

New Pressures for Renewal Demand a New Canadian Agri-Food Policy

Independent Agri-Food Policy Note

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The Issue

The pressures on agri-food policy in Canada are playing out in real time. Their implications are varied in magnitude, significance, urgency, and permanence:

- The loss of the vast majority of the food service market in Canada- only now beginning its recovery. Will it return to its past size/scope?
- Ongoing threat of sudden closures of processing facilities- notably in meat processing. In turn, this has (re)exposed important fissures at the provincial level that have long existed.
- Practical difficulties and uncertainties associated with accessing foreign workers, undermining horticultural enterprises on some farms. The optics of worker illness, with some Covid fatalities, is broadly negative and an underlying threat to foreign worker programs. At the same time, the Canadian workforce is not well aligned with repeated laborious work- including farm work and food processing. This could prove to be among the principal strategic issues exposed by COVID-19 pandemic, and it is global in scope.
- In most field crops, the price outlook for the harvest of 2020 is bearish, emboldened by historic agricultural support levels in the US, and the prospect of bumper crops in key growing areas and burdensome stocks going into the fall harvest.
- Inequities perceived across farm commodities in terms of public support for losses- whether related to trade injury, or Covid-19. This is perhaps best exemplified by support allocated to the dairy industry in consideration of CETA/CPTPP/CUSMA versus federal assistance provided to canola, and more recently federal assistance for beef and pork.
- The appearance of fragmented price mechanisms promulgating economic inequities. US grain futures commodity prices are extensively used as a price reference in Canada and subject to arbitrage- but with agricultural support conditions so different between the US and Canada, arbitrage occurs across an increasingly unlevel playing field in which low prices carry different implications for US producers than it does Canadian producers. This ultimately leaves Canadian producers in an unsustainable position absent mitigating measures.¹ Another example in Canada is hog pricing models- in some cases based on carcass value, and in other cases hog futures/cash prices in US Midwest, potentially creating very different return streams for producers.
- Increased erosion in the integrity of rules-based trade, with immediate threats from measures by countries to block (or hoard) personal protective equipment, a prospective SARS-Cov 2 vaccine, in addition to food security inspired measures to constrain exports. Also renewed agri-food trade policy as an element of geo-politics- such as barley and beef in the China-Australia relationship.
- Increasing tension in the US-China relationship, possibly pressuring greater bilateral US-China trade

¹ See testimony before the US Senate Finance Committee in which Joseph Glauber estimates that in 2019 the US exceeded its allowable agricultural support levels for 2019 under the

WTO-Agreement on Agriculture <https://www.ifpri.org/news-release/current-state-agricultural-trade-and-world-trade-organization>

in agri-food, with other international agri-food suppliers (like Canada) relegated to a second tier.

- With domestic unemployment running in excess of 12 percent in June (nationally), and similarly in other developed countries, slumping incomes will eventually impact food demand. Conversely, the financing of sweeping government aid packages across the economy enacted as emergency measures could be inflationary with the ultimate impacts and costs deferred to future macroeconomic measures.
- Some regions in Canada are especially hard hit, notably Alberta and Saskatchewan, under the slumping oil demand.²

The breadth and depth of issues impacting the agri-food policy landscape in Canada has perhaps never been more challenging. However, beyond the immediate and urgent needs of the Covid-19 crisis, these signal more fundamental shifts, and threaten the (relative) cohesion in Canadian agri-food policy that has occurred over the last 25 years.

The purpose of this policy note is to frame the issues characterizing the current dialogue, to highlight the risks and potential for failure- both in domestic and trade policy- and to provide some direction for bold changes.

Canada's Shifting Geo-political Space for Agri-Food

From a broader perspective, Canada has enjoyed a long period of economic and social stability following World War II, maintained to a great extent by the comfort offered by three broad umbrellas.

The first of these has been the steady increase in the integration of the Canadian and US economies over many years, offering not only a nearby stable market

for the country's wares, but also a highly common culture based on democratic ideals.

The second has been the rise of international institutions that have to a great extent leveled the playing field for small/medium-sized countries in international trade. This has been based on the progression toward liberalization of trade based on truly multilateral efforts in the GATT and now the WTO, along with plurilateral agreements such as the CPTPP and CETA, as well as bilateral and trilateral agreements with several countries, most importantly, the USA and Mexico.

The third is the role played by the international institutions involved in peace and security including the United Nations, NATO, and the G7 among many others to which Canada belongs and is a beneficiary of, such as the Commonwealth.

The US has played a leadership role in the development and maintenance of these umbrellas of benefit to Canada, based on its economic strength and as the most powerful nation militarily, technocratically, and scientifically. Nonetheless, the progression toward greater trade liberalization has created significant adjustments in the North American economy, particularly the movement offshore of some industries, especially dirty, dangerous and labour intensive, coupled with the emergence of value chains linking the economies of many countries. The resulting decline in certain manufacturing jobs within the US, while also linked to technological change, has been viewed as a product of trade liberalization. This sense that trade liberalization has gone too far has fractured the political consensus for greater liberalization enjoyed in past decades. Indeed, the US lack of support and leadership internationally has weakened substantially several multilateral institutions in the past few years, institutions on which Canada's domestic, international and foreign policies have relied.

² For June 2020, Statistics Canada reported unemployment rates of 15.5% for Alberta and 11.6% for Saskatchewan

That these shifts are real, significant and threatening to Canada are beginning to be realized. For example, Lawrence Martin, writing in the *Globe and Mail*, recently noted that Canada could be left behind by US nationalism- regardless of the victor in the November, 2020 US Presidential election.³ John Ibbitson, also in the *Globe and Mail*, worries that shifts in geo-politics have made the outlook bleak, and that Canada could find itself dangerously left out.⁴

Canadian Agri-Food Policy: Getting to Whitehorse

Canada has enjoyed two of the most cooperative and productive decades of federal-provincial-territorial agri-food policy arrangements since at least World War II. There were several underlying domestic and international forces which enabled the emergence of these arrangements after years of domestic haggling among the partners about cost sharing responsibilities, levels of funding, and equity of treatment of producers across Canada by the federal government. Indeed, much of the federal agricultural legislation differentiated between eastern and western Canada in treatment of producers including the policy instruments for each region. As well, regardless of repeated legislative attempts to offer predictable support for agricultural production, a multitude of region and commodity specific *ad hoc* payment programs were used to respond to various events seemingly not covered by the legislated programs. With the legislated differences by region and commodity, along with the many *ad hoc* programs, there was little evidence that the various parts of the agricultural sector felt that they were being treated equitably or fairly across Canada.

Three events in the late 1980s and early 1990s began to lay the groundwork for pulling together a common agri-food policy framework for Canada. First, the

CUSTA and subsequently the NAFTA agreements enabled the emergence of a North American marketplace for agriculture and food. With the exception of dairy, poultry and eggs, the loosening of a welter of Canada-US and Canada-US-Mexico border restrictions allowed markets and integrated pricing relationships not only at the farm level but also throughout much of the North American value chains.

Second, by the mid-1990's, the outlines of the trade rules were emerging in the GATT negotiations, involving access arrangements, export subsidies and domestic support. What was becoming increasingly clear was that commodity-specific support would not fare well under the emerging trade rules. Canadian legislation covering domestic support for agriculture was enacted that provided the foundation for common support programs across Canada, the Farm Income Protection Act. The first common support program with negotiated Federal-Provincial-Territorial (FPT) cost shares across all regions, commodities and governments came into effect in 1991, the Net Income Stabilization Account.

Third, with the WTO Agreement on Agriculture coming into force in 1995, the trade rules set out the framework for both limiting and enabling domestic support that had at most minimal effects on production levels and trade. Along with the federal Program Review in fiscal year 1995-96, regional agricultural subsidy levels were reduced or eliminated, and federal-provincial agreements were struck on sharing the federal funds equitably across provinces along with provincial commitments on cost sharing of some programs. In fact, the federal budget for agricultural support was frozen, with the understanding that agriculture could not come back to Cabinet for additional funding for up to five years.

The collapse of hog prices in 1997 and 1998 posed a significant policy dilemma for Canada. It was a

³ Lawrence Martin, "Biden's new nationalism could leave Canada behind", *Globe and Mail* July 15, 2020

⁴ John Ibbitson, "Canadian gothic: A bleak world has left our foreign policy out of step with the times", *Globe and Mail* July 17, 2020

commodity specific issue, so any support for hogs would fall within the WTO limitations on commodity specific support. As well, the hog countervail case brought by the US against Canada was still active, with the expectation that the US would raise the countervail tariff and capture the bulk of the commodity specific subsidy. In addition, whatever action was taken to soften the blow to hog producers would involve more funds than were allocated annually from the Program Review.

Alberta and PEI had experimented with a “whole-farm program” in 1997. This design was used as the basis for the AIDA program, a whole farm program across Canada, joint with provinces that responded to individual producer results regardless of the commodity mix on the individual farm. If hog producers were in difficulty, available funds would automatically flow toward hog enterprises from the program, and to any other farms or commodities that were facing financial hardship. This shift in program design and FPT joint policy and program management was sufficient to overcome the federal reluctance to increase funding beyond the levels set in the Program Review.

All of this led to the Whitehorse Accord in 2000, and the watershed 5-6 year FPT agreements that followed up to the present with the Canadian Agri-food Program (CAP). The steady haggling over costs and equity in support programs declined dramatically with the Whitehorse Accord in place, and it allowed Ministers to move beyond their concentration on business risk management (BRM) programming and funding, to additional important policy issues including environment, research, and market development.

Sobering Developments Pressuring Agri-Food Policy in Canada

A recent series of events has begun to place serious pressure on the common policy framework for

provinces, territories and the federal government. These include:

- The Nairobi Agreement terminating export subsidies as of 1 January 2021, affecting exports of Canadian dairy products.
- Increasing pressure from the US to seek a renovation of the NAFTA Agreement; now in force, with additional US access to Canada for dairy and other supply managed products and limiting Canadian exports of certain dairy products.
- The US withdrawal from the TPP negotiations, and the subsequent signing of the agreement as the CPTPP (11 nations).
- Pressure on Japan to provide access for US products to Japan equivalent to those obtained by the CPTPP partners, without the requirement that the US provide access to Japan in return for such access, resulting in the US-Japan Agreement. This is in contrast to the give and take compromises forged among CPTPP countries, including Canada.
- The coming into force of the CETA agreement between Canada and the EU, providing additional access to Canada for EU dairy products while still leaving some significant non-tariff barriers for Canadian meat products wishing to enter the EU.
- The US refusal to allow confirmation of members of the WTO Appellate Body, eliminating the capacity of the WTO agreement to govern and implement results from panel disputes.
- China’s aggressive international posture, sometimes referred to as “wolf-warrior” diplomacy. This is evident in its response to the arrest of Meng Wanzhou; indirectly this influenced the timing of halting canola shipments to China and the temporary suspension of meat exports to China from Canada last year. In parallel, China’s trade action on barley from Australia is disrupting the barley market (feed and for malt) and presents another illustration.

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- The US-China agreement of January 2020 on managed trade for agricultural products, giving the US greater/preferred access to China versus other trading partners.
- African Swine Fever (ASF) in China and other east Asian countries is placing great pressure on world protein supplies on which China is heavily dependent. While ASF has temporarily lowered China's protein demands for animal feed, it has increased China's demand for food proteins; unfortunately for China this occurred coincidentally with major flooding in some areas of central and southern China which has had a significant effect on grain and oilseed storage stocks.
- The spread of SARS-Cov-2 across countries disrupting value chains, shifting food consumption in developed countries from food service to retail food purchases, the interruption in processing capacity for foods generally and live animals/meat in particular, the value of live animals falling in North America while retail level prices have risen for processed meats and other foods.
- Slumping international oil prices weighing heavily on western Canadian economies, with ongoing risks of disinvestment and layoffs in the petroleum sector. The situation is exacerbated by challenges in obtaining approvals for large-scale development projects, like pipelines. Moreover, policy action to mitigate climate change- that will impact petroleum prices and recovery costs- appears broadly supported in eastern Canada but much less so in the west.

Some Observations

All of these events in domestic and international markets have dramatically increased the volatility in agricultural prices and trade flows. Markets are not only responding to volatile frictional global supply and demand pressures, but also to the increasingly political and unpredictable nature of trade and foreign affairs actions. This leads to unforeseen

disruptions in major world markets to Canadian suppliers, stranding supplies in search of markets. Instead of valuing commodities the same around the world adjusted for quality, location and availability, prices can differ substantially for considerable periods of time, responding to political and foreign policy decisions in many cases unrelated to fundamental agri-food supply and demand conditions.

The large tranches of funding by the US for its producers during the past three years, with no apparent slow down in the months ahead, adds to the volatility in markets, and reduces the economic pressure for adjustments to market realities by producers as well as to the policies and programs pursued in the US. The steady stream of payments is building in an expectation of continuing payments making it difficult to begin the process of winding down the funding levels, particularly in such a politically charged period.

The continuing Covid-19 pandemic has been particularly brutal on our meat processing and horticultural industries. Both sectors rely on foreign worker programs which are increasingly at risk in securing and maintaining a healthy immigrant workforce.

Despite significant duty reductions negotiated under CPTPP and CETA for Canadian processed products, the uncertainty of markets for processed products emanating from COVID-19 and the above mentioned China and U.S. actions raise continuing concerns about additional investment to expand (or even maintain) food processing capacity in Canada and to build supply chains around processed products rather than the major reliance on exporting raw materials.

The agriculture and food sector could be a major contributor to mitigation of GHGs, and take some of the pressure off Canadian fossil fuels in that regard. The US is actively considering climate change mitigation based on agriculture carbon offsets and perhaps costing of carbon, which in turn will provoke the need for carbon taxes at the border for imports

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not generated with an equivalent carbon mitigation program.⁵

If the US moves in this manner and Canada does not, Canada could be left with a barrier to exports in one of our largest markets and a significant missed opportunity for an additional revenue stream for agriculture.

Some Implications

The fraying of multilateralism in trade is a threat to Canada, and especially to Canadian agri-food. Canada will need to identify and develop specific bilateral and plurilateral relationships to effectively use our agri-food capacity, while playing an active role in revitalizing or at least halting the decline in the rules-based system. Ibbitson refers to this as a foreign policy of “strategic retrenchment”, in which Canada both tries to fix existing multilateral institutions, but also explores new relationships that address specific interdependence issues in which Canadian agri-food can play a major role- such as food security and climate change mitigation. It is what the Canadian Agri-Food Policy Institute has referenced as a coalition of the willing.

This prospect of further deterioration in the external environment stands to place increased pressure on domestic economies in Canada, exacerbated by a worsened economic outlook, and tighter public budgets. Provincialism and beggar-thy-neighbour provincial policy to grow/retain provincial industries as economic development could result. Agri-food is especially vulnerable to provincialism as it is a portfolio of joint federal and provincial authority. In

the immediate term, accommodating/facilitating domestic demand for products whose existing capacity has been predicated on extensive and liberal export market access in specific regions could be challenging and disruptive.

More broadly, agri-food could be seen in some areas as an engine of local/provincial economic development in a situation of broader economic malaise, leading to rivalry among provinces to land agri-food investments located in their jurisdictions- rather than based on strategic or efficiency considerations. These strains could occur precisely as agri-food must take a more refined and strategic view of investment in food processing- as market access for farm products becomes increasingly uncertain and volatile. Canada will find it increasingly difficult to be suppliers of basic commodity agricultural products.

An aspect of this is how Canada can tie its agri-food product attributes to the needs of the world in terms of food security and environmental sustainability. The response of some exporting countries to the Covid-19 environment and their willingness to suspend agri-food exports, leaving some importing countries vulnerable, is concerning- especially for countries dependent upon imports.⁶ The awareness of environmental sustainability linked to food has reached a new level- the international concern and objections raised by national leaders to land clearing in the Brazilian Amazon,⁷ and the attention now turning to tracking beef supplies and cattle procurement from illegally cleared areas serve as clear examples.⁸

⁵ See media discussion of a proposal before the US Senate Agriculture Committee <https://www.wired.com/story/carbon-farming-could-make-us-agriculture-truly-green/>

⁶ See as an illustration the food exports restrictions tracker <https://www.ifpri.org/project/covid-19-food-trade-policy-tracker>

⁷ See for example <https://www.cnbc.com/2019/08/23/amazon-fires-brazils-bolsonaro-faces-backlash-from-world-leaders.html>

⁸ See for example recent announcement by Marfrig regarding a cattle procurement tracking system designed to discourage Amazon deforestation <https://www.bloomberg.com/news/articles/2020-07-10/marfrig-to-build-tracking-system-for-cattle-raised-in-the-amazon>

This is an opportunity for Canada. Canada's established and emerging mechanisms to track, trace, and establish the origin of farm and food products have been developed for a variety of reasons- animal health, voluntary standards (e.g., GM-free), etc., and are broadly seen as having integrity internationally. Past barriers to considering sustainability as a broad aspect of marketing were that it would create cost disadvantages to Canada versus competitors (notably the US- with whom we share an integrated market and pricing model in many cases), and some ambivalence regarding the merits of sustainability as a dimension of marketing and the science suggesting that some current/past practices were probably unsustainable.

The stark prospects that now lie in front of us should shatter those concerns. The agricultural support levels paid out in the US already undermine the integrity of our integrated market and pricing model with the US, with support conveying the equivalent of an advantage to the US. Broad public concerns regarding deforestation and aspects of agriculture's footprint on the environment are no longer the concerns of a fringe element of the population- rather they are focuses of retailers and governments in a range of countries throughout the world in responding to consumers and planning how they will feed their populations respectively.

In many cases, as a small country, it is practically difficult for Canada to separate its supply for export from its domestic supply, as processing scale requires accessing both markets. It is thus relatively easy for Canada to commit to staying the course with its export supplies in times of global shortage. The linkage with environmental sustainability is that as Canada is increasingly perceived as a reliable supplier of healthy and environmentally sustainable food, countries with an agri-food importing interest that are more food insecure countries will not have the

same incentive to develop their own production, which in many cases will be uncompetitive and environmentally unsustainable.⁹

In this new environment, the concern exists that we could greatly underestimate the true nature of perils and risks that apply to the various stages of the agri-food supply chain. Our existing expectations of business risks are predicated on our experience of rules-based trade under GATT and WTO, and the stable domestic agri-food policy environment since the FPT arrangements leading to stable five-year funding agreements. This experience may not be indicative of what is to come.

As an illustration, the current BRM policy discussion between industry and Canadian governments has focused on industry dissatisfaction with AgriStability and the desire to strengthen it with greater sensitivity of payment triggers built into a renewed program design. Industry desires for program design changes are predicated on past market volatility and needs for stabilization. However, if the realistic prospect exists that the new volatility will swamp the protection offered under AgriStability- regardless of desired program design changes- then it challenges industry and governments to think beyond tweaks in existing parameters, and toward a much more unstable farm operating income outlook and its associated needs in BRM programming. In recognizing and embracing the likelihood of greatly expanded demands on BRM, industry and governments will need to remind themselves of the pitfalls of provincialism in BRM programming.

Domestic agri-food policy has been shaped to a large degree by a problem of abundance. It is characterized by plentiful supplies of farm products, relatively inexpensive food, and the worry addressed by policy that under pressure from growing supplies farm prices will collapse below sustainable

⁹ There are a number of examples of this- notably initiatives in arid Middle Eastern countries to develop more of their own food supply, at very high cost.

profitability levels for farmers, and/or that instability in farm prices will lead to inefficiently low levels of investment on farms. Food security, with the exception of food access as a distribution/cost issue for the most vulnerable portions of the population, has not been a primary target of Canadian agri-food policy.

The problem of abundance remains for Canada. However, in certain products- especially fresh fruits and vegetables- the adequacy of supplies must be raised as a critical issue. We may need to evaluate the risks of Canadian production suffering a sharp decline. The continuing pressure on human resources for horticulture- notably through the Seasonal Agricultural Worker and Temporary Foreign Worker programs- has created difficulties in producer use of these programs in 2020 due to Covid-19 public health measures. Moreover, the optics of outbreaks on farms and the public perceptions of workplace and housing conditions for workers, threaten the future of these programs. The program parameters, and cost/work expectations of both employers and workers, are not consistent with the SARS-Cov2 pandemic and the need for social distancing.

Because the need for offshore farm workers is overwhelming in horticulture, the experience of 2020 could be enough for many growers in Canada to throw in the towel and abandon horticultural enterprises requiring workers on their farms, with the associated loss in fruit and vegetable production. Other factors surely will also play a role in grower decisions and in the ultimate effects, such as the size of farms and share of production of farms in individual crops, and producer demographics. But if this occurs, the shift will not be gradual, and it could be sudden and profound.

As a northern country, Canada already imports significant volumes of fruits and vegetables from elsewhere, but Canadian production of many fresh and storable fruits and vegetables is a very significant and important source of domestic consumption. Moreover, the same farm workforce effects that have

impacted Canada have impacted fruit and vegetable production, as well as meat processing operations, in the US, Mexico, Brazil, and throughout Europe- sources of fruit and vegetable imports for Canada. This presents the prospect of future fruit and vegetable shortages in Canada due to reduced Canadian production and reduced access to supply from imports. If this occurs, it would represent a new dimension of food security concern. Canada should be prepared for this contingency.

Conclusion

The disruptions in Canada's (and other countries') agriculture and food sectors have been rolling out in rapid succession, in trade levels and prices. In several respects, these disruptions are not the typical movements of supply and demand that frame our experience, nor the plodding evolution toward an ever more efficient agri-food system in which each year some farms and agri-food businesses are cast aside. Rather, today we are presented with the prospect of sudden, stark, and potentially permanent changes, not of our choosing.

The origins are, for the most part, in the realm of geopolitics but also increasingly from disease, environmental issues or climate and in virtually all cases stemming from outside Canada. However, as a small or medium-sized trading nation, our domestic policy constructs rest upon the multi-lateral institutions developed among countries and the behaviour of our allies and the big geo-political powers. With this acknowledged, Canada has a range of important issues that are domestic in nature, quite apart from how we survive/rebuild/grow under the ongoing pandemic conditions, and (especially in agri-food) we cannot simply assume that the FPT uniformity of view and action on policy will simply carry on. We must grasp the extent of these changes in order to assess the right response and how we can best work together in a transformative period.

This calls on us to ask some fundamental questions regarding Canadian agri-food. First, do we really

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understand what our weaknesses are and to what extent they need to be addressed? Which are our most vulnerable areas that threaten collapse?

This note has highlighted our human resource stock, not well oriented to farm work and laborious repeated tasks as a weakness, and when coupled with foreign worker programs not designed for the upheaval presented by a pandemic, one that could pose a serious threat to horticulture and perhaps other segments. This, in turn, could affect our food security as many suppliers of imports are subject to the same challenges.

Another example is the broad national consensus on agri-food policy programming forged in FPT agreements and supported by industry at the national level. Getting to this structure was a tough slog- the victory of a shared national interest over segmented local/provincial interests. But its future is not assured- it is built on multilateral concepts of market access and domestic agricultural support; if these fade away, the national interest in agri-food policy that has existed could go with it. The erosion into ardent provincialism in agri-food policy could drastically limit scale, efficiency, and opportunity in a domestic population of only 35 million and with less certain prospects for export.

A second fundamental question relates to the opportunities that lie before us. What are our strengths to build upon to leverage those opportunities? We have established that Canada has the capacity to be a robust agri-food exporter in a world in which this will become more valued over time, although more work in validating and understanding the dimensions of this is warranted.¹⁰ Another latent strength relates to agri-food sustainability, in which Canada has the natural resource base that would allow it to be a leader.

Who are our allies internationally in agri-food that are like-minded? Could a coalition of the willing be formed with others to leverage our strengths? The prospect may exist that the right set of allies and coalitions could serve as a backstop to eroding rules-based trade.

The understanding of data and interpretation in responding to these two questions can be grouped into two categories (1) Measures that Canada is largely in control of, and (2) Measures that Canada does not have absolute control over, but may be able to influence or even lead with others, using soft power.

Neither of these broad categories draw from an existing playbook of policy development, as some of the international structures upon which the past 60-70 years of agri-food policy were built are suddenly changing. Even the measures that are largely internal to Canada must confront the fragmentation of interests across provinces, commodities, food processing infrastructure, etc. Nonetheless, the challenges of the time implore us to think more broadly, deeply and boldly in strategic agri-food policy planning.

¹⁰ See *The New Trade Economy of Food Security*:

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