



A Toast to Wine Production in Canada

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Meet Your Market:
The Canadian
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in Europe

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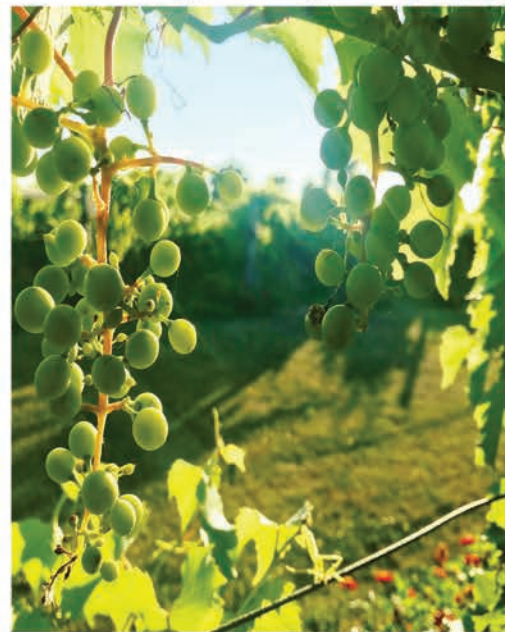
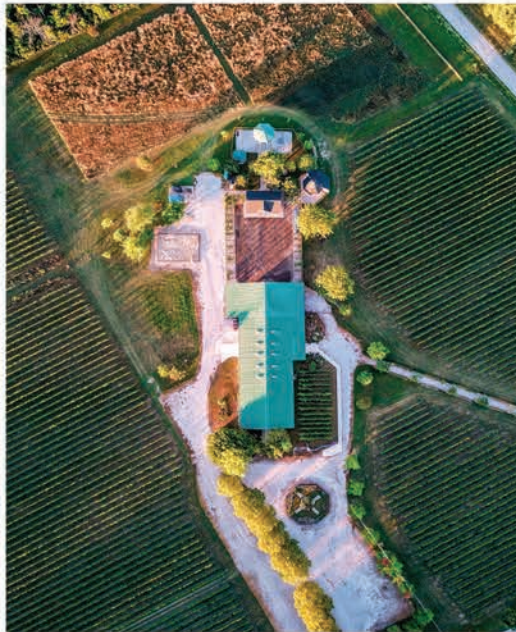
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Published By:
Matrix Group Publishing Inc.
 Canada Post Mail Publications
 Agreement Number: 40609661
 Return undeliverable copies to:
 309 Youville Street
 Winnipeg, Manitoba R2H 2S9
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on the cover: This issue's cover of *Export Savvy* celebrates wine production in Canada. Flip to page 19 to learn more about how made-in-Canada wines are taking centre stage across the globe.

Photo credit: Diamond Estates Winery





Susan Powell, President
Canadian Food
Exporters Association

“One of the very nicest things about life is the way we must regularly stop whatever it is we are doing and devote our attention to eating.”

—Luciano Pavarotti

Nowadays, it seems our lives are going a million miles a minute. No matter how efficient we may be, the ever-growing list of things we must accomplish seems to multiply. But the beautiful thing is that no matter how busy we are on any given day, no matter how long the list of To-Dos gets, we must always take a few moments to slow down, so we can fuel our bodies and our minds.

Whether you're able to enjoy a long, leisurely lunch or must squeeze in a short break on the way to your next meeting, these meals bring us a moment of reprieve from the daily grind. While we may have a few favourite go-to items, there truly are endless options when it comes to the food, beverages, and ingredients we can choose to chow down, both here in Canada and around the world. And Canada plays a huge role in exporting some of these items to various worldwide locales.

For over 25 years, the Canadian Food Exporters Association (CFEA) has raised the international profile of Canadian food and beverage and ingredient products, increased the number of small to medium-sized food and beverage processors and manufacturers that are exporting, and increased the profitable export sales of Canadian food and beverage products.

This magazine encourages professional improvement and knowledge exchange among those interested in food export. In this edition of *Export Savvy*, our lead feature, *Meet Your Market*, looks at a principal sector of Canada's agri-business industry and how it helps drive the Canadian economy. Flip to page 10 to read about the Canadian agri-food sector and the role it plays in exporting Canadian food products around the world.

Canada and the European Union (EU) enjoy a strong trading relationship. The EU



is Canada's second-most important trading partner, after the United States. The entry into force of the *Canada-EU Comprehensive and Economic Trade Agreement* has expanded opportunities for Canadian exporters. *Trading Partners: Export Opportunities in Europe* on page 13 highlights why the EU is a dynamic place to conduct business, with access to several neighbouring countries with industries deeply integrated into broader regional value chains.

By 2050, it's estimated that global agricultural demand will be over 50 per cent higher than it was five years ago. Canada's agri-food sector has a tremendous opportunity for significant growth over the next 30 years and beyond, particularly in Asia-Pacific markets, where consumer spending is projected to climb from \$12.3 trillion in 2015 to \$36.6 trillion by 2030. *Growing Demand: Export Opportunities in Southeast Asia* on page 16 looks at how a growing

population and ongoing urbanization are driving the ASEAN region to consume higher-value foods that are high in protein, more convenient, and nutritious.

Canadians can be proud of the craftsmanship of made-in-Canada wines. In 2020, Canadian bottled wine exports totaled one-million litres, valued at \$20.3 million. The top bottled wine export markets were China, the United States, the United Kingdom, and Hong Kong, representing 79.4 per cent of export value and 82.2 per cent of export volume. Canada is also the world's largest consistent producer of icewine; in 2020, icewine represented 51.9 per cent of total export value (\$10.5 million) and 13.1 per cent of export volume (137,422 litres), as a percentage of total bottled exports. On page 19, *Heard it Through the Grapevine* celebrates some of Canada's finest producers.

At the CFEA, we focus on helping members promote products in international markets and bring awareness of Canadian excellence to potential buyers. To learn more about our association or to find out how you can become a member, go to www.cfea.com. We have several handy industry links and delicious recipes there, too. And be sure to flip to page 8 of this magazine, where you'll find a sampling of some fabulous fare from our members. Whether it's a light starter to nosh on, a main meal you can sink your teeth into, or a carefully crafted beverage to sip on, these resplendent recipes are sure to impress.

While 2022 started off with a bit of uncertainty, thanks to the Omicron variant of COVID-19, I am hopeful there will be much to look forward to throughout the rest of the year. Despite the challenges we've faced over the last two years since this pandemic began, we, at the CFEA, and at businesses across our country and around the world, are finding ways to live with this novel coronavirus and—better yet—to move forward and find success as we transition into a post-COVID-19 world. Cheers to that! 🇨🇦

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2022-2023

US ECRM Virtual B2B Program
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2022-2023

EU ECRM Virtual B2B Program
(New programs will be continually added as they become available)

ASIA PACIFIC

April 26-30, 2022

AAHAR, New Delhi, India

May 18-20, 2022

SIAL Show, Shanghai, China

June 2022

Trade Mission to Southeast Asia
(Singapore, Indonesia & Vietnam)
(Dates to be confirmed)

June 22-25, 2022

Food Taipei, Taiwan

September 5-8, 2022

Fine Food Australia, Melbourne, Australia
(Pending re-opening of country)

October 2022

Trade Mission to Japan & South Korea
(Dates to be confirmed)

November 8-11, 2022

Prowine China, Shanghai, China

November 10-12, 2022

Hong Kong Wine & Spirits Fair

MIDDLE EAST

September 2022

Trade Mission to Saudi Arabia & UAE
(Dates to be confirmed)

EUROPE

April 4-7, 2022

Alimentaria, Barcelona, Spain

April 4-7, 2022

Visitor Program to Alimentaria, Barcelona, Spain
(To be confirmed)

May 31-June 1, 2022

PLMA Show, Amsterdam, The Netherlands

December 6-8, 2022

Food / Health Ingredients Europe
(Fi/Hi Europe), Paris, France

LATIN AMERICA

May 16-19, 2022

Trade Mission to ANTAD,
Guadalajara, Mexico

June 7-10, 2022

Alimentec, Bogota, Colombia

September 21-23, 2022

Alimentaria, Lima, Peru

USA

June 12-14, 2022

Summer Fancy Food Show, New York,
New York

November 13-15, 2022

PLMA Show, Chicago, Illinois



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Culinary delights

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Mediterranean Hummus Naan Pizza

Provided by Summer Fresh

INGREDIENTS

- 227g Summer Fresh Roasted Garlic Hummus
- 2-3 large pieces of naan
- ¼ cup pesto
- ¼ cup sundried tomatoes, sliced
- 1 ½ cups fresh spinach, chopped
- ½ cup Mozzarella, shredded

DIRECTIONS

Preheat oven to 375°F. Heat three tablespoons of olive oil in a small pan, add spinach, and sauté for two to three minutes, or until wilted. Place naan bread on a lined baking sheet. Spread Summer Fresh Roasted Garlic Hummus over naan, top with pesto, sundried tomatoes, spinach, and mozzarella. Bake pizza for 10 to 12 minutes or until the crust is golden brown and the cheese has melted. Take out of oven, cut into appetizer size pieces, and serve warm.

Roasted Root Vegetables with Pure Infused Maple Syrup Cinnamon, Nutmeg & Clove

Provided by Hutchinson Maple

INGREDIENTS

- 1 ½ cups carrot, sliced and peeled
- 1 ½ cups parsnip, sliced and peeled
- 1 ½ cups turnip, cubed and peeled
- 1 cup Brussels sprouts, cut in half
- 1 cup radishes, cut in half
- ½ tsp kosher salt
- ¼ tsp black pepper, freshly ground
- 2 tbsp olive oil
- 3 tbsp Pure Infused Maple Syrup Cinnamon, Nutmeg & Clove

DIRECTIONS

Preheat oven to 400°F. Combine all ingredients in a bowl. Line a baking sheet with parchment paper. Place vegetables on baking sheet (do not over-crowd). Bake for 30 minutes until tender and golden, stirring every 10 minutes. Drizzle with Pure Infused Maple Syrup, before serving.



Pulled Bison Sliders Three Ways

Provided by Noble Bison

INGREDIENTS

PULLED BISON

- 3 pkgs 1 ½ lb (700 g) Noble Premium Bison Steak Cubes
- ½ tsp each salt and pepper
- 2 tbsp canola oil
- 1 onion, chopped
- 2 garlic cloves, minced
- 1 tbsp fresh thyme, finely chopped
- 1 tbsp fresh rosemary, finely chopped
- 1 ½ cups beef stock
- 1 tbsp tomato sauce
- 1 tbsp Worcestershire sauce
- 12 slider buns, split

SLIDERS WITH CARAMELIZED ONION & GORGONZOLA

- 2 tbsp mayonnaise
- 1 tbsp horseradish
- ½ tsp lemon juice
- ½ tsp Dijon mustard
- ¼ cup packed arugula
- ¼ cup prepared caramelized onions
- 4 oz (125 g) blue cheese, cut into four slices

SLIDERS WITH KIMCHI & BACON

- 2 tbsp mayonnaise
- 2 tsp gochujang sauce
- 2 slices bacon, cooked and halved
- ¼ cup chopped kimchi
- 12 thin slices cucumber
- 1 tsp toasted sesame seeds

SLIDERS WITH MANGO CHUTNEY & YOGURT SAUCE

- ½ mango, diced
- 2 tbsp golden raisins
- 4 tsp granulated sugar
- 1 tbsp cider vinegar
- 1 shallot, diced
- 1 garlic clove, minced
- 1 tsp fresh ginger, minced
- ¼ tsp mustard seeds
- 2 cardamom pods
- 1 whole clove
- ¼ tsp coriander seeds and cumin seeds, crushed
- 1 pinch red chili flakes
- 2 tbsp full-fat Greek yogurt
- 1 tbsp fresh mint, finely chopped
- 1 tbsp fresh cilantro, finely chopped
- 1 tbsp lime juice
- 1 pinch each salt and pepper
- ¼ cup spinach



DIRECTIONS

Pulled Bison: Pat bison dry with paper towel; season with salt and pepper. Heat oil in high-sided skillet over medium heat. Cook bison for five to eight minutes or until browned all over. Transfer to plate. Stir onion, garlic, thyme, and rosemary into skillet. Cook for three to five minutes or until slightly softened. Pour in stock, tomato sauce, and Worcestershire sauce; bring to a boil. Return bison to pan, reduce heat to medium-low. Cover and cook for two-and-a-half to three hours, or until very tender. Transfer bison to a large bowl. Let rest for 10 minutes. Shred bison using two forks. Toss with some of the cooking juices. Return to skillet and keep warm.

Sliders with Caramelized Onion & Gorgonzola: Stir together mayonnaise, horseradish, lemon juice, and mustard and spread over four slider buns. Top with arugula. Divide one-third of the pulled bison among the buns. Top with caramelized onions and blue cheese.

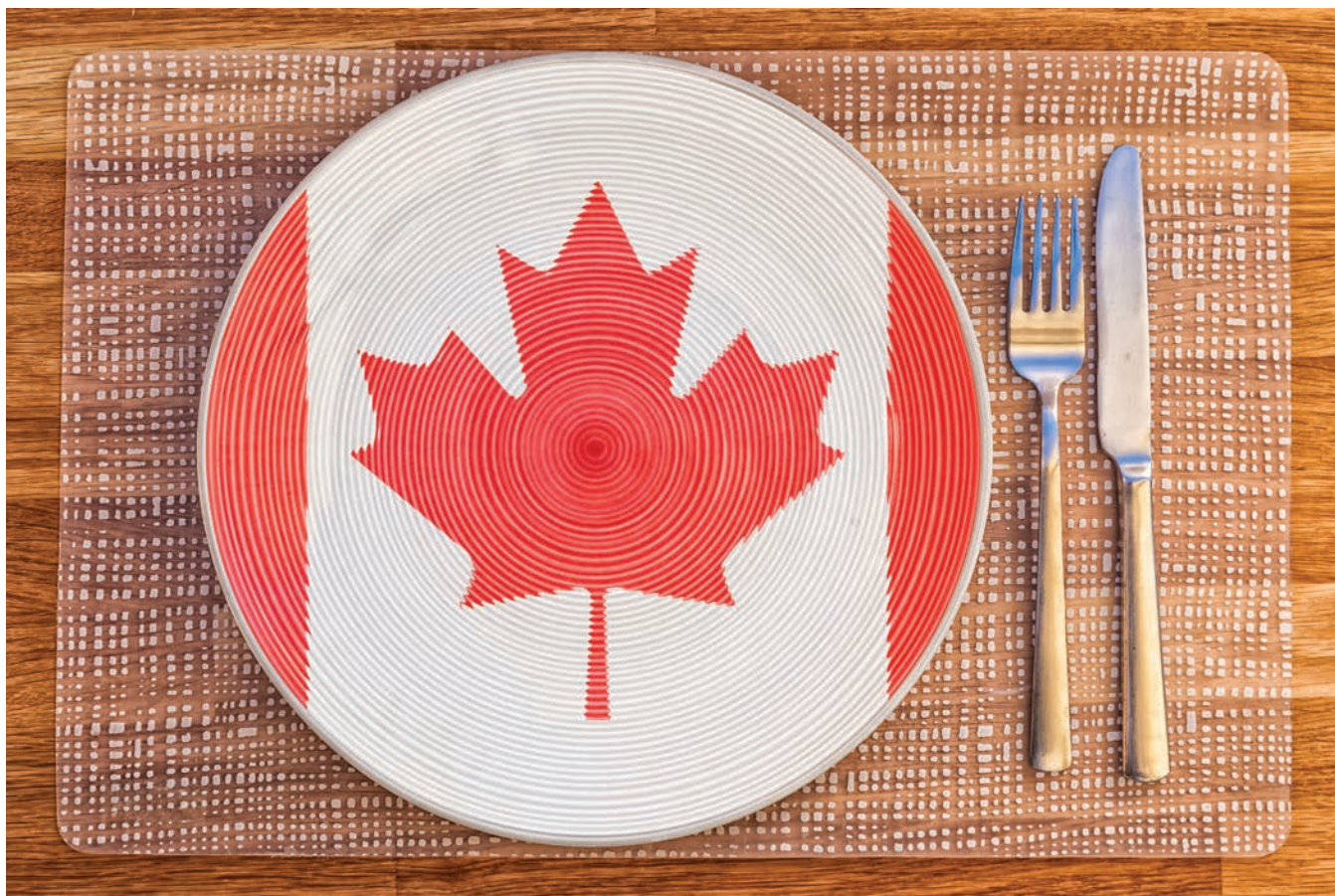
Sliders with Kimchi & Bacon: Stir together mayonnaise and gochujang. Spread over four slider buns. Divide one-third of the pulled bison among the buns. Top with bacon, kimchi, cucumber, and sesame seeds.

Sliders with Mango Chutney & Yogurt Sauce: In saucepan set over medium-high heat, combine mango, raisins, sugar, vinegar, shallot, garlic, ginger, mustard seeds, cardamom pods, clove, crushed coriander, cumin, and chili flakes; bring to boil. Reduce heat to medium. Cook, stirring frequently to prevent scorching, for 10 to 15 minutes, or until thickened. Let cool completely. Stir together yogurt, mint, cilantro, lime juice, salt, and pepper. Spread chutney over four slider buns. Top with spinach. Divide remaining pulled bison and yogurt sauce among the buns.

Tip: To make caramelized onions, cook one large onion in four teaspoons of butter with a pinch of salt and sugar in a saucepan set over medium-low heat, stirring occasionally, for 25 to 30 minutes or until golden brown.

Meet Your Market:

The Canadian Agri-Food Sector



The value of the Canadian processed food and beverage sector is immense. It is a large and diverse member of Canada's agriculture and agri-food system and plays a key role in transforming agricultural commodities into food, feed, and non-food products sold to consumers within Canada and around the world.

Canada possesses many key advantages that have helped to establish its place as world leader in food production and processing, like abundant land and water resources, access to international markets, strong research and development capacity, and a well-earned global reputation as a trusted supplier of safe, top-quality food.

"Canada's food is backed by a strong food safety system, and we are recognized as having one of the world's strongest, science-based food safety regulatory systems," says Cameron Newbigging, a spokesperson for AAFC.

“We offer high-quality foods from a dynamic food industry and, from farming and fishing to high-tech processing, from manufacturers to after-market and technical experts, Canada’s food industry delivers quality.”

There are many opportunities to be seized and benefits to be gained by international buyers that choose to do business with Canadian companies. Working together not only opens the door to a world of business opportunities, it allows companies to navigate the complexities of global markets together, helping businesses become stronger and more profitable. This, in turn, helps companies grow, both at home and abroad.

International buyers that do business with Canadian companies can also benefit from government to government contracting, which can help reduce risk, offer access to buyers, and increase competitiveness. Another advantage comes in the form of an expedited acquisition process, mitigation of project risks, assurance of ethical business practices, and an enhanced bilateral relationship.

Canada’s processed food and beverage sector represents the largest manufacturing segment in all of Canada (for both GDP and employment), and, today, Canadian processed food and beverage products are exported to approximately 190 countries, with a significant proportion of these exported products going to a just a few key trading partners such as the United States, China, and Japan.

According to data from Statistics Canada and Agriculture & Agri-Food Canada (AAFC), between January and October 2021, the Canadian processed food and beverage sector accounted for 1.7 per cent of the national GDP and made up 17.6 per cent of the overall manufacturing sector’s GDP. The GDP of the processed food and beverage sector grew by 3.9 per cent in the first 10 months of 2021, compared to the same period in 2020, reaching \$32.8 billion. The meat processing sub-sector accounts for the largest share of total processed food and beverage sector sales (26.0 per cent in October 2021), followed by grain and oilseed processing (11.3 per cent in October 2021), and dairy (11.2 per cent in October 2021).

Canadian processed food and beverage sector sales reached \$114.7 billion in the first 10 months of 2021 (a 13.4 per cent increase over the same period in 2020), and food and beverage manufacturing exports and imports in the first 10 months of 2021 increased by 17.2 and 3.8 per cent, respectively, reaching \$39.6 billion and \$33.3 billion. Capital investment in this manufacturing sector reached an estimated \$4.5 billion in 2020—the highest among any other manufacturing sub-sectors, like transportation, equipment, and other capital-intensive sectors.

“Global demand for food is expected to have robust growth in the coming decades and changing consumer preferences are creating growth opportunities for new value-added products such as plant-based protein alternatives,” says Newbigging. “Canadian exports of agricultural and agri-food commodities are projected to continue experiencing steady growth over the next decade; however, COVID-19 impacts on global GDP and disposable income could pose challenges in the near future.”

Recent trade agreements, like the *Comprehensive and Progressive Agreement for Trans-Pacific Partnership* (CPTPP), the *Comprehensive and Economic Trade Agreement* (CETA), the *Canada-Korea Free Trade Agreement* (CKFTA), and the *Canada–United States–Mexico Agreement* have also worked to reinforce a greater appetite for Canadian exports.

Negotiating and implementing free trade agreements (FTA) remain top priorities, as Canada seeks to grow and diversify its trade of agricultural products. Canada currently has 15 bilateral and regional FTAs covering 51 countries, which offer Canadian agriculture and agri-food exporters—including those from the processing sector—a significant, competitive edge in two-thirds of the global economy. Between 2014 and 2019, the export of Canadian processed food and beverage products grew at an average annual rate of 6.9 per cent and were valued at \$38.9 billion in 2019.

“Free trade agreements provide new market access opportunities for Canadian agricultural and agri-food exporters of primary commodities, processed food, and beverages through the

elimination of tariffs and non-tariff barriers,” says Newbigging. “Recent agreements also include a chapter on general rules of origin and product-specific rules that products need to satisfy to qualify for preferential tariff treatment under the agreement. Rules of origin ensure only goods produced within the territories of parties to a free trade agreement can benefit from preferential tariff treatment. They also take into account the existing production patterns and regional integration and provide even more export opportunities to Canada’s processed food and beverage sector.”

According to Statistics Canada, specific examples of growth include:

- Frozen french fries: Since the entry into force of CKFTA, Canadian exports of frozen french fries to Korea has grown 196 per cent to \$16.2 million in 2020.
- Pet food: Since the entry into force of CETA, Canadian exports of pet food to the European Union has grown 26.5 per cent to \$127.5 million in 2020, and since the entry into force of CKFTA, Canadian exports of pet food to Korea have grown 311 per cent to \$23.9 million in 2020.
- Baked goods: Since the entry into force of CPTPP, Canadian exports of baked goods to Japan have grown 15.34 per cent to \$7.4 million in 2020, and since the entry into force of CKFTA, Canadian exports of baked goods to Korea have grown 90.5 per cent to \$3.8 million in 2020.
- Sugar and confectionery products: Since the entry into force of CPTPP, Canadian exports of sugar and confectionery products to CPTPP members have grown 17.0 per cent to \$61.6 million in 2020. Since the entry into force of CETA, Canadian exports of sugar and confectionery products to the European Union have grown 33.4 per cent to \$107.4 million in 2020. Since the entry into force of CKFTA, Canadian exports of sugar and confectionery products to Korea have grown 122.2 per cent to \$10.2 million in 2020.
- Canola oil: Since the entry into force of CPTPP, Canadian exports of

canola oil to CPTPP members has grown 45.0 per cent to \$329.7 million in 2020. Since the entry into force of CETA, Canadian exports of canola oil to the European Union has grown 136.8 per cent to \$47.4 million in 2020. Since the entry into force of CKFTA, Canadian exports of canola oil to Korea has grown 63.4 per cent to \$125.3 million in 2020.

- Non-alcoholic beverages: Since the entry into force of CETA, Canadian exports of fruit and vegetable juices

to the European Union has grown 381.3 per cent to \$5.2 million in 2020.

- Wine: Since the entry into force of CETA, Canadian exports of wine to the European Union has grown 93.6 per cent to \$2 million in 2020.

COVID-19 has impacted supply chains across the board and its effect is keenly felt by the Canadian processed food and beverage industry. The rising costs for inputs and transportation have resulted in significant cost pressures for food manufacturers, and,

given the concentrated retail environment, they were further challenged to pass these costs to retailers. Weather-related events, including the western drought and the flooding in British Columbia, further complicated supply challenges for the sector. The ongoing need to attract and retain labour will remain the primary challenge impacting the sector.

“In addition, the Government also recognizes the importance of ensuring temporary foreign workers can continue to arrive in sufficient numbers, stay healthy, and support the sector,” says Newbigging. “That is why we continue to prioritize the processing of agricultural temporary foreign worker applications. In addition, a pilot project launched with the Government of Quebec will increase the maximum number of temporary foreign workers allowed in low-wage positions to 20 per cent from 10 per cent in certain sectors, including agri-food processing.”

Because of a slower-than-expected recovery from the pandemic and multiple challenges that have rocked industry supply chains in 2021, organizations like Farm Credit Canada are suggesting the future will be challenging to accurately forecast. Despite this uncertainty, however, it is critical the Canadian processed food and beverage sector find ways to mitigate risks and recognize opportunities when they present themselves.

“While there are many challenges on the road ahead, there are also many opportunities for Canadian agriculture and food producers, processors, suppliers, and service providers,” said J.P. Gervais, Farm Credit Canada’s chief economist, in a press release. “One key is to have sound risk management strategies to ensure your business can thrive despite some economic headwinds and take advantage of those opportunities as they arise.”

As things continue to normalize throughout 2022 and beyond, the business climate will even out for Canadian exporters and the international buyers they choose to work with, encouraging economic recovery and continued growth across the board as we navigate this new normal together. 🇨🇦



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Trading Partners:

Opportunities in Europe



Under CETA, Canada's agri-food and seafood exports to the EU have increased to \$4.6 billion in 2020, a 48.9 per cent increase compared to pre-CETA levels back in 2016.

The close bond that exists between Canada and the European Union (EU) is based on a long history of shared values and cooperation dating back to 1959, the oldest formal relationship the EU has with any industrialized country. As leaders on the world stage, Canada and the EU have been able to collaborate and promote trade and investment, high standards for food safety, and sustainability.

The EU is the world's second-largest importing market for goods, whose annual imports alone are worth more than the whole of Canada's GDP. And because of its single market mechanism, which permits the unrestricted movements of goods and services without border regulations and tariffs once a product enters the European Union, the EU offers the Canadian processed food and beverage sector open access to more than 450 million consumers across 27 member states.

The strength of the Canada-EU relationship has allowed the EU to grow to become Canada's second-largest trading partner after the United States, and it is the fourth most important

destination for Canada's agri-food and seafood exports, only behind the United States, China, and Japan.

There are a number of positive trends presenting significant opportunities for innovative Canadian food exporters who are committed to pursuing the EU market, like a growing demand for retail-ready products focused on the health and wellness sector, new taste experiences and flavour profiles, and products (and companies) that show a commitment to sustainability and innovation. In fact, three of the top-10 products imported from Canada in 2020 were included in EU 28's top-10 imports of processed products from around the world and accounted for 57 per cent of all processed Canadian imports that year.

There is important growth potential for Canadian businesses, especially in Eastern European countries, with significant opportunities for many sectors, ranging from agriculture and agri-food to fish and seafood, and beyond.

Regional and sub-regional differences in the EU, in terms of regulations, market dynamics, and economic trends, also provide companies with a diversity of opportunities. Some of these market-specific opportunities include:

- France and the Mediterranean countries: These markets are expected to grow in the medium-term, as the recovery and reforms implemented after the financial crisis are expected to pay off. Companies can benefit from opportunities in aerospace, agri-food and life sciences, among others.
- The UK: The United Kingdom relies on imports for goods, as strong demographics are helping demand. The market is also equipped with a highly skilled workforce and a slow wage growth. Companies can benefit from opportunities in agri-food, energy, and financial services.

Because of agreements like the Canada-EU *Comprehensive Economic and Trade Agreement* (CETA), Canada and the EU are working closer

than ever before across a wide spectrum of policies and areas of interest.

Provisionally applied since September 21, 2017, CETA has bilaterally covered virtually all aspects of Canada-EU trade. It is among the best of international trade agreements and sets the standard for trade in goods and services. CETA strengthens economic relations, opens markets, and promotes new economic opportunities for Canadian businesses that benefit Canadian consumers. The application of CETA also helps Canadian exporters make access of EU agri-food markets and offers Canada a competitive advantage in the global market, which benefits all Canadians.

With CETA, Canadian exporters of processed food and beverage products have clear and favourable rules that consider Canada's supply chains to determine which products are considered originating and are, therefore, eligible for preferential tariff treatment. In addition, CETA also aims to simplify customs procedures to help further reduce processing times at the border and make it easier to move goods between the various countries.

"CETA benefits Canadian exporters by making trade more predictable, transparent, and accessible by offering a single set of high-standard rules for trade across the EU," says Suzie Poisson, a spokesperson for Agriculture & Agri-Food Canada (AAFC). "This agreement has improved market access across a broad range of products by reducing or eliminating tariffs, as 94 per cent of the EU's agricultural and 96 per cent of fish and seafood import tariffs have become duty-free. These tariff reductions lower the cost of participating in international trade, which, in turn, makes Canadian products more competitive when sold in the European Union marketplace."

Under CETA, Canada's agri-food and seafood exports to the EU have increased to \$4.6 billion in 2020, a 48.9 per cent increase compared to pre-CETA levels back in 2016. This trend of growth slowed somewhat during 2021, with exports valued at \$3.6 billion as of November 2021—a

decrease of 11.3 per cent from the same period a year earlier, but still higher than pre-CETA.

The EU is an important but challenging market for Canadian agri-food exporters to navigate. Canada's processed food and beverage sector face a highly competitive retail environment and a diverse range of consumer and retail preferences across the various member states. Because of this, Canadian exporters must take the time to do their due diligence and develop an intimate understanding of local preferences, keep abreast of relevant regulations for their products, and undertake the considerable logistics of getting products from Canada to the EU.

"Canadian industries must understand and adapt to the EU requirements in order to properly access the European marketplace," says Poisson. "The Government is committed to working with industries toward achieving commercially viable market access into the EU, as well as monitoring the EU's implementation of its CETA commitments."

Organizations, like the Canadian Food Exporters Association (CFEA), can advise Canadian companies and help them with exporting products, from agriculture and agri-food to processed foods and beverages and ingredients, not only to the EU but around the world. Providing access to resources focused on expanding market access, networking with an international trade commissioners and buyers around the world, and attending trade shows are some of the ways the CFEA can help Canadian companies tap into international markets like the ones found throughout the EU.

When the United Kingdom negotiated its exit from the EU at the end of 2020, there was initially some concern on both sides of the Atlantic about what that might mean for Canada-UK trade relations, since the United Kingdom's decision to withdraw from the European Union meant CETA ceased to apply to Canada-UK trade. To maintain trade and minimize disruptions, Canada and

the UK have established the *Canada-UK Trade Continuity Agreement* (TCA).

“Both parties have agreed to launch negotiations toward a comprehensive free trade agreement (FTA) within one year of entry into force of agreement by April 1, 2022,” says Poisson. “The FTA negotiation will be an opportunity to create an agreement tailored to our specific bilateral interests and serve to further deepen the Canada-UK relationship.”

CETA will continue to govern Canada-EU trade and is unchanged by the conclusion of a Canada-UK TCA.

COVID-19 has had an impact on Canada-EU trade and their respective trade with the world. Canada-EU bilateral trade in goods dropped 11.4 per cent in 2020 compared to 2019, but Canada-EU bilateral trade in goods in 2020 was still 12.5 per cent higher than it was in 2016, pre-CETA. This would indicate that, despite the challenges brought by COVID-19, it appears CETA is working and has encouraged greater trade between Canada and the EU, as intended.

“Despite the COVID-19 pandemic causing initial challenges for some commodities, supply chains with the EU and the UK have proven to be resilient and Canadian agri-food supply chains and exports remain strong,” says Poisson.

Looking ahead, the Government of Canada continues to be committed to working in collaboration with industry and provincial and territorial partners to access export opportunities for agri-food products, including in the EU.

“AAFC will continue to work with industries to leverage new opportunities and address any outstanding market access issues faced in the EU market,” says Poisson. “Likewise, the Government of Canada will continue to press the EU on outstanding market access and engage with the EU at all levels to advance Canadian export interests.”

To find out more about the export opportunities that exist in the EU, contact the CFEA, your gateway to the world. 🇨🇦

ON A MISSION

The Canadian Food Exporters Association is on a mission to:

- Increase the profitable export sales of food, beverage and ingredient products.
- Increase the number of small- to medium-sized food, beverage, and ingredient processors and manufacturers exporting.
- Raise the international profile of Canadian food, beverage, and ingredient products.



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CAFOODA INTERNATIONAL LTD. is located in Saskatchewan, Canada, which produces and sells Canadian agri-food products. Its brand is CAFOODA. The company's products are quick oats, honey, flax oil, and canola oil, all grown, processed, and packaged in Canada. It can also provide OEM services for new and old customers.

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Growing Demand:

Export Opportunities in Southeast Asia



The Association of Southeast Asian Nations (ASEAN) was formed in 1967 by Indonesia, Malaysia, the Philippines, Singapore, and Thailand, and was later joined by Brunei, Cambodia, Lao People's Democratic Republic, Myanmar, and Vietnam. Now, 65 years after it was first established, ASEAN has grown to become one of the fastest-growing economic regions in the world.

Exports to ASEAN countries cover a range of sectors, with the top spots going to wheat, pulp, and non-metallic minerals. Among the top exports, food, as a whole, accounts for 25 per cent of export activity. Commodities tend to dominate what Canada exports to ASEAN countries, but higher value-added exports, like machinery and pharmaceuticals, account for more than 14 per cent of total annual exports and have grown exponentially by an average of more than 10 per cent annually over the last couple of decades.

With more than 643 million people, the ASEAN region increasingly presents an important opportunity for Canadian sectors such as agriculture and agri-food, natural resources, fish and seafood, clean technology, infrastructure, and financial services. Processed and packaged western food is quickly gaining popularity throughout the region, and the Canadian processed food and beverage producers' well-earned reputation for high-quality and safe processed products has put the sector on the path to meet that growing demand. In addition, regional trends among the ASEAN partners indicate a heightened focus on health and well-being, which provide further opportunities for Canadian agri-food exporters.

And there are plenty of reasons for Canadian companies to consider exporting their goods to ASEAN countries. Indonesia,

Vietnam, and the Philippines are often cited as the next up-and-coming or emerging top-potential countries in the world. Singapore, meanwhile, continues to be a mainstay for global trade, and Myanmar, Cambodia, and Laos have incredible potential for expedient expansion. Export growth for Canadian companies is especially strong when doing business with the "Fast-4" countries: Vietnam, the Philippines, Cambodia, and Myanmar.

As a group, the combined economies of ASEAN member states in 2020 represented Canada's fourth-largest trading partner and bilateral trade between Canada and ASEAN, reaching \$26.7 billion, with exports of agri-food, fish, and seafood products totalling \$2.1 billion.

Canada is already a major supplier of commodities to the region, and, in 2020, the top three ASEAN export destinations were Indonesia (\$855 million), Vietnam (\$371.2 million) and the Philippines (\$340 million). Also in 2020, Canada provided \$1 billion in wheat, \$281 million in soybeans, \$186 million in pork products, and nearly \$95 million in fish and seafood (crab, lobster, shrimp, and salmon) to ASEAN markets.

"This region has been identified as offering the best potential for Canada to pursue growth and diversification,"



says Suzie Poisson, a spokesperson for Agriculture & Agri-Food Canada. “Consumers in these emerging markets have increasing disposable incomes and evolving tastes, and our imports increasingly will be needed to meet demand.”

The regional trends of Southeast Asia include growing populations, increased urbanization, and a developing taste for high protein, convenient, and nutritious foods. This has resulted in an increased demand for the higher-value food and beverage products Canada is known for. But the region is not homogenous, and ASEAN countries have varying import requirements, industrial structures, income levels, cultural norms, and consumer preferences and—not unlike other markets—the Canadian processed food and beverage sector faces some tariff and non-tariff barriers in ASEAN markets.

Looking ahead, there will be a myriad of opportunities for a range of Canadian agri-food and seafood products, and the Government of Canada continues to proactively engage with ASEAN countries to increase exports through improved market access for a range of agri-food products. Canadian exporters are provided with increased market access in the ASEAN markets of Singapore and Vietnam under the *Comprehensive &*

Progressive Agreement for Trans-Pacific Partnership (CPTPP) and to the ASEAN markets of Brunei and Malaysia once they ratify the Agreement. When fully implemented with all signatories, CPTPP will represent 13 per cent of global GDP.

At the 2017 ASEAN Economic Ministers – Canada Consultation, both Canada and ASEAN member states agreed to launch exploratory discussions that would explore the potential for a *Canada-ASEAN Free Trade Agreement* (FTA). From September 1 to October 16, 2018, the Government of Canada conducted a series of public consultations to gather the views of Canadians on a possible FTA with ASEAN. A total of 20 submissions were received from the agriculture sector, which, as a rule, were very supportive of FTA exploratory discussions with ASEAN and for the Government’s efforts to diversify Canada’s trade in the Asia-Pacific region.

In a feasibility study by Global Affairs Canada on the potential benefits of a Canada-ASEAN FTA, economic models suggested that Canada’s GDP would increase by an additional \$2.54 billion because of the FTA and result in a \$7.8-billion increase in bilateral trade between Canada and ASEAN member states.

QUICK FACTS

- With a combined GDP of \$5 trillion and a population of approximately 650 million, ASEAN represents the world’s fifth-largest economy and third-most populous consumer market.
- As a bloc, the 10 ASEAN member states comprise Canada’s sixth-largest trading partner.
- Bilateral merchandise trade between Canada and ASEAN reached \$26.7 billion in 2020, while services trade amounted to \$5.8 billion in 2020, with further opportunity for growth.
- ASEAN is a fast-growing and dynamic market with increasingly important opportunities in sectors such as agriculture and agri-food, natural resources, fish and seafood, clean technology, infrastructure, and financial services.
- According to the *ASEAN-Canada FTA Joint Feasibility Study*, an FTA would result in a US\$7.8 billion increase in bilateral trade between ASEAN member states and Canada.
- The 45th anniversary of Canada-ASEAN relations will be celebrated in 2022.

Source: Global Affairs Canada

In addition to improving Canadian exporters’ access to the large and fast-growing markets of Southeast Asia, a Canada-ASEAN FTA would also help diversify supply chains, increase trade and investment, and further reinforce Canada and ASEAN’s shared commitment to open markets and rules-based trade. In addition, an FTA would also present the opportunity to level the playing field for Canadian exporters with top agri-food competitors that already have FTAs with ASEAN, like Australia and New Zealand.

“Canada will be seeking ambitious outcomes, including improved market access for agricultural goods achieved through the elimination of tariff and non-tariff barriers and rules of origin that take into account the existing production patterns and regional integration of Canada’s agri-food supply chains,” says Poisson.

On November 16, 2021, the Honourable Mary Ng, minister of international trade, export promotion, small business, and economic development, met virtually with ASEAN Economic Ministers at the ASEAN Economic Ministers (AEM) – Canada Consultations, where it was announced that Canada and ASEAN have agreed to proceed with negotiations toward a comprehensive Canada-ASEAN FTA. This work will help create new market opportunities for Canada's various agriculture and agri-food sectors and support a more transparent and predictable environment for trade and investment.

"The commercial relationship between Canada and ASEAN has significant potential for growth," said Minister Ng in a press release. "Proceeding with negotiations on a comprehensive free trade agreement with ASEAN provides an important opportunity to secure enhanced market access for Canadian business to supply chains in the Indo-Pacific region, create new opportunities for our businesses in this rapidly growing market, and drive long-term job creation and sustainable, inclusive

growth for generations to come. This is a significant milestone in the renewal and deepening of Canada's economic partnerships and commercial engagement across the Indo-Pacific."

Canada and ASEAN plan to hold a first round of negotiations as soon as possible in 2022. The negotiations are expected to be complex; in its negotiating approach, Canada will need to take into account the various levels of economic development within the different ASEAN countries and available negotiating resources.

"While a plurilateral outcome offers the greatest potential benefits, it is also more complex to negotiate and likely involves longer timeframes, given the broader range of interests and considerations at play," says Poisson. "As such, Canada and ASEAN will work closely together to negotiate a comprehensive ambitious FTA and bridge our approaches."

In addition to its efforts toward negotiating a Canada-ASEAN FTA, the Government of Canada has also launched separate *Comprehensive Economic Partnership Agreement* (CEPA) negotiations

with Indonesia in June 2021. Indonesia is already Canada's largest export market in Southeast Asia and is a key destination for Canadian agricultural products; a CEPA will be able to further enhance opportunities for Canadians to export to this dynamic market of 270 million people. Officials hope to hold a first round of negotiations by mid-2022.

Looking ahead, Canadian food exporters will be able to benefit from population growth, market, increasing incomes, and urbanization in the ASEAN market, which is creating more demand for higher-value food and beverage products.

"Consumers in this market are developing tastes for high protein, convenient, and nutritious foods and there is a growing demand for red meat and meat alternatives, poultry, and bakery products," says Poisson. "The future for Canadian exporters looks promising, as Canada builds upon its strong reputation in the region as a global supplier of safe and high-quality food and beverages."

The Canadian Food Exporters Association is proud to connect Canadian exporters with targeted business opportunities, promote the advantages of doing business with Canadian companies, and provides members with information and learning opportunities to understand the requirements of getting their products to market overseas.

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Heard it Through the Grapevine:

A Toast to Wine Production in Canada



Some of Diamond Estates' well-known brand names include 20 Bees, EastDell, Lakeview Cellars, FRESH, Dan Aykroyd, and Seasons.



Based out of Niagara, Ontario, Diamond Estates Wines & Spirits produces Vintners Quality Alliance and blended wines.

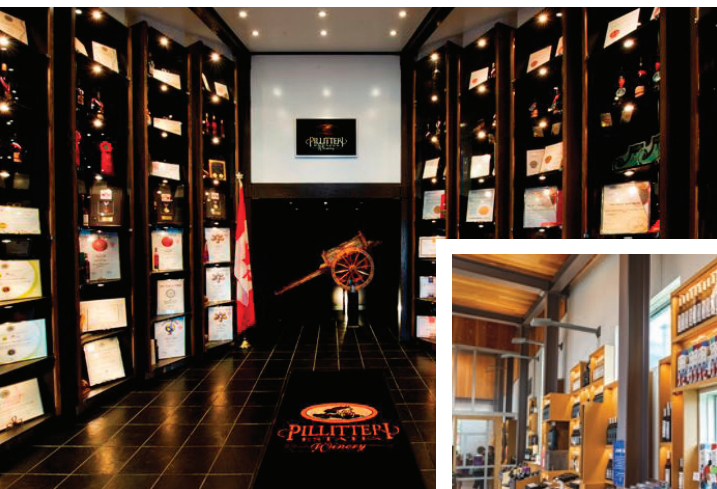


Pillitteri expects importers will shed some slow-selling items and take on some new and exciting wines.

Canadians should be proud of their made-in-Canada wines, which have grown from being one of Canada's best-kept secrets to taking centre stage across the globe.

Wine is a \$9-billion industry in Canada, of which the export market accounts for \$20.34 million. Of this, more than \$10 million was destined for China. Together, with the United States and the United Kingdom, these three countries alone represent 79.4 per cent of export value and 82.2 per cent of export volume.

There are currently more than 800 wineries in Canada, with some parts of the country being more prolific in this sector than others, due to having a favourable climate and soil conditions more conducive for growing grapes; for example, British Columbia has 231 wineries, Ontario has 186, and Newfoundland & Labrador has only two.



Pillitteri's products can be found on the shelves in 35 countries and have garnered over 1,000 international awards.

Diamond Estates has exported its icewines and table wines for more than 15 years.



Peelee Island has grown to more than 700 acres and is one of Canada's largest wineries.



More than 150 years after planting its first grapes into the warm soils of Lake Erie's Pelee Island, Pelee Island Winery has grown to more than 700 acres and is, today, one of the nation's largest wineries. The winery takes advantages of the island's unique sub-appellation climate to produce some of Canada's finest cabernet sauvignon, chardonnay, riesling, pinot noir, cabernet franc, gewürztraminer, pinot gris, and merlot.

"If you consider vineyards across the country, we've all specialized in certain styles of grape varieties that do really well in the Canadian climate," says Everett de Jong, export coordinator at Pelee Island Winery. "The industry, as a whole, appears to be doing well, even though we all have to contend with

certain limiting factors, like government oversight, that make it difficult to do our own marketing and build a brand."

Pelee Island Winery is one of Canada's top exported brands, and their bottles can be found on the shelves in countries around the world. Even so, it can still be a challenge for Canadian wine makers to push back against stereotypes and change the perception of Canada's wines. Part of this challenge for Pelee stems from the fact that other countries' wine sectors typically correspond to a specific cultural culinary scene; not so much for Canada.

"If you're in the Italian, or Greek, or French wine industry, it's easy because anywhere you go, there's usually a Italian, Greek, or French restaurant and a

recognized cuisine to go along with it," says de Jong. "It's harder to come up with a Canadian cuisine, especially when the only restaurant people seem to know is Tim Hortons. And there aren't a lot of great wines to pair with a Timbit."

What Canada has is quality, and the country provides some of the best quality products and ingredients in the world, whether it's beef from Alberta, seafood from the Maritimes, or potatoes from Prince Edward Island. Canadian wine can also be added to that list.

"We are not large enough to flood the market, and Canadian wine is not going to be in every grocery store around the world," says de Jong. "Instead, we excel at getting our product into top-quality wine shops in places like New York, Chicago, and Paris and into restaurants where people are open to new cuisine and concepts. This is where Canadian wines will shine the brightest."

Canada is the currently world's largest consistent producer of icewine. In 2020, icewine represented 51.9 per cent of total export value and 13.1 per cent of export volume as a percentage of total bottled exports.

Founded in 1993, Pillitteri Estates Winery has grown to become the world's largest estate producer of icewine. Pillitteri first exported icewine into Taiwan in 1995 and has not looked back since. Today, its products can be found on the shelves in 35 countries and have garnered the company over 1,000 international awards.

The last couple of years have been a challenge for the wine sector, largely because of the impact of COVID-19, but also because of a 2021 World Trade Organization challenge launched by Australia that caused the federal government to drop excise exemptions for domestically produced wine. This was a significant blow for all Canadian wineries, which already contend with the rising costs of dry goods, labour, real estate, production equipment, and logistics.

"But there have also been some silver linings in that time," says Jared Goerz, export manager at Pillitteri Estates Winery. "While challenging, the virus has also been a positive catalyst for online direct-to-consumer sales for the wineries that were able to invest and pivot. The travel restrictions also encouraged a lot of

Canadians to take their holidays within Canada and have allowed us to reconnect with our domestic customers.”

Internationally, the pandemic has significantly disrupted the supply chain. The industry has seen its shipping costs hit record highs and it is often difficult to secure a container, even if you are willing to pay the premiums.

“This is a two-way street since we heavily rely on importing many of our dry goods, mostly glass bottles. Even the label printers have been experiencing paper shortages that have led to increased lead times,” says Goerz. “This means, with respect to exports, it has become increasingly difficult to meet tight deadlines, but we have been able to operate in this environment without too much disruption.”

As the world looks to the post-pandemic, Canadian wine makers are seeing a return to normal, as it relates to business. Pillitteri expects there will be many changes to major portfolios, as importers seize the opportunity to shed some slow-selling items and take on some new and exciting wines.

“We are very optimistic moving forward, as direct-to-consumer sites are

being integrated in the back-end, virtual content is being improved every day, and direct interaction with international consumers is quickly growing,” says Goerz. “We’re not out of the woods yet, but we believe that if we stick to our strategy, we will be able to emerge from this pandemic stronger than ever.”

Established in 2000, and based out of Niagara, Ontario, Diamond Estates Wines & Spirits produces Vintners Quality Alliance and blended wines under such well-known brand names as 20 Bees, East-Dell, Lakeview Cellars, FRESH, Dan Aykroyd, and Seasons. And while Diamond Estates’ labels can be seen in stores here in Canada, the company has also been actively exporting its icewines and table wines for more than 15 years.

“Today, our wine is sent around the world, from the United States and Mexico, into the European Union, the United Kingdom, Scandinavia, and Russia and into Asian markets, like China, Japan, Korea, South Korea, Thailand, and Vietnam,” says Peter Toms, director of sales and channel development at Diamond Estates Wines & Spirits. “People are

sometimes surprised we produce wine here in Canada, but, when they get a chance to sample it, they’re convinced pretty quickly we’re doing a pretty good job.”

The next few years are sure to present new challenges for Canadian wine makers to overcome. What will new COVID-19 variants mean for keeping restaurants open? What does it mean for business relations if Canada doesn’t send its delegates to the Olympics in China? What comes out of Russian posturing over Ukraine? Fortunately, Canadian wine producers have proven their resilience and are prepared to tackle whatever comes next.

“I’m naturally a glass-half-full kind of guy for most things in life, but many of our top concerns are out of our control, so I’m only cautiously optimistic about what the future holds,” says Toms. “For us, 2021 brought a lot of interest in our wines, and our goal for 2022 is to carry some of that interest forward into actual sales. We just have to be patient and have faith that cooler heads will eventually prevail and allow our businesses to operate.” 🇨🇦

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INFORMATION SHARING

At the CFEA, we provide a Central Information Clearinghouse for timely intelligence, global marketplace information, and export assistance. We also have access to key export contacts such as buyers, brokers, and distributors.

MARKET & TECHNICAL REGULATIONS

Our office is here to assist with market-specific searches to get you the information you need to adequately assess your market of interest. We also provide assistance—or direct you to assistance—to help ensure you're meeting technical regulations of all types in the various markets you want to serve.

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Because your business may take you across the country or around the world, we have signed an agreement with Park'N Fly. We're proud to be able to offer CFEA members reduced parking rates at Canadian airports.

SEMINARS

We organize several seminars each year, all focused on export. These sessions will help you get started or enhance your knowledge on exporting. Members can participate for free or at reduced rates.

TRADE SHOWS

Every year, we organize many trade shows focused on retail, food service, specialty, and private label. CFEA members benefit from reduced pricing on space, shipping, and travel, and they also save staff time with trade show coordination, as our office is here to assist members with that.

TRADE MISSIONS

We organize outbound trade missions of various types—appointment style, table-top demos, and in-store demos—to those markets in which our members tell us they have a high interest. We target at least three missions per year. 🇨🇦

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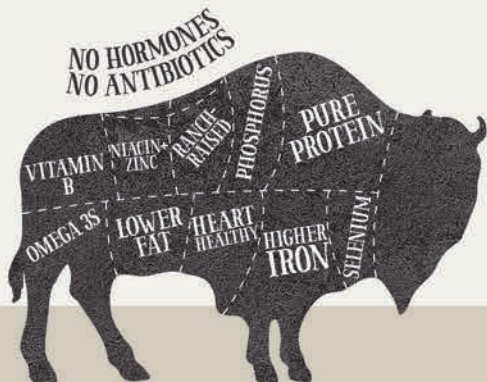


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Cholesterol (mg)	82	86
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Source: Canadian Nutrient File, 2001b

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