

UK & Europe Deep Dive: Value Add Food Opportunities

An overview of the challenges and opportunities
for Nova Scotia businesses.

► Prepared by Invest Nova Scotia - February 2026

Invest 
NOVA SCOTIA

TRADE MARKET
INTELLIGENCE
REPORT





Disclaimer

All Rights Reserved

Invest Nova Scotia owns this publication. No part of this publication may be reproduced, distributed, rented, sub-licensed, altered or stored in a retrieval system or transmitted in any form by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission of the publisher, Invest Nova Scotia.

The information and facts of this report are believed to be accurate at the time of publication, but because of the rapid changes in the market or other conditions, cannot be guaranteed. Please note that the findings, conclusions and recommendations that Invest Nova Scotia delivers will be based on information gathered in good faith from both primary and secondary sources, whose accuracy we are not always in a position to guarantee. All information is provided "as is" without warranty of any kind, and Invest Nova Scotia makes no representations, and disclaims all express, implied, and statutory warranties of any kind to user and/or any third party, including but not limited to, the accuracy, timeliness, completeness, merchantability, fitness for any particular purpose and freedom from infringement. As such, Invest Nova Scotia has no liability in tort, contract, or otherwise, to user or any third party, for actions taken based on any information that may subsequently prove to be incorrect.



Table of Contents

<i>Market Overview</i>	5
<i>Value-Add Formats Gaining Traction</i>	10
<i>6 Countries, 6 Opportunities</i>	13
<i>Key Takeaways</i>	25
<i>Additional Resources</i>	26
<i>References</i>	27

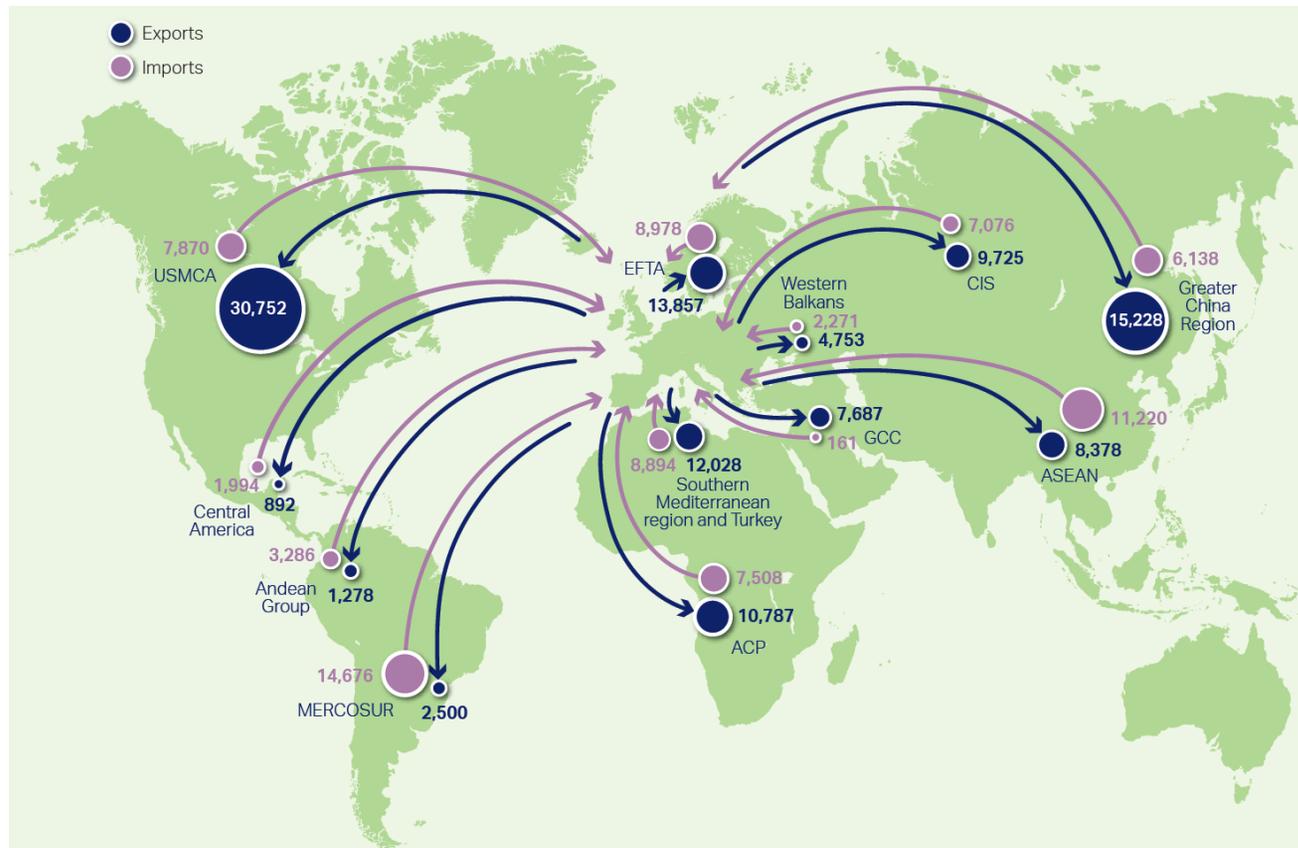


Market Overview

Market Overview

According to FoodDrink Europe, the food and drink industry is the European Union (EU)'s largest manufacturing sector, **generating €1.196 billion and contributing 1.9% of the EU's gross value added**. The sector employs roughly 4.7 million people and encompasses around 304,120 companies, underscoring its substantial impact on the European economy. The EU is also a leading player in global food and beverage trade.¹

Figure 1: EU Food and Drink Trade Flows with Key Regions (2023, € Million)



Rising Demand

Across Europe, people are changing the way they think about food. More than ever, they're looking for products that offer something extra: **whether it's better nutrition, greater convenience, or a lighter impact on the planet.** Healthier, clean-label options, plant-based alternatives, and quick meal solutions are all gaining traction, especially as busy lifestyles leave less time for traditional cooking. Simply put, consumers want food that fits their values and their day-to-day lives. ⁱⁱ

- **Taste, of course, still matters - a lot.** In fact, it's one of the biggest reasons people come back to a product. European shoppers are becoming more adventurous, seeking out bold flavors and global influences while still appreciating the comfort of traditional, locally made favorites. From spicy fusion sauces to small-batch cheeses, people are drawn to foods that feel authentic, exciting, and thoughtfully made.
- **Health-conscious choices are shaping what flavor looks like.** Brands are moving away from added sugar, salt, and artificial ingredients, instead using things like herbs, spices, and fermentation to build flavor in more natural ways. Texture is also in the spotlight, especially in plant-based and alternative products, because people want the same satisfaction they'd expect from the original version.
- The **functional food market**, which includes enhanced products with additional health benefits, was valued at **USD 95.6 billion in 2023 and is projected to reach USD 171.42 billion by 2030**, growing at a compound annual growth rate (CAGR) of 8.7%.ⁱⁱⁱ Additionally, the **organic food sector** is experiencing robust growth, with market value expected to reach approximately USD 132.82 billion by 2032, reflecting a CAGR of 10.25% from 2024 to 2032. ^{iv}
- The EU is moving quickly to build more **sustainable and healthy food systems** through policies under the [Green Deal](#) and [Farm to Fork Strategy](#). Recent changes to corporate sustainability reporting rules show the EU is willing to reduce short-term compliance pressure while keeping long-term goals in place, including major targets such as cutting food waste by 2030. ^v For food producers, this means sustainability is increasingly expected and can help with market access and competitiveness in Europe. ^{vi}

Key Market Opportunities

Choosing the right market is not just about current demand, it's about strategic alignment with Nova Scotia's broader agri-food strengths and future growth potential. The **United Kingdom, Spain, Italy, the Netherlands, Belgium** and **Denmark** stand out as high opportunity targets due to their strong import demand, consumer fit, logistical access, and shared priorities around quality, sustainability, and traceability. These countries are not only key Nova Scotia export destinations. They are also established Canadian trade partners making them accessible and familiar with Canadian standards.

United Kingdom

- The **UK** remains a high-priority market thanks to its robust appetite for both **high-quality seafood** and **premium shelf-stable agri-food products** such as sauces, condiments, and baking ingredients. Post-Brexit agreements streamline Canadian access, and Nova Scotia's traceable, clean-label goods are well-aligned with UK retailer and consumer expectations. The UK also ranks among Canada's top five agri-food export destinations, indicating familiarity with Canadian regulatory standards and supplier reliability.

Spain

- **Spain** offers dual opportunities: a growing gourmet segment aligned with Nova Scotia seafood and a strong retail appetite for legumes, prepared vegetables, and conservas. Spain's food culture favors regional, premium-quality ingredients providing room for **Canadian-sourced pantry staples** and **clean-label innovation**. As a top 10 agri-food partner for Canada, Spain presents both familiarity and gaps particularly in premium plant-based and sustainable ready-meal segments Nova Scotia can fill.

Italy

- **Italy** is Europe's benchmark for premium food. Nova Scotia exporters should consider ingredients that serve Italy's food processing industry, such as **grains, specialty oils, and frozen produce**. Nova Scotia's sustainable, high-quality inputs fit Italy's emphasis on **premium and regionally inspired ingredients**. Italy's long-standing trade relationship with Canada under CETA supports deeper market investment.

The Netherlands

- The Netherlands is Europe's **logistics and agri-food gateway**. With Rotterdam's global port and advanced cold-chain systems, it provides a strategic entry point for **food-processing ingredients**, including marine oils, plant-based inputs, and sustainable proteins. Its role as a major Canadian trade partner and distributor into wider EU markets makes it ideal for companies prioritizing **reach, efficiency, and scale**.

Belgium

- Belgium offers a **premium retail and specialty-food opportunity** distinct from larger EU distribution hubs. Buyers emphasize **traceability, sustainability, and clean-label ingredients**, creating openings for Nova Scotia's wild blueberries, plant-based inputs, and functional ingredients. Belgium's advanced **bakery, chocolate, beverage, and processed-food sectors** further align with Nova Scotia's ingredient strengths, making it a strong market for high-margin, specialty offerings.

Denmark

- Denmark presents a **niche, innovation-driven opportunity** rooted in its leadership in sustainable and science-based food systems. Danish buyers prioritize **clean-label, climate-friendly, and functional ingredients**, aligning with Nova Scotia's wild blueberries, functional compounds, and plant-based inputs. Its strong **food-tech, alternative protein, and nutraceutical sectors** distinguish Denmark from logistics-focused Netherlands and retail-oriented Belgium.



Value-Add Formats Gaining Traction

Value-Add Formats Gaining Traction

To succeed in Europe's rapidly evolving food landscape, **it's not just what you sell, it's how you format it.** Nova Scotia food exporters need to align with the formats driving shelf space, menu inclusion, and consumer loyalty. Across the market, **value-added formats that blend convenience, health, heritage, and indulgence** are outperforming conventional offerings. The table below highlights the top formats gaining traction, with real examples and reasons why they matter now.

Key Value-Add Formats:

- Food Kits ^{vii}
- Clean Label Plant-Based Alternatives ^{viii}
- Heritage-inspired Convenience Foods ^{ix x}
- Premium single-Indulgence ^{xi}
- Frozen Single-Serve Meals ^{xii xiii}
- Functional & Fortified foods ^{xiv xv}
- Sustainable Products ^{xvi xvii}
- Upcycled Products ^{xviii}

Value-Add Formats Gaining Traction

Trend Category	What is it?	Example	Why is it Gaining Traction?
Food Kits ^{vii}	Ready-to-cook , chef-curated kits with measured ingredients and instructions across ethnic, regional, and wellness formats.	<u>HelloFresh's Ciao, Italia series</u> - Traditional Italian meals with Colavita ingredients. <u>Old El Paso Fajita Kits</u> – Retail Tex-Mex kits with spice mixes, tortillas, sauces.	Leads Meals & Soups growth in UK (+11.6%) Spain (+10.1%), Italy (+7.6%); aligns with premium convenience , flexitarian diets, and global flavors.
Clean Label Plant-Based Alternatives ^{viii}	Plant-based products with minimal, recognizable ingredients avoiding artificial additives and excessive processing.	<u>Planted</u> – plant-based meat with just four ingredients. <u>Oatly Barista Oat Drink</u> – Plant-based milk with transparent sourcing, optimized for coffee prep.	Consumers seek natural ingredients ; 8% CAGR for 'natural' plant-based claims; Spain's market growing 10% by 2025; flexitarian appeal.
Heritage - Inspired convenience Foods ^{ix x}	Ready-to-heat meals inspired by authentic regional recipes and traditional methods.	<u>La Linea Verde</u> , an Italian company offering a variety of ready-to-eat soups that emphasize high fiber and protein content, often inspired by regional Italian recipes.	42% of Europeans value authenticity in food ; Italy/Spain show strong regional pride; supports premium pricing.
Premium Single-Indulgence ^{xi}	High-quality, portion-controlled treats offering premium ingredients and luxury experiences.	<u>Kinder Bueno Ice Cream Cone</u> – Indulgent, layered dessert with nostalgic branding. <u>Läderach Chocolate Cubes</u> – Individually wrapped luxury Swiss chocolate.	Desire for ' permissible indulgence '; 4.1% CAGR in EU ice cream market; social media influence; exclusivity from limited-edition flavors.

Value-Add Formats Gaining Traction

Trend Category	What is it?	Example	Why is it Gaining Traction?
Frozen Single-Serve Meals ^{xii xiii}	Portion-controlled, premium frozen meals designed for solo dining with convenience and nutrition.	<u>Higgidy Pies</u> – Comfort food in small formats. <u>Bonduelle Grains + Veg Mixes</u> – Balanced, frozen solo meals with nutritional focus.	Post-pandemic solo dining growth ; demand for affordable luxury; UK, Spain, and Italy seeing freezer category expansion for premium meals.
Functional & Fortified Foods ^{xiv xv}	Products enhanced with added nutrients, probiotics, or other health-promoting ingredients.	<u>Actimel (Danone)</u> : yogurt shot packed with L.casei cultures and vitamins D and B6 which help support the immune system. PepsiCo launched <u>Pepsi Prebiotic Cola</u> with combines functional nutrition with cola drinking.	52% of exercisers choose probiotics to support immune system, while 57% of supplement takers seek fibre for digestive health.
Sustainable Products ^{xvi xvii}	Products produced with minimal environmental impact, promoting social and economic benefits , and ensuring food security for future generations.	<u>Heura Foods</u> - focus on creating sustainable and healthy food products, particularly plant-based meats	60 % of consumers in Europe are likely to buy and eat food that is less damaging for the environment and is more sustainable.
Upcycled Products ^{xviii}	Made from discarded materials that are transformed into something new , often with increased value.	<u>Irvins Fish Skin</u> - uses the skin from salmon (and other fish) that would otherwise be discarded after the meat is processed, transforming it into their popular crispy snacks.	Upcycled food is rising : \$95B by 2032 (6% CAGR), driven by consumer demand and waste-cutting policies (France’s AGEC, EU Green Deal); 20% of EU food waste is upcyclable, per the European Commission.

Implications for Nova Scotia Exporters

Understanding these value-add format trends gives Nova Scotia exporters a clearer path to market alignment. To compete and scale exporters should:

- Invest in **packaging innovation** to enable premium single-serve and ready-to-heat formats.
- Explore **co-branded kit opportunities** with European meal kit providers using Nova Scotia legumes, grains, and seafood.
- Highlight clean-label, **minimally processed credentials** on plant-based SKUs.
- Position **heritage-inspired products** through storytelling linking East Coast Canada with regional European flavors.
- Leverage frozen, **solo meal solutions** for health conscious, cost aware consumers in both retail and foodservice channels.

6 Countries, 6 Opportunities

Each of Europe's leading food markets offers distinct consumer behaviors, retail formats, and product preferences that align well with Nova Scotia's value-add capabilities. By understanding what's working on the shelves and where demand is accelerating, Nova Scotia food exporters can tailor their offerings to meet the moment. The following snapshots distill the most relevant consumer shifts, high-performing products, and market-aligned opportunities that can guide strategic entry and expansion.

xix xx xxi xxii xxiii xxiv xxv xxvi xxvii xxviii xxix xxx xxxi xxxii xxxiii xxxiv

United Kingdom

Consumer Shifts ^{xix xx xxi}

Restaurant-style meals at home via **'fakeaway'** culture; frozen ready meals growing; HFSS regulation (high in fat, salt or sugar) and anti-ultra processed food push cleaner, healthier meals.

High-Performing Products

MOWI, the world's largest salmon producer, expanded into oven-ready seafood with its Bistro Bakes line in 2023. This range of four Scottish salmon dishes (e.g. flaky Salmon Pastries, cheesy Melts, zesty Roasting Joint) delivers “restaurant-quality” meals at home without the usual effort. Their product comes pre-seasoned in ovenable trays – appealing to shoppers who love the taste and nutrition but lack the time or to cook it from



scratch. By taking “the hassle out of it” and elevating fresh fish with flavorful crusts and sauces, MOWI is trading consumers up from raw fillets to a value-added, indulgent gourmet and convenient experience for just £4.50.

Examples: Higgidy (frozen meals), Tesco Tex Mex Feast, McCain Air Fryer Chips, Jason's Bake At Home, The Gym Kitchen, Princes (Fish for Greatness), Bold Beans, SimplyCook/Tesco kits.

Opportunities for Nova Scotia Exporters:

Frozen/chilled ready meals with NS seafood or legumes; meal kits with Atlantic ingredients; air fryer/bake-at-home formats; clean-label health messaging, and HFSS compliant formats.



Spain

Consumer Shifts ^{xxii xxiii xxiv}

Demand for fast, authentic meals; rise of chilled/frozen tapas and soups; clean-label and sustainable-packaging are critical and non-negotiable; food kits growth is a key trend and indicates that flavorful and convenient meals are dominating the market.

High-Performing Products

Spanish startup Snack'In For You scored a hit with Simple Pops, a crunchy puffed snack made from chickpeas, peas, rice and real veggies (broccoli, carrot, or tomato). Each variety pairs wholesome ingredients with bold seasonings – from sour cream & onion on broccoli bites to chili on tomato puffs – making healthy eating feel fun and full of flavor. With >20% protein and high fiber, these snacks satisfy hunger yet stay “better-for-you”, proving that convenience and nutrition can go hand-in-hand in the snack aisle. The consumer response earned it Spain’s Product of the Year 2025 for healthy snacks, as shoppers embraced this innovative fusion of local vegetables and on-the-go crunch. The product works so well because it fuses indulgence and wellness.



Examples: Fripozo’s +Proteínas, García Millán gazpachos, HelloFresh + Rana kits, Litoral Veg, Carretilla tapas, Heura ham, Florette Xtreme Chicken salad.

Opportunities for Nova Scotia Exporters:

Chilled/frozen tapas kits with NS seafood; cold-pressed sauces/soups with eco-packaging; flexitarian-friendly dishes with NS legumes; ethnic co-branded kits for modern retailers.



Italy

Consumer Shifts ^{xxv xxvi xxvii}

Convenience is rising but must coexist with **taste, tradition and transparency**. Chilled meals preferred; flexitarian diets grow; global flavors rise; local ingredients and sustainability becomes a key trend.

High-Performing Products

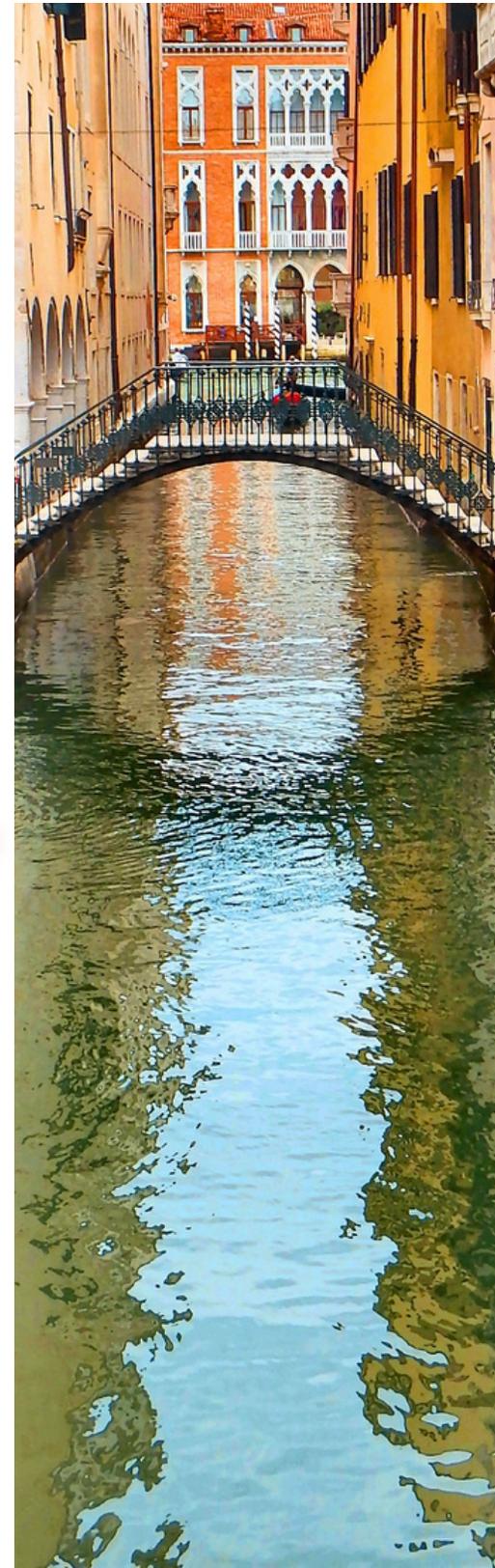
Ferrero extended its iconic Nutella brand into the frozen bakery aisle with the Nutella Croissant, launched in January 2024. Made with slow-leavened dough and filled end-to-end with Nutella, it delivers Italian pastry authenticity in a convenient, bake-at-home format. The product quickly became a breakfast hit, earning Ferrero its first Product of the Year 2025 award in the frozen pastry category. Its success stems from combining a beloved brand with easy indulgence – a premium twist on a classic that offers strong retail pull and broad consumer appeal.



Examples: Zerbinati, Bonduelle Wellness Salads, La Linea Verde Wraps, HelloFresh Asia kits, Old El Paso kits, Valfrutta soups, Heura meats.

Opportunities for Nova Scotia Exporters:

Chef-style chilled entrees with NS seafood; global meal kits using NS ingredients; clean-label single-serve wraps and soups; wellness-positioned indulgent formats pose a massive opportunity for exporters.



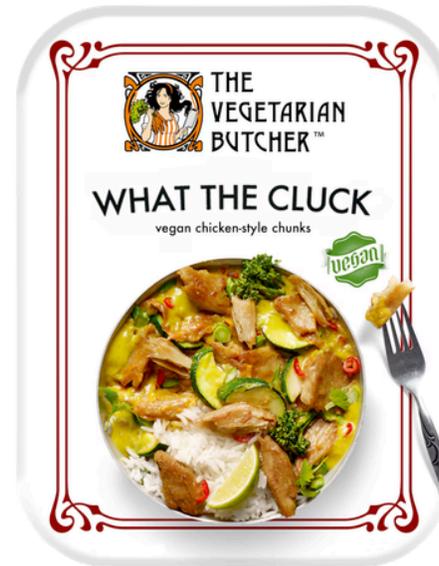
The Netherlands

Consumer Shifts ^{xxviii xxix xxx}

National guidelines, consumer preferences, and emerging food cultures in the Netherlands are increasingly aligned around health, sustainability, and plant-forward diets. For value-added food producers targeting the Dutch or wider EU market, this suggests that products combining taste, convenience, and clear sustainability or health-based positioning are more likely to gain traction.

High-Performing Products

The Vegetarian Butcher's success stems from making plant-based eating mainstream by offering meat-like products that fit familiar meals, appealing to flexitarian consumers rather than a niche audience. Strong alignment with Dutch sustainability and health trends, rapid adoption by major supermarkets, and a clear, scalable brand proposition helped drive growth and led to its acquisition by Unilever (and subsequently Vivera). Demonstrating how value-added food innovation in the Netherlands can move from local innovation to international scale by combining consumer familiarity with environmental positioning.



Examples: Vivera Plantaardige Krokettburger, Otaly Barista Edition Oat Drink, Schouten Vegetable Bites, The Dutch Weed Burger, Seaweedland Sausages

Opportunities for Nova Scotia Exporters:

Strong Dutch demand for health-focused foods, reflected in 37% of consumers actively seeking healthy ingredients, combined with high blueberry consumption (c. 42,000 tonnes annually, largely imported) creates a clear opportunity for value-added blueberry products positioned around health, convenience, and quality.



Belgium

Consumer Shifts ^{xxxi xxxii}

Belgian consumers are gradually reducing red meat consumption, opting instead for fish and poultry, which are perceived as healthier and more convenient options. This is driving demand for value-added fish and poultry products, such as prepared, marinated, and ready-to-cook formats, while plant-based alternatives remain a smaller but growing niche.

High-Performing Products

Berloumi is a Belgian-made grillable cheese inspired by halloumi that has gained traction by offering a familiar dairy product in a convenient, versatile format that browns without melting. Produced by De Zuivelarij using local milk, it has scaled from small-batch production to national retail distribution and is offered in multiple flavour variants, including natural, herb-infused, and chilli, helping broaden its appeal and usage occasions. Its success reflects strong consumer demand for premium, locally made, value-added foods that combine tradition with convenience.



Examples: Iglo frozen vegetables, Bonduelle canned and frozen vegetables, Bec Cola (carbonated soft drink sweetened with maple syrup), McCain Foods

Opportunities for Nova Scotia Exporters:

Retail-ready seafood meals using Nova Scotia lobster and whitefish; ingredient-grade IQF blueberries and fruit concentrates for Belgium's frozen and food manufacturing sector; and ready-to-cook seafood components for Dutch processors and EU foodservice channels are clear value-add growth opportunities for Nova Scotia exporters in Belgium.



Denmark

Consumer Shifts ^{xxxiii xxxiv}

Danish consumers are increasingly health, sustainability, and convenience-oriented, but remain price and taste sensitive with strong trust in food safety and quality information. Imported value-added foods that deliver premium convenience, transparent sourcing/credentials, and appealing flavour are well-positioned to perform in this market.

High-Performing Products

Arla transformed koldskål from a homemade Danish summer dessert into a high-volume, ready-to-eat chilled product by applying processing, branding, and retail-ready packaging to a basic dairy base. By offering consistent quality, convenient formats, and wide supermarket distribution, Arla shifted consumption from occasional home preparation to mainstream purchase, capturing higher value per litre of milk and achieving multi-million-litre sales during peak summer months. This makes koldskål a clear value-add success, demonstrating how convenience, branding, and format innovation can turn a traditional product into a scalable, higher-margin food offering.

Examples: Findus frozen seafood meals, Royal Greenland (frozen shrimp and prawns), Granini (premium fruit juices and nectars), Innocent Drinks (smoothies and chilled juices)

Opportunities for Nova Scotia Exporters:

Convenience-focused chilled seafood meals using Nova Scotia lobster, scallops, and whitefish, alongside wellness-oriented berry blends for smoothies and breakfast foods, present strong value-added export opportunities in Denmark, where consumers favour easy-to-prepare, high-quality products with clear health and origin cues.





Key Market Entry Tips

Market Entry Tips

Before entering any new market, understanding how to meet expectations across packaging, sustainability, cultural fit, and sales channels is crucial. This table distills key must-knows for Nova Scotia exporters targeting the United Kingdom and the European Union. It offers a quick reference to help food producers tailor formats, partnerships, and positioning opportunities.

Category	United Kingdom	European Union (incl Spain, Italy, Netherlands, Belgium, Denmark)
Trade Agreement	<p>The Canada-United Kingdom Trade Continuity Agreement (CUKTCA) came into force on April 1, 2021, preserving the main benefits of CETA. It provides Canadian businesses, exporters and investors with extensive preferential access to the UK market, including the elimination of 99% of tariffs on Canadian goods.</p>	<p>The Canada-European Union Comprehensive Economic and Trade Agreement (CETA) presents Canadian businesses with preferential access to growth opportunities in the EU. September 21, 2024, marked the seventh anniversary of CETA's provisional application. The Agreement will come into full effect when all EU Member States have completed the ratification process. Until then provisional application of CETA will continue and remain accessible to Canadian and EU business alike.</p>
Labeling Requirements	<p>UK food labelling regulations include:</p> <ul style="list-style-type: none"> • The name of the food • a 'best before' or 'use by' date • any necessary warnings • net quantity information • a list of ingredients (if there is more than 1) • the country or place of origin, if required • the lot number or use-by date • any special storage conditions • instructions for use or cooking, if necessary (all legally required) <p>Product Safety Law: advice for manufacturers and importers</p>	<p>European Union food labelling rules:</p> <ul style="list-style-type: none"> • name of the food • ingredient list (inc additives and quantify of certain ingredients) • allergen information • date marking (best before / use by) • country of origin • name and address of the food business operator established in the EU or importer • net quantity • any special storage conditions and/or conditions of use • instructions for use if needed • alcohol level for beverages (if higher than 1.2%) • nutrition declaration <p>Many products must bear the CE marking before they can be sold in the EU – no matter where they were manufactured.</p>

Market Entry Tips

Category	United Kingdom	European Union (incl Spain, Italy, Netherlands, Belgium, Denmark)
Sustainability Standards	<ul style="list-style-type: none"> UK buyers expect food to be produced with sustainable practices: reduced pesticide use, biodiversity protection, and ethical labor. Certifications like <u>MSC</u> (for seafood), <u>GlobalG.A.P.</u>, and organic (UK-recognized) can support market entry. UK regulations are phasing in <u>Extended Producer Responsibility (EPR)</u> and Plastic Packaging Tax; use recyclable, compostable, or reusable packaging to comply 	<ul style="list-style-type: none"> <u>EU Packaging Regulation (PPWR)</u>: packaging must be recyclable, reduced, and include recycled content; bans on certain substances (e.g. PFAS) coming. <u>Food Contact Safety</u>: materials must comply with EU migration limits; recycled plastics face strict approval rules. <u>EPR & Recycling</u>: producers/importers must register with national packaging recovery schemes in both countries. <u>EU Corporate Sustainability Reporting Directive (CSRD)</u>: while this directive applies to large EU companies, it affects non-EU exporters through supply chains as EU buyers increasingly require suppliers to align with requirements. Voluntary but Expected – eco-labels (Organic, Fairtrade, Rainforest Alliance), carbon footprint disclosure, and minimal packaging are valued by buyers.
Cultural Fit	<ul style="list-style-type: none"> <u>UK consumers</u> increasingly seek plant-based, sustainable, and ‘free-from’ foods due to health and environmental concerns <u>Openness to Global Flavours with Local Integrity</u>: While UK shoppers favor British-sourced ingredients, there's strong interest in authentic international flavors, especially when paired with ethical sourcing and quality 	<ul style="list-style-type: none"> <u>Fresh, Local, and Health-Conscious Eating</u>: <u>Spanish consumers</u> prioritize fresh, locally sourced foods, with rising demand for plant-based, organic, and healthy options <u>High Seafood Consumption</u>: Spain is one of the world's top consumers of seafood, making it a strong market for Nova Scotia’s fish and shellfish exports. <u>Health-Conscious & Sustainable Eating</u>: Italians prioritize fresh, local, organic, and plant-based foods, aligning with health and sustainability trends, particularly the Mediterranean diet.

Market Entry Tips

Category	United Kingdom	European Union (incl Spain, Italy, Netherlands, Belgium, Denmark)
Shelf-Stable vs Fresh	<ul style="list-style-type: none"> Shelf-stable products must comply with UK food safety regulations, including hygiene and packaging standards, with specific guidelines for composite foods, ensuring they are processed, cooked, and meet safety criteria <u>Fresh foods must maintain a cold chain with strict temperature controls</u> for different categories, such as meat, and must undergo pre-notification and health certifications upon import. 	<ul style="list-style-type: none"> Shelf-stable products must comply with EU food safety regulations, ensuring proper hygiene and packaging standards to prevent contamination during storage and transport The <u>General Food Law Regulation</u> is the EU's foundational food safety rules, including mandatory traceability from farm to table and business operator responsibilities for safe food. The law is established by the European Food Safety Authority (EFSA) and is based on the 'Farm to Fork' approach. Maintaining the cold chain is crucial for fresh foods, with specific temperature requirements for different meat categories (<u>e.g., poultry at 4 °C, offal at 3 °C, and other meats at 7 °C</u>).
Retail Opportunities	<ul style="list-style-type: none"> Supermarkets dominate the UK food retail market, particularly in key categories like dairy. They control pricing, shelf space, and product selection Securing listings with major retailers is critical for scale and visibility. <u>Strategic partnerships</u> with top UK chains can accelerate market entry. 	<ul style="list-style-type: none"> Leverage the growth of e-commerce and omnichannel food retail across the EU, using digital platforms to build brand awareness, trust, and credibility in markets such as <u>Italy</u>, where consumers increasingly research food quality and origin online before purchase. Prioritise high-growth value-added categories aligned with <u>EU demand</u>, including ready meals, savoury snacks, and processed meats, where convenience, quality, and consistency are key purchase drivers. Design <u>products and packaging</u> for convenience and quality, using EU-compliant labelling and portion formats, and leverage EU based co-packing, fulfilment and delivery partners to enable fast, reliable distribution and maintain cold-chain integrity from production to the consumer.

Market Entry Tips

Category	United Kingdom	European Union (incl Spain, Italy, Netherlands, Belgium, Denmark)
Intellectual Property	<ul style="list-style-type: none"> • IP protection is territorial – Canadian trademarks and designs do not apply in the UK; exporters must register directly with the UK Intellectual Property Office (UKIPO). • Register early and use the right IP tools under the UK’s first-to-file system—trademarks for brands, registered designs for packaging, copyright for creative content, and patents where applicable—to prevent conflicts and secure market access. • Protect recipes, formulations, and know-how through contracts, especially when using UK co-packers or distributors, as trade secrets rely on confidentiality rather than registration. 	<ul style="list-style-type: none"> • The EU operates a single, centralized IP system, the European Union Intellectual Property Office (EUIPO), that can provide protection across multiple member states, but it is strictly territorial and first-to-file. For Canadian exporters, securing EU-wide protection early and managing IP consistently across markets is critical when entering or scaling in the EU. • Register early and use the right mix of IP tools under a first-to-file system, combining EU trademarks and registered designs (for brands and packaging) with trade-secret protection for recipes, formulations, and know-how, particularly when working with EU co-packers or manufacturers. • Control IP through contracts with EU partners, clearly defining ownership, permitted use, territory, and post-termination rights in distribution, licensing, and co-packing agreements to prevent loss of control or unintended reuse.
More Information	<ul style="list-style-type: none"> • A practical overview of how Canadian businesses can leverage CUKCTA to enter and operate in the UK market, outlining key considerations related to market access, regulations. • Export requirements for Canadian fish and seafood and raw materials for human consumption. 	<ul style="list-style-type: none"> • How Canadian businesses can leverage CETA to enter and operate in the EU market, outlining key considerations related to market access, regulations, and doing business across EU member states. • A guide for Canadian businesses exporting Agri-food products and fish and seafood to the European Union.

Key Takeaways

Europe's food sector is transforming fueled by post-pandemic habits, rising food costs, and a growing demand for **traceability**, **purpose**, and **convenience**. The UK, Spain, Italy, the Netherlands, Belgium and Denmark are leading the charge. These markets aren't just mature they're signaling what's next. For Nova Scotia producers, the next 2–3 years offer a clear path to growth: deliver health, heritage, and sustainability in formats that fit modern lives.

- **Certify:** Europe's Halal food and beverage market has an estimated worth of \$15.5 billion and is growing at a CAGR of 5.61% which is driving the increase in demand for these kinds of ready meals, seafoods, and snacks. Consider certifying select seafood SKUs (e.g., scallops, mussels) and plant-based proteins for easier market entry.
- **Simplify Sustainability:** 70% of UK consumers assess sustainability credentials before making purchasing decisions. Pair eco-packaging with carbon labeling and storytelling around NS's clean ocean harvests to create differentiation.
- **Satisfy with Localized Convenience:** In the UK, frozen products are booming due to HFSS rules. Nova Scotia can lead with products like lobster mac & cheese, chowder bakes, and air fryer-friendly seafood kits that meet both taste and health criteria. While in the EU, chilled meals with local flavors and artisanal cues win—think seafood tapas trays or paella kits. Heat-and-eat convenience, paired with local flavor profiles, helps products feel both foreign and familiar key to long-term repeat sales.
- **Flexitarian and High Protein Innovation:** Protein remains one of the most important nutrition attributes across Europe—but plant-forward, “better-for-you” products are gaining ground. Nova Scotia legumes (like lentils) and grains can be formulated into snack packs, soups, or salads that meet demand for clean-label, high-protein formats.



Additional Resources

Nova Scotia & Atlantic Supports

- [Invest Nova Scotia – Export Development Program](#): Funding, mentorship, and export readiness initiatives including trade missions and market entry programs.
- [Invest Nova Scotia – Trade Market Intelligence \(TMI\)](#): Custom research and sector insights to help Nova Scotia companies identify opportunities, assess competition, and enter new markets.
- [The Market Entry Development Program \(MEDP\)](#): helps Atlantic Canadian businesses grow with confidence in Europe and the Indo-Pacific.
- [Atlantic Canada Opportunities Agency \(ACOA\) – Export Development](#): Federal programs and advisory support for Atlantic Canadian companies expanding into global markets.
- [World Trade Centre Atlantic Canada \(WTCAC\)](#): Regional hub providing training, trade missions, and international business connections.

Federal Trade Tools & Funding

- [Trade Commissioner Service \(TCS\)](#): On-the-ground support in 160+ markets, offering advisory services, matchmaking, and sector intelligence.
- [Export Development Canada \(EDC\) – Agri-Food Export Hub](#): Export financing, risk insurance, and advisory services designed for agri-food exporters.
- [CanExport SMEs Program](#): Federal funding to help Canadian SMEs with market research, trade shows, and promotional activities abroad.
- [Global Affairs Canada – Free Trade Agreements](#): Summaries and benefits of trade agreements like CETA and CUKTCA, including tariff reduction details.

Sector & Branding Supports

- [Canada Brand Program – Agriculture and Agri-Food Canada](#): Branding toolkit with visual assets, messaging, and consumer insights to strengthen Canada's food exports.
- [Canadian Agri-Food Trade Alliance \(CAFTA\)](#): Industry alliance advocating for agri-food exporters, with updates on global market access and competitiveness.
- [Canadian Food Inspection Agency \(CFIA\)](#): Export standards, labeling guidance, and certification requirements for international food trade.

Connect with Invest Nova Scotia

Want to take a deeper dive into opportunities specific to your business, **Invest Nova Scotia** has a number of programs and services that can support you.

Find out more at investnovascotia.ca



References

ⁱFoodDrinkEurope. (2024). *Data & Trends of the European Food and Drink Industry 2024*. [Food Drink Europe](#)

ⁱⁱGlobeNewswire. (2024, May 30). *Europe Organic Food Market Report 2024-2032*. [Globe Newswire](#)

ⁱⁱⁱVirtue Market Research. (2024). *Europe Functional Food Market*. [Europe Functional Food Market](#)

^{iv}GlobeNewswire. (2024, May 30). *Europe Organic Food Market Report 2024-2032*. [Globe Newswire](#)

^v European Commission. (2025). *Corporate sustainability reporting: EU postpones sector-specific sustainability reporting standards*. [European Commission](#)

^{vi} European Commission. (n.d.). *EU actions against food waste*. Food Safety. Retrieved April 4, 2025, from [European Commission](#)

^{vii} Euromonitor International (October 2024) *Meals and Soups in the United Kingdom Country Report*

^{viii} Innova Market Insights. (March 24, 2025). *European food trends 2025: Consumer insights and preference*. [Innova Market Insights](#)

^{ix} Innova Market Insights. (March 24, 2025) *European food trends 2025: Consumer insights and preference*. [Innova Market Insights](#)

^x Gallelli, F. (March 24, 2025) *Taste is key to a successful future for plant-based food in Italy*. GFI Europe. [GFI Europe](#)

^{xi} IMARC Group. (2024) . *Europe Ice Cream Market Size, Trends, Share, Report, 2033*. [IMARC Group](#)

^{xii} Euromonitor International (October 2024) *Meals and Soups in the United Kingdom Country Report*

^{xiii} Innova Market Insights. (March 24, 2025). *European food trends 2025: Consumer insights and preference*. [Innova Market Insights](#)

^{xiv} Euromonitor. (August 2025). *Voice of the Consumers: Nutrition Survey 2025 Key Insights*.

^{xv} Danone S.A. (n.d.). *Actimel dairy immune support shots*. [Danone](#)

^{xvi} European Commission, Directorate-General for Health and Food Safety. (n.d.). *Sustainable food production*. [European Commission](#)

- ^{xvii} Shahbandeh, M. (2025, March 28). *Sustainable food consumers in Europe - statistics & facts*. [Statista](#)
- ^{xviii} Upcyclink. (2024, April 25). *Food upcycling: A trend on the rise*. [Upcyclink](#)
- ^{xix} Euromonitor International (October 2024) *Cooking Ingredients and Meals in the United Kingdom Country Report*
- ^{xx} Euromonitor International (November 2024) *Staple Foods in the United Kingdom Country Report*
- ^{xxi} Euromonitor International (October 2024) *Meals and Soups in the United Kingdom Country Report*
- ^{xxii} Euromonitor International. (October 2024). *Cooking Ingredients and Meals in Spain Country Report*.
- ^{xxiii} Euromonitor International. (October 2024). *Staple Foods in Spain Country Report*.
- ^{xxiv} Euromonitor International. (October 2024). *Meals and Soups in Spain Country Report*
- ^{xxv} Euromonitor International. (October 2024). *Cooking Ingredients and Meals in Italy Country Report*.
- ^{xxvi} Euromonitor International. (October 2024). *Staple Foods in Italy Country Report*.
- ^{xxvii} Euromonitor International. (October 2024). *Meals and Soups in Italy Country Report*.
- ^{xxviii} Gezondheidsraad. (December 2025). *Guidelines for good nutrition: protein sources and dietary patters 2025*. <https://www.gezondheidsraad.nl/adviesonderwerpen/voedingsrichtlijnen/richtlijnen-goede-voeding-eiwitbronnen-en-voedingspatronen-2025>
- ^{xxix} Euromonitor International. (June 2024). *Consumer Values and Behaviour in the Netherlands Report*.
- ^{xxx} Government of the Netherlands. (September 2025). *The Dutch market potential for fresh fruit and vegetables*. <https://www.cbi.eu/market-information/fresh-fruit-vegetables/netherlands/market-potential>
- ^{xxxi} The FPS Economy. (January 2023). *Study "What meat do we have in the tub? How do Belgians view meat and alternatives?"* <https://economie.fgov.be/nl/publicaties/studie-welk-vlees-hebben-we-de>
- ^{xxxii} Food Export. (2005). *Belgium Country Profile*. <https://www.foodexport.org/export-insights/market-country-profiles/belgium/>
- ^{xxxiii} DTU National Food Institute. (October 2025). *Danes' food choices are shaped by price, taste and trust*. <https://www.food.dtu.dk/english/newsarchive/2025/10/danes-food-choices-are-shaped-by-price-taste-and-trust?>
- ^{xxxiv} European Food Safety Authority. (September 2025). *2025 Eurobarometer on Food Safety in the EU*. <https://www.efsa.europa.eu/en/corporate/pub/eurobarometer25>