



SHANNA MUNRO

President and Chief Executive Officer
Restaurants Canada

THE 2016 GLUTEN-FREE STAKEHOLDER UPDATE & PLANNING SESSION PRESENTED IN COOPERATION WITH:



Agriculture and
Agri-Food Canada



Canadian Grain
Commission

Growing Forward 2 



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Restaurants Canada

The voice of foodservice | La voix des services alimentaires

FOOD SERVICE PERSPECTIVE

Shanna Munro, President and CEO, Restaurants Canada
September 27, 2016

RD, MHSc



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WHO IS RESTAURANTS CANADA?

A national, not-for-profit association of 30,000 restaurants, bars, caterers and other food service business across Canada.

Our purpose is to proactively drive a strong, vibrant and successful foodservice industry through leadership, knowledge and advocacy with a united voice.

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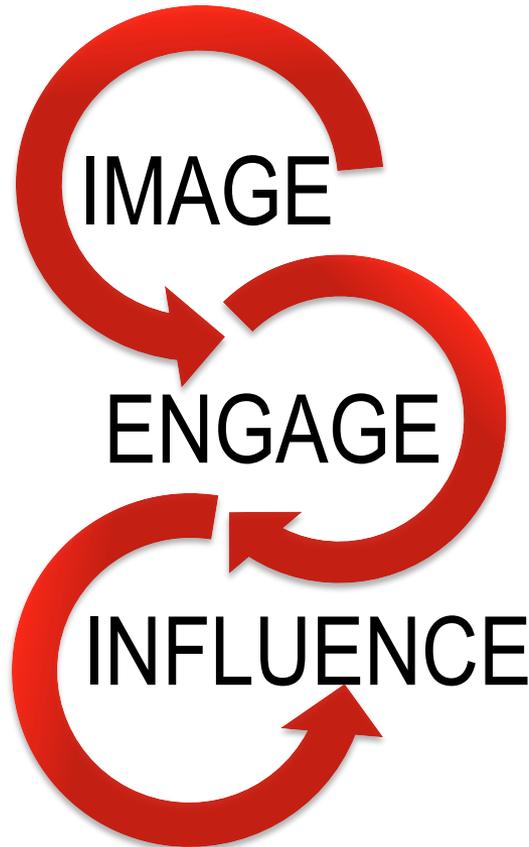


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WHAT WE DO

Restaurants Canada works with industry to educate our members, stakeholders and the public at large on the importance of the industry, the significant roll it plays in our economy and how it impacts the lives of Canadians.

By bringing industry together Restaurants Canada serves as the voice for all. We collaborate with other groups who share our common goals and we work with government to find solutions to emerging issues that impact our industry



At Restaurants Canada we create opportunities to bring our members together by offering products and services to enhance their business, thought leadership and, networking and mentoring opportunities

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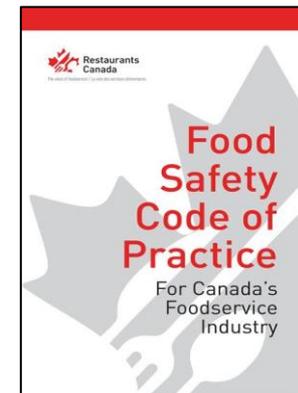
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FOOD SAFETY IS A TOP PRIORITY!

National Food Safety Training Program

Food Safety Code of Practice

Food Allergen Guide



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CONSUMER PERSPECTIVE



Sourced by Ipsos Canada

1.5% of purchases by consumers at home or away from home have gluten-free labels

Approximately 7% of individuals frequenting the foodservice channel are trying to limit/eliminate gluten from their diets

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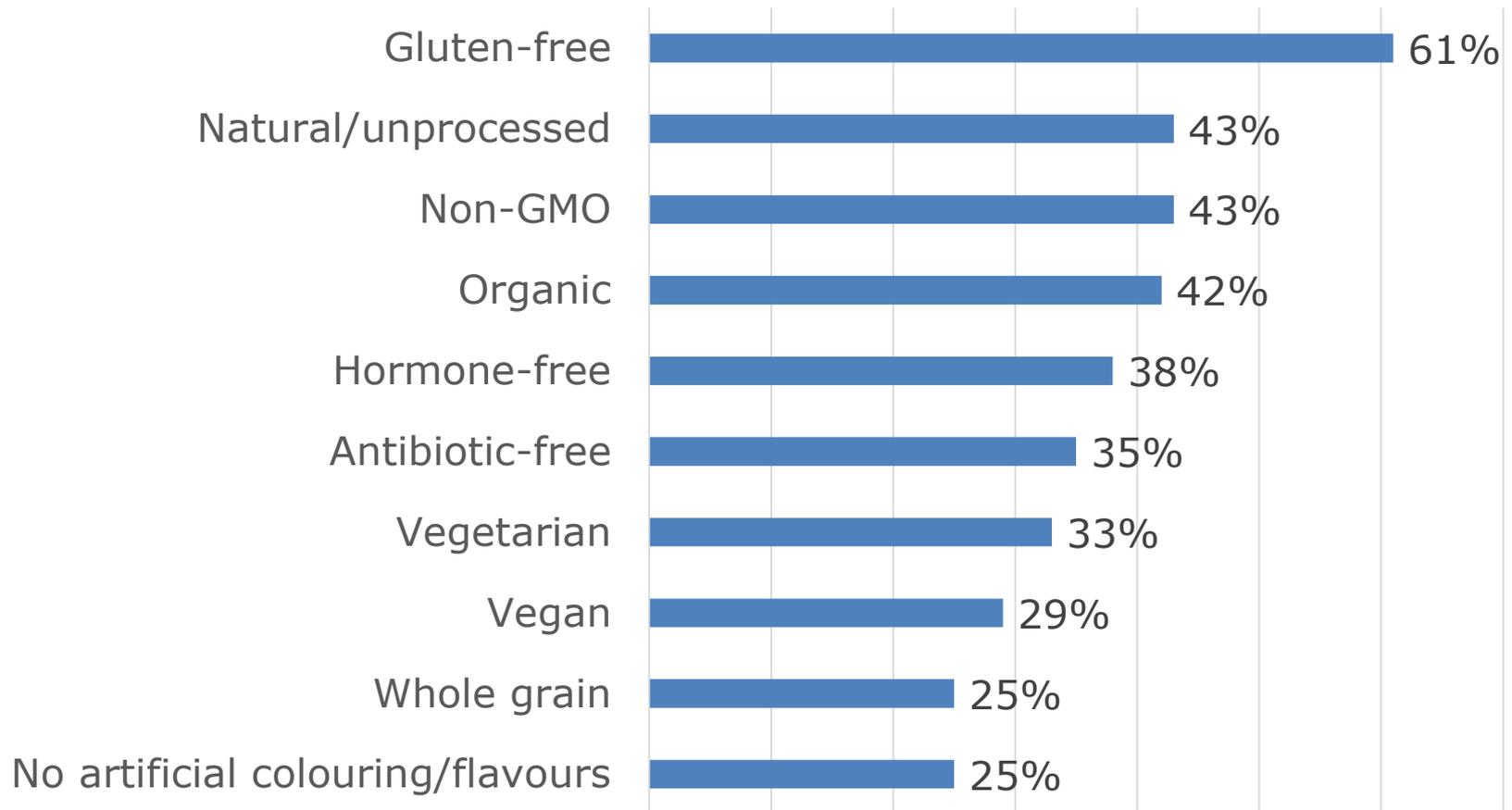
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TOP 10 HEALTH-FOCUSED TRENDS AT RESTAURANTS



Sourced by Restaurants Canada, Chef Survey 2016

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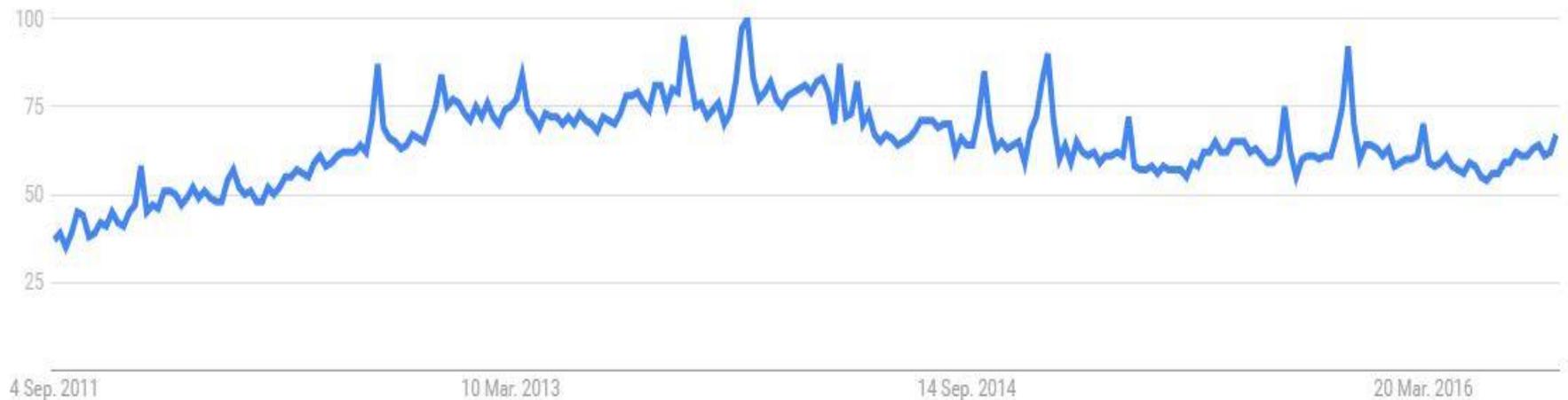
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CANADIANS SEEKING GLUTEN-FREE INFORMATION CONT'D



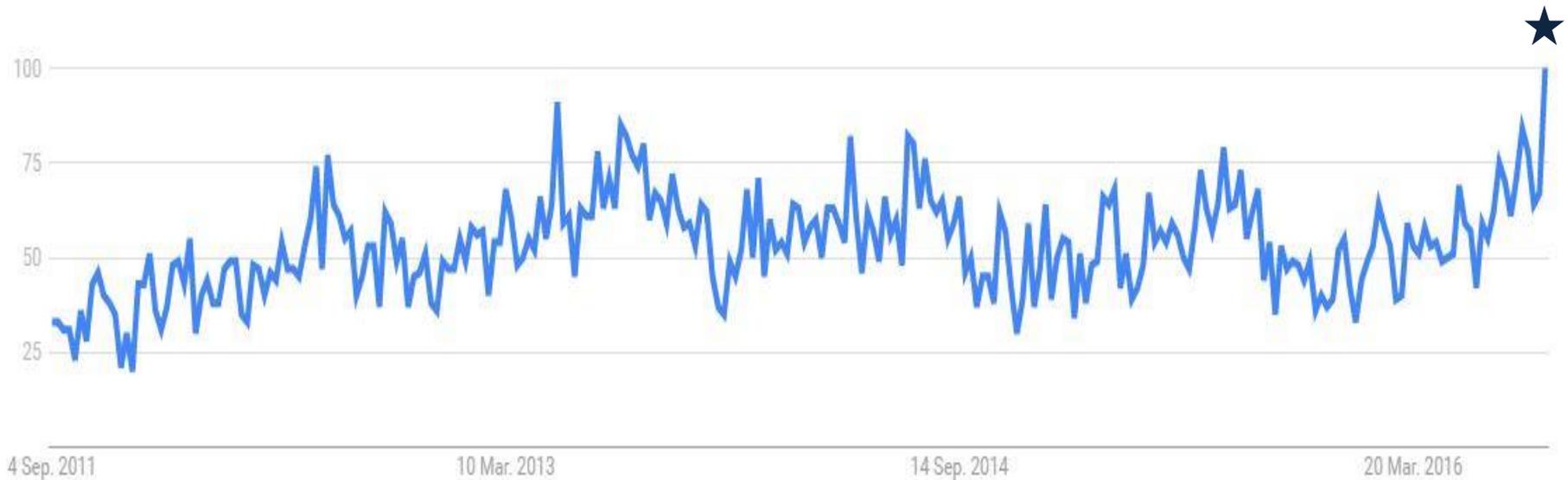
Canadians continue to seek gluten-free menu options

Google gluten-free analytics from 2011 – 2016 in Canada

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CANADIANS SEEKING GLUTEN-FREE INFORMATION



Canadians continue to seek information on gluten-free restaurants

Google gluten-free analytics from 2011 – 2016 in Canada

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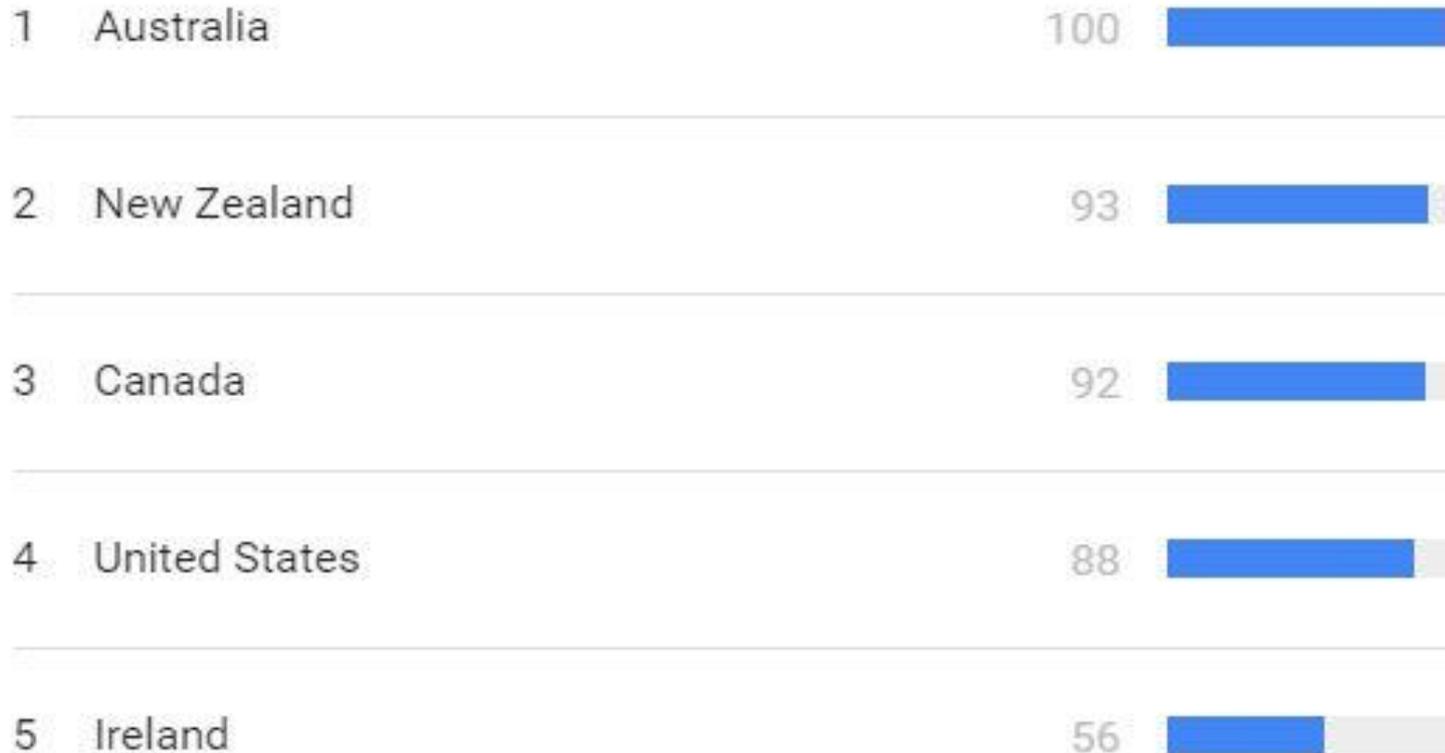
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WHERE CANADA RANKS WORLDWIDE



Google gluten-free analytics from 2011 – 2016 in Canada

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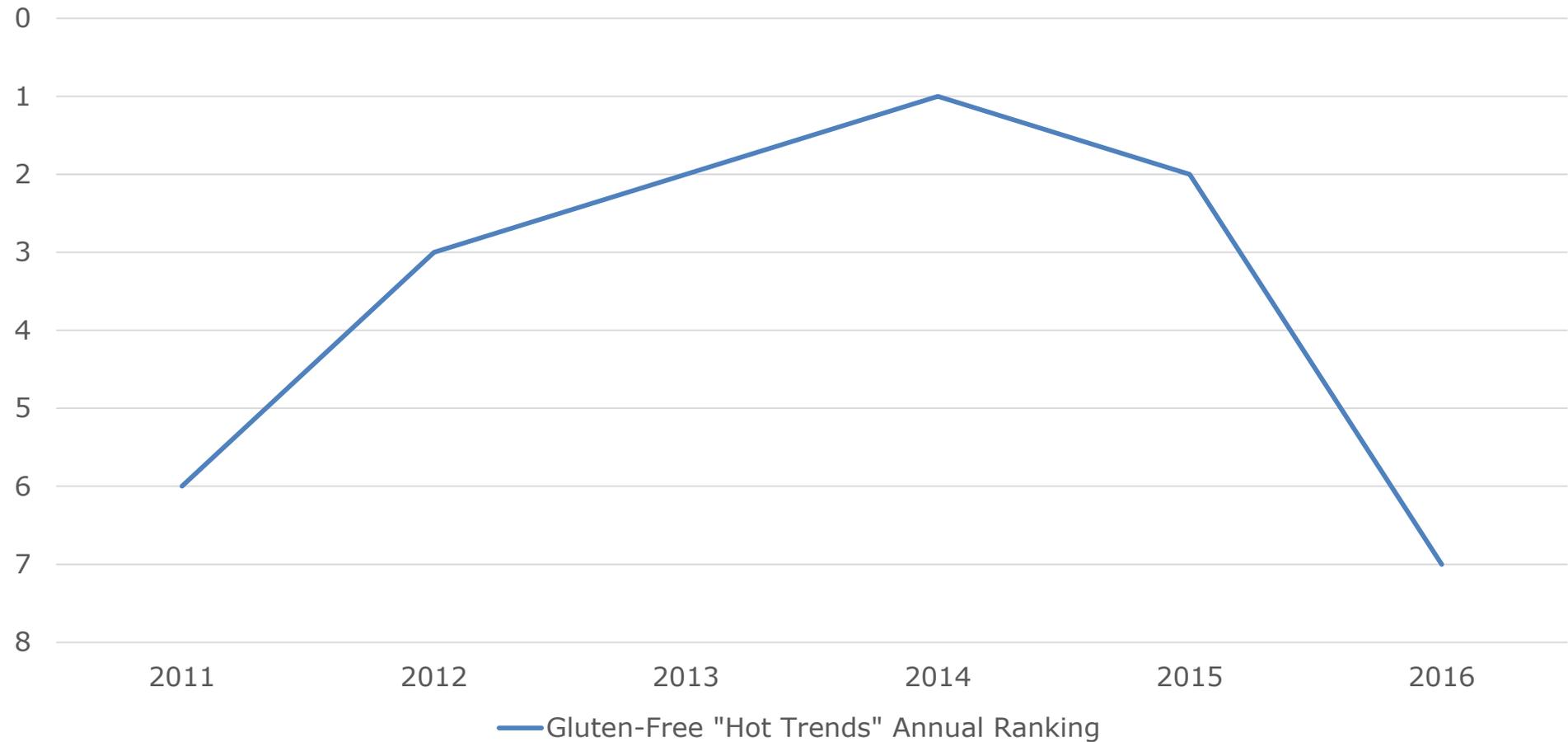
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CHEF PERSPECTIVE

Gluten-Free "Hot Trends" Ranking



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FOODSERVICE CHALLENGES

- A. Traces of gluten-free must not surpass 20 part per million
- B. Gluten-free carries an increased cost

How does this affect gluten-free offerings?



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BEST PRACTICES TO CONTROL FOR GLUTEN

1. Education
2. Menu Ingredient Information
3. Risk Management



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WORKING TOGETHER

"Restaurants that are proactive instead of reactive, are better able to meet the challenges of customer needs"
– Foodservice Facts 2016

1. Pre-made or semi-made gluten-friendly products
2. Competitive gluten-friendly product pricing
3. Information from suppliers on products containing barley and rye

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