

- Look for opportunities to combine Japan's purchasing power, sources of technology and investment funds and their shortage of manpower to upgrade Canadian agri-food products to the final retail form.
- The changing market regime of the European Community (EC) and the creation of a unified set of regulations will reduce the administrative burden for Canadian exporters, but the EC will still require careful monitoring of any new non-tariff barriers that might arise.
- Investment and strategic alliances will be key mechanisms for dealing with these barriers. Exports to Western Europe could also be increased by focusing on key "image" products and niche areas of demand; e.g. maple sugar, honey, wild rice, organically grown products, berries, processed sweet corn, horse meat, bison meat, goose meat and convenience foods.

Continue strong market development and market access support for primary products exporters in existing markets, particularly Japan, China, Brazil, Colombia, Mexico, Russia, Iran and Saudi Arabia.

Focus development activities on the following key emerging markets for primary products: Korea, Taiwan, Mexico, the former Soviet Union, the Gulf States and ASEAN.

- Emphasis will also be placed on building substantial niche markets in livestock genetics, seed potatoes, feed and pulses in the Pacific Rim, Western Europe and emerging markets in Latin America and the Middle East.
- While the countries of the former Soviet Union outside of Russia also offer prospects for expanded grain sales, this is subject to credit availability and payment capabilities.

Put priority on resolving market access issues in a timely fashion.

- Once access is obtained, our trading rights must be aggressively pursued and maintained. The most important problem to be addressed is the issue of EC support to their primary product industries.
- Closely monitor phytosanitary and animal health standards to ensure early identification of any changes that could affect market access and to enable a swift response on the part of the Canadian government.
- Special teams of agricultural market access experts will ensure swift response to specific market-access problems as they arise.

Enhance the rapid delivery of market intelligence to the private sector.

- There is a great deal of market intelligence available and being gathered by various sources. To ensure delivery of intelligence on global business opportunities in the most useful form, industry associations will be used to identify the type and level of information required.

- Strengthen the agri-food background and training for trade officers responsible for the agri-food sector to further improve the analysis and delivery of market intelligence.
- Encourage industry associations to serve as channels for market information, and promote direct electronic dissemination of information.

Help the Canadian agri-food industry become more internationally competitive by:

- supporting private sector-led initiatives such as the Forum for International Trade Training (FITT) to deliver effective joint education programs geared to helping agri-food firms become export-ready. (Specialized seminars and workshops could focus on meeting such requirements as packaging, distribution systems and consumer tastes and trends, and on strategic approaches, such as the use of joint ventures and strategic alliances.);
- making use of market intelligence to encourage producers and companies to specialize or tailor their products/production to meet foreign market requirements; and
- encouraging small and medium-sized enterprises to strengthen their international presence by forming international marketing networks and by developing supplier relationships with multinational enterprises.

Consult with Canadian-based multinationals in order to identify how they can obtain more product mandates and how their marketing capabilities could be more fully utilized by small and medium-sized enterprises.

Increase government-business co-operation in planning and implementing market-development activities.

- Meaningful and effective co-ordination of government and private sector plans can be enhanced by ensuring that market-development strategies of industry associations, as fostered through the Agri-food Industry Market Strategies (AIMS) process, are the basis of further planning.
- In addition to using industry associations in the delivery of market intelligence, ties between associations and government can be strengthened by assigning government trade officers to associations through interchange and other arrangements.

Strengthen foreign awareness of Canadian capabilities and ties with Canadian industry.

- Training, education and technical exchanges, along with incoming and outgoing missions, will be aimed at delivering the widest, most cost-effective exposure to Canadian capabilities in the agri-food industries.
- International programs, such as those offered by the Canadian International Grains Institute and the proposed International Red Meat Institute, will be supported, with an aim to extending such programs to other components of the agri-food sector.

Encourage product specialization and market diversification.