

MARKET PROSPECTS

The areas of highest priority for the sector include the Pacific Rim, Latin America and Europe. A lesser priority but still a substantial market for certain primary products is the Middle East.

Pacific Rim

Japan is a major market for primary products and is considered a key market by many sectors of the industry. Both Korea and Taiwan are becoming increasingly more important as markets for primary products. (In the animal, poultry breeding stock sub-sector both Japan, \$90 million and Korea \$17, million represent sizeable markets dominated by the U.S. with Canada's market share relatively small - 4.5% and 2.9% respectively - with ample potential for growth.) Other countries such as Thailand and Singapore are also viewed as having potential.

Latin America

Brazil, Mexico and Colombia are very important markets for livestock genetics, feed, pulses, seeds and the special crops sub-sector. There is opportunity to increase Canada's exports to these countries, particularly Mexico, in a range of commodities. Other Latin American countries such as Argentina and Venezuela purchase a variety of primary products from Canada but are viewed as offering less opportunity for export expansion.

Western Europe

Western Europe has traditionally been a priority market for Canada's primary agriculture industry. Although largely an established market it still demands attention, and areas for growth exist. Market development resources should be focused on market maintenance but need to be flexibility enough to respond to developing opportunities. Eastern Europe has longer term potential.

Africa and Middle East

Africa and Middle East are a substantial market for selected products - livestock genetics, seed potatoes, feed and pulses. The region as a whole is not viewed by industry as a top priority with the exception of selected countries eg. Iran and Algeria.

The priority of effort should be:

PRIORITY A: Asia-Pacific - Japan
Latin America - Mexico, Colombia, Brazil, Argentina, Venezuela
Europe - France

PRIORITY B: Europe - U.K., Germany, Italy, Spain,
Asia-Pacific - Korea, Taiwan, Thailand