

ATS Bulletin | Bulletin SEA

AGRI-FOOD TRADE SERVICE | SERVICE D'EXPORTATION AGROALIMENTAIRE

Inside This Issue

► Agriculture & Agri-Food Canada – 3 new economic reports

These reports provide financial and market forecasts for the sector and offer benchmarks for producers, industry stakeholders and governments as they plan for the years ahead.

► Country Profile - Consumers in Japan

This report was prepared using multiple sources of information and is intended to increase the reader's understanding of the factors that influence Japanese food consumption and purchasing decisions.

► Modern Grocery Retailing in the United States

Most American consumers choose to shop in modern grocery retailers over traditional formats.

Trade Reports

The Agri-food trade service will be pleased to send electronic copies or faxes of these reports. Please contact us (see last page).

Agriculture & Agri-Food Canada – 3 new economic reports

Agriculture and Agri-Food Canada is anticipating a strong year for Canadian farmers in 2014. Three new reports released recently, ***the Farm Income Forecast for 2013 and 2014, the Medium Term Outlook and the Farm Income, Financial Conditions and Government Assistance Data Book, 2013***, suggest an overall positive situation for the agriculture sector in 2013 and 2014. These reports provide financial and market forecasts for the sector and offer benchmarks for producers, industry stakeholders and governments as they plan for the years ahead. With farmers' net incomes remaining near historical peaks, robust crop prices,

favourable livestock markets and an excellent Prairie harvest, indications suggest an overall positive situation for the agriculture sector in 2013 and 2014.

<http://www.agr.gc.ca/eng/about-us/publications/economic-publications/?id=1366724330959>

To request a copy of these complete publications, please contact: publications@agr.gc.ca

Source: Agriculture and Agri-Food Canada (AAFC)

Agri-Food Sector Profile - Dominican Republic

The Dominican Republic (DR) is the second-largest country in the Caribbean, with a population of approximately 9.9 million. While most of the population's daily diet is comprised of traditional, locally-produced staple food items (rice, beans, plantains, meats, and vegetables), Dominican consumers in urban centers have become more sophisticated, especially in the middle and high socio-economic segments. In the last years, there has been a sustainable (and growing) demand for processed, consumer-ready

products such as breakfast cereals, snacks, dairy, frozen foods - including desserts, nutritional foods, and others.

<http://www.tradecommissioner.gc.ca/eng/document.jsp?did=122869>

Source: The Canadian commissioner service, Foreign Affairs and International Trade Canada (DFAIT)
March 2014 (7 pages)

Country Profile - Consumers in Japan

Japan is an important export market for Canada's food and beverage producers and processors. The country must import approximately 60% of their food and, with Canada able to supply products that meet many of their traditional and emerging food needs, the relationship has certainly been positive. Canada's top exports to Japan include fresh and frozen pork, canola seed, soybeans, non-durum wheat, frozen lobster, crab, and fish, as well as shrimp and prawns (Agriculture and Agri-Food Canada, 2012). This report was prepared using multiple sources of

information and is intended to increase the reader's understanding of the factors that influence Japanese food consumption and purchasing decisions. Connecting product attributes to the attitudes and values of the consumer in a target market is an essential element of effective marketing strategies. <http://www.ats-sea.agr.gc.ca/asi/6396-eng.htm>

Source: International Markets Bureau, AAFC
April 2013 (12 pages)

Trade Reports

Private Label Trends - Packaged Food in Japan

Japan's private label market was valued at US\$24.8 billion in 2012 (Euromonitor, 2013). Private labels had a 10.5% share of the packaged food market and grew at a compound average annual growth rate (CAGR) of 1.4% from 2007 to 2012. Chilled and dried processed food were the largest sub-sectors. Canadian food producers have an opportunity to supply Japan's private labels as they expand their reach into additional sub-sectors and undertake further innovation. Moreover, there is great interest in budget-

priced, environmentally sustainable, and convenience products in Japan. This report provides, among other things, market overview, market performance, product innovation, major private labels and opportunities.

<http://www.ats-sea.agr.gc.ca/asi/6386-eng.htm#>

Source: International Markets Bureau, AAFC

April 2013 (12 pages)

The Hispanic-American Consumer Behaviour, Attitudes and Perceptions Toward Food Products

Hispanic-Americans represent the fastest-growing demographic in the United States (U.S.). The Hispanic market is ethnically and generationally diverse, creating opportunities for niche markets within the larger Hispanic marketplace. With this diverse market, it is important for food manufacturers and marketers to go beyond the term 'Hispanic' and recognize that there are some 20 different nationalities that make up the total Hispanic population. Having said that, many Hispanic-American families closely resemble America's idealized concept of the 1950s nuclear family;

they tend to be young, and live in large, traditional, married-with-children families, with lots of participation from grandparents. The Hispanic-American market represents a growth opportunity within a mature market for today's food manufacturers. Family, food and flavours are extremely important to Hispanics and central to self-identification.

<http://www.ats-sea.agr.gc.ca/amr/6366-eng.htm>

Source: International Markets Bureau, AAFC

March 2013 (11 pages)

Modern Grocery Retailing in the United States

In 2011, modern grocery retailers, such as supermarkets, hypermarkets and discounters, held 84% of value sales in the grocery retailing sector. They represented 62% of outlets and 81% of selling space. Most American consumers choose to shop in modern grocery retailers over traditional formats, with modern grocery retailers generating sales of US\$777 billion in 2011, compared to US\$153 billion worth of sales made through traditional grocery retailers.

This report provides, among other things, socio-economic profile, consumer preferences and grocery shopping habits, grocery retail sales overview, distribution formats, market share by company and brand, major retailing trends, packaged food sales and packaged food trends.

<http://www.ats-sea.agr.gc.ca/amr/6365-eng.htm>

Source: International Markets Bureau, AAFC

March 2013 (12 pages)

Répertoire 2014 des acheteurs alimentaires

This directory has been prepared for the Quebec food and agri-food companies wishing to develop the Ontario market and the West Canadian market. (Toronto - Calgary - Vancouver)

(Available in French only)

Document downloadable from MAPAQ web site:

<http://www.mapaq.gouv.qc.ca/fr/Pages/Accueil.aspx>

(October 2013, 173 pages)

Source : ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec (MAPAQ), Équipe des marchés extérieurs



The Global Analysis Group of Agriculture and Agri-Food Canada publishes a variety of market intelligence reports to help Canadian suppliers understand world markets and compete internationally.

Recent publications:

- *Market Overview: France (April, 8 p.)*
- *Fruit Juices in China (April, 8 p.)*
- *Foodservice Trends in Brazil (April, 11 p.)*

- *Packaged Food Sales in Saudi Arabia (March, 10 p.)*
- *Retail Innovation: Tesco in the United Kingdom (March, 8 p.)*
- *Consumer and Retail Trends in China (March, 9 p.)*
- *Market Overview: United Kingdom (March, 8 p.)*

For more information on these reports, or to join the distribution list and receive new reports as soon as they are issued, please contact: infoservice@agr.gc.ca



Events

Quebec Events

Mondial de la bière (21^e édition)

NEW

Montreal, Quebec – June 11 – 15, 2014

Montreal's first great festival of the summer, the Mondial de la bière is a unique tasting event dedicated to the reinstatement of beer's noble status. Founded in 1994, the Mondial de la bière is considered to be a gateway to the Québec and foreign beer industry. The professional MBeer segment, which began in 2005 with the MBeerconference, is enriched by the visit of international beer celebrities who contribute to its reputation. The MBeer Contest and the MBeer school of beerology, created in 1996, have also helped develop Quebec's expertise in this domain. Through the years, the event has become the most important festival of international beers in America and its reputation now travels over to many countries. For more information please visit the event website:

http://festivalmondialbiere.qc.ca/en/festivals/mondial_de_la_biere_montreal_2014/

Event INITIA Fondation

NEW

Boulangerie – quelle est votre valeur ajoutée ?

Montreal, Quebec – May 1, 2014 - (In french)

I.TH.Q. (Institut du Tourisme et d'Hôtellerie du Québec).

Welcome, among other, to dietitians and nutritionists, food processing companies, ingredients suppliers, research centers, consultants and private laboratories and government agencies involved in the food chain. For more information please visit the event website:

<http://initia.org/evenements/boulangerie-quelle-est-votre-valeur-ajoutee/>

Think Big: Exporting for Growth 2014

NEW

Webinaire – April 22, 2014 - 1:00 p.m. - 2:00 p.m. (EDT)

Growing a business demands a solid business strategy, topnotch people, skillful use of company resources and an ability to identify promising opportunities. Those opportunities, though, aren't necessarily here at home. Once you start to look, you may find that one of the best ways to grow is through international trade—in a word, exporting. This one-hour webinar will highlight:

- The benefits of diversifying your markets and customer base;
- The importance of developing a business strategy for growth;
- How exporting can be a solution to grow your business; and
- How to manage the risks involved with a growing business.

For more information please visit the event website:

https://www.edc.ca/events/EN/1-AN63FC/Pages/overview.aspx?frompage=EDM_ti_C3_FR

BENEFIQ 2014

Quebec, Quebec – September 23 – 25, 2014

The only scientific and business gathering in Canada dedicated to health ingredients. Based on the successful first edition, the organizers will offer once more a top level international event. Renowned speakers will lecture on current hot topics, a broad range of health ingredients suppliers will showcase their products, innovative technologies will be presented, and business meetings and networking opportunities will abound.

For more information please visit the event website:

<http://www.benefiq.ca/en/>

Canada Events

Bakery Showcase 2014

NEW

Toronto, Ontario – May 4 – 6, 2014

Established in 1965, Bakery Showcase is Canada's largest baking specific event that includes a trade show, seminars & workshops and evening festivities. It has been designed to provide a forum where suppliers, bakers small and large and buyers of baked goods can meet on common ground and conduct business. Bakery Showcase it's over 4,250 industry professionals including bakers (retail, wholesale, commercial), grocery and foodservice outlets. For more information please visit the event website:

<http://www.baking.ca/Bakery%20Showcase/bakery%20showcase%20-%20about.aspx>

Canada's Farm Progress Show

NEW

Regina, Alberta – June 18 – 20, 2014

The country's Largest Trade Show is a dry land farm technology show that annually attracts 45,000 visitors from around the globe. It's the place to be for opportunity, innovation and excitement. Perennial favorite programs will include the demonstration areas, Innovation Showcase, Ride and Drive Test Area, New Innovations Showcase and the Antique Truck and Tractor Showcase. In addition, Livestock Centre, Energy Centre, Modern Lifestyles Showcase, entertainment and educational seminars are all on offer and promise to be better than ever. The International Buyers Program is another feature that sets the CFPS apart from other shows of its kind. International guests and buyer delegations from over 50 countries are matched with the products, services and suppliers that they need. For more information please visit the event website:

<http://www.myfarmshow.com/>

Check it Out

To find more events or other trade-related resources, visit the Agri-Food Trade Service website

www.ats-sea.agr.gc.ca

International Events

2014 Sweets & Snacks Expo

NEW

Chicago, Illinois – 20 – 22 May, 2014

This show is more than 15,000 qualified professionals attend with global participation from 90 countries, 620+ exhibiting companies display more than 3 acres of candy and snacks, innovations awards reveal the top new items that have been taste-tested across eight different categories, learning opportunities through standing-room only keynote sessions as well as merchandising solutions on the show floor. The 2014 Sweets & Snacks Expo is filled with more new products and categories from more new companies. Come to the 2014 Expo to discover what's new in your category! For more information, please visit the following event web site: <http://www.sweetsandsnacks.com/>

International Dairy - Deli - Bakery Association Show

Denver, Colorado – June 1 – 3, 2014

IDDBA's Dairy-Deli-Bake is the largest show in the world serving several categories of actors in that sector. It's also the most-focused show because it only targets the serious buyers, merchandisers, and executives who have a shared passion for food. Attendees include retail executives, buyers, merchandisers, directors, brokers, distributors, manufacturers, and others. For more information, please visit the following event web site: <http://www.iddba.org/>

Alimentaria Mexico 2014

Mexico city, Mexico – June 3 – 5, 2014

Alimentaria México is the only Mexican food and drink event devoted to the food industry in Mexico, distribution, marketing, and the restaurant industry, including everything involved with food and drink, for instance: dairy products, confectionary, fruit and vegetables, meat products, fish and seafood, preserves and frozen food, drinks, organic products and teams dedicated to the preparation, preservation and presentation of food and drink for the restaurant and catering industry. For more information, please visit the following event web site: <http://www.alimentaria-mexico.com/en/home>

Agroactiva 2014

NEW

Buenos Aires, Argentina – June 4 – 7, 2014

AgroActiva is the best showcase since 1995 to exhibit technological advances, the main business generation and training center chosen by producers, technical professionals and researchers. And also as a meeting and entertainment space for the entire family. For more information, please visit the following event web site: http://www.agroactiva.com/en/somos_agroactiva

Nanotech 2014 – Advanced Materials

NEW

& Applications

Washington DC (USA) - June 15 – 19, 2014

Some applications may have links with the agri-food industry (packaging, biomaterials, green energy, a measure of pollution and pollution control technologies ...). For further information, please visit the event website: <http://www.techconnectworld.com/Nanotech2014>

Institute of Food Technologists (IFT) 2014

NEW

Annual meeting and Food Expo

New Orleans, Louisiana – June 21 – 24, 2014

The IFT Annual Meeting & Food Expo is the only annual event that brings together professionals involved in both the science and the business of food - experts from around the world from industry, academia, and government. You'll learn about the very latest trends, the newest products, and the most recent scientific innovations...and make important new professional connections. For more information, please visit the following event web site: <http://www.am-fe.ift.org/cms/>

Food Taipei 2014

Taipei World Trade Centre Nangang Exhibition Hall, Taipei, Taiwan – June 23 – 25, 2014

Food Taipei is one of Asia's most important food shows and had celebrated it's 24th birthday in 2014. The show itself has been the most popular platform for industry players to launch their products into the hottest Taiwan and overseas markets. In 2013, Food Taipei had a record 997 exhibitors and 2,041 booths, the exhibition include all kinds of ready-to-eat food items and distinctively Taiwanese produce, raw materials, processed and semi-processed products, such as indigenous Taiwanese tea, sub-tropical fruit, fish that are farmed using unparalleled technology, vegetarian food of various cuisine styles, and more. For more information, please visit the following event web site: http://www.foodtaipei.com.tw/en_US/index.html

60th Summer Fancy Food Show (SFFS)

NEW

New York, New York – June 29 – July 1, 2014

The SFFS is the largest specialty food and beverage event in North America with 2,400 exhibitors from 80 countries & regions. This is an opportunity to meet senior representatives from every segment of the food service industry – retailers, restaurateurs, brokers, wholesalers, importers and other distributors of specialty-gourmet, ethnic, natural and organic food, snacks and beverages. For more information, please visit the following event web site: <http://www.specialtyfood.com/fancy-food-show/summer-fancy-food-show/>

Food Expo 2014 (25th Edition)

NEW

Hong Kong, China – August 14 – 18, 2014

The fair is divided into the Trade Hall and Public Hall to cater all the needs of food lovers. The Trade hall is dedicated to all industry professionals for conducting businesses and exchanging market information. The 2013 Trade Hall was organized into country pavilions including pavilions from Canada, Greece, Guam, Indonesia, Iran, Italy, Japan, Korea, Mexico, Poland, Taiwan, the Philippines, the US and the Chinese mainland provinces including Fujian, Guangdong, Guangxi, Guizhou, Heilongjiang, Jiangsu, Jilin, Ningbo, Qinghai, Shaanxi and Xinjiang. This is the best marketplace for food retailers, wholesalers, suppliers, agencies and brokers to manifest their strength.

For further information, please visit the event website: <http://www.hktdc.com/fair/hkfoodexpo-en/HKTDC-Food-Expo.html>



Announcements / News

● Let's Talk Exports Cross Canada Tour (EDC) - April 24 and May 30, 2014

If you think the global economy is behaving unpredictably, at least there's one thing you can always depend on: **Let's Talk Exports** is the most productive hour you'll spend to help you make sense of our current growth cycle and its impact on Canadian businesses like yours. **Let's Talk Exports** will empower you with the information you need to make informed and effective business decisions. You'll learn:

- the hotlist of opportunities and risks for 2014-2015;
- the export outlook for your industry sector;
- specific opportunities at the provincial level;
- tips to succeed in the global marketplace.

For dates and cities, please visit the event web site:

<http://www.edc.ca/EN/LTETour/Pages/default.aspx?HP=HP-RB-2-F>

● Canada-Korea Free Trade Agreement (CKFTA)

This landmark agreement constitutes Canada's first free trade agreement in the Asia-Pacific region and will provide new access for Canadian businesses and workers to the world's 15th-largest economy and the fourth-largest in Asia. In fact, the Canada-Korea Free Trade Agreement is projected to create thousands of jobs for hardworking Canadians by boosting Canada's economy by \$1.7 billion and increase Canadian exports to South Korea by 32 percent.

Visit the following web site for further details and get access to the related links: <http://www.international.gc.ca/trade-agreements-accords-commerciaux/agr-acc/korea-coree/index.aspx?lang=eng>

Order Form

On the form below, please indicate the documents that you wish to receive, and we will forward them by mail as soon as possible. Please return this sheet by fax to: **Diane Chamard**, Agriculture and Agri-Food Canada at: **514-496-3966**. If you would like additional information prior to ordering, please call: **514-315-6172 or 514-315-6179**

- ☐ Agriculture & Agri-Food Canada – 3 new economic reports;
- ☐ Agri-Food Sector Profile - Dominican Republic;
- ☐ Country Profile - Consumers in Japan;
- ☐ Private Label Trends - Packaged Food in Japan;
- ☐ The Hispanic-American Consumer Behaviour, Attitudes and Perceptions Toward Food Products;
- ☐ Modern Grocery Retailing in the United States;
- ☐ Répertoire 2014 des acheteurs alimentaires

Name: _____

Company: _____

Address: _____

Postal Code: _____

Phone Number: _____

E-mail address: _____

Fax Number (If applicable): _____

Please indicate below if you would like to modify your subscription

- ☐ Please remove the following e-mail(s) from the distribution list:

- ☐ please add the following e-mail(s) to the distribution list:

Quebec Regional Office

Name Scott Patterson

Acting Regional Director

Tel: 514-315-6171

Email: scott.patterson2@agr.gc.ca

Name Annie Dubé

Analyst, Agriculture & Agri-Food Sector

Tel: 514-315-6180

Email: annie.dube@agr.gc.ca

Name Sonia Vieira

Analyst, Agriculture & Agri-Food Sector

Tel: 514-315-6184

Email: sonia.vieira@agr.gc.ca

Name Marie-Claude Massicotte

Analyst, Agriculture & Agri-Food Sector

Tel: 514-315-6181

Email: marie-claude.massicotte@agr.gc.ca

Name Roger Riverin

Analyst, Agriculture & Agri-Food Sector

Tel: 514-315-6183

Email: roger.riverin@agr.gc.ca

Name Éric Larivière - Senior Economist

Acting Regional Deputy Director

Tel: 514-315-6176

Email: eric.lariviere@agr.gc.ca

Name Diane Chamard

Information and Coordination Officer

Tel: 514-315-6172

Email: diane.chamard@agr.gc.ca

Name Martin Lebrun

Markets Information Officer

Tel: 514-315-6179

Email: martin.lebrun@agr.gc.ca

Name Sohrab Oshidar

Analyst, Agriculture & Agri-Food Sector

Tel: 514-315-6177

Email: sohrab.oshidar@agr.gc.ca

Name Tommy Couture

Economist

Tel: 514-315-6175

Email: tommy.couture@agr.gc.ca

DID YOU KNOW?

According to the latest Agriculture Census from Statistics Canada in 2011, the average age of farmers in Canada is now 54, an increase of 7 years in 20 years. In Quebec, the farmers age 55 and older own 48.8% of farms. Amongst all Canadian provinces Quebec has the lowest percentage. For example, in British Columbia it reaches 61.6%. The aging of the farming profession plays an important role for the next generation. Only 9.9% of Canadian farms have a farmer-owner under 40 years of age, in other words, one in ten.

Source: article, *La Terre de chez nous*

