



TRADE MARKET
INTELLIGENCE
REPORT

Value-Add in Food, Growth Potential & Global Trends to Watch

► Prepared by Invest Nova Scotia – November 2025



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What is Value Add?

What is Value-Add?

Value-added food products are **enhanced beyond their original state** through processes that improve shelf-life, nutritional value, safety, convenience, or consumer appeal. Nova Scotia is already advancing in this space, actively delivering value-added products that reflect the regional strengths and market opportunities. The following Canadian examples and global insights are designed to help continue that momentum and support further innovation across the sector.

Value-add can occur at various stages of the supply chain, not just with raw agricultural inputs. Broadly, producers are leveraging in three main approaches:

1. **Packaging Innovation:** Improvements in packaging that extend freshness, enhance convenience, reduce waste, support sustainability goals, or create a more user-friendly product experience.
2. **Health Positioning:** Processes or formulations that enhance the nutritional profile, improve functional benefits, or better align products with consumer health and wellness preferences.
3. **Flavour Innovation:** Techniques that introduce new or enhanced taste profiles, such as seasonings, fermentation, or ingredient combinations to differentiate products and expand culinary applications.

Together these value-added strategies can enhance the original product's utility, align with market trends, and support brand differentiation - ultimately enabling food producers to capture greater value per unit.

Graphic 1: Value Add Conversionsⁱ

The value-added food sector takes raw agricultural products like:



Why go Value-Add?

In today's competitive food landscape, value-added production is more than just processing - it's a **strategic pathway to growth, resilience, and differentiation**. By transforming raw commodities into high-value goods, businesses can unlock new markets, capture stronger margins, and build deeper relationships with consumers. The following sections explore how **value addition delivers measurable benefits** across growth, profitability, pricing, market access, and brand loyalty - backed by real Canadian examples.

Growth Potential

Canada processes approximately 50% of its agricultural output, indicating substantial potential to enhance domestic value-added transformation. In 2024, **Canada's exports of processed food and beverage products reached a record value of \$54.3 billion**, marking a 14.1% increase over the previous year and accounting for 34.7% of the production value.ⁱⁱ In comparison, the Netherlands, with 34 times less farmland, exported €128.9 billion worth of agricultural goods in 2024, an increase of nearly 5% from the previous year.^{iii iv} This achievement highlights how strategic investment in food processing and innovation can position a country as a leading exporter in the agri-food sector. It's important to note that "processed food" encompasses a wide range of products, from minimally processed items like frozen vegetables to more complex preparations.

In this context, the focus is on value-added processing that enhances shelf life, nutritional profile, safety, convenience, or consumer appeal, aligning with emerging consumer demands such as plant-based, organic, or functional foods.

Improved Margins

Value-added products consistently command **higher prices than raw commodities**, leading to stronger profit margins. *Fruit d'Or*, a Quebec-based company, earns premium returns by processing cranberries into organic powders, concentrates, and snacks tailored for health-conscious global consumers. *Citadelle*, a maple syrup cooperative, similarly enhances profitability by transforming bulk syrup into a range of packaged formats—such as single-serve portions, gift-ready glass bottles, and organic-certified variants—paired with strong Canadian branding. This approach combines packaging innovation, format customization, and origin storytelling, allowing the cooperative to position its products in premium global markets and capture more value per unit.

Enabling Market Entry

Canadian small and mid-sized businesses are increasingly **utilizing value-added innovation to penetrate niche and international markets**. *Big Mountain Foods* in British Columbia has pioneered the world's first soy-free tofu made from Canadian fava beans. Their innovative approach to plant-based protein products has garnered attention in both domestic and international markets, appealing to health-conscious and environmentally aware consumers. *Merit Functional Foods* in Manitoba specializes in high-purity plant protein ingredients derived from peas and canola, Merit Functional Foods collaborates with global food companies to develop sustainable and nutritious plant-based products. Their commitment to innovation and sustainability has positioned them as a key player in the global plant-based protein market.

Strategic Pricing Power

Value-added products allow businesses to set prices based on **perceived consumer value rather than solely on production costs**. Attributes such as health benefits, environmental sustainability, and convenience contribute to consumers' willingness to pay premium prices. By aging maple syrup in bourbon, whisky, and oak barrels, [Wabanaki Maple](#) of New Brunswick has created a unique, premium product that combines enhanced flavor profiles with Indigenous storytelling. This value-added approach enables them to market their syrup as a luxury gift item, commanding higher price points in both local and international markets. Offering plant-based, certified organic energy drinks made with natural caffeine sources like guarana and green tea, [Guru Energy](#) in Quebec targets health-conscious consumers seeking sustainable alternatives to traditional energy beverages. Their focus on clean ingredients and environmental responsibility allows them to position their products at a premium price point.

Extended Shelf Life and Efficiency

Value-added processing techniques not only enhance product appeal but also significantly extend shelf life, **enabling broader distribution and reducing food waste**. Canadian dairy producers such as [Saputo Inc.](#) utilize Modified Atmosphere Packaging (MAP) to extend the shelf life of cheese products. For instance, hard cheeses are packed in CO₂ gas to inhibit mold growth, while soft cheeses use CO₂/N₂ gas mixtures to prevent bacterial spoilage. This packaging method can extend cheese shelf life up to 12 weeks.^v Canadian companies such as [Vancouver Freeze Dry Ltd. \(VFD\)](#) offer freeze-dried fruits, which involve removing moisture under low temperatures to preserve nutritional content and flavor. These products are shelf-stable and can last for extended periods without refrigeration.^{vi} [Fruit d'Or](#), a Quebec-based company, processes cranberries into frozen packs, purees, and jams. Their frozen cranberries have a shelf life of up to 24 months when stored at -18°C, allowing for year-round distribution and consumption.^{vii}

Brand Loyalty and Customer Stickiness

Consumers increasingly seek products that reflect their values, such as buying local, sustainable, and healthy, and value-added products enable producers to build deeper connections with their audiences. For example, [Stonetown Artisan Cheese](#) in Ontario produces washed-rind cheeses using local Ontario wine lees, creating a flavour-forward identity product that showcases regional terroir and craftsmanship.^{viii} Similarly, Ontario's [Cosman & Webb](#) produces barrel-aged organic maple syrup in bourbon barrels, blending storytelling, premium packaging, and sensory depth to appeal to discerning buyers. In British Columbia, [Krause Berry Farms](#) offers a Westcoast seafood chowder mix featuring scallops, clams, prawns, and whitefish—combining local sourcing, hearty ingredients, and comforting flavours in a ready-to-cook format that evokes a sense of place and homegrown quality. These identity-based products increase customer retention, inspire brand loyalty, and generate strong word-of-mouth in crowded markets.

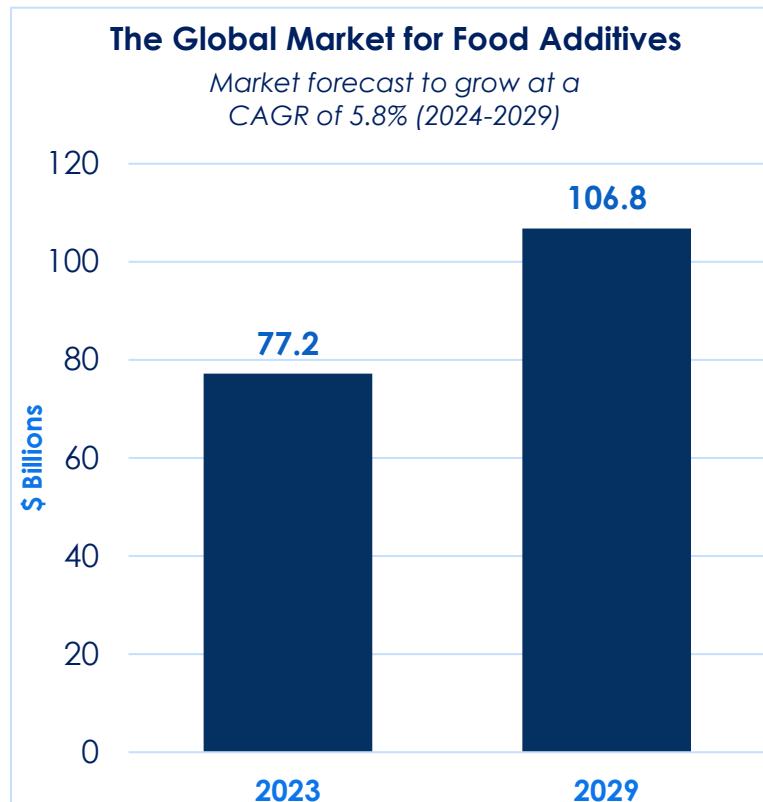
The Size of the Value-Add Opportunity

Value-added food strategies are not just about elevating products: they're about elevating entire businesses. Whether it's through premium pricing, shelf-stable innovations, or purpose-driven branding, Canadian food producers that invest in value-add are better positioned to scale, compete, and thrive in both local and global markets.^{ix}

As consumer preferences shift toward healthier, more convenient, and sustainable choices, market research firms project strong expansion across various segments of the value-added food landscape. The global food additives market, a core component of value-added processing, is expected to grow from **\$77.2 billion in 2023 to \$106.8 billion by 2029**, representing a **compound annual growth rate (CAGR) of 5.8%**. This growth is propelled by rising demand for enhanced food experiences and functional benefits.^x

Meanwhile, global packaged food sales are projected to exceed **\$3 trillion in 2024**, with continued volume growth expected. This robust baseline signals sustained consumer demand and growing global opportunities for companies offering value-added products.^{xi}

Graphic 2: The Global Market for Food Additives (2024-2029) ^{xii}



The Canadian packaged food market reflects significant global trends, particularly the growing consumer preference for health-conscious products. **In 2023, retail sales of packaged food in Canada totaled CAD \$77.6 billion, with notable demand for products featuring natural, fortified, or functional ingredients.** Plant-based and high-protein items are especially sought after, indicating a shift towards healthier eating habits.^{xiii}

Together, these insights confirm that the value-added food sector is not only dynamic, but also **financially significant**. It offers a compelling avenue for producers to scale, differentiate, and respond to evolving consumer expectations—through innovation, storytelling, and premium quality.



Top Global Trends

Top Global Trends

Value-added food innovation is no longer limited to artisanal jams or organic pasta—it now encompasses everything from reformulated ingredient panels to advanced packaging, private label production, and convenient new formats like ready-to-eat snacks, beverages, and meal kits. Below are **five core pathways** through which companies are creating **higher-value offerings** in the food sector, supported by data and examples.

1. Reformulation for Health, Functionality & Clean Label ^{xiv xv}
2. Packaging Innovation to Drive Shelf Life, Convenience & Sustainability ^{xvi xvii}
3. Processing, Co-Packing & Ingredient-Based Differentiation ^{xviii xix}
4. Private Label, Brand Extensions & Retail Partnerships ^{xx xxi}
5. Format Innovation: Beverages, Snacks, Kits & On-the-Go Solutions ^{xxii xxiii}

Reformulation for Health, Functionality & Clean Label

Reformulation is one of the most direct value-add strategies. By removing or reducing ingredients like sugar, salt, and fat—or adding protein, fiber, and probiotics—companies enhance both perceived and functional value. Consumers are increasingly drawn to “better-for-you” claims, yet functional positioning remains underutilized: fewer than 4% of new global food launches highlight benefits like digestion or immunity. Recent data highlights that the average packaged food product is expected to see a **0.6% reduction in sugar, salt, and saturated fat per 100g/ml from 2023 to 2028**, reflecting industry-wide reformulation efforts. Simultaneously, **29% of consumers actively look for food labels with all-natural claims**, while the plant-based packaged food market is expected to grow at a 10.9% CAGR over 2024–2028—twice the pace of the overall packaged food industry. These shifts underscore the urgency and upside of investing in health-forward reformulation. ^{xvii, xviii}

Insight:

- Additive suppliers like DSM (Life's Omega) and Tate & Lyle (PROMITOR®) are enabling functional upgrades like heart-healthy fats and gut-friendly fibers.

Case Study:

- SweetRight Stevia is a natural, plant-derived sugar replacement that enables food and beverage producers to reformulate products with reduced sugar content without compromising on taste. It is especially suitable for private label brands and health-focused product lines, supporting the development of better-for-you SKUs in response to growing consumer demand for functional and clean-label foods.

Opportunity:

- Co-packers and food manufacturers can collaborate with additive innovators to reformulate legacy products or offer white-label lines targeting low-sodium/sugar and all-natural consumer segments.



Packaging Innovation to Drive Shelf Life, Convenience & Sustainability

Value-add increasingly comes through **packaging that extends shelf life, enhances portability, or reduces environmental impact**. Consumers reward packaging that delivers on both convenience and values.^{xix xx}

Insight:

- Natural antimicrobial preservatives like rosemary extract (Kemin) enable longer shelf life without synthetic preservatives.

Case Study:

- Tetra Pak's Aseptic Packaging cartons are used by various Canadian dairy and beverage producers to package products like milk and plant-based beverages. This packaging technology extends shelf life without the need for refrigeration and is made from renewable materials, aligning with sustainability goals.
- Tate & Lyle's compostable additive packaging is part of a growing shift toward environmentally conscious, value-added positioning.

Opportunity:

- Small processors and regional brands can stand out with shelf-stable formats for exports, retail partners, or subscription boxes.



Processing, Co-Packing & Ingredient-Based Differentiation

Processing adds tangible value by turning raw commodities into unique formats—whether through baking, freezing, fermenting, drying, or blending. Additives like **organic starches** and **plant-based proteins** (e.g., PURITY P 1002 by Ingredion) improve taste, mouthfeel, or nutritional profiles. ^{xxi xxii}

Insight:

- Texturizing agents like NUTRAVA™ citrus fiber offer creaminess and structure to low-fat or plant-based formulations, helping co-packers deliver desirable eating experiences. Texture and taste remain top drivers—20% of new savoury snacks in 2023 featured spicy or bold textures.

Case Study:

- Big Mountain Foods is a women-owned, allergen-free food manufacturer that co-packs and produces plant-based protein alternatives using ingredients like lentils, fava beans, and mushrooms. Their Vancouver facility includes high-efficiency equipment for steaming, blending, and forming clean-label products, supporting both branded and private-label clients. With certifications in SQF, non-GMO, and gluten-free, they cater to the rising demand for minimally processed, allergen-conscious foods—showcasing how processing infrastructure and ingredient know-how can drive product differentiation and scalability.

Opportunity:

- Atlantic Canadian processors can expand by investing in flexible processing lines that support niche ingredients and plant-based demand.



Private Label, Brand Extensions & Retail Partnerships

Private label production is emerging as a **major value-add channel**, especially as large retailers seek unique, high-quality SKUs that cater to niche markets. In 2023, over **90% of new food launches globally were brand extensions**, not new standalone brands. ^{xxiii xxiv}

Insight:

- Private label food accounts for **13.1% of global packaged food**, a 10-year high—reflecting growing trust in retailer brands.

Case Study:

- Farm Boy, a specialty grocery chain owned by Empire Company Limited, emphasizes fresh, locally sourced products. They collaborate with regional producers to develop private label items that align with their brand's focus on quality and local sourcing. For instance, Farm Boy offers a range of prepared foods, dairy products, and baked goods under their own label, produced in partnership with local suppliers. This approach allows regional producers to access broader markets while providing Farm Boy customers with high-quality, locally inspired products.

Opportunity:

- SMEs with processing capacity or unique inputs (e.g. functional seafood, organic vegetables) can enter higher-margin markets through contract manufacturing deals.



Format Innovation: Beverages, Snacks, Kits & On-the-Go Solutions

Creating value through **new formats**—like shelf-stable beverages, single-serve snacks, or DIY meal kits—is one of the fastest-growing pathways to meet evolving consumer lifestyles. These formats extend reach into convenience stores, travel, e-commerce, and wellness. ^{xxv xxvi}

Insight:

- Meal kits, mini-meals, and emotionally driven snacking (e.g. stress, celebration) are reshaping packaged food demand. Natural flavors (e.g., **Givaudan's True Taste Ginger**) and flavor-layering technologies are elevating beverage and snack formats.

Case Study:

- Caudle's Catch Seafood, based in Ontario, offers a comprehensive Seafood Chowder Kit that exemplifies format innovation in the agri-food sector. This kit includes a large can of New England Clam Chowder, along with frozen wild-caught Canadian cold-water shrimp, bay scallops, cod loins, and cream. By bundling these ingredients, Caudle's Catch provides consumers with a convenient, ready-to-prepare meal solution that brings restaurant-quality seafood chowder into home kitchens. This product not only adds value to traditional seafood commodities but also caters to the growing demand for easy-to-prepare, gourmet meal options.

Opportunity:

- Micro-SKUs, portioned packs, and culturally resonant snacks offer an on-ramp for producers to scale both locally and globally.



How to Start Your Value-Add Journey

Adding value to food doesn't always require massive capital or a brand overhaul. Often, it begins with a single strategic step: reformulating a product, upgrading packaging, or introducing a new format like a snack or meal kit. Whether you're a small producer or an established processor, there are multiple entry points to scale your impact, reach new markets, and boost your margins. The table below outlines six accessible strategies, along with inspiring Nova Scotian examples, to help you kickstart or expand your value-added journey.^{x xi}

Strategy	What it Looks Like	Inspiring Example
Reformulation	Reduce sugar/sodium, boost protein or fibre, switch to clean-label ingredients	Terra Beata (Nova Scotia) offer low sugar dried cranberries - with 40% less sugar per serving.
Packaging	Resealable, compostable, or export-ready formats that extend shelf life	Benjamin Bridge (Nova Scotia) canned wines offer a portable, easy-to-transport format that extends their premium wines beyond traditional bottles.
Processing	Turn raw products into shelf-stable or seasonal extensions	Van Dyk's by Nature (Nova Scotia) pure wild blueberry juice transforms a seasonal harvest of Nova Scotia blueberries into a shelf-stable, year-round product.
Co-Packing	Partner with a certified facility to produce and package your goods	Made with Local (Nova Scotia) co-packs its naturally-sweetened snack bars and granola mix.
Private Label	Manufacture under a grocery or retailer's brand	Highliner Foods (Nova Scotia) process their seafood into retailer-branded private-label products ready for store shelves.
Format Innovation	Create new formats like snacks, kits, and functional drinks	World Food Link (Nova Scotia) offer lobster concentrate, a 100% natural emulsified culinary base for use in food service and industrial processes.



The Opportunity

The Nova Scotia Opportunity

Nova Scotia's food and beverage sector presents significant opportunities for value-added innovation. From its rich seafood harvests to burgeoning beverage industries, local producers have access to unique resources and supportive infrastructure to enhance product offerings and expand into new markets.

Top Value-Add Sectors:

- **Seafood:** Nova Scotia stands as Canada's leading seafood exporter, accounting for 35% of the nation's shellfish exports. The province's seafood reaches over 60 international markets, with the United States, China, and the European Union being the top destinations. This expansive reach presents significant opportunities for businesses involved in harvesting, processing, and exporting premium seafood products. [The Nova Scotia Seafood brand](#) actively promotes the province's seafood in these global markets, highlighting the quality and sustainability of its offerings. Additionally, the [Nova Scotia Seafood Export Directory](#) serves as a valuable resource for connecting suppliers with potential buyers, further facilitating international trade. ^{xxiv}
- **Agriculture:** Nova Scotia's agricultural sector is diverse and export-oriented, with strengths in both fruit and vegetable production. While wild blueberries remain the province's largest fruit crop—cultivated on over 40,000 acres by more than 1,000 producers—the region also supports a robust apple industry, particularly in the Annapolis Valley, known for high-quality exports to Europe and the Americas. Highbush blueberries and emerging crops like haskap berries are gaining traction due to their adaptability and health appeal.

The province also produces a wide variety of vegetables, including carrots, cabbage, and sweet corn, supplying both domestic and export markets. Nova Scotia's cool climate, coastal moderation, and fertile soils offer strong potential for further value-added processing, especially in functional foods and local supply chains. Industry organizations such as the [Wild Blueberry Producers Association of Nova Scotia \(WBPANS\)](#) and [Perennia](#) provide research, market support, and product development services that foster innovation.^{xxv} ^{xxvi} ^{xxvii} ^{xxviii}

- **Beverages:** Nova Scotia boasts a vibrant and diverse beverage industry, shaped by its clean environment, rich agricultural heritage, and innovative spirit. From award-winning distilleries, wineries, craft cideries, and breweries to producers of juices, sparkling waters, fermented drinks, and specialty non-alcoholic beverages, the province offers something for every palate. Rooted in Maritime flavors and supported by growing global demand, Nova Scotia's beverage makers are crafting high-quality, retail-ready, and private-label products that are trusted, authentic, and export-ready.^{xxix}
- **Meat, Dairy, Value-Added, and Specialty Products:** Nova Scotia's value-added food products capture the region's character—modern, sustainable, and rooted in tradition. As home to one of Canada's largest pie producers, the province delivers a taste of heritage with every slice. Local ingredients shape a vibrant export landscape that includes specialty chocolates, maple syrups, preserves, and a variety of snacks. Culinary offerings are elevated further by a rich selection of spices, sauces, and condiments, all inspired by Nova Scotia's distinctive flavors and deep-rooted food culture.^{xxx}

Top Enablers of Growth:

- **Food Technology & Innovation:** Organizations like [Perennia Food and Agriculture Inc.](#) provide non-repayable financial assistance to Nova Scotia commercial entities in the fishing, aquaculture, and seafood processing sectors to increase productivity and competitiveness. They also manage the Nova Scotia [Seafood and Agriculture Strategic Investment](#) Fund 2025-2027, which is designed to support major innovative and transformative projects in the seafood and agriculture sectors.
- **Packaging Solutions:** The province offers programs like the [Value-Adding Equipment](#) Program, designed to help build capacity and competitiveness in the agriculture sector by funding the adoption of new and improved processes and technologies, including packaging solutions.
- **Cold Chain Infrastructure:** From a value-added and cold storage perspective, Nova Scotia is strategically investing in infrastructure to strengthen its seafood sector. One key initiative includes support for Ocean Choice International's new cold storage and retail packing facility in Dartmouth, which enhances the province's capacity for advanced, value-added seafood processing. These improvements in cold chain logistics enable Nova Scotia to move beyond primary exports and better serve high-value global markets. By supporting modern processing technologies and expanding storage capabilities, the province is positioning itself as a competitive hub for premium, sustainably handled seafood exports.^{xxx}
- **Nova Scotia Loyal:** the program encourages consumers to buy local by promoting Nova Scotian products through a recognizable brand, in-store signage, and retailer partnerships. Businesses can register as [NS Loyal Producers or Retailers](#) to use the branding, gain visibility, and benefit from provincial procurement preferences that favour local suppliers. Through Invest Nova Scotia, the [NS Loyal Producer Labelling Program](#) provides up to 70% reimbursement (to \$3,000) for packaging and design costs to incorporate the NS Loyal mark.

- **Funding & Support Programs:** Nova Scotia offers a well-developed suite of funding and advisory programs designed to help agricultural producers and processors pursue value-added opportunities. Through initiatives supported by the [Sustainable Canadian Agricultural Partnership](#), businesses can access cost-shared programs to improve processing efficiency, adopt new technologies, and diversify product lines - such as through the [Value-Adding Equipment Program](#), which enables upgrades to equipment that enhance product quality and production capacity. Complementing these are supports like low-interest farm loans, infrastructure upgrade programs, and business risk management tools that create a stable investment environment for producers to scale operations. In addition, [Invest Nova Scotia's Innovation Rebate Program \(IRP\)](#) helps processors recover a portion of eligible project costs when they invest in innovation, automation, or productivity improvements - opening the door to higher-margin product development and export readiness. Together, these programs offer producers a strong foundation to build competitive, value-added agri-food businesses that can thrive in both local and global markets.^{xxxii}
- **Export Development Programs:** Nova Scotia's value-added food and beverage producers have access to several programs designed to connect their products with global buyers. Initiatives such as the [Export Development Program](#) and [Market Entry Development Program](#) provide practical support, including export-readiness training, market intelligence, one-on-one advisory services, and participation in trade missions and buyer engagement events. These resources help to reduce barriers to entry and accelerate pathways to international markets.

Conclusion & Key Takeaways

Nova Scotia's food and beverage sector is well-positioned to lead in value-added innovation. With strong agricultural assets and growing demand for functional, sustainable, and culturally rooted products, the province is primed to deliver higher-margin offerings. By enhancing raw exports through advanced processing and branded formats, local businesses can grow their market reach and competitiveness. Key takeaways include:



Boost Growth and Profitability: Value-added strategies empower businesses to enhance margins, expand markets, and build lasting consumer loyalty.



Leverage Nova Scotia's Strengths: The province's seafood, agriculture, and beverage sectors offer unique opportunities for high-value product innovation and global market expansion.



Access Support for Innovation: Nova Scotia's funding programs and infrastructure investments enable producers to scale, automate, and compete in premium markets.

Nova Scotia companies that adapt early to this shift stand to gain the most from changing consumer demands and value chain opportunities—strengthening both their margins and the province's food economy.



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