



Agriculture and
Agri-Food Canada

Agriculture et
Agroalimentaire Canada

Canada



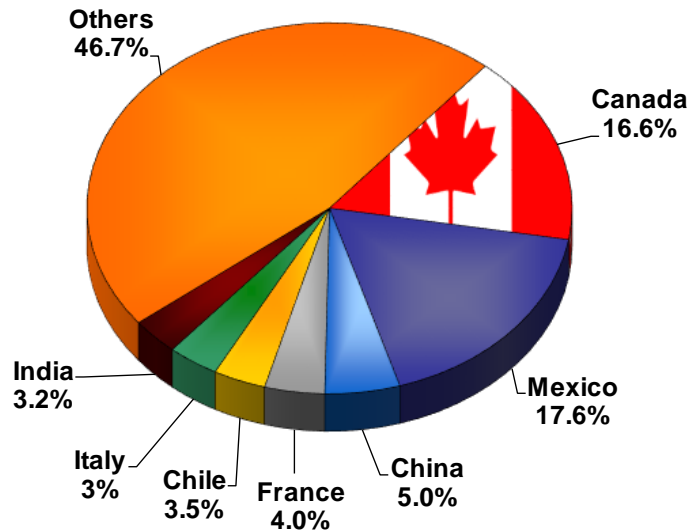
US Capacity Workshops for Atlantic Canada

Agriculture and Agri-Food Canada (AAFC) Services and Support for Canadian Exporters

Cheryl Donnelly, Sr. Market Development Officer,
Market Access Secretariat, AAFC

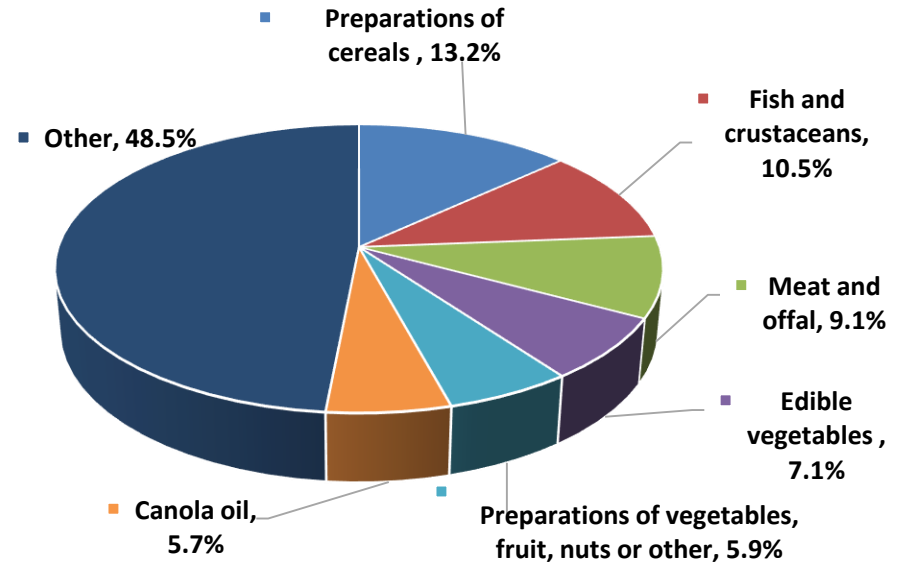
Trade Snapshot

Market Share of Top Agri-food and Seafood Import Suppliers to the US, in 2018



Country (Value in US\$ million)	2017	2018
Mexico	27,528.6	29,129.5
Canada	26,558.6	27,354.7
China	7,581.1	8,300.9
France	5,975.8	6,649.1
Chile	5,373.1	5,802.6
Italy	5,128.1	5,534.1
India	5,053.4	5,223.1
Other	72,433.2	77,285.4

US Imports from Canada in 2018 (US\$)



Products (Value in US\$ million)	2017	2018
Preparations of cereals	3,192.5	3,613.7
Fish and crustaceans	2,830.8	2,881.8
Meat and offal	2,450.4	2,484.1
Edible vegetables	1,828.9	1,934.5
Preparations of vegetables, fruit, nuts or other	1,506.1	1,609.5
Canola oil	1,771.2	1,570.9
Other	12,978.6	13,260.3

Source for both: Global Trade Tracker, 2019

Trade Snapshot

Retail Sales Value by Category in the U.S

Historic/ <i>Forecasted</i> Retail Value - US\$ millions - Current Prices - Fixed 2018 Exchange Rates								
Categories	2016	2017	2018	*CAGR% 2016-2018	2019	2020	2021	*CAGR% 2019-2021
Meat	174,439.2	177,866.2	182,232.0	2.2%	187,402.7	191,713.5	195,660.1	2.2%
Bakery & cereals	107,364.5	109,501.0	112,479.4	2.4%	115,653.7	118,454.7	121,259.4	2.4%
Dairy & soy food	57,831.0	58,069.4	58,989.1	1.0%	59,248.8	59,967.0	60,657.9	1.2%
Confectionery	37,680.0	38,664.1	39,603.6	2.5%	40,558.8	41,532.1	42,495.0	2.4%
Savoury snacks	34,026.2	35,227.9	36,759.1	3.9%	38,408.2	40,188.2	42,086.6	4.7%
Fish & seafood	26,267.9	26,667.7	27,057.9	1.5%	27,511.8	27,937.2	28,338.5	1.5%
Savoury & deli foods	23,846.8	24,487.6	25,425.0	3.3%	26,306.6	27,176.9	28,038.3	3.2%
Seasonings, dressings & sauces	22,875.0	23,667.1	24,578.7	3.7%	25,481.0	26,375.1	27,289.6	3.5%
Prepared meals	19,385.5	20,050.7	20,556.3	3.0%	21,117.5	21,702.8	22,347.0	2.9%
Ice cream	11,335.1	11,643.7	12,007.7	2.9%	12,571.9	13,063.8	13,522.0	3.7%
Other frozen food	8,769.3	8,897.6	9,115.9	2.0%	9,305.7	9,493.8	9,685.4	2.0%
Syrups & spreads	7,323.5	7,945.3	8,674.6	8.8%	9,462.0	10,262.0	11,023.6	7.9%
Oils	6,554.1	6,718.1	6,892.6	2.6%	7,208.1	7,478.2	7,728.8	3.5%
Soups	5,804.0	5,963.6	6,166.1	3.1%	6,417.1	6,657.9	6,894.2	3.7%
Pasta & noodles	5,020.0	5,182.9	5,391.4	3.6%	5,631.6	5,867.1	6,102.8	4.1%
Other canned food	4,808.1	4,822.7	4,871.5	0.7%	4,920.2	4,967.0	5,014.0	0.9%
Other dried food	4,364.2	4,426.0	4,576.3	2.4%	4,713.3	4,841.8	4,979.2	2.8%
Meat substitutes	882.1	910.4	953.8	4.0%	995.2	1,036.5	1,079.0	4.1%

Source: GlobalData Intelligence, 2019

Market Trend Summary

- Consumers “Healthier for me, Better for the world”
 - Quality: Both private label and branded products
 - Examples: Fresh, local, “clean label/free-from”
 - Health/Wellness: Personalized to specific concerns
 - Examples: Energy boost, stress reduction and sleep
 - Sustainability: Increasing focus on product lifecycle
 - Examples: plastic-free packaging, food waste and
 - Values/Transparency: “Walking the Talk”
 - Examples: B-Corp certified, private animal welfare standards and fair trade
 - Convenience: Snacking as Meals
 - Examples: “Speed scratch”, meal kits, functional beverages and snack foods
 - Innovation: Trend leaders
 - Examples: Flavours, ingredients and technology

Market Trend Summary

- Retail and Foodservice
 - Consumer trends driving foodservice and retail offerings
 - 5.2% of disposable income on food at home, 4.8% on food away from home
 - Move to quick trips and pantry “fill-in” 2.2 trips/week spending an average \$109/week
 - Impact of discounters, convenience chains, dollar stores, specialty
 - Thrift: overlooked but important segment
 - Increasing E-commerce/brick and mortar partnerships
 - Personalized, interactive, fresh and wellness focus to compete with online
 - Full range of eating out experiences: home - delivery models adding pressure
- Primary Agriculture/Processing Ingredients
 - Continuation of highly integrated supply chains - commodities
 - Companies looking for healthy, innovative ingredients

AAFC's Role in Market Development

- At AAFC, market development efforts are strategized, funded and delivered in tandem with the Provinces and Territories.
- We work together to ensure in-market activities and promotions are aligned and accurately promote the greatest opportunities for Canadian agri-food and fish and seafood products.
- The FPT market development continuum:

COST-SHARED FPT Approach to Market Development:



- A connected FPT network is here to assist you with your exporting needs!

Tools and Services for Canadian Exporters

AAFC, in coordination with the Canadian Food Inspection Agency, Global Affairs Canada and other federal and provincial partners (ie. ACOA) assists the Canadian agriculture sector to take advantage of agriculture and agri-food opportunities



**Agri-Food Trade
Commissioner Service**



**Canada Pavilion Program:
Flagship Trade Show**



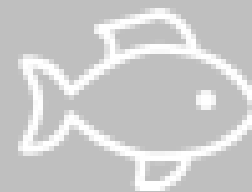
**Customized market
intelligence services**



**Canada Brand: marketing
materials**



**CanExport: funding support
for SMEs**



**Fish and Seafood sector
funding support**



Agri-Food Trade Commissioner Service:

- [Agri-Food Trade Commissioners \(TCs\)](#) are present in 15 markets, with 35 agents ready to help you succeed on the global scale.
- What services do Trade Commissioners provide?
 - Help prepare companies for international markets by understanding your potential
 - Advise on your export strategy
 - Assist in finding qualified contacts and build meaningful relationships
 - Address business problems by advising you with on-the-ground expertise
 - Help ensure Canadian products have access to the market and assist in addressing market access issues
- Find a Trade Commissioner in your market of interest
 - To get started, [find a trade commissioner](#) or contact a [regional office of Agriculture and Agri-food Canada](#).



Canada Pavilion Program: Flagship Trade Shows

The Canada Pavilion program is Agriculture and Agri-Food Canada's support program designed to simplify trade show participation at the world's premier food and beverage events 'where the world shops'.



ANUGA (Cologne, Germany): October 5 to 9, 2019



China Fisheries & Seafood Expo (Qingdao): Oct 30 – Nov 1, 2019



Food & Hotel China (Shanghai): November 12 – 14, 2019



GULFOOD (Dubai): February 16 – 20, 2020



FoodEx Japan (Tokyo): March 10 – 13, 2020



Food & Hotel Asia (Singapore): March 31 – April 3, 2020



Seafood Expo Global (Brussels): April 21 – 23, 2020



SEOUL Food and Hotel (Seoul): May 19 – 22, 2020



**Salon International de l'Alimentation (Paris):
October 18 – 22, 2020**



Customized Market Intelligence Services

- AAFC's Global Analysis offers **free** international market intelligence services for Canadian agriculture and agri-food businesses, including:
 - Market, sector and product trends and opportunities
 - Economic, business and consumer trend forecasts
 - Distribution channel analysis
 - And other customized analysis to meet an organization's unique needs
- Access international [market intelligence reports](#) by market, sector, type of report, and year published.
 - Examples of some recent US reports:
 - Smoked salmon retail sector in Canada and the United States
 - Savoury snacks in the United States
 - Barbecue sauces and spices market in the United States and Europe
- Request market intelligence: aafc.mas-sam.aac@canada.ca.
- Subscribe to receive the latest reports in your email inbox: aafc.infoservice.aac@canada.ca.



Canada Brand: Marketing Materials

- Objective is to raise the profile of and help differentiate your Canadian food products from the competition
- Over 700 Canadian agri-food businesses and associations across all sectors are using the Canada Brand to enhance their local and international promotions.
- The Canada Brand provides:
 - Branding and graphics
 - A photo suite of high-resolution Agriculture and Fish and Seafood photos to use for marketing materials
 - Canadian content statements (ie. Product of Canada or Processed in Canada to clearly identify and promote the Canadian content of your products)
 - Messaging on Canada's advantages – statements to support marketing to consumers
 - Promotion at Canada Pavilions – matches branding used at many trade shows with a organized Canadian presence
- Join Canada Brand to help strengthen your marketing activities. For more information or to apply: aaafc.canadabrand-marquecanada.aac@canada.ca



CanExport: Funding Support for SMEs

- **The AgriMarketing Program: Small and Medium-sized Enterprises Component is moving to CanExport**, which is delivered by Global Affairs Canada.
 - Aligning federal export development services for Canadian businesses.
 - The AgriMarketing Program: National Industry Association Component will continue to be delivered by Agriculture and Agri-Food Canada.
- SME's who were eligible for AMP are encouraged to apply for [CanExport: SME Program](#)
- Key advantages of the Can-Export Program:
 - Service standard for decision - 25 business days
 - Expanded definition of Small and Medium-sized Enterprises.
 - Eligible SMEs now include businesses: with up to 500 employees and which have annual revenues no more than \$100 million
 - An improved, recipient favourable, cost-share ratio that is now 75:25.
 - Increased activity selection, which includes market research, IP certification, and business, tax, or legal advice

AAFC Contacts

- [AAFC Regional Offices](#)

- Agriculture and Agri-Food Canada's (AAFC's) regional offices - local access to agri-food programs, services and trade assistance that can help you meet your business objectives.
- Contact the aafc.mas-sam.aac@canada.ca to connect with your Regional Office

- Market Development Officers

- AAFC Market Development Officers - inform you about in-market promotional activities, point you to tools, services and programs, and connect you to TCs and other departmental contacts

Europe, Middle East, and Africa – Cheryl Donnelly, Cheryl.Donnelly@Canada.ca

US/Mexico/Latin America – Diane Jebson, Diane.Jebson@canada.ca

Greater China – Jean Emmanuel Poitras, jean-emmanuel.poitras@canada.ca

Rest of Asia – Katie Meredith katie.meredith@canada.ca

Additional Resources or Questions

Find information, resources and services about the US and all of AAFC's other priority markets at our Industry, Markets and Trade portal:

<http://www.agr.gc.ca/eng/food-products>

For assistance with market access and trade issues

aafc.mas-sam.aac@canada.ca