

EXECUTIVE SUMMARY

This Global Market Opportunity review has been undertaken in order to assist the value-added food sector to regain its share of world exports of these products, thereby supporting the entire agri-food sector in Canada, and contribute to the exports which are expected to lead Canada's recovery. The strategy pulls together views of all of the participants influencing exports - the firms, their associations, Federal Government Departments, Provincial Governments and their Marketing Councils, Canada's Trade posts, and the TOS subcommittee of the SAGIT. It reviews the sector, noting that the Canadian economy is very dependant on agri-food exports, and highlights some of the challenges facing the sector.

The Review then covers the major market opportunities as identified by industry and the Posts - USA, Japan, Western Europe, and a brief discussion of other possible markets. The trends in the agri-food markets in each of these regions are covered, as well as some of the basic requirements that exporters must meet.

The next section of the Review covers the competitive strengths of the industry, noting particularly the excellent industrial organization, Canada's proximity to the US market, and the international reputation its foods already enjoy. Sectoral market problems identified include non-tariff problems of access, of supply continuity, and inexperienced, inadequately financed firms.

The strategy proposed will assist producers of value-added food products to take advantage of their competitive strengths, recognize their weaknesses and, from there, select the most promising export markets. A work plan is proposed incorporating efforts by the Federal Government, led by the Department of Foreign Affairs and International Trade, in conjunction with Agriculture and Agri-Food Canada and Industry, Science and Technology Canada; by the industry, and its associations, and by the individual exporters. Key components of this strategy are the improved information flow on international marketing efforts provided by the International Trade Business Plan (ITBP), and the Trade Opportunities Strategy (TOS) initiatives.

The views and advice of Commercial Officers in some of Canada's major trade posts are included in an annex to the document, for the convenience of firms looking for some "dos and don'ts" of the export market.