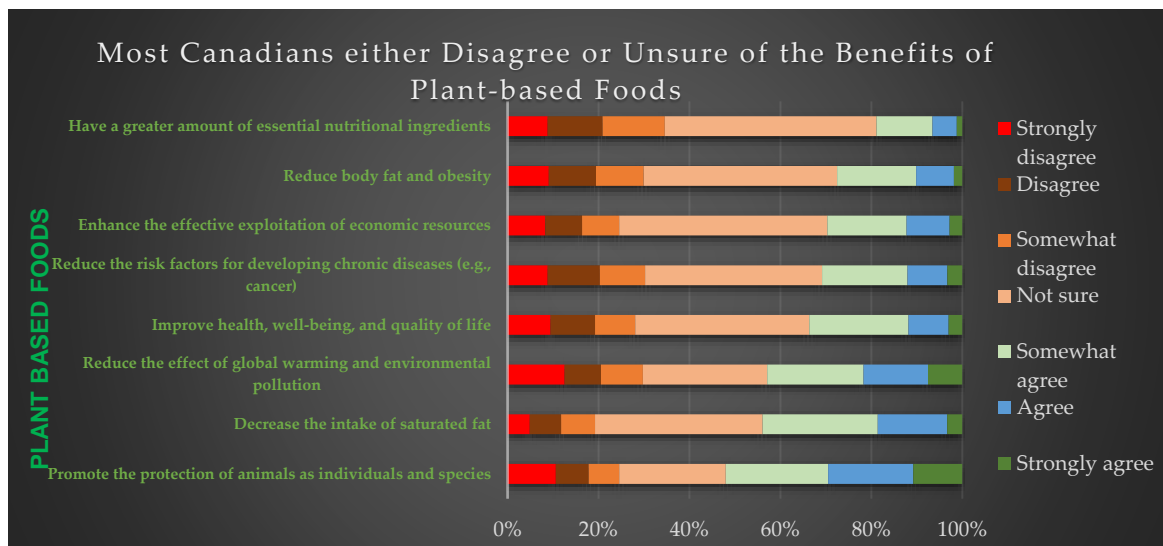


The value of plant-based proteins for food, feed, and ingredients: A value chain perspective

Canadian consumers' perspective:

- A trend to reduce meat consumption, but most Canadians find it nutritionally essential.
- Plant-based proteins have gained popularity but are not widely used as a regular diet yet.
- Plant-based milk is the most tried animal alternative but is far from a regular choice.
- Canadians consider sensory attributes (flavor, taste, and texture), affordability, and nutrition as the most important factors in choosing plant-based foods, followed by health, availability, and appearance.
- Environmental and ethical concerns and support for local economies received a lower rating from Canadian consumers when choosing plant-based foods.
- A divided opinion regarding the labeling of animal alternatives versus the conventional ones.
- Most Canadians either “disagree” or are “unsure” about the benefits of plant-based foods.



Canadian food processors' perspective:

- Most plant protein processors are in Central Canada, Prairies, and West Coast
- Most companies (66%) in our survey were established in the 2000s; 28% were in the last two years.
- Canadian plant protein sector is considered competitive in access to raw materials, production costs, and infrastructure quality.
- Opinions on government policies and regulations are generally less favorable.
- Logistics is generally considered good, but only slightly.
- Attracting plant protein manufacturers to the region depends on access to finance, quality of infrastructure, growers' technology adoption, and sufficiency and quality of raw material supply.

Atlantic Canadian producers' perspective:

- Producers engaged in protein crops in Atlantic Canada have diverse motivations for crop farming, including economic, cultural, social, and environmental reasons.
- Most producers indicated a modest interest in participating in the plant-protein value chain linked to food manufacturing industries.
- About 75% of the producers are indifferent or unsatisfied with the current market price.

- Most producers doubt their ability to achieve their economic goals under the current market and regulator conditions.

Atlantic Canadian stakeholders' perspective:

- There is consensus on the role of crop farming to promote a healthy, sustainable, and safe food system.
- Six enablers of plant-based foods have been identified, including the impact of COVID-19, media coverage, local food movements, training programs, culture, and climate change.
- However, key challenges remain to promote plant-based proteins in the region: product attributes, market conditions, vulnerability to disasters, the scale of production, access to finance, and regulations.
- Private-public partnerships, incentive schemes, and clear labeling guidelines are suggested to promote a sustainable food system that benefits the local economy, the environment, and public health.