

# Bakery Products

HD9505  
.C3  
I5  
1990-91  
B3 c.2

IC



Industry, Science and  
Technology Canada

Industrie, Sciences et  
Technologie Canada

I  
N  
D  
U  
S  
T  
R  
Y  
P  
R  
O  
F  
I  
L  
E

## Business Service Centres / International Trade Centres

Industry, Science and Technology Canada (ISTC) and International Trade Canada (ITC) have established information centres in regional offices across the country to provide clients with a gateway into the complete range of ISTC and ITC services, information products, programs and expertise in industry and trade matters. For additional information contact any of the offices listed below.

### Newfoundland

Atlantic Place  
Suite 504, 215 Water Street  
P.O. Box 8950  
ST. JOHN'S, Newfoundland  
A1B 3R9  
Tel.: (709) 772-ISTC  
Fax: (709) 772-5093

### Prince Edward Island

Confederation Court Mall  
National Bank Tower  
Suite 400, 134 Kent Street  
P.O. Box 1115  
CHARLOTTETOWN  
Prince Edward Island  
C1A 7M8  
Tel.: (902) 566-7400  
Fax: (902) 566-7450

### Nova Scotia

Central Guaranty Trust Tower  
5th Floor, 1801 Hollis Street  
P.O. Box 940, Station M  
HALIFAX, Nova Scotia  
B3J 2V9  
Tel.: (902) 426-ISTC  
Fax: (902) 426-2624

### New Brunswick

Assumption Place  
12th Floor, 770 Main Street  
P.O. Box 1210  
MONCTON, New Brunswick  
E1C 8P9  
Tel.: (506) 857-ISTC  
Fax: (506) 851-6429

### Quebec

Tour de la Bourse  
Suite 3800, 800 Place Victoria  
P.O. Box 247  
MONTREAL, Quebec  
H4Z 1E8  
Tel.: (514) 283-8185  
1-800-361-5367  
Fax: (514) 283-3302

### Ontario

Dominion Public Building  
4th Floor, 1 Front Street West  
TORONTO, Ontario  
M5J 1A4  
Tel.: (416) 973-ISTC  
Fax: (416) 973-8714

### Manitoba

8th Floor, 330 Portage Avenue  
P.O. Box 981  
WINNIPEG, Manitoba  
R3C 2V2  
Tel.: (204) 983-ISTC  
Fax: (204) 983-2187

### Saskatchewan

S.J. Cohen Building  
Suite 401, 119 - 4th Avenue South  
SASKATOON, Saskatchewan  
S7K 5X2  
Tel.: (306) 975-4400  
Fax: (306) 975-5334

### Alberta

Canada Place  
Suite 540, 9700 Jasper Avenue  
EDMONTON, Alberta  
T5J 4C3  
Tel.: (403) 495-ISTC  
Fax: (403) 495-4507  
  
Suite 1100, 510 - 5th Street S.W.  
CALGARY, Alberta  
T2P 3S2  
Tel.: (403) 292-4575  
Fax: (403) 292-4578

### British Columbia

Scotia Tower  
Suite 900, 650 West Georgia Street  
P.O. Box 11610  
VANCOUVER, British Columbia  
V6B 5H8  
Tel.: (604) 666-0266  
Fax: (604) 666-0277

### Yukon

Suite 301, 108 Lambert Street  
WHITEHORSE, Yukon  
Y1A 1Z2  
Tel.: (403) 668-4655  
Fax: (403) 668-5003

### Northwest Territories

Precambrian Building  
10th Floor  
P.O. Bag 6100  
YELLOWKNIFE  
Northwest Territories  
X1A 2R3  
Tel.: (403) 920-8568  
Fax: (403) 873-6228

### ISTC Headquarters

C.D. Howe Building  
1st Floor East, 235 Queen Street  
OTTAWA, Ontario  
K1A 0H5  
Tel.: (613) 952-ISTC  
Fax: (613) 957-7942

### ITC Headquarters

InfoExport  
Lester B. Pearson Building  
125 Sussex Drive  
OTTAWA, Ontario  
K1A 0G2  
Tel.: (613) 993-6435  
1-800-267-8376  
Fax: (613) 996-9709

## Publication Inquiries

For individual copies of ISTC or ITC publications, contact your nearest Business Service Centre or International Trade Centre. For more than one copy, please contact

For Industry Profiles:  
Communications Branch  
Industry, Science and Technology  
Canada  
Room 704D, 235 Queen Street  
OTTAWA, Ontario  
K1A 0H5  
Tel.: (613) 954-4500  
Fax: (613) 954-4499

For other ISTC publications:  
Communications Branch  
Industry, Science and Technology  
Canada  
Room 208D, 235 Queen Street  
OTTAWA, Ontario  
K1A 0H5  
Tel.: (613) 954-5716  
Fax: (613) 954-6436

For ITC publications:  
InfoExport  
Lester B. Pearson Building  
125 Sussex Drive  
OTTAWA, Ontario  
K1A 0G2  
Tel.: (613) 993-6435  
1-800-267-8376  
Fax: (613) 996-9709

**Canada**



1990-1991

## BAKERY PRODUCTS

INDUSTRY, SCIENCE AND  
TECHNOLOGY CANADA  
LIBRARY

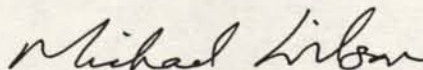
JUL 9 1992

BIBLIOTHÈQUE  
INDUSTRIE, SCIENCES ET  
TECHNOLOGIE CANADA

## FOREWORD

*In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to growth and prosperity. Promoting improved performance by Canadian firms in the global marketplace is a central element of the mandates of Industry, Science and Technology Canada and International Trade Canada. This Industry Profile is one of a series of papers in which Industry, Science and Technology Canada assesses, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological, human resource and other critical factors. Industry, Science and Technology Canada and International Trade Canada assess the most recent changes in access to markets, including the implications of the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the profiles.*

*Ensuring that Canada remains prosperous over the next decade and into the next century is a challenge that affects us all. These profiles are intended to be informative and to serve as a basis for discussion of industrial prospects, strategic directions and the need for new approaches. This 1990-1991 series represents an updating and revision of the series published in 1988-1989. The Government will continue to update the series on a regular basis.*



Michael H. Wilson  
Minister of Industry, Science and Technology  
and Minister for International Trade

**Structure and Performance****Structure**

The bakery products industry comprises firms engaged in making bread, rolls (sweet and unsweetened), cakes, pies, doughnuts, muffins and similar perishable products. The industry is divided into two subsectors: wholesale and retail bakeries. The primary focus of this profile is wholesale bakeries. Doughnut shops are not included by Statistics Canada as part of this industry.

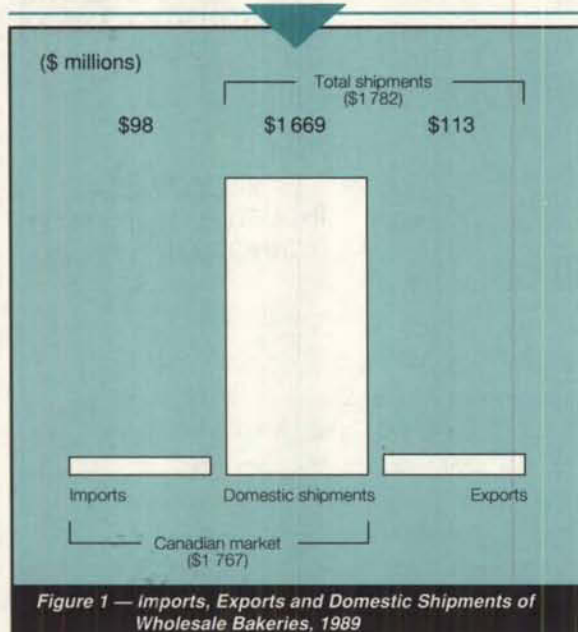
Wholesale bakeries produce high-volume products such as white bread and rolls, which are typically sold to grocery stores, chain stores or the foodservices sector. The large, wholesale operations encompass company-owned distribution facilities that in most cases include both trucking and warehouse operations. Some specialty wholesale bakeries

have developed to serve niche markets for products such as English muffins, bagels, croissants, European cakes, small cakes, pastries and pita bread.

The wholesale bakeries subsector also includes firms that produce frozen premixed doughs and preformed products for smaller retail outlets that do the final baking before selling them to the public. These products can include croissants, specialty bread doughs, buns, puff pastry dough, turnovers, Danish dough products and frozen muffin mixes. Frozen finished baked products that require only thawing prior to serving are also produced by these wholesale operations.

The retail subsector, which serves the market for goods baked fresh and sold over the counter, provides competition to wholesale bakeries. Retail bakeries produce and sell on the premises freshly baked goods such as crusty rolls, breads and pastries. These can be produced from frozen, premixed





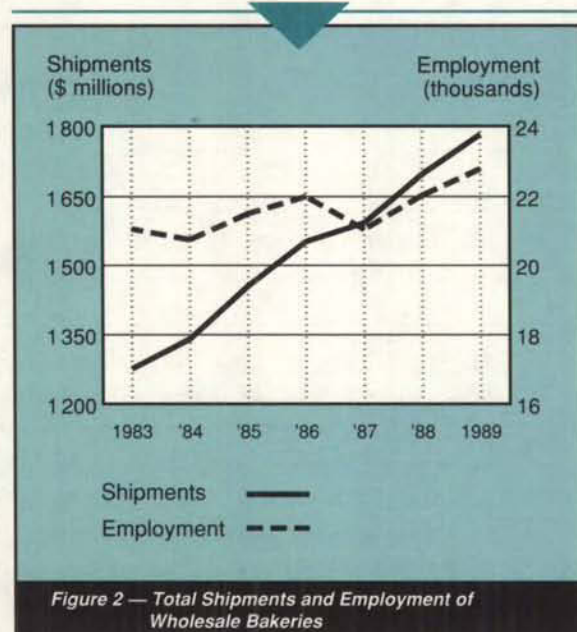
dough supplied by wholesalers, from dry mixes produced by flour millers or from scratch. Retail bakeries include independent retail stores, franchise operations and in-store bakeries. They generally have the ability to satisfy regional market demands for highly differentiated products (cheese sticks, coffee cakes, flavoured croissants) and seasonal items that are baked fresh daily.

The size of Canadian production facilities ranges from small, two-person, independent retail bakeries to several full-range wholesale operations employing more than 1 000 people.

In 1989, there were 491 wholesale bakery establishments in Canada, which shipped products valued at nearly \$1.8 billion (Figure 1) and employed nearly 23 000 people. Exports in 1989 totalled \$113 million, almost all directed to nearby major population centres in the United States, while imports in the same year amounted to \$98 million.

The retail bakeries subsector comprises more than 3 000 firms, with estimated annual sales of over \$500 million. Many retail in-store bakeries were initially considered traffic builders rather than profit centres. Today these units are expected to return a profit as well as attract customers. Both subsectors of this industry serve primarily the domestic market.

Wholesale bakery establishments are located in all regions of the country, their size and number being roughly proportional to the population. Because of the need to supply a fresh product that has a limited shelf life, the major firms



that operate in wide geographic areas, such as Ben's, Corporate Foods, Culinar, Eastern Bakeries (owned by Corporate Foods), McGavin Foods, Multimarques and Weston Bakeries, do so through branch plants, subsidiaries or affiliates.

Historically, the concentration level of the wholesale bakery products industry has been among the lowest of all industries in the food and beverage sector. In 1988, the four largest enterprises accounted for only about 30 percent of industry shipments and the eight largest for about 47 percent. By contrast, the corresponding figures for all food and beverage industries were 50 and 68 percent, respectively.

Foreign ownership in the past has been limited. However, the recent acquisition of Maple Leaf Mills by Hillsdown Holdings has given this British firm a better than 50 percent interest in Bunsmaster Bakeries, Corporate Foods and Eastern Bakeries.

### Performance

Between 1983 and 1989, the value of wholesale bakery product shipments rose from almost \$1.3 billion to nearly \$1.8 billion (Figure 2). Adjusted for inflation, however, this performance represents a real decline of 4 percent. While the number of establishments has fluctuated, the general trend over most of the 1980s was downward. This trend reflected a declining demand for the key product of the wholesale subsector — white bread — which accounts for approximately 45 percent of the value of industry shipments. Persistent excess





capacity in the Canadian industry has resulted in considerable attrition of wholesale bakery establishments over the same period. It has also been the driving force behind several major corporate consolidations.

The number of wholesale establishments returned in 1989 to the levels of the early 1980s; however, this increase appears to be a result of the opening of new specialty bakeries. Overall capacity utilization has now improved to an estimated 75 percent of full production, compared with approximately 70 percent a few years ago. This improvement reflects industry rationalization as well as the development of new lines of products other than white bread, including frozen-dough and specialty bakery products.

Recent interfirm comparison studies conducted by ISTC reveal that average industry profits for wholesale bakeries tend to be low in comparison with those of other food-manufacturing industries. Indeed, return on investment (ROI) decreased from a relatively low median value of 4.3 percent in 1980 to a level of 0.9 percent in 1985. ROI increased to 5.6 percent in 1988, reflecting higher gross margins. This recovery is a result of realistic price increases and industry efforts to maintain greater cost control over ingredient and material costs. Higher margins have assisted the industry in financing modernization. Recent investments in new automated technologies — for example, at the Weston plants in Longueuil and Calgary — will also increase efficiency. Labour costs, too, stabilized between 1985 and 1988, and overhead costs remained stable.

Cost advantages achieved through production efficiencies have enabled large firms to exert pricing pressure on their smaller wholesale rivals. There are, however, inherent limits to the benefits of production line consolidation in Canada as increased distribution costs associated with centralized operations offset the gains of scale economies. On average, distribution costs are estimated to represent a significant 40 percent of the total selling price of bakery products.

Per capita consumption of white bread reached a high of 42 kilograms in 1961 but fell to 28 kilograms by 1986. Recent annual per capita consumption figures for white bread are not available, but it is believed that consumption has continued its long-standing decline of an estimated 2 percent per year. Consumption of other bakery products (rolls, European breads, etc.) has increased, however, and has maintained some stability in overall per capita consumption of bakery products.

An aging population, reduced numbers of school children, increased consumption of meals away from home, increased product range and changing consumer tastes have contributed to the decline in consumption of white bread. Specialty packaged products such as croissants, pies, cakes and muffins have increased in popularity in recent years as a result of

the expansion of in-store bakeries. These operations have created a quality and freshness image with the quick introduction of new products. This has put added pressure on the major wholesalers to develop new products or to reposition existing items to meet evolving demands. In response, wholesale bakeries have introduced multigrain, high-fibre and calorie-reduced breads along with upscale products to compete with those offered by in-store bakeries. Specialty wholesale operations have developed a strong quality image for European products and other specialty items.

Frozen, preformed dough operations do not fully bake the product themselves but distribute it frozen to retail bakeries, in-store bakeries and other foodservices. The resulting finished products of retail bakeries and others have cut into traditional markets of wholesale bakeries. However, a number of wholesale bakeries and independent suppliers are involved in the production and distribution of frozen-dough products to both the domestic and export markets. Preformed, frozen-dough products are produced by Corporate Foods (through its interest in Dough Delight) and Weston Bakeries (through Ready Bake Foods). Other companies such as Pro Pastries and Rich Products, while not affiliated with major wholesale operations, are strong competitors in this market.

The expansion of in-store bakeries that are located in supermarkets and convenience stores across Canada is providing additional volume for suppliers of frozen dough while increasing competition for traditional wholesale bakery products. As a result, wholesale bakeries have lost market share for these products and their large bulk deliveries to chain stores have declined. This situation has contributed to an increase in the unit distribution costs of wholesale bakeries.

In-store retail bakeries manufacture a full line of bakery products through two distinct operations — scratch and bake-off — and may supplement their needs through the purchase of other baked products. Bake-off operations primarily bake products that are either preformed and frozen or they may use dried flour mixes that require minimal preparation. These operations have reduced investment in capital and equipment and operate with low labour costs. Scratch bakery operations have higher costs for labour and require more square footage as a result of the need to prepare products from a basic recipe. This involves mixing and blending of ingredients, proofing (the final fermentation process to ensure proper volume and texture of the bread) as well as baking and usually is done under the direction of a skilled baker. Both types of operations, because of their limited fixed costs (and no need for a distribution network), have the flexibility to adjust prices to changing market conditions. This places pressure on wholesale operations to match prices on a daily basis or lose their competitive position.





International trade does not play a large role in this industry. Exports of bakery products, though a small fraction of total production, have been consistently greater than imports, generating a small annual trade surplus. From 1983 to 1989, the value of Canadian exports increased from \$52 million to \$113 million. This increase in exports is largely attributable to the development of preformed and frozen-dough products that have successfully supplied operations in the United States. These products are less perishable than traditional baked goods and are more suited to long-distance shipping to supply the growing number of bake-off operations in the United States.

Imports averaged around \$40 million from 1983 to 1987, but nearly doubled in 1988, remaining at this higher level in 1989. This increase, however, appears in part to be attributable to the introduction in 1988 of the Harmonized Commodity Description and Coding System of exports and imports (see footnote to Trade Statistics table). The United States has continued to supply a relatively steady share of imports averaging 74 percent in recent years. These imports consist largely of pastries and baked goods sold in Canadian markets close to the U.S. border. Similarly, the majority of Canadian exports of bakery products are shipped to the United States.

Flour is the single most important input in this industry and on average accounts for around 40 percent of the cost of raw materials. Canadian domestic wheat prices were higher than world prices between 1985 and mid-1988. Historically, the impact of the higher domestic prices on the overall performance of the industry was relatively limited, as import penetration of bakery products in most regions of Canada was relatively low. Price concessions to more closely match the world price of wheat were also available for exports of finished products that contained significant amounts of flour.

With a view to the implementation on 1 January 1989 of the Canada-U.S. Free Trade Agreement (FTA), the Canadian Wheat Board (CWB) domestic wheat pricing was adjusted to reflect the North American market. Effective 2 January 1991, the CWB began pricing domestic milling wheat on a daily basis. Also, consistent with the FTA, import licences as of 3 May 1991 are no longer required for wheat and wheat products.

These changes have resulted in Canadian prices close to or equivalent to U.S. prices and have enhanced the ability of Canadian bakeries to be more competitive with their U.S. counterparts in the North American market.

## **Strengths and Weaknesses**

### **Structural Factors**

Competitiveness in this industry is influenced by the perishable nature of the product, the regional character of

the Canadian market and related transportation and distribution costs. Most baked products are perishable in a matter of days. Moreover, transporting a product that is bulky or fragile incurs high distribution costs relative to the value of the goods shipped. Therefore, the large Canadian bakeries have followed a practice of acquiring small, regional operations rather than trucking products from centralized plants to surrounding population centres. Changes in the market, however, plus increased production of higher-value specialty products, together with a need to increase productivity, have recently resulted in increased centralization of some operations.

The nature of baked goods and their regional production have at the same time served to isolate Canadian wholesale bakers from most international competition. International trade in fresh bakery products has been significant only in areas where there are large population centres close to border points.

### **Trade-Related Factors**

Bread in retail packages enters the United States duty-free. Under the FTA, tariffs on other bakery products are being eliminated in 10 annual, equal steps ending 1 January 1998. As of 1 January 1992, the Canadian tariff on preformed frozen dough is 6 percent. Cakes, pies and pastries that are not frozen have a tariff rate of 9.3 percent.

There are relatively few non-tariff barriers (NTBs) in the bakery products trade. Import licences on wheat and flour products (including finished bread, buns, bagels, rolls, pastry, cakes and muffins) are no longer required between Canada and the United States.

### **Technological Factors**

Although the Canadian industry includes large, modern plants, it has generally been characterized by smaller operations with older equipment. Recent rationalization in the industry has led some operations to adopt computer-controlled ingredient systems and conveyorized proofing as well as automated packaging systems. The goal of these companies is to lower costs by replacing part of their work force with machinery that can be easily adapted to handle several types of products. Automation also ensures consistency and an accompanying higher level of quality in the finished product.

Bakeries in the United States are building larger plants that are more automated, more efficient and located in areas of high population growth. These plants are much larger than present production operations in Canada. Smaller and more widely dispersed markets limit the scope for larger-scale plants in Canada. While there has been some consolidation, the emphasis appears to be on improved productivity while maintaining product diversity.





The machinery used by the industry is usually available off the shelf from equipment suppliers. New capital investments have been made in the industry, and future changes are expected to focus on reducing labour costs as well as adding new technology to increase quality and flexibility.

### **Other Factors**

A major issue for the industry will be meeting the challenge of the National Packaging Protocol established by the Canadian Council of Ministers of the Environment, which calls for a voluntary reduction of 50 percent of total solid waste packaging by the year 2000, relative to the base year of 1988.

Reusable, returnable shipping trays have been widely used in the industry for many years. These shipping trays, while an expensive capital investment, represent a cost-efficient means of distribution while contributing to the reduction of packaging waste. Damaged baked goods as well as returned products are reused for animal feed as additional measures to reduce waste.

This industry increasingly requires a labour force with the skills to operate automated equipment. The old skills of blending, baking and formulation will be less important to large wholesale bakeries as these operations move to more automated equipment. On the other hand, specialty retail shops that produce unique baked goods will continue to have a need for traditional baking skills.

### **Evolving Environment**

Wholesale bakeries have been facing and are likely to continue to face the problems of an overall decline in market demand and shifts in consumption patterns for baked products. Slow population growth along with changes in demographics, the work force, ethnic mix and eating habits as well as health concerns are all contributing factors. Wholesale bakeries have increasingly expanded production to include a broader range of products for changing market demands and to use available capacity. Increased flexibility and upgraded equipment can facilitate this; however, mass production will remain the basis of their overall operations.

Consumers continue to show an increasing demand for goods that are baked and sold fresh over the counter. This trend as well as the demand for specialty products that meet particular health, variety and quality needs have benefited retail and in-store bakeries. Wholesale bakeries that supply the preformed, frozen-dough mixes required by the over-the-counter bakeries have also been able to share in this growth, although it has not fully compensated for the loss of sales and reduced capacity utilization for their main product, white bread.

The recent recession has not had much of an effect on the bakery products industry. The food industry is usually recession-proof, particularly for products, such as bread, that are basic commodities.

### **Competitiveness Assessment**

Canadian wholesale bakeries have addressed excess capacity problems and changing demands by reinvesting in plants and rationalizing production lines. The subsector has improved its productivity levels and profit performance.

Wholesale bakeries distributing traditional fresh-baked goods have experienced increasing competitive pressures from similar products produced by in-store bakeries. These competitive pressures have been partially offset as some wholesale bakeries have moved into the production of frozen dough for over-the-counter operations.

The Canadian fresh-baked goods market will remain largely sheltered from imports because of the limited shelf life of fresh products and the long distance required for distribution of bulky, relatively low-value product. Now that import permits are no longer required for U.S. wheat and flour, Canadian bakeries will have access to competitively priced flour from either Canadian or U.S. sources. These changes will provide the industry with the overall competitive ability to meet future challenges.

For further information concerning the subject matter contained in this profile, contact

Food Products Branch  
Industry, Science and Technology Canada  
Attention: Bakery Products  
235 Queen Street  
OTTAWA, Ontario  
K1A 0H5  
Tel.: (613) 954-3090  
Fax: (613) 941-3776





## PRINCIPAL STATISTICS<sup>a</sup>

	1973 <sup>b</sup>	1983	1984	1985	1986	1987	1988	1989
Establishments	1 690	493	485	473	479	437	473	491
Employment	17 789	21 061	20 748	21 506	22 000	21 051	22 039	22 793
Shipments (\$ millions)	598	1 276	1 341	1 455	1 552	1 593	1 698	1 782

<sup>a</sup>See *Food Industries*, Statistics Canada Catalogue No. 32-250, annual (SIC 1072, bread and other bakery products industry). Data are for wholesale bakeries only.

<sup>b</sup>Data for this year are not strictly comparable with data for other years shown, due to changes in the definition of the industry introduced in the revised edition of *Standard Industrial Classification, 1980*, Statistics Canada Catalogue No. 12-501.

## TRADE STATISTICS

	1973 <sup>a</sup>	1983	1984	1985	1986	1987	1988 <sup>b</sup>	1989 <sup>b</sup>
Exports <sup>c</sup> (\$ millions)	9	52	57	63	73	90	110	113
Domestic shipments (\$ millions)	589	1 224	1 284	1 392	1 479	1 503	1 588	1 669
Imports <sup>d</sup> (\$ millions)	6	34	35	39	42	47	89	98
Canadian market (\$ millions)	595	1 258	1 319	1 431	1 521	1 550	1 677	1 767
Exports (% of shipments)	1.5	4.1	4.3	4.3	4.7	5.6	6.5	6.3
Imports (% of Canadian market)	1.0	2.7	2.7	2.7	2.8	3.0	5.3	5.5

<sup>a</sup>Data for this year are not strictly comparable with data for other years shown, due to changes in the definition of the industry introduced in the revised edition of *Standard Industrial Classification, 1980*, Statistics Canada Catalogue No. 12-501.

<sup>b</sup>It is important to note that data for 1988 and after are based on the Harmonized Commodity Description and Coding System (HS). Prior to 1988, the shipments, exports and imports data were classified using the Industrial Commodity Classification (ICC), the Export Commodity Classification (XCC) and the Canadian International Trade Classification (CITC), respectively. Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in shipment, export and import trends, but also changes in the classification systems. It is impossible to assess with any degree of precision the respective contribution of each of these two factors to the total reported changes in these levels.

<sup>c</sup>See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

<sup>d</sup>See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.





### SOURCES OF IMPORTS<sup>a</sup> (% of total value)

	1973	1983	1984	1985	1986	1987	1988	1989
United States	61	68	77	73	72	75	79	81
European Community	16	29	17	21	21	19	13	11
Asia	3	1	1	1	1	1	3	4
Other	20	2	5	5	6	4	5	4

<sup>a</sup>See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.

### DESTINATIONS OF EXPORTS<sup>a</sup> (% of total value)

	1973	1983	1984	1985	1986	1987	1988	1989
United States	98	97	96	97	97	92	90	92
European Community	1	1	1	1	1	—	1	1
Asia	—	—	—	—	—	—	4	4
Other	1	2	3	2	2	8	5	3

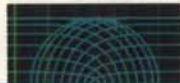
<sup>a</sup>See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

### REGIONAL DISTRIBUTION<sup>a</sup> (average over the period 1986 to 1988)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	6.1	37.8	30.6	15.0	10.5
Employment (% of total)	6.7	37.3	38.8	9.6	7.6
Shipments (% of total)	6.1	35.1	41.2	10.4	7.2

<sup>a</sup>See *Food Industries*, Statistics Canada Catalogue No. 32-250, annual.





BAKERY

## MAJOR FIRMS

Name	Country of ownership	Location of major plants
Ben's Limited	Canada	Moncton, New Brunswick Halifax, Nova Scotia
Corporate Foods Limited	United Kingdom	Toronto, Ontario London, Ontario Ottawa, Ontario Saint John, New Brunswick Moncton, New Brunswick Woodstock, New Brunswick Berwick, Nova Scotia St. John's, Newfoundland
Culinar Inc.	Canada	Sainte-Marie-de-Beauce, Quebec Montreal, Quebec Aurora, Ontario
McGavin Foods Limited	Canada	Langley, British Columbia Edmonton, Alberta Winnipeg, Manitoba
Multimarques Inc.	Canada	Montreal, Quebec
Weston Bakeries Inc.	Canada	Longueuil, Quebec Kitchener, Ontario Kingston, Ontario Kirkland Lake, Ontario Orillia, Ontario Toronto, Ontario Winnipeg, Manitoba Regina, Saskatchewan Calgary, Alberta Edmonton, Alberta Vancouver, British Columbia





## INDUSTRY ASSOCIATIONS

Atlantic Provinces Bakers Association  
100 Mark Drive  
SAINT JOHN, New Brunswick  
E2L 3Z2  
Tel.: (506) 633-2500  
Fax: (506) 633-9837

Bakers Association of British Columbia  
2892 West 24th Avenue  
VANCOUVER, British Columbia  
V6L 1R4  
Tel.: (604) 291-6045  
Fax: (604) 434-9635

Bakery Council of Canada  
Suite 301, 885 Don Mills Road  
DON MILLS, Ontario  
M3C 1V9  
Tel.: (416) 510-8041  
Fax: (416) 510-8043

Bakery Production Club of Ontario  
32 Baybrook Crescent  
SCARBOROUGH, Ontario  
M1H 2R6  
Tel.: (416) 431-9214

Quebec Bakery Council  
Suite 402, 2950 Masson Street  
MONTREAL, Quebec  
H1Y 1X4  
Tel.: (514) 729-8311  
Fax: (514) 729-8311

Printed on paper containing recycled fibres.

