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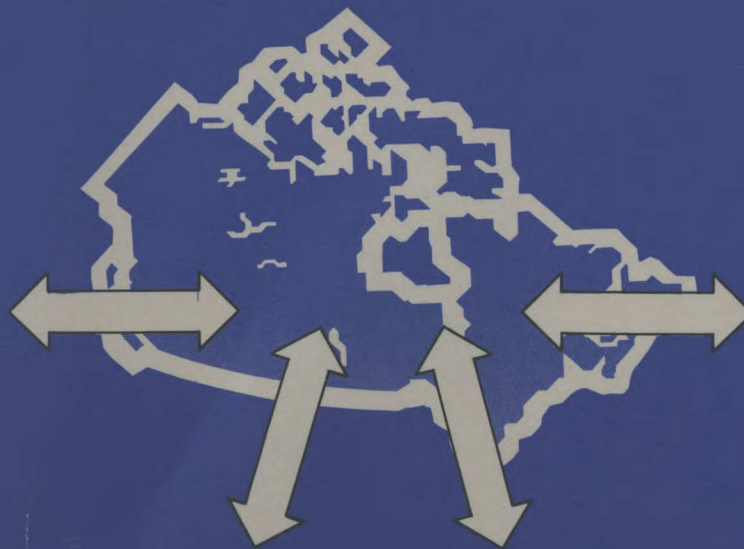
Industrie, Sciences et  
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# MARKET INTELLIGENCE

## YOGOURT

Pub. No.: 90056-IP

September 1990



Canada





ID. 90-0287

# YOGOURT

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## FOR MORE INFORMATION PLEASE CONTACT:

Market Intelligence Division  
Services to Business Branch  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-4970

OR Animal and Plant Products Division  
Service Industries and Consumer Goods  
Branch  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-2942

## REFERENCE SOURCES

Industry, Science and Technology Canada  
Statistics Canada, Tel.: (613) 951-9647  
Revenue Canada, Tel.: (613) 954-6913

## TARIFFS

Enquiries concerning **Canadian** tariffs  
should be directed to the nearest Customs  
and Excise office or to:

Tariff Programs  
Revenue Canada  
Customs and Excise  
Ottawa, Ontario K1A 0L5  
Tel.: (613) 954-6913

Enquiries concerning tariffs and other  
government trade regulations in **foreign**  
countries should be directed to:

Info Export  
External Affairs  
Ottawa, Ontario  
K1A 0G2  
Tel.: (613) 993-6435 OR  
1-800-267-8376

## EXPLANATORY NOTES

### Commodity Classification

Canadian Trade statistics are classified and published according to the International Convention on the Harmonized Commodity and Description Coding System (H.S.), as defined by the Canadian Customs Tariff and Statistical Nomenclature.

### Valuation

Dollar values shown in this report are based on selling price F.O.B. plant, in Canadian dollars. This selling price represents the value paid by the importer, excluding all freight, packing and insurance costs when specified. All trade discounts, when applicable, are also deducted from the selling price.

### Rounding

Figures may not add due to rounding.

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## YOGOURT

### I. INTRODUCTION AND SCOPE

This report is one of a continuing series designed to increase business awareness of the potential existing for production in Canada. It is important, however, to emphasize that this report does not attempt any assessment as to the feasibility of competing in a particular market.

This profile is based on data from several sources for the Harmonized System (H.S.) commodity code 0403.10.00.00, Yogourt.

### II. CANADIAN IMPORTS

#### TOTAL IMPORTS

<u>Description and Commodity Code</u>	<u>1988</u>		<u>1989</u>		<u>1990 Jan.-June</u>		<u>Major Country of Export to Canada % of Total Value</u>		
	<u>Quantity (Kg 000)</u>	<u>Value (\$000)</u>	<u>Quantity (Kg 000)</u>	<u>Value (\$000)</u>	<u>Quantity (Kg 000)</u>	<u>Value (\$000)</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>
Yogourt							USA	USA	USA
H.S. 0403.10	1 141	2 023	800	1 401	200	328	98	100	100

#### 1989 IMPORTS FROM ALL COUNTRIES

#### BY PROVINCE OF CUSTOMS CLEARANCE

<u>H.S. Code</u>	<u>Québec</u>	<u>Ontario</u>	<u>Manitoba</u>	<u>Alberta</u>	<u>British Columbia</u>	<u>All Provinces</u>
0403.10.00.00						
Yogourt						
Quantity (000 Kg)	41	661	12	16	70	800
Value (\$000)	98	1 141	25	32	105	1 401

## YOGOURT

### III. CANADIAN IMPORTS FROM THE UNITED STATES BY STATE OF ORIGIN

(H.S. 0403.10)

1989

<u>State of Origin</u>	<u>Quantity</u> (Kg)	<u>Value</u> (\$)	<u>Import Market</u> <u>Share</u> (% based on \$ value)	<u>Average</u> <u>Unit</u> <u>Price</u> (\$/Kg)
Texas	278 980	481 068	34	1.72
Massachusetts	145 040	294 419	21	2.02
California	137 190	204 282	15	1.48
Iowa	99 790	163 226	12	1.63
Oregon	53 675	76 747	5	1.42
Wisconsin	19 914	47 186	3	2.36
Utah	12 079	30 542	2	2.52
Illinois	13 947	25 831	2	1.85
Florida	6 524	17 660	1	2.70
Washington	9 107	16 701	1	1.83
Arizona	8 116	14 347	1	1.76
Connecticut	5 621	9 441	*	1.67
Pennsylvania	3 536	6 576	*	1.85
Other	<u>6 432</u>	<u>12 712</u>	<u>*</u>	<u>1.98</u>
TOTAL	799 951	1 400 738	100	1.75

\* Less than one per cent

### IV. CANADIAN SHIPMENTS

Canadian yogourt production exceeded 94 000 tonnes in 1989, valued at an estimated \$250 million.

## YOGOURT

### V. CANADIAN IMPORTERS - 1988

The principal six importers of yogourt accounted for 67 per cent of the total import value during 1988.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Per Cent of Total Value</u>
3	967	48
6	1 355	67
10	1 560	77
20	1 814	89
25	1 880	92
All Importers (38)	2 034	100

The principal 25 importers are listed below in alphabetical order.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Ault Dairies, Div. of		Honey Hill Farms	Concord, CA., USA*
Ault Foods Ltd.	Don Mills, Ont.	Marks & Spencer, Div. of	
Burgess Wholesale Limited	Newmarket, Ont.	Marks & Spencer Canada Inc.	Mississauga, Ont.
Clearview Turkey Farms Ltd.	Mississauga, Ont.	Mother Parkers Foods Ltd.	Cooksville, Ont.
Columbo Dairy Food Products		Ramsey Laboratories Inc.	Cleveland, OH., USA*
Co. Ltd.	Etobicoke, Ont.	Remark Orchard & Nursery	Kingsville, Ont.
Columbo Inc.	Montréal, Qué.	Silverwood Dairies Ltd.	London, Ont.
Crescent Cheese Company Inc.	Montréal, Qué.	Skrows Product (1971) Ltd.	Toronto, Ont.
Damfoods Visa Inc.	St-Laurent, Qué.	Snak Tyme Foods Ltd.	Winnipeg, Man.
Dubord & Rainville Inc.	Montréal, Qué.	St. Lawrence Foods Corp.	Markham, Ont.
Elan Foods Ltd.	Fort Erie, Ont.	Stross Management Ltd.	Edmonton, Alta.
Finlay Greenwood Inc.	Hamilton, Ont.	Tropical Enjoyment Ltd.	Winnipeg, Man.
Forgurts Café	Vancouver, B.C.	Wild West Organic Harvest	Vancouver, B.C.
Fresh'N Easy Yogourt Inc.	Toronto, Ont.	Zacks Development Inc.	Toronto, Ont.

\* Non resident importer



## YOGOURT

### VI. U.S. EXPORTERS TO CANADA

1989

(H.S. 0403.10)

Major exporters to Canada of yogourt are listed in descending order of dollar value. These exporters accounted for 84 per cent of the total value of Canadian imports during 1989.

<u>Country</u>	<u>Exporter Name</u>	<u>State of Origin</u>	<u>Value of Exports to Canada - 1989</u> (\$000)
United States	Americana Foods Inc.	Texas	) * 782
	Colombo Inc.	Massachusetts	
	Grain Processing Corp.	Iowa	) * 396
	Honey Hill	Illinois	
	Springfield Creamery	Oregon	
	Tropical Sno Co. Inc.	Utah	) —
TOTAL			1 178

\* Aggregated to preserve confidentiality of Canadian importers.

## YOGOURT

### VII. CANADIAN SUPPLIERS

The following lists are taken from two sources: a) the Business Opportunities Sourcing System (BOSS), a computerized data bank established by the Federal Department of Industry, Science and Technology Canada; and, b) the Canadian Trade Index, published by the Canadian Manufacturers' Association (CMA). These lists may not include all suppliers of the products in question, as companies must themselves register in BOSS or the Canadian Trade Index. In both cases, information on Canadian products supplied is as given by the companies.

#### BOSS

Canadian companies are arranged in alphabetical order.

#### Yogourt

<u>Name</u>	<u>Address</u>
Agrinove, Cooperative Agro-Alimentaire	Ste-Claire, Qué.
Agropur, Cooperative Agro-Alimentaire	Granby, Qué.
Alamar Farms Ltd.	Delta, B.C.
Archers Dairy Limited	Kirkland Lake, Ont.
Astro Dairy Products Ltd.	Etobicoke, Ont.
Ault Foods Limited	Winchester, Ont.
Catelli Inc.	Winnipeg, Man.
	Weston, Ont.
Clover Leaf Cheese Ltd.	Montréal, Qué.
Dairy Producers Co-operative Limited	Calgary, Alta.
Farmers Co-operative Dairy Limited	Regina, Sask.
Foremost Foods Limited	Halifax, N.S.
*H.J. Heinz Company of Canada Ltd.	Burnaby, B.C.
Health Pasteurized Milk Company Ltd.	Toronto, Ont.
*Imperial Flavours inc.	Hunter River, P.E.I.
*Institut Rosell Inc.	Mississauga, Ont.
Island Farms Dairies Co-op Association	Montréal, Qué.
Laiterie Chalifoux Inc.	Victoria, B.C.
Laiterie Dallaire, Div. de Aliments Ault	Sorel, Qué.
Laiterie de la Baie Ltée.	Rouyn, Qué.
Les Aliments Ault Ltée. (Sealtest)	Ville de la Baie, Qué.
Les Laboratoires Lalco Inc.	Montréal, Qué.
Les Laboratoires Vachon Inc.	Montréal, Qué.
	Lauzon, Qué.

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\* Company engaged in export trade

## YOGOURT

### VII. CANADIAN SUPPLIERS (Cont'd)

#### Yogourt

##### Name

##### Address

Lucerne Foods Ltd.	Winnipeg, Man.
*Lyo-San Inc.	Lachute, Qué.
Maple Leaf Dairy (1986) Limited	Summerside, P.E.I.
Northern Alberta Dairy Pool Limited	Edmonton, Alta.
Olympic Dairy Products Ltd.	Richmond, B.C.
Palm Dairies Limited	Calgary, Alta.
Peninsula Farm Limited	Lunenburg, N.S.
Poppa Corn Company Limited	Mississauga, Ont.
Westhill Dairy Inc.	Downsview, Ont.
William Neilson Ltd./Ltée.	Toronto, Ont.

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\* Company engaged in export trade

Any enquiries and/or comments regarding the BOSS list should be directed to:

Business Opportunities Sourcing System (ABOS)  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario K1A 0H5  
Tel.: (613) 954-5031  
Telex: 053-4123  
Fax: (613) 954-1894

## YOGOURT

### VII. CANADIAN SUPPLIERS (Cont'd)

#### CANADIAN TRADE INDEX

Canadian companies are arranged in alphabetical order.

<u>Name</u>	<u>Address</u>
Agropur Cooperative Agro-Alimentaire	Granby, Qué.
Aliments Delisle Ltée.	Boucherville, Qué.
Ault Foods Limited	Etobicoke, Ont.
Beatrice Foods Inc.	Etobicoke, Ont.
Central Alberta Dairy Pool	Red Deer, Alta.
Chapman, David Ice Cream Limited	Markdale, Ont.
Crescent Cheese Ltd.	Montréal, Qué.
Dairy Producers Co-operative Limited	Regina, Sask.
Dairyland Foods	Burnaby, B.C.
Eplett Dairies Company Limited	Brampton, Ont.
Farmers Co-operative Dairy Limited	Bedford, N.S.
Foremost Foods Ltd.	Vancouver, B.C.
Gay Lea Foods Co-operative Limited	Weston, Ont.
Liberty Brand Products Inc.	Candiac, Qué.
Lucerne Foods Ltd.	Edmonton, Alta.
Manitoba Dairy Co-operative Ltd.	Winnipeg, Man.
McCain Refrigerated Foods Inc.	Oakville, Ont.
Miles Canada Inc., Biotechnology Group	Etobicoke, Ont.
Neilson, William, Ltd./Ltée.	Toronto, Ont.
Palm Dairies Limited	Calgary, Alta.
Peninsula Farm Limited	Lunenburg, N.S.
Rainbow Brand Natural Ice-Cream	Downsview, Ont.
Rolmex Inc.	Boucherville, Qué.
Romi Foods	Weston, Ont.
Western Creamery	Downsview, Ont.

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Any enquiries and/or comments regarding the Canadian Trade Index list should be directed to:

The Canadian Manufacturers' Association  
One Yonge Street  
Toronto, Ontario  
M5E 1J9  
Tel.: (416) 363-7261  
Telex: 065-24693  
Fax: (416) 363-3779



## YOGOURT

### VIII. CANADIAN AND FOREIGN TARIFFS

Yogourt included in this report are dutiable under the following Canadian tariff item.

<u>Tariff Item</u>	<u>Description of Goods</u>	<u>Tariff Treatment</u>		
		<u>Most Favoured Nation Tariff</u>	<u>General Preferential Tariff</u>	<u>United States Tariff</u>
0403.10.00.00	Yogourt	15%	X	13.5%
	On and after January 1, 1990			12%
	On and after January 1, 1991			10.5%

Where the symbol "X" appears in the column "General Preferential Tariff" the rate of customs duty that applies to those goods is the rate set out with respect to those goods in the column "Most-Favoured-Nation Tariff".

Enquiries concerning tariffs should be directed to the nearest Customs and Excise office or to:

Tariff Programs  
Revenue Canada  
Customs and Excise  
Ottawa, Ontario  
K1A 0L5  
Tel.: (613) 954-6913  
Fax.: (613) 954-2509

### FOREIGN COUNTRIES

Enquiries concerning tariffs and other government trade regulations in foreign countries should be directed to:

Info Export  
External Affairs  
Ottawa, Ontario  
K1A 0G2  
Tel.: (613) 993-6435 OR 1-800-267-8376  
Fax.: (613) 996-9709

## YOGOURT

### IX. MARKET OVERVIEW

Canadian yogourt production exceeded 94,000 tonnes in 1989. Both production and consumption of yogourt products have increased over 50 per cent in the last five years making it one of the fastest growing dairy products. Yogourt consumption reached 3.59 kg per capita in 1989. Annual production is now valued at approximately \$250 million in Canada.

Stirred yogourt and firm yogourt with fruit added represent at least three quarters of the Canadian market for various yogourt products. It should be stressed that the market for yogourt products is an innovative one with manufacturers regularly testing consumer acceptance of new products. Other kinds of yogourt now beginning to appear include yogourt spreads, unrefrigerated yogourts, cream yogourts, light skim milk yogourts, UHT yogourts, frozen yogourts and yogourt drinks.

Much of the early development and introduction of yogourt products in the Canadian market first occurred in Québec. Québec still accounts for about 57 per cent of production in Canada followed by Ontario with 23 per cent, while Alberta and British Columbia together account for at least another 10 per cent. Both of these western provinces and Quebec have per capita consumption rates above the national average.

The dynamics of the U.S. market are very similar to what is happening in Canada. High annual growth of sales and a proliferation of new products are also occurring there. The high consumption levels of yogourt in Alberta and British Columbia could in part be a reflection of the strong popularity of yogourt in California. That state could be projecting some northward influence since California is the leading producing state of yogourt products and has consumption rates above the U.S. national average.

Texas is one of the major suppliers of the limited volume of yogourt that is shipped to Canada along with Massachusetts, California and Iowa. Due to import restrictions, the total value of imports was only \$1.5 million or less than one per cent of the total market in 1989. The U.S. was the only supplier with the above mentioned four states accounting for 75 per cent of these imports. Ontario was the province of customs clearance for over 80 per cent of these imports.

Canadian consumption rates for yogourt on a per capita basis are slightly higher than U.S. rates. Some Europeans eat large amounts of yogourt so that ethnic habits and tastes have considerable influence on the North American market. Success in further increasing yogourt sales probably depends on adopting new ideas from western Europe as well as from Canadian and American research. This may include innovations in packaging as well as increased use as a snack food. Yogourt is well established as a healthy nutritious food particularly among younger consumers. Future growth in Canadian and U.S. sales, possibly at slower rates, can be reasonably expected.

