkland Signature (4), Agneau du Québec (4) and Alexia (4) from 2018 to 2022.

Top 10 brands of the 87 lamb meat 2018-2022

Brand	2018	2019	2020	2021	2022	Total Sample
Dion	2	9	0	0	0	11
New Zealand Spring Lamb	0	0	3	2	0	5
Kirkland Signature	3	0	1	0	0	4
Agneau du Québec	4	0	0	0	0	4
Alexia	1	2	1	0	0	4
McCormick Gourmet	0	0	0	4	0	4
PC Free From	0	0	2	1	0	3
PG Plaisirs Gastronomiques	1	1	0	1	0	3
Les Filles Fattoush	0	0	2	0	0	2
La Fernandière	2	0	0	0	0	2

Source: Mintel, 2023

Top companies in 2022, include Dion Herbs & Spices, The Lamb Company, Loblaws, McCormick and Lamb Weston.

Top 10 companies of the 87 lamb meat 2018-2022

Company	2018	2019	2020	2021	2022	Total Sample
Dion Herbs & Spices	2	9	0	0	0	11
The Lamb Company	0	0	3	4	0	7
Loblaws	1	0	3	1	0	5
McCormick	0	0	0	5	0	5
Lamb Weston	1	2	1	0	0	4
Costco Wholesale	3	0	1	0	0	4
Plaisirs Gastronomiques	1	1	0	1	1	4
Sobeys	4	0	0	0	0	4
Les Aliments Rose Hill Foods	0	0	2	0	0	2
La Fernandière	2	0	0	0	0	2

Source: Mintel, 2023

Top three claims were Kosher (25), Halal (24) and Low/No/Reduced Allergen (24) from 2018 to 2022.

Top 10 claims of the 87 lamb meat 2018-2022

Claims	2018	2019	2020	2021	2022	Total Sample
Kosher	4	12	2	6	1	25
Halal	4	1	7	11	1	24
Low/No/Reduced Allergen	4	12	2	3	3	24
Gluten Free	4	12	2	3	2	23
Social Media	4	2	4	4	1	15
Free from Added/Artificial Preservatives	2	1	1	5	1	10
No Additives/Preservatives	2	1	1	5	1	10
Hormone Free	0	1	2	5	2	10
Ethical - Animal	0	1	4	4	1	10
Ethical - Environmentally Friendly Package	2	2	0	2	2	8

Source: Mintel, 2023

Top three flavours were Unflavoured/Plain (30), lamb (6) and garlic (5) from 2018 to 2022.

Top 10 flavors of the 87 lamb meat 2018-2022

Flavour	2018	2019	2020	2021	2022	Total Sample
Unflavoured/Plain	9	2	9	9	1	30
Lamb	1	3	0	0	2	6
Garlic	1	2	0	2	0	5
Gravy	1	1	0	2	0	4
Spice/Spicy	1	1	1	0	1	4
Mint	0	0	3	0	0	3
Mediterranean	2	0	1	0	0	3
Smoke	0	0	0	3	0	3
Rosemary	0	1	1	1	0	3
Curry	1	1	0	0	0	2

Source: Mintel, 2023

The ingredients were salt (32), spices (29), Waters (26), Garlic (23) and onion (16) from 2018 to 2022.

Top 10 ingredients of the 87 lamb meat 2018-2022

Ingredients	2018	2019	2020	2021	2022	Total Sample
Salt (Food)	10	3	3	9	7	32
Spices (Food)	9	7	3	6	4	29
Waters (Food)	8	3	4	6	5	26
Garlic (Food)	7	5	3	4	4	23
Onion (Food)	4	4	2	2	4	16
Lamb Meat (Food)	4	1	4	2	4	15
White Sugar (Food)	4	0	2	3	3	12
Modified Corn Starch (Food)	3	2	1	3	2	11
Garlic Powder (Food)	4	3	2	0	1	10
Low Erucic Acid Rapeseed Oil (Food)	2	4	2	1	1	10

Source: Mintel, 2023

Launch type were New Variety/Range Extension (49), New packaging (20), new product (16) and relaunch (2) from 2018 to 2022.

Launch type of the 87 lamb meat 2018-2022

Launch type	2018	2019	2020	2021	2022	Total Sample
New Variety/Range Extension	16	16	10	7	0	49
New Packaging	1	3	4	11	1	20
New Product	3	1	4	3	5	16
Relaunch	0	0	0	0	2	2
Total Sample	20	20	18	21	8	87

Source: Mintel, 2023

Location of manufacture were Canada (16), USA (7), Australia (6) and New Zealand (3) from 2018 to 2022.

Location of manufacture of the 87 lamb meat 2018-2022

Location of manufacture	2018	2019	2020	2021	2022	Total Sample
Canada	8	2	2	3	1	16
USA	1	2	1	0	3	7
Australia	3	0	2	1	0	6
New Zealand	0	0	2	1	0	3
Italy	0	0	0	2	0	2
South Africa	0	0	0	1	0	1
Taiwan, China	0	0	0	1	0	1
Total Sample	20	20	18	21	8	87

Source: Mintel, 2023

Top three nutrition were sodium (47), carbohydrates (47) and energy (47) from 2018 to 2022.

Top 10 nutrition of the 87 lamb meat 2018-2022

Nutrition	2018	2019	2020	2021	2022	Total Sample
Sodium (listed on pack)	10	8	9	13	7	47
Carbohydrates (listed on pack)	10	8	9	13	7	47
Energy (kcal) (listed on pack)	10	8	9	13	7	47
Fat (listed on pack)	10	8	9	13	7	47
Protein (listed on pack)	9	8	9	13	7	46
Cholesterol (listed on pack)	9	8	9	12	7	45
Iron (listed on pack)	9	8	9	12	7	45
Saturated Fat (listed on pack)	9	8	9	12	7	45
Trans Fat (listed on pack)	9	8	9	12	7	45
Fibre (listed on pack)	9	8	9	12	7	45

Source: Mintel, 2023

Top three storage were supermarket (63), Natural/Health Food Store (10) and club store (8) from 2018 to 2022.

Top storage type of the 87 lamb meat 2018-2022

Storage type	2018	2019	2020	2021	2022	Total Sample
Supermarket	13	16	13	16	5	63
Natural/Health Food Store	1	4	2	1	2	10
Club Store	3	0	3	2	0	8
Mass Merchandise/Hypermarket	3	0	0	2	1	6
Total Sample	20	20	18	21	8	87

Source: Mintel, 2023

Top three subcategories were meat products (40), seasonings (24) and cooking sauces (5) from 2018 to 2022.

Top 10 subcategories of the 87 lamb meat 2018-2022

Sub-categories	2018	2019	2020	2021	2022	Total Sample
Meat Products	13	3	11	10	3	40
Seasonings	3	11	4	6	0	24
Cooking Sauces	2	0	1	1	1	5
Meat Substitutes	0	3	0	1	0	4
Potato Products	1	2	0	0	0	3
Hard Cheese & Semi-Hard Cheese	0	0	0	2	0	2
Meal Kits	0	0	0	0	1	1
Stuffing, Polenta & Other Side Dishes	0	0	0	0	1	1
Hors d'oeuvres/Canapes	0	0	1	0	0	1
Rice	0	0	0	0	1	1

Source: Mintel, 2023

Pet food

Top brands were Western family (3), Big Country Raw (2), Crave (2), Hungry Hunter (1) and Iams Proactive Health (1) from 2018 to 2022.

Top 10 brands of the 29 pet food 2018-2022

Brand	2018	2019	2020	2021	2022	Total Sample
Western Family	1	0	0	2	0	3
Big Country Raw	0	0	0	0	2	2
Crave	1	1	0	0	0	2
Hungry Hunter	0	0	0	1	0	1
Iams Proactive Health	0	1	0	0	0	1
Catit Gold Fern	0	0	0	1	0	1
PureSnacks	1	0	0	0	0	1
PureBites	0	0	1	0	0	1
Pedigree Choice Cuts in Sauce	0	0	1	0	0	1
Holistic Blend My Healthy Pet	1	0	0	0	0	1

Source: Mintel, 2023

Top pet food companies in 2022, include Mars, Overwaitea Food, Big Country Raw, Mars Petcare and Nestlé Purina PetCare.

Top 10 companies of the 29 pet food 2018-2022

Companies	2018	2019	2020	2021	2022	Total Sample
Mars	1	2	2	0	0	5
Overwaitea Food	1	0	0	2	0	3
Big Country Raw	0	0	0	1	2	3
Mars Petcare	1	0	1	0	0	2
Nestlé Purina PetCare	0	1	1	0	0	2
Pure Treats	1	0	1	0	0	2
Bio Biscuit	1	0	0	0	0	1
Solid Gold Pet	0	1	0	0	0	1
Loblaws	0	1	0	0	0	1
WellPet	1	0	0	0	0	1

Source: Mintel, 2023

Top three claims were pet-adult (16), Low/No/Reduced Allergen (10) and Vitamin/Mineral Fortified (10) from 2018 to 2022.

Top 10 claims of the 29 pet food 2018-2022

Claim	2018	2019	2020	2021	2022	Total Sample
Pet - Adult	4	3	5	3	1	16
Low/No/Reduced Allergen	3	3	2	1	1	10
Vitamin/Mineral Fortified	2	3	3	1	1	10
No Additives/Preservatives	3	2	2	0	1	8
High/Added Protein	2	2	3	0	1	8
Free from Added/Artificial Preservatives	2	2	2	0	1	7
Free from Added/Artificial Flavourings	1	2	2	0	1	6
Free from Added/Artificial Colourings	2	1	1	0	1	5
Premium	2	2	0	1	0	5
Social Media	1	0	4	0	0	5

Source: Mintel, 2023

Top three flavours were lamb (24), Chicken (7) and rice (5) from 2018 to 2022.

Top 10 flavours of the 29 pet food 2018-2022

Flavour	2018	2019	2020	2021	2022	Total Sample
Lamb	6	5	6	4	3	24
Chicken	3	1	2	1	0	7
Rice	1	2	0	2	0	5
Salmon	0	1	0	1	1	3
Vegetable	0	0	3	0	0	3
Rice (Brown)	0	1	2	0	0	3
Turkey	0	0	0	1	1	2
Bacon/Lardon/Pancetta/Speck	0	0	1	0	0	1

Mussel	0	0	0	1	0	1
Gravy	0	0	1	0	0	1

Source: Mintel, 2023

The ingredients were lam meat (17), supplement (17), Vitamin E (17), Cholecalciferol (16) and salt (15) from 2018 to 2022.

Top 10 ingredients of the 29 pet food 2018-2022

Ingredient	2018	2019	2020	2021	2022	Total Sample
Lamb Meat (Food)	4	5	3	3	2	17
Supplement	5	4	4	3	1	17
Vitamin E (Food)	5	4	4	3	1	17
Cholecalciferol (Food)	5	4	4	2	1	16
Salt (Food)	4	4	3	3	1	15
Choline Chloride (Food)	4	6	2	3	0	15
Food Acids	6	2	4	3	0	15
Potassium Chloride (Food)	4	5	3	2	1	15
Thiamine Mononitrate (Food)	5	4	3	2	1	15
Biotin (Food)	5	4	2	3	0	14

Source: Mintel, 2023

Launch type between 2018 and 2022 were New Variety/Range Extension (10), New Product (9), New Packaging (8) and relaunch (2).

Launch type of the 29 pet food 2018-2022

Launch type	2018	2019	2020	2021	2022	Total Sample
New Variety/Range Extension	1	3	4	1	1	10
New Product	4	1	1	1	2	9
New Packaging	3	1	2	2	0	8
Relaunch	1	1	0	0	0	2
Total Sample	9	6	7	4	3	29

Source: Mintel, 2023

Top three nutrition were protein (28), fat (28) and moisture (28) from 2018 to 2022.

Top 10 nutrition of the 29 pet food 2018-2022

Nutrition	2018	2019	2020	2021	2022	Total Sample
Protein (listed on pack)	9	6	6	4	3	28
Fat (listed on pack)	9	6	6	4	3	28
Moisture (listed on pack)	9	6	6	4	3	28
Fibre (listed on pack)	9	6	6	3	2	26
Energy (kcal) (listed on pack)	4	1	3	3	2	13
Metabolisable Energy (kcal) (listed on pack)	4	4	2	1	1	12
Omega-6 (listed on pack)	2	3	2	0	0	7
Omega 3 Fatty Acids (listed on pack)	1	2	2	0	0	5
Carbohydrates (listed on pack)	0	0	0	1	2	3
Phosphorus (listed on pack)	0	0	0	1	2	3

Source: Mintel, 2023

Top three store type were Specialist Retailer (11), Supermarket (10) and Mass Merchandise/Hypermarket (5) from 2018 to 2022.

Top store type of the 29 pet food 2018-2022

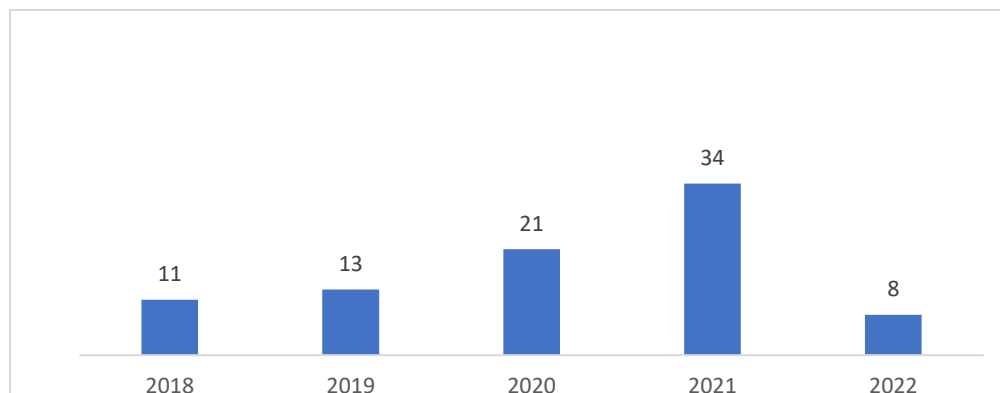
Storage type	2018	2019	2020	2021	2022	Total Sample
Specialist Retailer	4	1	1	2	3	11
Supermarket	2	3	3	2	0	10
Mass Merchandise/Hypermarket	1	1	3	0	0	5
Club Store	1	0	0	0	0	1
Natural/Health Food Store	1	0	0	0	0	1
Drug Store/Pharmacy	0	1	0	0	0	1
Total Sample	9	6	7	4	3	29

Source: Mintel, 2023

Sheep milk

According to Mintel, there were 87 new sheep milk, launched (including new variety/range extension, packaging, formulation or relaunched) in Canada between the period of January 2018 and December, 2022.

**Number of sheep-related food products launched in Canada, (Jan. 2018 – December, 2022)
total product item count (87)**



Source: Mintel, 2023

According to Mintel, new brands related to sheep milk include Longo's Curato (5), Western Family (5), Dodoni (5).

Top 10 brands of the 87 sheep milk 2018-2022

Brand	2018	2019	2020	2021	2022	Total Sample
Longo's Curato	0	0	0	4	1	5
Western Family	2	0	0	3	0	5
Dodoni	1	1	0	3	0	5
Krinos	1	0	1	0	2	4

Lalumière Bonanza	0	2	2	0	0	4
PC President's Choice	2	0	0	1	1	4
Kirkland Signature	1	0	1	1	0	3
Roussas	0	0	0	3	0	3
Biobio	0	0	2	0	0	2
Don Bernardo	0	0	2	0	0	2

Source: Mintel, 2023

Top companies in 2022, were Loblaws (10), Longo Brothers Fruit Markets (5), Dodoni (5), Krinos Foods (4) and Jan K. Overweel (4).

Top 10 companies of the 87 sheep milk 2018-2022

Companies	2018	2019	2020	2021	2022	Total Sample
Loblaws	3	1	1	4	1	10
Longo Brothers Fruit Markets	0	0	0	4	1	5
Dodoni	1	1	0	3	0	5
Krinos Foods	1	0	1	0	2	4
Jan K. Overweel	0	1	0	3	0	4
Lalumière Bonanza	0	2	2	0	0	4
Roussas Dairy	0	0	0	3	0	3
Costco Wholesale	1	0	1	1	0	3
Save-on-Foods	0	0	0	3	0	3
Biobio	0	0	2	0	0	2

Source: Mintel, 2023

Top three claims were No Additives/Preservatives (18), Free from Added/Artificial Colourings (13) and Free from Added/Artificial Flavourings (11) between 2018 and 2022.

Top 10 claims of the 87 sheep milk 2018-2022

Claim	2018	2019	2020	2021	2022	Total Sample
No Additives/Preservatives	4	0	4	5	3	16
Free from Added/Artificial Colourings	3	0	3	4	3	13
Free from Added/Artificial Flavourings	3	0	3	4	1	11
Free from Added/Artificial Preservatives	2	0	3	1	2	8
Premium	0	1	1	4	1	7
Organic	0	0	3	3	0	6
GMO Free	0	1	4	0	0	5
Microwaveable	1	1	1	2	0	5
Vegetarian	1	1	0	3	0	5
Ethical - Sustainable (Habitat/Resources)	1	0	2	2	0	5

Source: Mintel, 2023

Top three flavours were I Unflavoured/Plain (48), Pesto/Pistou (9) and Basil (4) from 2018 to 2022.

Top 10 flavours of the 87 sheep milk 2018-2022

Flavour	2018	2019	2020	2021	2022	Total Sample
Unflavoured/Plain	4	7	15	18	4	48
Pesto/Pistou	2	2	1	3	1	9
Basil	2	0	0	2	0	4
Cheese (Feta/Fetta)	0	0	0	2	2	4
Three/Four/Mixed Cheeses	1	0	1	2	0	4
Cheese (Romano)	2	0	0	1	0	3
Spinach	0	1	1	0	1	3
Cheese (Parmesan/Parmigiano Reggiano)	2	0	0	1	0	3
Cheese (Pecorino)	1	0	0	2	0	3
Cheese (Mozzarella)	0	1	1	0	0	2

Source: Mintel, 2023

The ingredients often found in these sheep-related products were sheep milk, salt, bacterial cultures, Rennet and milk (food).

Top 10 ingredients of the 87 sheep milk 2018-2022

Ingredients	2018	2019	2020	2021	2022	Total Sample
Sheeps Milk (Food)	10	12	20	30	8	80
Salt (Food)	9	11	20	28	8	76
Bacterial Cultures	7	11	19	24	7	68
Rennet (Food)	6	8	13	18	5	50
Milk (Food)	6	5	8	14	5	38
Waters (Food)	7	2	8	11	6	34
Food Enzymes (Food)	7	5	9	7	3	31
Food Acids	6	4	7	11	3	31
Goats Milk (Food)	3	3	6	12	2	26
Garlic (Food)	4	3	4	10	2	23

Source: Mintel, 2023

The five nutrition over the 5-year period containing sheep milk includes Sodium (77), Cholesterol (77), iron (77), protein (77)n and calcium (77).

Top 10 nutrition of the 87 sheep milk 2018-2022

Nutrition	2018	2019	2020	2021	2022	Total Sample
Sodium (listed on pack)	11	9	17	32	8	77
Cholesterol (listed on pack)	11	9	17	32	8	77
Iron (listed on pack)	11	9	17	32	8	77
Protein (listed on pack)	11	9	17	32	8	77
Calcium (listed on pack)	11	9	17	32	8	77
Energy (kcal) (listed on pack)	11	9	17	32	8	77
Saturated Fat (listed on pack)	11	9	17	32	8	77

Trans Fat (listed on pack)	11	9	17	32	8	77
Fat (listed on pack)	11	9	17	32	8	77
Fibre (listed on pack)	11	9	17	32	8	77

Source: Mintel, 2023

The five sub-categories over the 5-year period containing sheep milk includes Soft Cheese & Semi-Soft Cheese (24), Hard Cheese & Semi-Hard Cheese (23), Pasta Sauces (11), Pasta (5) and Pizzas (5).

Top 10 Sub-categories of the 87 sheep milk 2018-2022

Sub-categories	2018	2019	2020	2021	2022	Total Sample
Soft Cheese & Semi-Soft Cheese	2	1	6	12	3	24
Hard Cheese & Semi-Hard Cheese	1	5	9	7	1	23
Pasta Sauces	2	2	1	5	1	11
Pasta	1	0	3	1	0	5
Pizzas	2	0	1	1	1	5
Prepared Meals	0	1	1	2	0	4
Hors d'oeuvres/Canapes	0	1	0	2	0	3
Pastry Dishes	0	0	0	1	2	3
Meat Products	2	0	0	0	0	2
Fish Products	0	0	0	2	0	2

Source: Mintel, 2023

Top three store types were Supermarket (61), Mass Merchandise/Hypermarket (9) and Natural/Health Food Store (8) from 2018 to 2022.

Top store type of the 87 sheep milk 2018-2022

Storage type	2018	2019	2020	2021	2022	Total Sample
Supermarket	8	8	11	26	9	61
Mass Merchandise/Hypermarket	1	3	2	3	0	9
Natural/Health Food Store	1	0	6	1	0	8
Club Store	1	1	2	3	0	7
Drug Store/Pharmacy	0	1	0	0	0	1
Total Sample	11	13	21	33	9	87

Source: Mintel, 2023

Product examples

Mini Lamb Hot Pot

Company: Bala Foods
Manufacturer: Bala Foods
Brand: Bala Foods
Category: Soup
Sub-Category: Wet Soup
Market: Canada
Location of Manufacture: Canada
Import Status: Not imported
Store Type: Supermarket
Date Published: Nov 2022
Launch Type: New Product
Price in local currency: CAD19.28
Price in US Dollars: 14.30
Price in Euros: 14.36



Product Description

Bala Foods Mini Lamb Hot Pot is now available, and retails in a 1000g pack.- Cooking instructions- Recyclable pack

Feta Cheese

Company: Krinos Foods
Importer: Krinos Foods
Brand: Krinos
Category: Dairy
Sub-Category: Soft Cheese & Semi-Soft Cheese
Market: Canada
Store Type: Supermarket
Date Published: Oct 2022
Launch Type: New Packaging
Price in local currency: CAD27.99
Price in US Dollars: 20.55
Price in Euros: 20.84



Product Description

Krinos Feta Cheese has been repackaged in a 1kg pack.- Made with sheep milk- 22% milk fat, 55% moisture- Feta cheese preserves better when fully submerged in brine- Logos and certifications: Protected Designation of Origin, Certified by Agrocet, Halal

Lamb Burgers

Company: NMK Foods
Manufacturer: NMK Foods
Brand: Kebab Factory
Category: Processed Fish, Meat & Egg Products
Sub-Category: Meat Products
Market: Canada
Store Name: Nofrills
Store Type: Supermarket
Date Published: Oct 2022
Launch Type: New Product
Price in local currency: CAD12.69
Price in US Dollars: 9.33
Price in Euros: 9.62

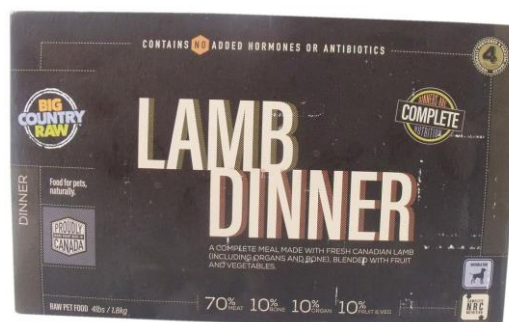


Product Description

Kebab Factory Lamb Burgers are now available, and retail in a 678g pack containing six 113g burgers.- Medium hot, with a two out of four spiciness rating- No artificial flavours, colours or preservatives added, and soy fillers- Uncooked- Pack featuring cooking instructions- Logos and certifications: Halal, Instagram, Facebook, Canadian Food Inspection Agency

Lamb Dinner Raw Pet Food

Company: Big Country Raw
Manufacturer: Big Country Raw
Brand: Big Country Raw
Category: Pet Food
Sub-Category: Dog Food Wet
Market: Canada
Location of Manufacture: Canada
Store Name: Pet Valu
Store Type: Specialist Retailer
Date Published: Mar 2022
Launch Type: New Product
Price in local currency: CAD22.99
Price in US Dollars: 18.05
Price in Euros: 16.50



Product Description

Big Country Raw Lamb Dinner Raw Pet Food is described as a complete meal made with fresh Canadian lamb, including organs and bone, and blended with fruit and vegetables. It comprises 70% meat, 10% bone, 10% organ and 10% fruit and vegetables. This complete NRC nutrition pet food is suitable for dogs, contains no added hormones or antibiotics, and retails in a 1.8kg pack with four 1-lb. individually portioned and vacuum sealed units, and bearing feeding guides, serving and handling instructions.

Resources

Global Trade Tracker 2023
 Euromonitor 2023
 Mintel Global Data New Product (GDNP) database, 2023

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