



DMi Report: Goat Cheese Canada April 2018

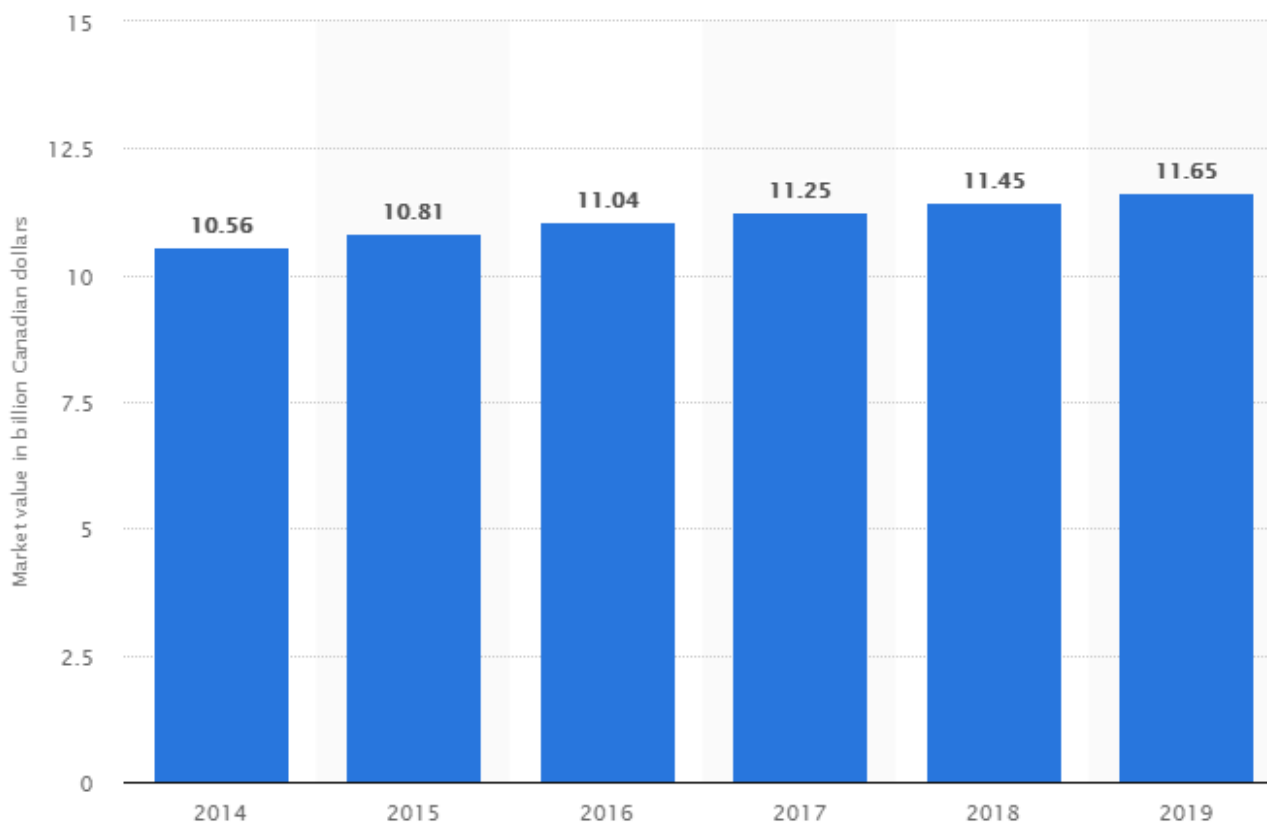
Please note that this DMi Insight report presents relevant and timely market data for **Goat Cheese**. No specific product or market strategies are formulated within this report. However this data is a useful resource for discussing and planning marketing strategies.

This report is focused on the Canadian marketplace and will provide:

- An overview of the dairy, specialty cheese and goat milk/cheese markets
- Competitive price analysis
- Goat cheese trends

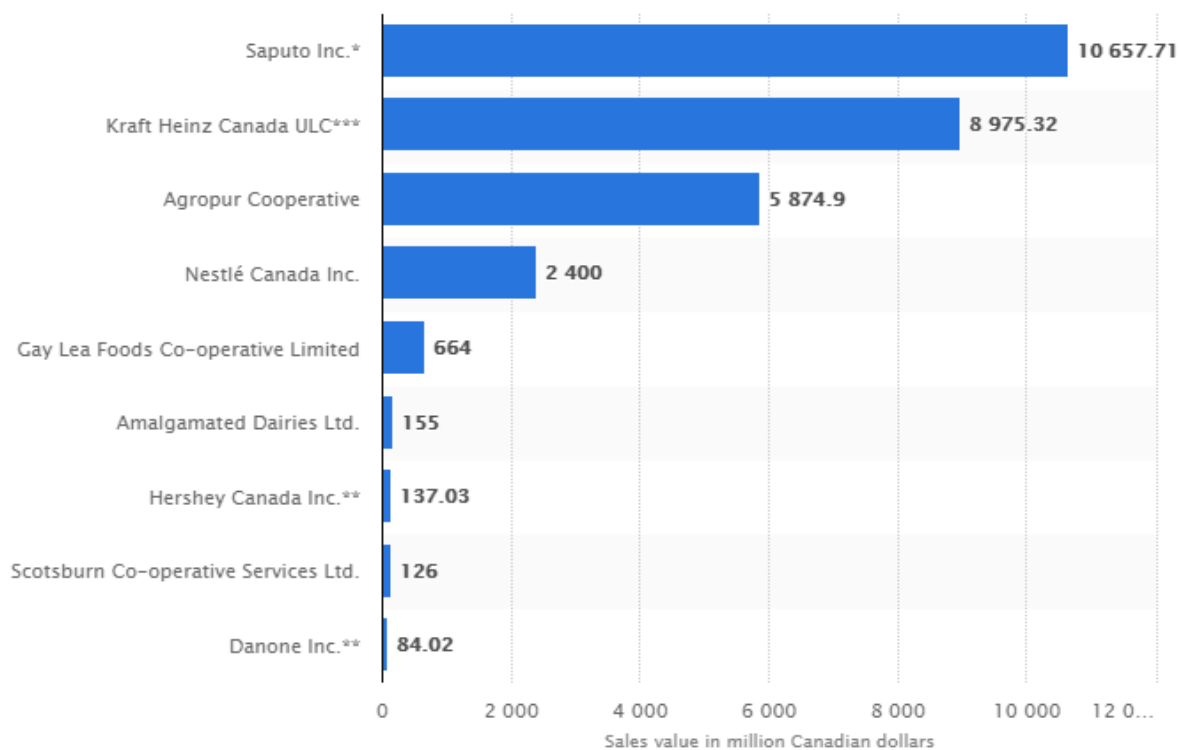
1. Market Category Report

MarketLine has predicted the dairy industry in Canada to grow to CAD \$11.65 billion in 2019.



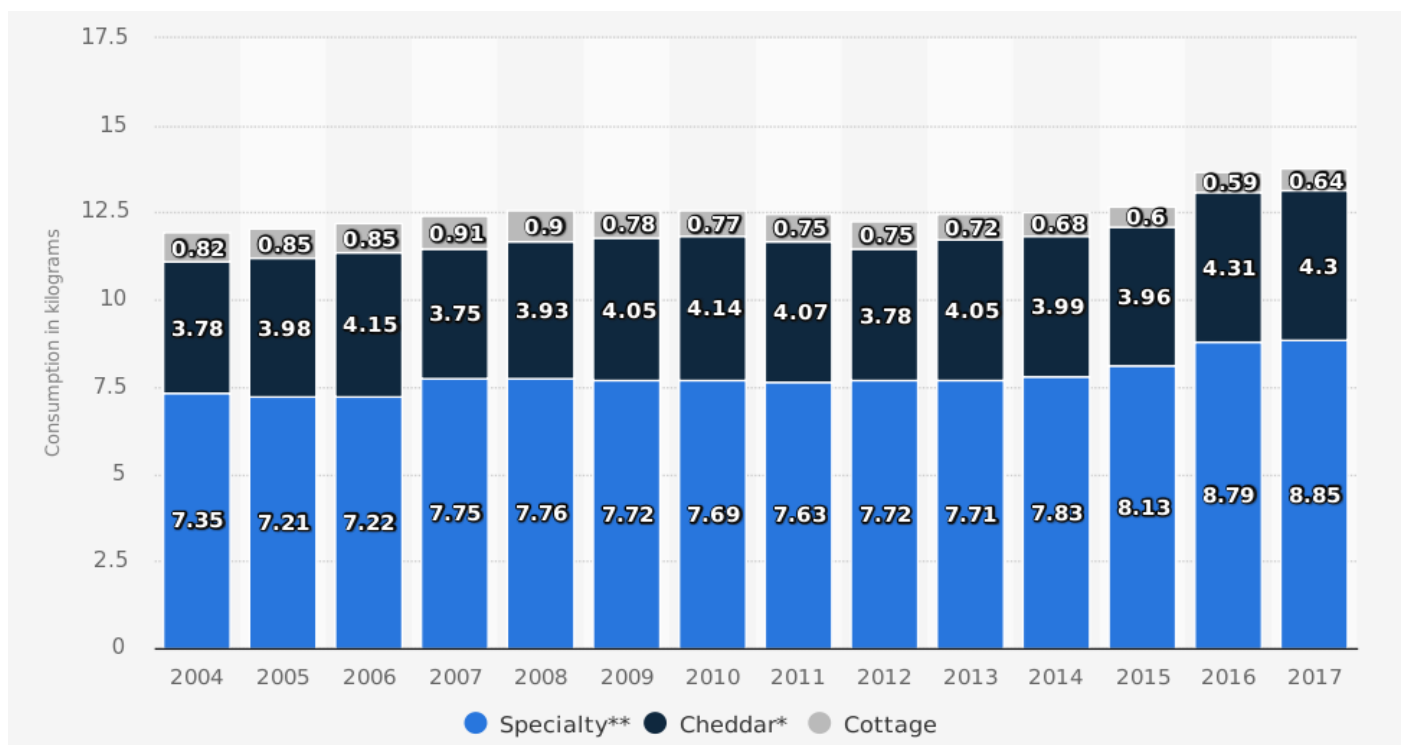
Source: MarketLine

This chart shows the sales value of leading companies in the dairy market in 2015 (total global sales in millions of CAD \$).



Source: StatCan 2015

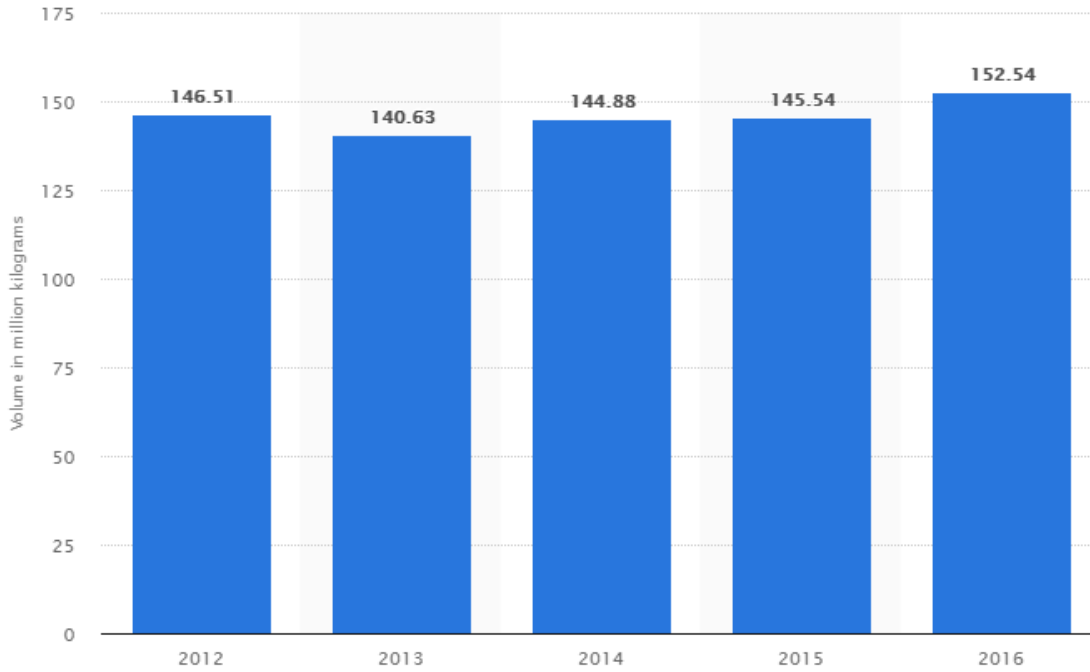
This shows the consumption of cheese per capita in Canada from 2004 to 2017, by type (in kilograms). The specialty cheese market (which includes goat cheese) is showing the most growth since 2014.



* Includes cheese used in the making of processed cheese. ** Excludes cheddar and cottage cheese.

Source: StatCan 2017

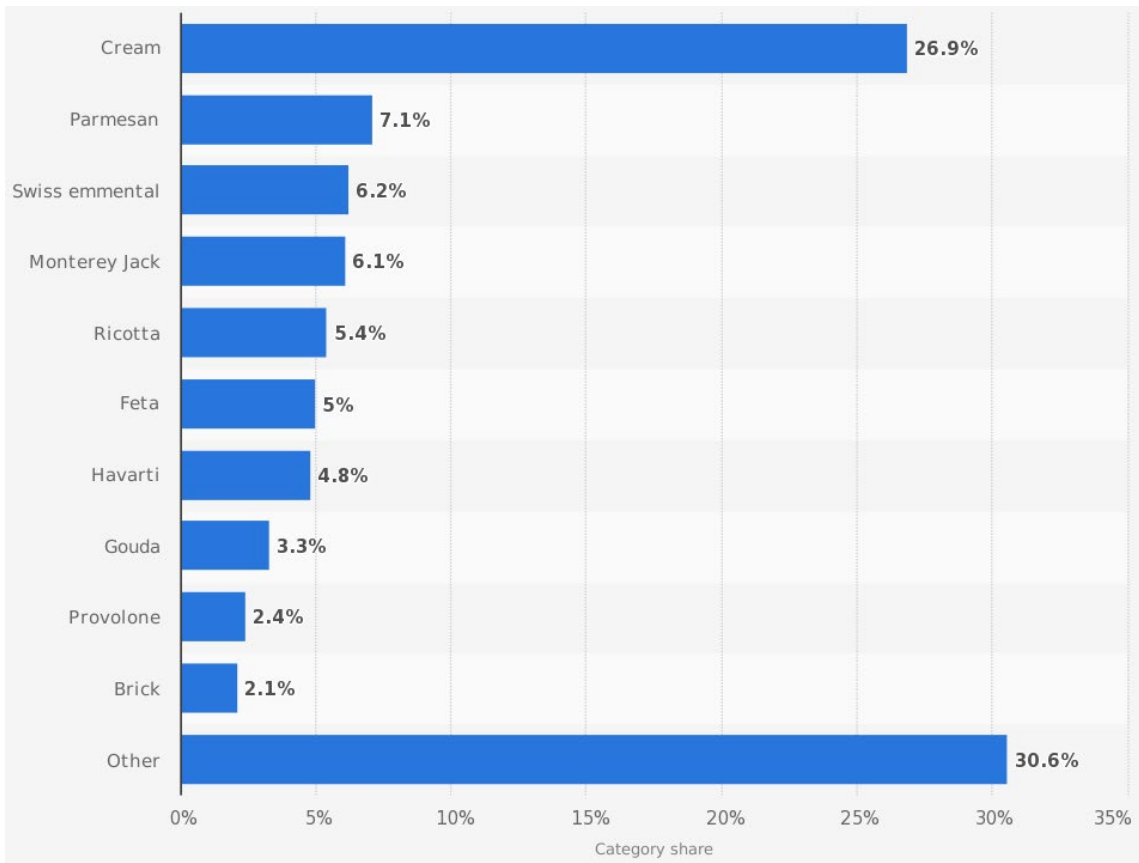
The volume of specialty cheese produced in Canada from 2012 to 2016 (in million kilograms).



*Data excludes cheddar, mozzarella, cottage, and pizza cheese.

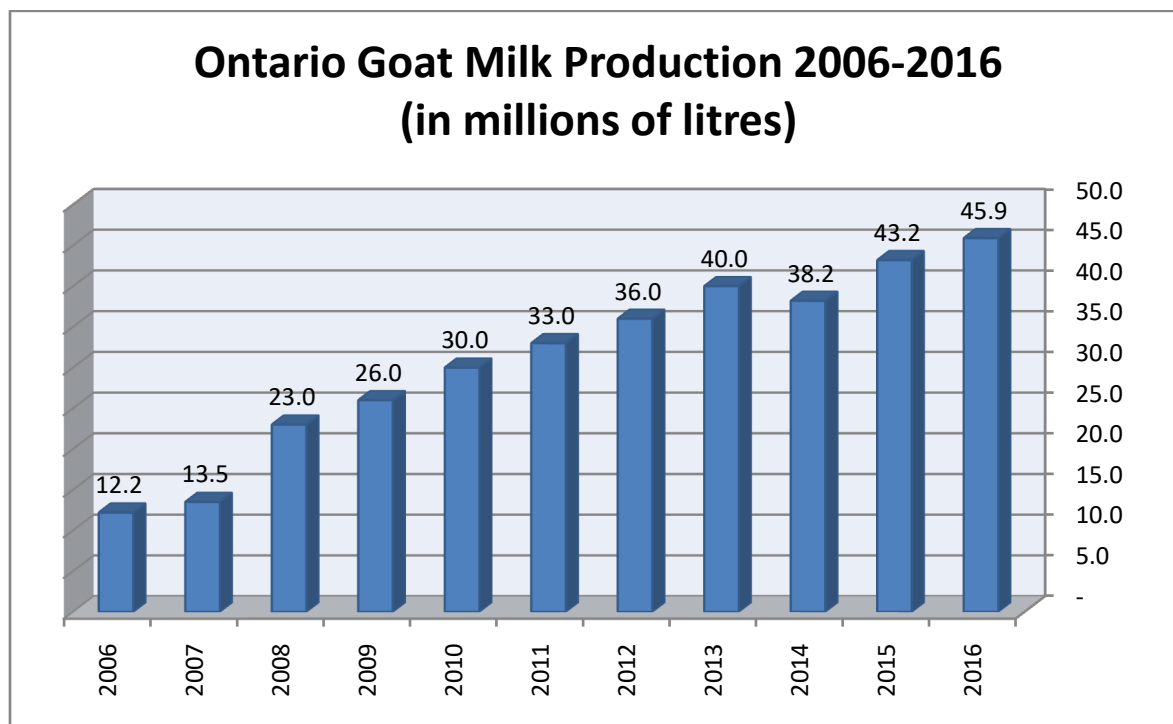
Source: StatCan 2017

The category share of the specialty cheese market in 2016—goat cheese is included in other.



Source: StatCan 2017

Ontario Goat Milk Production has increased steadily from 2006 to 2016, with the exception of 2014.



Source: StatCan 2017

According to the Progressive Dairyman article *Dairy Goat Industry Growing to Meet Demand* (August 2016): “The bulk of the milk – about 90 percent – is used for cheese production. The other 10 percent is used for fluid milk and other dairy products.” The next chart details the provincial breakout of goat milk production in millions of litres. Ontario dominates Canada’s production share with 376% increase from 2006 to 2016.

Goat Milk Production

	BC		AB		MB		ON		QC		NB		NS		PEI		Canada ¹	
	Production (millions of litres)	Producers	Production (millions of litres)	Producers	Production (millions of litres)	Producers	Production (millions of litres)	Producers	Production (millions of litres)	Producers	Production (millions of litres)	Producers	Production (millions of litres)	Producers	Production (millions of litres)	Producers	Production (millions of litres)	Producers
2016	..	16	..	12	..	..	45.9	258	11.5	110	..	..	..	..	..	2	57.4	398
2015	..	18	..	12	..	1	43.2	240	11.5	110	.. ²	.. ²	..	..	..	2	54.7	383
2014	..	16	..	13	0.2	1	38.2	218	11.1	125	..	..	0.1	4	..	4	49.7	381
2013	..	12	..	14	0.2	1	40.0	224	11.3	125	..	1	..	4	..	4	51.5	385
2012	..	15	..	13	0.2	1	36.0	230	10.3	141	..	1	..	4	..	4	46.5	409
2011	..	13	..	12	0.2	1	33.0	250	10.4	141	..	..	..	..	..	..	43.6	417
2010	..	13	..	12	0.2	1	30.0	261	11.5	141	..	..	..	3	..	3	41.7	434
2009	26.0	254	9.5	145	..	..	..	3	..	3	35.5	405
2008	23.0	225	9.5	137	..	..	..	..	..	..	32.5	362
2007	13.5	190	8.6	113	..	..	..	..	..	..	22.1	303
2006	12.2	163	8.0	113	..	..	..	..	..	..	20.2	276

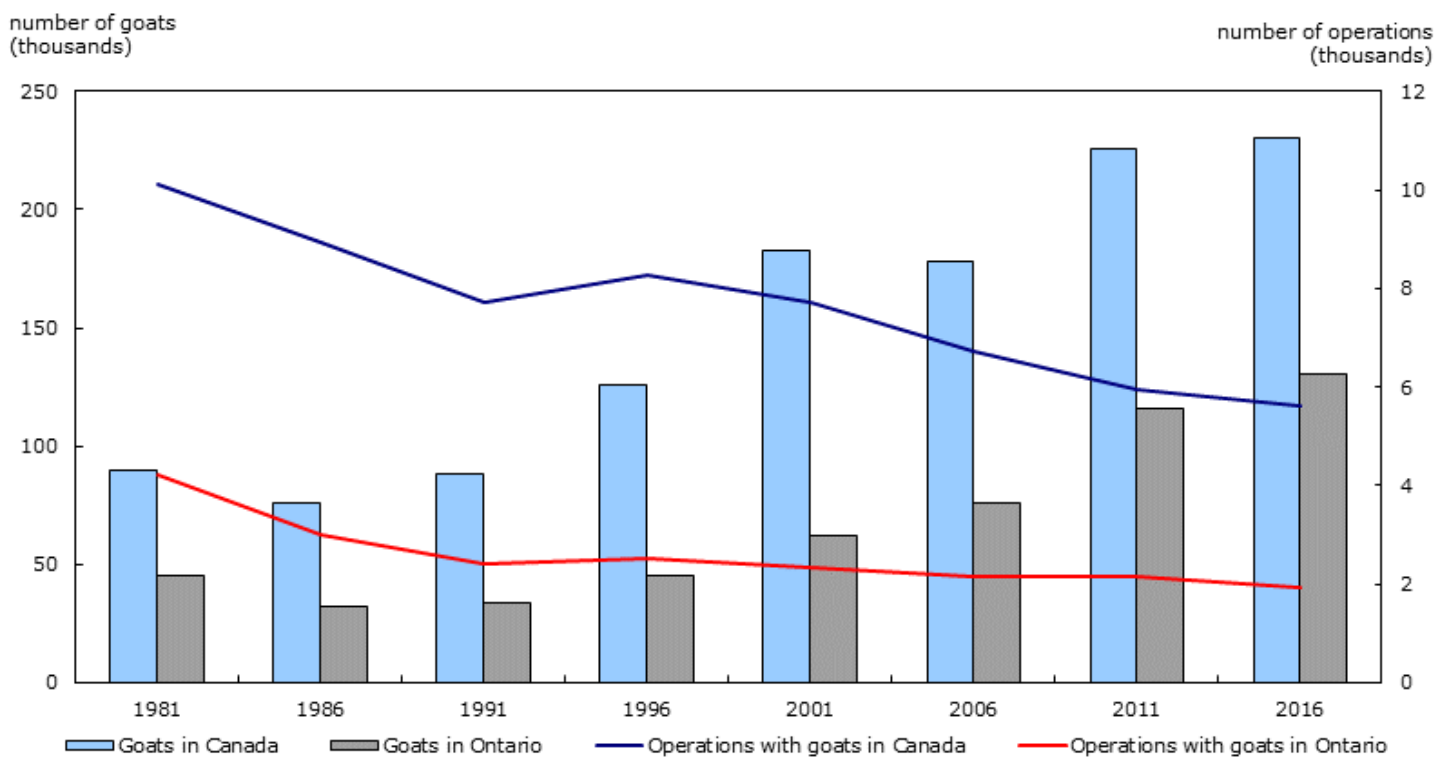
Sources: Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA), Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec (MAPAQ), Manitoba Agriculture Food and Rural Initiatives (MAFRI) and the Canadian Committee of the International Dairy Federation (IDF)

The number of goats in Canada increased 2.0% from 225,461 in 2011 to 230,034 in 2016 (Chart 1). The increase was largely driven by Ontario, where the number rose 12.0% to 130,219, representing 56.6% of all goats in Canada in 2016. The province with the second-highest number of goats was Quebec, with 15.5% of the national total in 2016. Conversely, the number of agricultural operations reporting goats in Canada fell 5.4% during this five-year period. The average number of goats per farm reporting goats remained relatively stable at 41 goats per farm in 2016, up from 38 goats in 2011. This follows the trend of consolidation seen across the agricultural sector.

The statistics for goats and operations with goats for Canada and Ontario are detailed below.

Chart 1

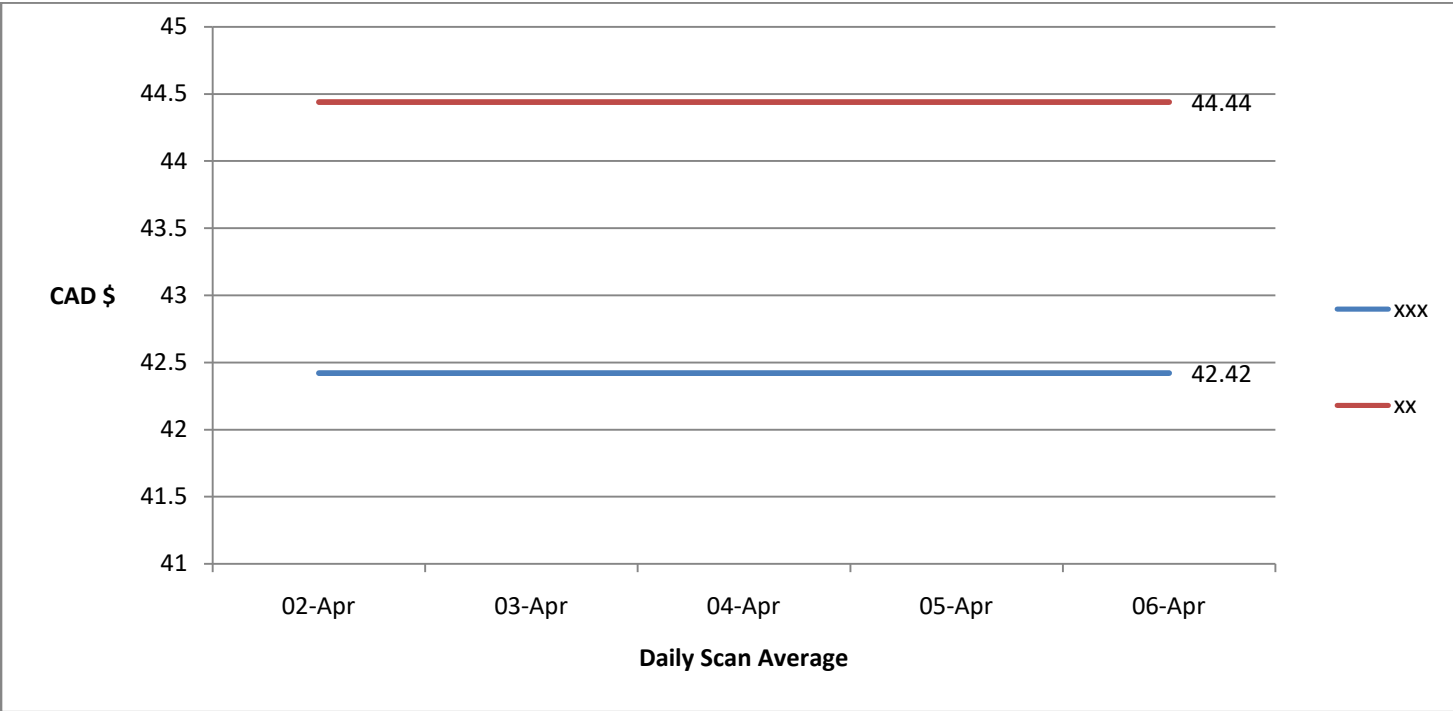
Goats and agricultural operations reporting goats, Canada and Ontario, 1981 to 2016



Source: CANSIM

2. Competitive Price Analytics

For this study, the selected competitor was xx and a truncated scan was implemented. The wholesale pricing data is shown below for 2/1kg xxx.

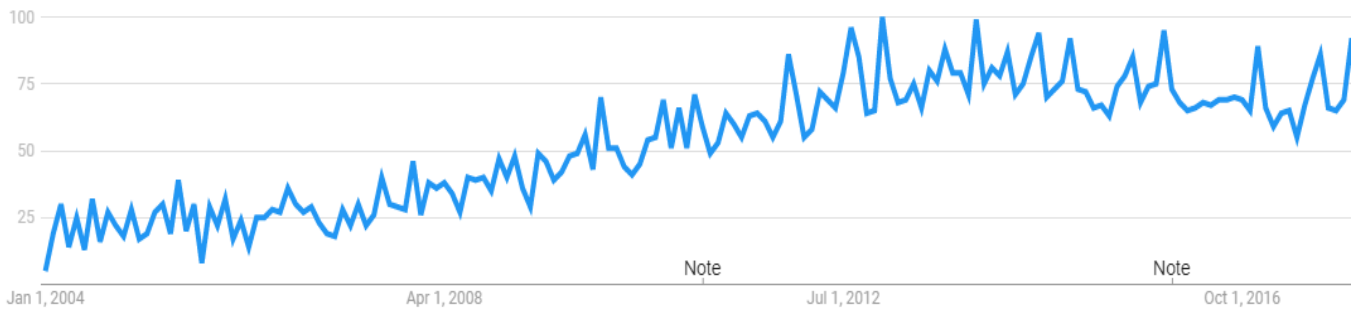


3. Product Trend Graph

This analysis has been limited to one scan of one criterion. Multiple sets of analytics for a variety of important criteria may be executed in an annual program.

Trend – Goat Cheese (2004 to 2016)

The trendline has increased significantly over the long term indicated growing consumer interest.



Source: Google Analytics

Prepared by Marketscape Inc. April 2018