

EXECUTIVE SUMMARY

Canada's agriculture industry encompasses a broad range of commodities produced in all regions of the country. The industry accounts for approximately 4% of Canada's GDP, with exports totalling some \$9 billion. Canada's 290,000 farmers form the basis of the agri-food industry which employs over one million seven hundred thousand individuals or 14-15% of Canada's total workforce.

Canada's international reputation and image is a significant strength in international markets. The excellent quality, diversity and uniqueness of its products (eg. from bison, wild rice to maple syrup) coupled with strict phyto-sanitary/health regulations controlling the production and movement of agricultural products, are key strengths of Canada's primary agriculture sector.

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. Other countries such as Thailand and Singapore are also viewed as having good potential. Latin America especially Brazil, Mexico and Colombia is a very important market for livestock genetics, feed and pulses. Western Europe has traditionally been a priority market for Canada's primary agriculture industry, and although largely an established market, it still demands attention and areas for growth exist.