Agriculture and Agri-Food Canada
Agriculture et Agroalimentaire Canada

Canada

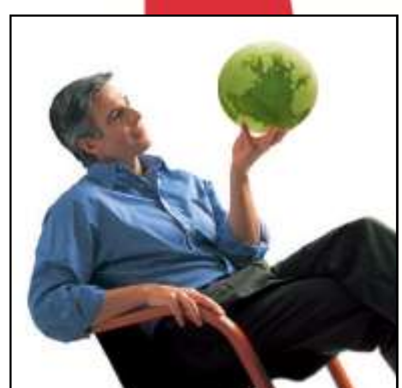
International Markets Bureau

MARKET INDICATOR REPORT | FEBRUARY 2013

Consumer Trends
Pasta and Couscous in the United States

Source: *Mintel*

Source: *Mintel*



Growing Forward

Canada

MARKET SNAPSHOT

- Pasta is a staple ingredient in the United States (U.S.). It is versatile for making both comfort and gourmet dishes. Spaghetti and macaroni are the two most popular types of pasta in the U.S.; however, the consumption of couscous and other types of pasta (such as ravioli) have been increasing, with a wide range of new products introduced in the market during the 2007-2012 period.

- Since 2009, there were many new products launched with convenient and easy-to-cook options. This encouraged manufacturers to introduce various chilled/fresh pastas featuring diverse flavours. In addition, there were a few new dried pasta launches that claimed to require a shorter cooking time than traditional varieties, and new couscous products marketed as main dish accompaniments or for use in salads. Manufacturers are producing such options as organic, gluten-free, fortified, and enriched, while exploring other grains to diversify their offerings. This demand for innovative products, such as alternative grain pasta, has contributed to value sales performance.

- According to Mintel, pasta consumption is more common in households with children, where usage is particularly high for packaged dried/chilled or fresh pasta (used by 73% of households with children, as opposed to 57% of those without) and canned/preserved pasta (used by 69% of households with children versus 53% of those without).

- As consumers are increasingly concerned with health issues, canned/preserved pasta has faced continuous sales decreases in both value and volume terms, including during the recessionary period of 2008-2010. These products are affordable but generally high in sodium, so they are not perceived as healthy options. In addition, the wide availability of economy substitutions such as ready meals, also further reduced canned/preserved pasta consumption. This trend is expected to continue in the coming years as the U.S. economy recovers and consumer income grows (Euromonitor, 2011).

- The pasta sector is facing a challenge in the form of increased societal focus on health issues such as obesity, diabetes and heart disease. Consumers are paying closer attention to their diets, driving manufacturers and retailers to address nutritional concerns and provide products with healthier attributes, such as whole grains, reduced sodium, and high fibre.

INSIDE THIS ISSUE

Source: *Shutterstock*

RETAIL SALES

- Total sales of pasta and couscous products were valued at US$3.3 billion in 2011, with a compound annual growth rate (CAGR) of 6.6% during the 2006-2011 period. Dried pasta and chilled/fresh pasta led value sales at a CAGR of 7%, while canned/preserved pasta experienced a decline in sales at a CAGR of -2.1% during this period.

- Total volume sales growth was limited in this category, with a CAGR of 1.6% over the 2006-2011 period, reaching just over 1 million tonnes in 2011. Dried pasta had positive growth at a CAGR of 1.6% from 2006 to 2011, reaching total volume sales of 977,200 tonnes in 2011. Chilled/fresh pasta experienced moderate volume growth at a CAGR of 3.9% during this period, registering total volume sales of 31,500 tonnes in 2011. However, canned/preserved pasta experienced a decrease in volume sales at a CAGR of -2.8% from 2006 to 2011, accounting for only 19,500 tonnes in 2011.

Pasta and Couscous* in the U.S. – Market Size by Retail Value Sales (Historic/Forecast) in US$ Millions

Category	2006	2011	2012	2016	2006-11 CAGR*	2011-16 CAGR*
Total pasta and couscous products	2,402.4	3,312.9	3,376.5	3,870.1	6.6%	3.2%
Dried pasta	2104.4	2,947.3	3,004.2	3,426.1	7.0%	3.1%
Chilled/fresh pasta	193.7	271.9	280.8	348.8	7.0%	5.1%
Canned/preserved pasta	104.3	93.7	91.5	95.2	-2.1%	0.3%

Pasta and Couscous* in the U.S. – Market Size by Retail Volume Sales (Historic/Forecast) in Thousand Tonnes

Category	2006	2011	2012	2016	2006-11 CAGR*	2011-16 CAGR*
Total pasta and couscous products	949.7	1,028.2	1,036.6	1,049.1	1.6%	0.4%
Dried pasta	901.2	977.2	985.5	996.4	1.6%	0.4%
Chilled/fresh pasta	26.0	31.5	32.1	34.7	3.9%	2.0%
Canned/preserved pasta	22.5	19.5	19.0	18.0	-2.8%	-1.6%

Source for both: *Euromonitor, 2012* ****CAGR****: compound annual growth rate*
**** Note:*** *Couscous data was not available as a separate category, but is reflected within the broader pasta categories.*

Retail Sales Forecasts

- Total value sales of pasta and couscous are expected to see moderate growth at a CAGR of 3.2% during the 2011-2016 period, reaching US$3.9 billion in sales by 2016. The chilled/fresh pasta market will grow relatively faster than other segments with a CAGR of 5.1% from 2011 to 2016, and total sales of US$348.8 million by 2016. Value sales growth will likely be supported by an increase in unit price, as companies continue to introduce value-added products with healthy properties. Euromonitor (2011) also indicated that a general shift toward 'premiumization' will likely contribute to growth in average unit prices.

- Total volume growth of this category will likely be minimal, with a CAGR of 0.4% over the 2011-2016 period. Chilled/fresh pasta is expected to enjoy relatively healthy growth compared to other segments with a CAGR of 2%, to reach total volume sales of 34,700 tonnes by 2016. Canned/preserved pasta will experience a further decline during the 2011-2016 period.

MARKET SHARE BY COMPANY

- Barilla Holding SpA was the leading company in the U.S. pasta market during the 2006-2011 period with its major brand, Barilla, accounting for a 15.7% share in 2011, or the largest pasta brand share in the U.S. By launching Barilla PLUS, a brand with fortified protein, omega-3 and fibre, the company expanded their product line and steadily increased value sales at a CAGR of 6.9% during the 2006-2011 period, reaching US$519.7 million in 2011.

- Grupo Ebro Puleva SA was the next leading company with an 11% share in 2011, registering total sales of US$363.5 million. The company's two major brands, Ronzoni and Creamette, held the third- and fifth-largest brand shares in 2011. Grupo Ebro Puleva SA maintained the second position in the U.S. pasta market, but has gradually lost market share at a CAGR of -0.2% during the 2006-2011 period. This company is expected to experience a further share decrease in 2012.

- During the 2006-2011 period, there were two major mergers and acquisitions in the U.S. pasta industry. Ralcorp Holdings Inc. acquired American Italian Pasta Company in 2010. At the time, American Italian Pasta Company was the third-largest pasta company and a major supplier of private label products in the U.S., operating multiple brands, including Ronco, Pennsylvania Dutch, Muller's, Heartland, Ragu and others. American Italian Pasta Company is now operating as a wholly-owned subsidiary of Ralcorp Holdings, and has continued to expand its business through Ralcorp Holdings' network. Secondly, Korean food manufacturing company Pulmuone Inc. acquired Wildwood and Monterey Gourmet Foods brand, creating Pulmuone USA Inc. in 2010. Pulmuone USA focuses on chilled/fresh pasta products.

- The U.S. pasta and couscous market is expected to further fragment due to new players, as well as the increasing popularity and entry of private label products. Excluding major companies with more than a 1% share, all other companies, including private labels, accounted for approximately 33% of the U.S. pasta and couscous market with total sales of US$1.1 billion in 2011. The aggregate sales of these minor companies grew at a CAGR of 10.9% during the 2006-2011 period. In addition, private labels also grew quickly in the U.S. pasta and couscous market at a CAGR of 11% during this period. Private labels represented a 21.7% share in 2011, reaching total sales of US$719.7 million. Euromonitor forecasts this trend will continue in 2012, as value-conscious consumers opt for private label pasta products with competitive prices.

Pasta and Couscous in the U.S. – Market Share by Major Company - % of Retail Value Sales

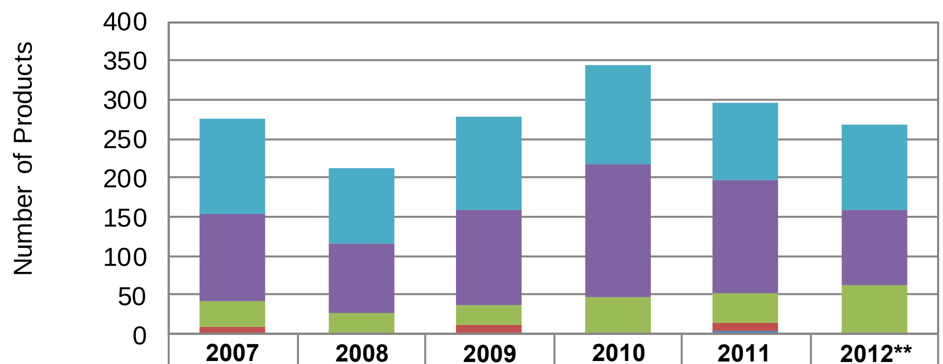
Company	2006	2007	2008	2009	2010	2011
Barilla Holding SpA	15.5	16.7	15.3	15.7	16.5	15.7
Grupo Ebro Puleva SA	15.3	14.1	11.9	11.5	11.4	11.0
Ralcorp Holdings Inc.	-	-	-	-	6.8	7.1
Nestlé SA	5.7	6.0	5.1	5.0	5.5	5.4
De Cecco SpA	1.6	1.6	1.5	1.4	1.4	1.5
ConAgra Foods Inc.	2.1	2.0	1.6	1.6	1.5	1.5
Pulmuone USA Inc.	-	-	-	-	1.5	1.1
Campbell Soup Co.	1.5	1.4	1.1	0.9	0.9	0.9
World Finer Foods	1.0	1.0	0.9	0.9	0.8	0.8
American Italian Pasta Company	10.8	10.5	9.1	7.9	-	-
Monterey Gourmet Foods Inc.	1.0	1.3	1.2	1.3	-	-
Private label	17.8	17.9	20.1	21.4	21.0	21.7

Source: *Euromonitor International, 2012*

NEW PRODUCT LAUNCHES

- According to Mintel, there were 1,673 new pasta and couscous products (1,607 pastas and 66 couscous) launched in the U.S. between January 2007 and November 2012, with the largest number of new products (344) coming to market in 2010. Of these new launches, “novel” and “new packaging” were the most popular launch types for pasta and couscous products. However, there was a higher number of new variety/range extension products introduced from January 2012 to November 2012 than in previous years.

New Pasta and Couscous Products Launched in the U.S. from January 2007 to November 2012, by Year and Launch Type



	2007	2008	2009	2010	2011	2012**
New variety*	121	97	120	126	99	109
New product	113	90	122	170	145	96
New packaging	31	25	25	46	36	62
New formulation	9	1	11	2	11	1
Relaunch	1	0	0	0	4	0

Source: *Mintel, 2012*
**** Note:*** *New variety includes range extension. **2012 is based on data from January to the end of November.*

Storage Type

- In terms of storage type, shelf stable products, including dried pasta and couscous items, were the most common new launches with 1,276 products. Chilled was the next most popular storage type with 214 products, followed by frozen with 183 products. Both 2010 and 2011 were active years for chilled introductions with 53 products each year. The popularity of chilled pasta and couscous products continued through 2012, with 36 new products launched from January 2012 to November 2012.

New Pasta and Couscous Products Launched in the U.S. from January 2007 to November 2012, by Storage Type

Storage Type	2007	2008	2009	2010	2011	2012**
Total products	275	213	278	344	295	268
Shelf stable*	215	164	232	241	220	204
Chilled	21	30	21	53	53	36
Frozen	39	19	25	50	22	28

Source: *Mintel, 2012* **Note:* *Shelf stable does not include canned/preserved pasta. Individual category data is not available for canned/preserved pasta, as these products are categorized within many types of meal centre and side dish categories.*
***2012 is based on data from January to the end of November.*

NEW PRODUCT LAUNCHES (continued)

Major Companies

- Between January 2007 and November 2012, 318 companies introduced 1,607 pasta products under 486 brands, and 32 companies introduced 66 couscous products under 33 brands. The companies with a larger market share in the U.S. pasta and couscous market were active in terms of new pasta products, while most couscous products were introduced by specialty packaged food companies. American Italian Pasta Company recorded the highest number of new pasta products with 69 launches, followed by New World Pasta with 66.
- During the January 2007 to November 2012 period, there were 580 new private label products, representing 34.7% of the new pasta and couscous launches in the U.S. This included 554 pasta products and 26 couscous products.

New Pasta Products Launched in the U.S. from January 2007 to November 2012 — Top 5 Companies

Company	Number of Products
American Italian Pasta Company	69
New World Pasta	66
Supervalu	49
Barilla	41
Trader Joe's	37

Source: *Mintel, 2012*

New Couscous Products Launched in the U.S. from January 2007 to November 2012 — Top 5 Companies

Company	Number of Products
Olive Branch Brokerage	4
Lundberg Family Farms	4
Whole Foods Market	4
Target	4
Fresh & Easy Neighborhood Market	3

Source: *Mintel, 2012*

Major Claims

- The top ten claims for the new pasta and couscous products focused on dietary suitability, natural ingredients and convenience. The most popular claim was kosher with 579 products, followed by all natural product with 329. Other popular claims included no additives/ preservatives with 258 products, organic (228) and wholegrain (224).
- Gluten-free and high/added fibre have been popular since 2009, and higher proportions of pasta and couscous products claim to have these properties. For gluten-free pastas, white rice flour, brown rice flour and corn flours were the major substitutes to wheat flours. Some products also used quinoa flours and amaranth flours. For high/added fibre pasta and couscous products, oat fibre was the major fibre component.

New Pasta and Couscous Products Launched in the U.S. from January 2007 to November 2012 — Top 15 Claims

Company	Number of Products
Kosher	579
All natural product	329
No additives/preservatives	258
Organic	228
Wholegrain	224
Low/no/reduced cholesterol	170
Time/speed	168
Low/no/reduced sodium	140
Environmentally friendly package	140
Low/no/reduced allergen	132
Low/no/reduced fat	129
High/added fibre	113
Microwaveable	112
Gluten-free	109
Premium	98

Source: *Mintel, 2012*

Pasta Types

- Among the 1,607 new pasta products, spaghetti was the most common type of dried pasta with 150 products, accounting for 12.4% of new dried pasta launches in the U.S. between January 2007 and November 2012. The next most common type was elbow macaroni with 121 products, followed by penne (111) and fettuccini (110). There were 40 new products branded as egg noodles, including both traditional-style pastas made with egg, and Asian-style egg noodles, which claim to be a good substitute in any pasta dish. Other common types of dried pasta were fusilli with 35 products, gnocchi (22), shells (17), and pappardelle (13). For premium dried pastas, short-cut extruded pastas, such as wholegrain and organic penne and gemelli, were popular types, along with traditional long-noodle pastas.
- For chilled and frozen pastas, filled pastas, such as ravioli, tortelloni, and tortellini, were the most popular types amongst the new launches. Ravioli products represented 48.0% of all new chilled and frozen pastas with 188 products. Other types of chilled and frozen pasta included gnocchi and fresh long noodles, such as fettuccini, linguini and egg noodles. Of the 66 couscous products, regular or original was the most common type with 51 new products. However, there were 14 Israeli/pearl couscous products and one barley couscous amongst the new launches.

Flavours

- Of the 239 flavours used in the 1,607 new pasta products, unflavoured/plain represented the majority, with 1,083, mostly in the dried pasta category. Cheese (unspecified) was the next most common flavour with 74 products, with spinach (20), vegetable (12), sausage (11) and mushroom (11) as the next most popular flavours. The rest of the flavours were blends of these popular components. Most of the flavoured pastas were pre-cooked, filled, frozen or instant with some sort of accompanying flavour packet.
- There were 19 available flavours for the new couscous products with unflavoured/plain as the predominant choice (35). Among the flavoured couscous launches, roasted garlic and olive oil was the most popular with six products, followed by parmesan cheese with four products. Other available flavours were blends of roasted vegetables, garlic, cheese, Mediterranean style and olive oil.

New Pasta Products Launched in the U.S. from January 2007 to November 2012 – Top 10 Flavours

Flavour	Number of Products
Unflavoured/plain	1083
Cheese (unspecified)	74
Spinach	20
Vegetable	12
Sausage	11
Mushroom	11
Spinach and cheese	10
Ricotta cheese	10
Beef	10
Spinach and ricotta cheese	8

Source: *Mintel, 2012*

New Couscous Products Launched in the U.S. from January 2007 to November 2012 – Top 5 Flavours

Flavour	Number of Products
Unflavoured/plain	35
Roasted garlic and olive oil	6
Parmesan cheese	4
Mediterranean	2
Garlic and olive oil	2

Source: *Mintel, 2012*

NEW PRODUCT EXAMPLES

The following are some examples of the new pasta and couscous products launched in the U.S. between January 2012 and November 2012, from the Mintel Global New Products Database (2012).

Garlic & Olive Oil Couscous

Company: Whole Foods Market
Brand: 365 Everyday Value Organic
Launch Type: New variety/range extension
Price (US$): 2.99
Packaging: Carton board white lined
Date Published: May 2012

Position Claims: Kosher, low/no/reduced sugar, microwaveable, organic, economy, environmentally friendly package, vegan, no animal ingredients, GMO-free

Ingredients: Organic couscous (pre-cooked organic durum wheat semolina), seasoning (sea salts, organic glucose, organic garlic powder, organic dehydrated garlic, organic soybean sauce powder [organic soybean salt], organic corn maltodextrin, organic umami flavour [organic yeast extracts, wheat, natural flavouring substance], organic dried parsley, organic black pepper, organic extra virgin olive oil)

Product Description: 365 Everyday Value Organic Garlic & Olive Oil Couscous is certified organic by the USDA. This naturally flavoured mix is suitable for vegans, microwaveable (cooks in five to six minutes), free from genetically engineered ingredients, and contains no added sugar. It is kosher certified and retails in a 5.8-oz. recyclable carton.

Ancient Grain Organic Penne Pasta

Company: Enray
Brand: TruRoots
Launch Type: New product
Price (US$): 3.99
Packaging: Flexible plastic
Date Published: September 2012

Position Claims: Kosher, organic, gluten-free, wholegrain, low/no/reduced allergen, charity, GMO-Free

Ingredients: Brown rice (organic), quinoa (organic), amaranth seed (organic), corn (organic)

Product Description: TruRoots Ancient Grain Organic Penne Pasta is made from quinoa, amaranth and brown rice. This wholegrain, gluten-free product is GMO-free and kosher certified. It retails in a 8-oz. pack.

Basil Gnocchi

Company: Cost Plus World Market
Brand: World Market
Launch Type: New variety/range extension
Price (US$): 2.79
Packaging: Plastic tray
Date Published: September 2012

Ingredients: Mashed potato (water, dehydrated potato flake, [potato, mono- and di-glycerides of fatty acids (emulsifiers, food acids)], natural flavouring substance), wheat flour, potato starch, basil, rice flour, salt, flavouring substances, lactic acid (acidity regulators, food acids), potassium sorbate (preservatives)

Product Description: World Market Basil Gnocchi cooks in 2-3 minutes and is imported from Italy. The product retails in a 16-oz. pack.

Source for all: *Mintel, 2012*

NEW PRODUCT EXAMPLES (continued)

Penne Rigate

Company: New World Pasta
Brand: Creamette Quick Cook
Launch Type: New packaging

Price (US$): 1.66
Packaging: Brown-lined carton board
Date Published: August 2012

Position Claims: Low/no/reduced cholesterol, kosher, low/no/reduced sodium, low/no/reduced fat, vitamin/mineral fortified, time/speed

Ingredients: Semolina (wheat), durum flour (wheat), niacin, ferrous sulphate, thiamine mononitrate, riboflavins, folic acid (food acids)

Product Description: Creamette Quick Cook Penne Rigate has been repackaged, and retails in a newly designed 1-lb. pack. This kosher-certified, enriched macaroni pasta is low fat, and contains no sodium or cholesterol. It cooks in three minutes.

Zahav Toasted Pasta Israeli Couscous

Company: Aron Streit
Brand: Streit's
Launch Type: New variety/range extension

Price (US$): 1.49
Packaging: Flexible plastic
Date Published: June 2012

Position Claims: Kosher, wholegrain

Ingredients: Whole wheat flour, water

Product Description: Streit's Zahav Toasted Pasta Israeli Couscous is made from whole wheat. This kosher product retails in an 8.8-oz. pack

Italian Sausage Ravioli

Company: Valley Fine Foods
Brand: Pasta Prima
Launch Type: New variety/range extension

Price (US$): 3.99
Packaging: Plastic tray
Date Published: November 2012

Position Claims: No additives/preservatives, all natural product, environmentally friendly product

Ingredients: Italian sausage (pork, fennel, oregano, black pepper), water, salt, onion granules, garlic, white sugar, mozzarella cheese (pasteurised semi-skimmed milk, cheese cultures [bacterial cultures], salt, vinegars, food enzymes), ricotta cheese (milk, vinegars, salt, xanthan gum, carob bean gum, guar gum [stabilizers]), imported parmesan cheese (aged, pasteurized milk, cheese cultures [bacterial cultures], salt, food enzymes), imported romano cheese (aged, sheep's milk, cheese cultures [bacterial cultures], salt, food enzymes), spices, low erucic acid rapeseed oil, dehydrated onion, garlic granules, salt, dough (durum flour, semolina flour, eggs, water, salt), parmesan herb packet (imported parmesan cheese [aged, pasteurized milk, cheese cultures (bacterial cultures), salt, food enzymes, garlic granules, spices])

Product Description: Pasta Prima Italian Sausage Ravioli product contains Italian sausage with fresh cut basil, creamy ricotta and aged imported parmesan cheese, and comes with a parmesan and herb seasoning packet. This USDA-certified product retails in 227-gram pack.

***Source for all:** Mintel, 2012*

▶ NEW PRODUCT EXAMPLES (continued)

Yolk-Free Noodle Style Pasta

Company: Aldi
Brand: Fit & Active
Launch Type: New variety/range extension

Price (US$): 0.99
Packaging: Flexible plastic
Date Published: February 2012

Position Claims: Low/no/reduced cholesterol, low/no/reduced fat, low/no/reduced sodium, low/no/reduced allergen, low/no/reduced lactose, environmentally friendly package

Ingredients: Durum wheat semolina, egg whites (enriched ferrous sulphate), vitamins B group (niacin, thiamine mononitrate, riboflavins, folic acid)

Product Description: Fit & Active Yolk Free Noodle Style Pasta is an enriched macaroni product that is 98% fat free, and low in sodium. The extra-broad noodles can be used in any recipe as a substitute for regular egg noodles, for rich flavour without the cholesterol. This naturally lactose-free pasta retails in a recyclable 12-oz. package.

Rotini Pasta Portions

Company: New World Pasta
Brand: San Giorgio
Launch Type: New variety/range extension

Price (US$): 1.48
Packaging: Flexible plastic
Date Published: August 2012

Position Claims: Kosher, microwaveable, time/speed, ease of use, convenient packaging

Ingredients: Semolina, durum flour (wheat), niacin, ferrous sulphate, thiamine mononitrate, riboflavins, folic acid (food acids)

Product Description: San Giorgio Rotini Pasta Portions is an enriched macaroni product featuring boil-in-bags, which can be prepared in just three minutes. The product does not require a strainer, is never sticky, and is easy to open. This product retails in a 255 gram pack, containing three 85-gram pouches.

***Source for both:** Mintel, 2012*

▶ SOURCES

Euromonitor International. "Pasta in the United States." September 2011. Accessed: November 2012.

Global Trade Atlas. Trade Data

Mintel Global New Products Database, 2012.

——- "Category Insight Report: Pasta, Rice and Noodles" September 2012. Accessed: November 2012.

Pulmuone Food USA, Inc. Company Website <http://www.wildwoodfoods.com/usa> 2012. Accessed: November 2012

Ralcorp Holdings Inc. Company Website <http://www.ralcorp.com> 2012. Accessed: November 2012

ANNEX: TRADE DATA

According to the Global Trade Atlas, the United States imported US$725.8 million worth of pasta products from the world in 2011. Canada was the second-largest supplier, with a 24.7% share of total U.S. pasta imports in 2011, following Italy (30.3%).

According to Canadian export statistics, Canada supplied over US$183 million worth of pasta products to the world in 2011. In the same year, approximately 98.9% of all Canadian pasta product exports were sent to the United States, at a value of US$181 million.

United States Import Statistics from the World
Commodity 1902: Pasta, Whether or not Cooked or Stuffed or Otherwise Prepared, Including Spaghetti, Lasagna, Noodles, etc.; Couscous, Whether or not Prepared

Partner Country	US$			% Share			% Change in Value 2010-2011
	2009	2010	2011	2009	2010	2011	
World	604,322,199	654,718,389	725,817,335	100.00	100.00	100.00	10.86
Italy	203,713,222	198,479,852	220,443,520	33.71	30.32	30.37	11.07
Canada	138,988,623	167,794,119	179,272,164	23.00	25.63	24.70	6.84
China	49,633,341	63,153,570	79,069,518	8.21	9.65	10.89	25.20
Mexico	41,176,785	38,909,720	47,865,045	6.81	5.94	6.59	23.02
Thailand	43,329,395	48,829,636	44,452,646	7.17	7.46	6.12	- 8.96
South Korea	35,009,612	39,969,820	44,260,525	5.79	6.10	6.10	10.73
Japan	27,801,792	29,256,766	26,970,123	4.60	4.47	3.72	- 7.82
Taiwan	10,658,807	11,246,343	14,081,273	1.76	1.72	1.94	25.21
France	5,081,121	4,712,804	9,597,059	0.84	0.72	1.32	103.64
India	4,865,416	6,336,137	8,327,394	0.81	0.97	1.15	31.43

Canadian Export Statistics to the World
Commodity 1902: Pasta, Whether or not Cooked or Stuffed or Otherwise Prepared, Including Spaghetti, Lasagna, Noodles etc.; Couscous, Whether or not Prepared

Partner Country	US$			% Share			% Change in Value 2010-2011
	2009	2010	2011	2009	2010	2011	
World	142,570,161	171,417,519	183,056,543	100.00	100.00	100.00	6.79
United States	140,338,650	169,374,103	180,973,379	98.43	98.81	98.86	6.85
United Kingdom	200,356	222,715	395,979	0.14	0.13	0.22	77.80
Israel	109,120	263,836	302,379	0.08	0.15	0.17	14.61
Philippines	575,656	340,818	301,160	0.40	0.20	0.16	- 11.64
Cuba	15,114	39,290	217,505	0.01	0.02	0.12	453.58
Bermuda	204,826	216,922	215,077	0.14	0.13	0.12	- 0.85
Chile	25,089	42,979	87,178	0.02	0.03	0.05	102.84
Jamaica	149,784	100,661	81,083	0.11	0.06	0.04	- 19.45
Hong Kong	43,422	29,173	77,416	0.03	0.02	0.04	165.37
South Korea	33,615	88,162	71,968	0.02	0.05	0.04	- 18.37

Source for both: *Global Trade Atlas, 2012*
Note: *The discrepancies in the figures regarding the U.S. imports from Canada versus Canadian exports to the U.S. are due to different methodologies used by Statistics Canada and the U.S. Statistics Bureau in collecting and tracking data.*

▶ ANNEX: TRADE DATA (continued)

According to the Global Trade Atlas, the United States imported just over US$12 million of couscous from the world in 2011. Canada was the largest supplier, with a 45.4% share of U.S. couscous imports in 2011, followed by Israel (32.8%) and France (13.6%).

According to Canadian export data, Canada supplied just under US$6 million of couscous to the world in 2011, with US$5.6 million (96%) going to the United States.

United States Import Statistics from the World
Commodity 190240: Couscous

Partner Country	US$			% Share			% Change in Value 2010-2011
	2009	2010	2011	2009	2010	2011	
World	9,470,940	10,683,863	12,175,248	100.00	100.00	100.00	13.96
Canada	5,107,248	5,494,393	5,528,234	53.93	51.43	45.41	0.62
Israel	2,076,655	3,227,323	3,996,961	21.93	30.21	32.83	23.85
France	1,588,169	1,297,933	1,656,296	16.77	12.15	13.60	27.61
Morocco	253,067	309,002	499,262	2.67	2.89	4.10	61.57
Italy	208,284	131,054	270,308	2.20	1.23	2.22	106.26
Tunisia	57,517	105,405	75,100	0.61	0.99	0.62	- 28.75
Lebanon	52,690	6,392	38,713	0.56	0.06	0.32	505.65
Jordan	8,151	15,141	32,908	0.09	0.14	0.27	117.34
Senegal	23,614	28,344	31,976	0.25	0.27	0.26	12.81
Taiwan	0	0	19,475	0.00	0.00	0.16	0.00

Canadian Export Statistics to the World
Commodity 190240: Couscous

Partner Country	US$			% Share			% Change in Value 2010-2011
	2009	2010	2011	2009	2010	2011	
World	5,242,624	5,809,189	5,897,285	100.00	100.00	100.00	1.52
United States	5,199,626	5,638,073	5,640,398	99.18	97.05	95.64	0.04
Israel	0	135,228	200,058	0.00	2.33	3.39	47.94
Chile	15,497	33,218	36,971	0.30	0.57	0.63	11.30
Netherlands	0	0	15,233	0.00	0.00	0.26	0.00
France	0	446	1,748	0.00	0.01	0.03	292.21
Cuba	370	1,877	1,628	0.01	0.03	0.03	- 13.24
Jamaica	0	260	1,248	0.00	0.00	0.02	379.12
Australia	14,642	0	0	0.28	0.00	0.00	0.00
Bermuda	1,389	0	0	0.03	0.00	0.00	0.00
Saudi Arabia	10,895	0	0	0.21	0.00	0.00	0.00

Source for both: *Global Trade Atlas, 2012*
Note: *The discrepancies in the figures regarding The U.S. imports from Canada versus Canadian exports to the U.S. are due to different methodologies used by Statistics Canada and the U.S. Statistics Bureau in collecting and tracking data.*

Consumer Trends: Pasta and Couscous in the United States

ISSN 1920-6593
AAFC No. **11969E**

Photo Credits

For additional copies of this publication or to request an alternate format, please contact:
Agriculture and Agri-Food Canada
1341 Baseline Road, Tower 5, 4th floor
Ottawa, ON
Canada K1A 0C5
E-mail: infoservice@agr.gc.ca

Aussi disponible en français sous le titre :
Tendances de consommation :
Pâtes alimentaires et couscous aux États-Unis

Canada