

Exporter

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SEPTEMBER Street Smart focuses on retail: private label, as well as health and wellness products

The upcoming tabletop event offers Ontario suppliers face-to-face meetings with key US buyers

Ready to tap into the lucrative US retail market? Plan to attend OFEX's next Street Smart session September 24-25, 2007, which will focus on private label, as well as health, wellness and organic products. "We covered the same categories at last year's event which was well received by retailers and suppliers; that's why we're



running it again," says Murray Howatson, OFEX's US geographic specialist. "With the aging population and people's awareness of their health, there's been a real push for those categories from retailers across the US. The feeling now is that these categories aren't a fad—they're here to stay—and being aggressive in getting these products out is a way

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ONTARIO Food Exports (OFEX) Trade Events

Increase your export potential by participating in an OFEX trade-related event. Our seminars, incoming and outgoing missions and international trade show participation are all geared to developing and maximizing export opportunities for Ontario companies. Through them, we can help you generate export sales, get in-market exposure, meet buyers face-to-face and gather first-hand information about export markets. If any of these events fit your strategies, contact your client account officer for further details on how your company may participate (see the contact list on page 7).



Incoming Missions

Street Smart

September 24-25, 2007

Ontario Food Export's popular Street Smart returns with a focus on the US private label as well as health and wellness (including organics) market.

The TableTop will provide qualified Ontario exporters with the opportunity to showcase their products to US retail representatives.

To learn more about this robust exporting opportunity contact your client account officer.



Outgoing Missions/ International Trade Shows



Alimentaria Mexico

June 5-7, 2007

OFEX's federal partner, Agriculture & Agri-Food Canada, is organizing the Canadian Pavilion for Canadian food and beverage exporters at Alimentaria Mexico in Mexico City. This premier trade show provides a solid opportunity to expand export sales into Mexico as Ontario food and beverage export sales to Mexico continue to grow year on year, especially value-added,

consumer-oriented products. The Canadian Pavilion will feature an open plan, thereby providing outstanding exposure and a reduction in the price of booth space.

Information and application forms may be found at http://ats.agr.ca/events/4089_e.htm or contact Diana Campbell.

PROFIT in the US (Retail Bus Tour)

June 13-14, 2007

Seats are selling quickly for this unique event! Join us for a two-day in-market trip to five major US markets! Participants will ride a motor coach to tour many retail food outlets in Buffalo, NY, Erie, PA, Cleveland, OH, Toledo, OH and Detroit, MI; gaining valuable market intelligence. Planned tours will feature many smaller independent retailers (e.g. The Anderson's Marketplace in Toledo), as well as larger national and regional retail chains such as Wegman's, Wild Oats, and Giant Eagle. The two-day trip will include an overnight stay in Cleveland.

Our previous market trips to Buffalo and Detroit were a complete success. This is a great program for graduates of our PROFIT program and others keen on nearby US markets. Contact your client account officer for more information. Register early to ensure a seat on the bus!



Food Expo in Hong Kong

August 16-20, 2007

In cooperation with other federal and provincial organizations, OFEX is organizing a dynamic Canadian Pavilion at this unique five-day, major food fair for food lovers (consumers and trade). This is the perfect venue to showcase new products to consumers and to prove the marketability of your products to trade representatives. Visit the web site (www.hkfoodexpo.com) for more information. Space in the Canadian Pavilion is limited. Contact Amos Tin, geographic specialist, to learn more about this unique avenue into the Hong Kong market.



OFEX'S Communications Supervisor



Dean Post

In his role as OFEX's Communications Supervisor, Dean Post is always working to help Ontario suppliers succeed at exporting. Post oversees communications, market research and events, working with sector and geographic officers to deliver quality programs for Ontario companies, such as Street Smart and the PROFIT programs, including PROFIT Plus and PROFIT in the US.

Staying on top of the latest exporting issues is all in a day's work for Post. "I spend a lot of time examining border issues and communicating them to the food industry in Ontario to make sure we can meet the ever-changing demands," he says. To stay on the

cutting edge of global exporting developments and opportunities, Post networks with government representatives, such as the FDA, US Customs and Border Protection and federal colleagues at Agriculture Canada along with association and service providers, including customs brokers and transportation companies.

Aside from his 10 years work experience at the Ontario Ministry of Agriculture, Food and Rural Affairs, Post's formal background in education helped prepare him for his role today. "Through my role in communications, and delivering OFEX programs like PROFIT, I'm still helping educate people so they can learn more about exporting."

Regulatory update: FDA reminder on permitting products into the US

The US FDA (Food and Drug Administration) recently released a reminder of the importance of getting their release before delivering imported products to US customers. When an FDA-regulated product is imported into the US, the US CBP (Customs and Border Protection) conditionally releases it, under a bond, allowing the importer to take possession of the product. However, the importer must hold the product intact until FDA makes a final decision on admissibility, which is usually based on the entry information provided to CBP by the exporter's broker. Once all of the pertinent information is reviewed, FDA will decide whether to grant permission for your products to proceed into domestic commerce (a "may proceed"); to allow the products to proceed if there are minor violations (a "release with comment"); or to "detain" your products. If your product is detained, you may request permission to correct the violation or offer evidence to overcome the appearance of a violation. However, if that evidence is not adequate, FDA may "refuse" admission of your product into the US.

To ensure that your product makes it over the border without any hitches or hold-ups, you need to be aware of the FDA requirements and comply with them. "Much of the initial investment done by exporters to ensure their products are wholesome

and safe, labeled properly and documented accurately will pay off later," says customs broker Nancy Dempsey, senior manager, regulatory operations for FedEx Trade Networks & Transport Brokerage, Inc. She recommends working with a customs broker who can establish expectations for your exports and ensure the paperwork is properly completed in advance.

Working with a paperless broker can ensure a smooth crossing through the border. The FDA allows customs brokers with a high degree of accuracy and proficiency to electronically file admissibility information through Automated Broker Interface (ABI). That allows for processing at any time for any port of entry, whether FDA has presence or not. "Electronic filing of admissibility information allows the carrier to proceed, whereas manual processing requires a driver to stop at the border point for paper processing," says Dempsey.

What do you do if your shipment is detained? "Because the transmission of Prior Notice occurs using the ABI or the electronic submission of admissibility information, the broker can look at the electronic transmission history and provide additional guidance on how you should proceed," says Dempsey. "It's critical for exporters and importers to recognize they may have a release from US CBP, but the goods have not been released by FDA for distribution." Once FDA has issued a release you can distribute your shipment freely.





TREND Watch

THINKING *outside the supermarket*

US customers are making the switch from supermarkets to mass merchandisers, big box stores and other alternative formats

Price and value are big priorities for US customers today. So retail formats that provide good products at a low price, such as warehouse clubs, like Costco, Sam's Club; mass merchandisers including Wal-Mart, Target and Meijer; and limited assortment stores, like Aldi, are experiencing a boom in the US while customers seem slightly less focused strictly on the convenience of supermarket shopping. "Ontario suppliers need to recognize the opportunities with these alternative formats," says Joe Senft, OFEX's advisor for the eastern US. "When the traditional Ontario supplier looks at the US market, he only thinks of US supermarkets and doesn't think of the other segments. They can capitalize on this trend toward the alternatives."

Alternative options

Alternative segments of the retail market are growing at a faster pace nationally than supermarkets. "Supermarket growth is at three per cent while these alternative markets are growing at eight to 10%," says Senft. The reason for the shift in some areas, such as the mid-west, is fairly obvious. Three things are affecting the way the average customer is shopping, explains Rick Tuma, OFEX's trade advisor for the central US. "The gas company hiked its prices on January 1, 2007, costing the average customer more, in February; Commonwealth Edison (ComEd), the main electrical supplier, raised its prices, which has increased people's electrical bills by about 22%; and rollercoaster fuel prices are fluctuating from \$2.30/gallon one month to \$3.50/gallon the next.



These are three factors that people have no control over and the first thing that gets cut when times are tight is grocery spending," says Tuma.

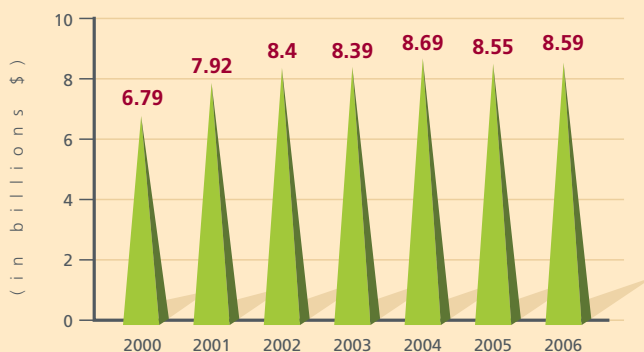
Seizing the opportunity

While customers spending less on groceries may sound like bad news, it could present an opportunity for export-ready Ontario suppliers. "I've been talking to store managers and big box, mass merchandise and limited assortment stores who are telling me that their sales at the first of the month and then mid-month have been phenomenal for the last three months," says Tuma. "These stores are seeing new customers who aren't their typical shoppers coming in to stock up on staples once or twice a month. These are households that used to shop weekly at supermarkets that are now looking for ways of saving money while they adjust to these fuel increases."

Aside from targeting alternative formats, Ontario suppliers may also want to consider opportunities in private label which is experiencing 10% growth in the US in 2007. "Historically, in times of minor recession, private label always takes off; it always does double-digit growth," says Tuma. "In the US, our private label products are 15% cheaper than national brand standards so they appeal to customers looking for good products that are lower priced." Alternative packaging may also offer an opportunity. "Customers shopping after payday at the start of the month might buy a five-pound package of a product instead of a one-pound packet and then use it for five different meals."

Ontario suppliers interested in these alternative market segments in the US should contact their client account officer who can help guide them with their approach, in researching the market opportunities and what they need to consider in terms of merchandise.

ONTARIO AGRI-FOOD EXPORTS



Growing Ontario exports

Agri-food export statistics for the fourth quarter of 2006 paint a strong picture for Ontario exports. Ontario agri-food exports totalled \$8.6 billion in 2006, up 26% from \$6.8 billion in 2000.

Consumer-oriented products (i.e. higher value-added products), which comprised 75% of this figure at \$6.41 billion, are the strength of Ontario's food processing industry. "Grain Products," which include bread, cookies, pastry, biscuits, mixes and dough, pre-cooked cereals and pasta, were the leading commodity group with about 20% of Ontario's total agri-food exports in 2006. Other top Ontario agri-food export categories include: meats, including poultry and pet food; fresh & processed vegetables; beverages (ie: fruit/vegetable juices, water, beer/wine, distilled spirits and other alcoholic beverages); food ingredients and confectionery.

Since January 1, 2006, 81% of Ontario agri-food exports were shipped to the United States. Other top export markets are Asia, including Japan, Europe and Mexico.

PROFIT UPDATE:

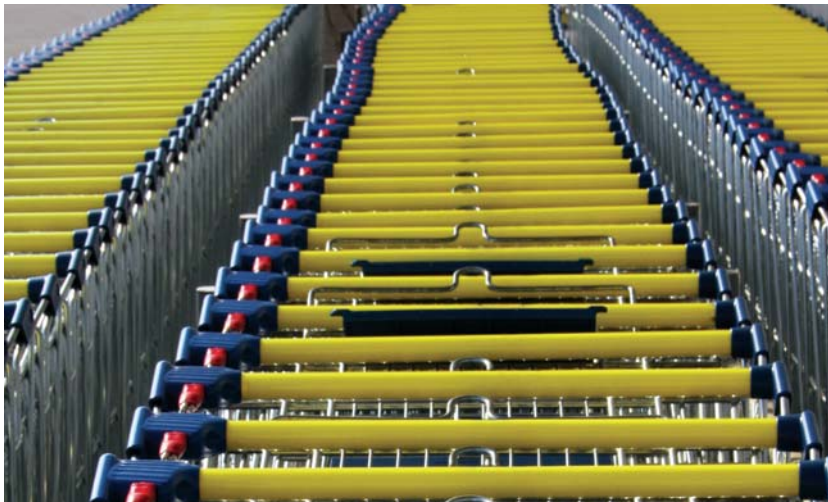
Cashing in on market tours

Store tours at US retailers are an essential part of export business development for Ontario suppliers

For Ontario suppliers planning to export to US retailers, the options are endless: the US has a large number of national and regional retail chains, each with their own market niche and unique approach to selling products. While conducting research on food retailers is helpful for understanding their market position, the store visit gives the supplier a better understanding of whether or not their product is a fit for the store or market. Ultimately that enables the supplier to spend their time and energy courting stores and markets that are suited to its product.

while another store may place it in a completely different one," says Senft.

Store visits also assist Ontario retailers with pricing their product, since prices vary depending on the store location. "A store in a rural area may price their product 20-25% higher than those found in a large urban centre," says Rick Tuma, OFEX's Central US trade advisor. Store tours can also give Ontario companies a chance to research competitors' products. "It's a great idea for the supplier to purchase products in the market they're visiting in order to know who they will be competing against," says Tuma.



The aisle-by-aisle approach

By visiting stores in-market, suppliers can undertake practical market research, which can be used when pitching a potential buyer. Through a store visit, the supplier can find out the range of products a retailer carries, from upscale to discount, ethnic foods to basic grocery items. It also gives Ontario suppliers a heads-up on regional merchandising and consumer tastes: Chicago area grocery stores, for example, carry much more pizza and far less fish than stores in the Greater Toronto Area.

"Store visits provide the supplier with a sense of how well the store is set-up, the quality of the operation, the cleanliness of the store and the featured merchandise items," says Joe Senft, OFEX trade advisor for the eastern US. "The set-up of a store can prove to be important, as one store may place your product in one section

Get on board

OFEX's PROFIT in the US (June 13-14) offers Ontario suppliers a unique opportunity to tour US retailers. "Store tours have been an integral part of the PROFIT program for the past 25 years," says Tuma. "For this upcoming PROFIT in the US trip we are focusing exclusively on retail tours." The trip provides potential Ontario exporters with some of the practical knowledge they need when making a successful pitch to US food retail buyers. PROFIT in the US store tour of the Great Lakes region will cover four states and five markets in two days, including Buffalo and Detroit and stops in Erie, Pennsylvania, Cleveland and Toledo, Ohio. Visits are tentatively scheduled for smaller, more independent retailers such as The Anderson's Marketplace (Toledo, OH) and Papa Joe's (Detroit, MI) as well as larger national/regional

operations such as Wegmans, Wild Oats Markets, Giant Eagle and Trader Joe's among others. In addition, the trip will also include a tour of a specialty food distributor's operation in Cleveland, OH. See OFEX Trade Events, page 2, for more information.

Results of the Export Services Review

OFEX has completed its latest Export Services Review, collecting feedback on the job we're doing from Ontario companies. "We're getting favourable comments from clients who tell us that we're helping them increase exports," says OFEX manager Dermot Mark. "Large exporters tell us that bringing in foreign buyers to meet with them directly, through buyer missions and events like Street Smart, is the most important part of our program. Smaller exporters tell us that OFEX provides them with the tools they need to learn how to export."

The Export Services Review helps OFEX stay in tune with the issues affecting Ontario exporters. "We're hearing that it's easier to get products across the US border by truck than to ship samples, so we're going to consult with federal colleagues to see what can be done to assist clients in addressing this situation," says Mark. "We'd like to thank clients for their cooperation and input. It's essential for helping us design our programs so they remain relevant to Ontario exporters' needs."



IN GOOD COMPANY:

Rising to the exporting challenge

Working with a broker specializing in frozen foods helped this Ontario pierogie manufacturer find success south of the border



Innovation, good publicity and connections with the right brokers have all helped Supreme Pierogies make headway into the competitive US market. The company, founded by Joseph Wilk in his basement in 1991, manufactures and distributes 19 varieties of frozen pierogies at its two plants, which include a 10,000-square-foot HACCP-registered production plant in Mississauga, Ontario. The fully automated plant features the unique pierogie machine and dough machine designed by Wilk to mass-produce pierogies while maintaining the quality and taste of a traditional hand-made pierogie. "Usually if pierogie dough is soft and thin, it will open up when you boil it, but Wilk found a way to make thin dough that doesn't open," says Supreme sales manager Maciej Pasternak. "Competitors have tried to buy our unique machines from us."

Supreme Pierogies products, which include its number one seller, cheddar pierogies, and unique dessert flavours, including blueberry, are sold in mainstream Canadian supermarkets, including Sobey's, Longo's, IGA and Rabba. The newer brand, called JJ Wilk, which is pre-cooked and in a larger package, was created for busy families wanting to cut down on cooking time. Sales show the products are a hit. "We're growing everywhere in every market," says Pasternak. "We attended a big pierogie festival in the US with our biggest truck and we were sold out. The second year we went, people were looking for our booth." Supreme Pierogies also garnered good publicity when it

The company: Supreme Pierogies Inc.

The challenge: Break into the US market with a new product

How OFEX helped: OFEX trade officers in the US provided valuable market insights and connections with brokers

Words to grow by: "It's easier to enter the market with a broker," says Supreme's Sales Manager, Maciej Pasternak. "They know the buyers and can save you time and money getting you meetings with them."

made Frozen Food Age's ranking of the 10 best new products two year's ago. "They discovered our product at a small chain store and contacted us for samples," recalls Pasternak. "We were number eight on the list. It was great publicity."

Nonetheless getting their product in front

six months to get an appointment. The broker we worked with did it in a month. And if the buyer knows the broker, then they can deal with someone they've worked with before."

While the company works with a broker that specializes in frozen foods, Pasternak still attends most buyer meetings. "I have more



of US buyers was a challenge for the company initially. "We were told it would be easy for us to enter the market because our price was right and we had a good quality product," says Pasternak. "But the pierogie market is not big like the pizza market and there were already established pierogie companies in the US." Working with a US broker has helped the company make headway. "It's extremely difficult for a producer to go directly to a chain store or buyer," says Pasternak.

"Brokers know the market and they save a lot of time. I called on one chain store and it took

knowledge about the product than the broker so I'm there to answer questions about it."

Supreme Pierogies has tapped the huge private label market in the US, which makes up about 50% of the company's business there. "Private label is becoming more and more popular in the US and Ontario products have a good reputation," says Pasternak. "Sometimes it's easier to enter the private label market than promote your own brand in the new market."

From the get-go, Pasternak credits OFEX

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In Good Company...

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for helping the company's foray into exporting south of the border. "We contacted the US trade officers, Joe Senft and Rick Tuma and they were extremely helpful," says Pasternak. They had unbelievable information on certain markets and gave us an overview of the marketplace, which saved us time and money because we didn't have to go there or buy studies about it. They were also well connected locally so they guided us in finding a broker."

Attending OFEX exporting events, including tours of US supermarkets, and incoming buyer missions has also proved to be a good strategy for Supreme Pierogies. "The buyer missions are excellent for small companies like ours because you never get in front of these companies otherwise," says Pasternak. "I presented our product to representatives from Club Marketing and Wal-Mart Mexico. They tell you what they're looking for in advance and in one day you can meet with five different buyers. It's extremely cost effective; otherwise you'd spend months chasing buyers and then have to travel to present to them." The Wal-Mart meetings showed promise, too. "They were extremely interested and we've sent them samples," says Pasternak.

September Street Smart... —continued from page 1

for retailers to set themselves apart."

Seventy to 80 Ontario suppliers are expected to attend Street Smart, which kicks off with a presentation from US retailers, distributors and brokers on the 24th followed by a networking reception for retailers and suppliers.

Ontario companies get the opportunity to showcase their products during the TableTop session on September 25th. "It's a great opportunity for export-ready Ontario companies," says Howatson. "Ontario companies have been supplying these products for years and are a good source of supply for the US."

In addition to the larger retailers, such as Target, Meijer and Giant Eagle who are scheduled to attend, OFEX has also invited independent retailers and distributors from the Great Lakes and Southeastern regions. "For Ontario companies that aren't ready to supply large retailers, the independents give them an opportunity to get into the market and test their product in niche areas in the US," says Howatson.

To make the most of the opportunity that Street Smart affords, Ontario suppliers should come prepared. "You should prepare your table appropriately with sell sheets, pamphlets that provide health or wellness attributes of your products and samples of your products and packaging," suggests Howatson. "It would also be helpful to have information handy on other private label programs that you're currently supplying." Of course, the work doesn't stop there: after Street Smart, the ball is in the supplier's court to follow-up with potential buyers. "The Ontario companies that have been the most successful are the most persistent with follow-up," says Howatson. "There has to be a level of aggressiveness there—you need to continually go after the business and remind buyers about your great products."

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GROWING agri-food opportunities in the US Southeast

Population growth in southern states is good news for Ontario suppliers

The US Southeast is increasingly offering more opportunities for export-ready Ontario suppliers. Encompassing Florida, Georgia, North Carolina, South Carolina and Virginia, the Southeast region purchased \$483 million of agri-food products from Ontario companies in 2006. While it's smaller than Ontario's largest market, the US Northeast, the Southeastern states, may be the next logical market for Ontario products.

Having purchased \$249 million CDN of Ontario products last year, Georgia is the largest Southeastern market for Ontario suppliers, followed by Florida, which purchased \$125 million CDN. "Georgia is a fast-growing state—it's the New York of the south," says OFEX trade advisor for the eastern US, Joe Senft. "And Florida is really growing; there's more potential in Florida than Ontario companies realize."

"...Florida is really growing; there's more potential in Florida than Ontario companies realize."

The retail players

With the exploding population growth in the Southeastern US, supermarkets will be adding more stores and more units, says Senft. "This is where Wal-Mart supercentres are concentrating a lot of their efforts." While the

retail giant is the number one chain in some of the region's markets, however, Publix controls most of the grocery dollars in others, including Florida. In that market, Wal-Mart Supercentres is second followed by Winn-Dixie. Nonetheless, Wal-Mart's grip is increasing in South Florida, with its Miami market share up more than 5% to 12.65%, according to the Shelby Report. Other retail players in the Southeast US include Bi-Lo, Bruno's and Food Lion plus some independent operators such as Richard's Whole Foods.

Ethnic retailers are also thriving in some parts of the region, including South Florida, to cater to the local customers. "Stores like Publix and Winn Dixie and others are setting up exclusively Hispanic stores, to appeal to this segment of the marketplace," says Senft.

Connecting Southeast buyers and Ontario suppliers

To capitalize on the opportunities with Southeastern retailers, OFEX is continually working to connect them with the right Ontario suppliers. In May, OFEX hosted bakery buyers, Jane Pixley and Jim Graff from Publix Super Markets, which has close to 900 stores in the US Southeast and sales in excess of \$20 billion, representing a tremendous opportunity for Ontario suppliers. Sourcing private label and bakery products, the buyers met with potential Ontario bakery suppliers in one-on-one meetings that offered both parties a rare opportunity. "The mission was excellent," says Pixley. "It gave us an opportunity to ask questions unlike in a conventional set-up which is more social than doing business." Graff also appreciated the face-to-face format:

"It allowed us to focus and thoroughly review what the vendors have to offer."

The timing may be right for some Ontario bakery suppliers interested in private label bakery opportunities at Publix. "We have voids to fill and our production plants are at capacity because we're growing so big so we're looking for outside products from vendors," explains Graff. Both buyers were impressed with the Ontario suppliers: "They're very good," says Pixley. "It's hard to get a meeting with Publix and we would have never stumbled across them. The mission gave us better exposure to what's available from Ontario suppliers." For companies, such as Ontario's Prime Pastries, which presented to the Publix buyers, one-on-one meetings are invaluable. "It's a very convenient and efficient way to connect with the right buyers," says Tom Tan, Prime Pastries Sales & Marketing manager.

Tapping in to OFEX connections

"The US Southeast is a very good market for Ontario companies," says Senft. It's still close enough that it's a day and a half transit so it's still convenient to service these customers. A number of Ontario companies are already servicing southern markets. If you've got the right products, it's an excellent opportunity."

For more information on whether or not the US Southeast is a fit for your company's products, contact Senft who can help you decide which market segments to target, and for advice in appointing a broker or attending trade shows. "I can help you flesh out your visit with meetings with retailers and brokers." (See page 7 for Joe Senft's contact information.)



Market reports available

Learn more about the New York and Chicago markets through recent reports published by OFEX. Metro New York 'Specialty' Retail Sector Market Report offers an overview of the leading independent and mini-chain specialty food retailers, including a list of regional distributors that work in that market. The Chicagoland Private Label Report focuses on the opportunities provided by private label programs of leading mainstream food retailers and independents in Chicagoland. Contact your client account officer for a copy of these valuable reports.