Ontario Food Exports®

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Exporter

SIAL Canada 2011

The upcoming Toronto trade show offers access to international buyers

The SIAL Canada international trade show is coming to Toronto and will be held May 11-13, 2011 at the Metro Toronto Convention Centre. Since the organizers' decision to rotate the show between Toronto and Montreal biennially, this will be the first opportunity for many Ontario companies to visit and/or exhibit at this event. "We're very happy that we've been able to partner with the Canadian Food Exporters Association and the Alliance of Ontario Food Processors in organizing an Ontario, Canada pavilion at this first Toronto event," says Alan Crawley, Manager, OFEX. "This provides an opportunity

Buyers from around the world are expected to attend SIAL 2011.

for a number of Ontario companies to take advantage of the support available and to join us at the pavilion for next May."

The focus of SIAL Canada is on processed and value-added foods.

—Continued on page 2

ONTARIO Food Exports (OFEX) Trade Events

Increase your exporting 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

HEB Mexico, November/December 2010
Buyers from HEB Mexico are coming to Toronto to source private label products from Ontario food and beverage companies.

Heinan's, December 2010
Buyers from Heinan's are coming to Toronto to source private label products from Ontario food and beverage companies.

Trade Events

SIAL Toronto, May 2011
SIAL is coming to Toronto for the first time ever. This is a great opportunity for Ontario food and beverage companies to tap into an international audience. Funding is available on a first-come, first-serve basis for participation in an Ontario, Canada pavilion. Please contact Susan Powell at the Canadian Food Exporters Association (416-445-3747) for more information.

SIAL Canada 2011

—Continued from page 1

"Retail is the primary focus but there are also opportunities on the foodservice front," says Crawley. Buyers from around the world are expected to attend the event, which will also feature pavilions from other Canadian provinces. "Since its introduction in Montreal in 2001 the SIAL Canada team has demonstrated their ability to pull together a representation of the international food industry," says Crawley. "This is a great opportunity for Ontario's food industry to tap into that international audience."

Ontario companies who are already exporting may qualify to participate in the Ontario pavilion, which will feature a lounge where Ontario suppliers can meet face-to-face with interested buyers. "For a company looking to export around the world, SIAL is an excellent venue for meeting buyers without actually having to leave the country," says Susan Powell, president of the Canadian Food Exporters Association (CFEA).

Companies interested in more information about SIAL 2011 should speak with their OFEX sector officer and Susan Powell at the CFEA (416-445-3747) as soon as possible; there are a limited number of spaces available in the Ontario, Canada pavilion.

Profile

NEW roles for OFEX team members

Kiran Pandey

Amos Tin, OFEX's geographic specialist for Asia/ Pacific has accepted a three-year posting as Trade Commissioner, Agriculture and Food at the Canadian Trade Office in Taipei, Taiwan. In addition to his role as OFEX sector officer for Beverages, Confectionary and Protein, **Kiran Pandey** has taken on the role of OFEX's geographic specialist for Asia/Pacific, to assist Ontario suppliers in their exports to China, Japan, Hong Kong, Taiwan, Korea, Vietman and the Philippines. Pandey previously held this position during Amos Tin's absence in 2008. "During that time, I had the opportunity to work with suppliers of protein, confectionary and beverages to facilitate exports for them to the Asia/Pacific markets," says Pandey. "I have established networks and understand the requirements of these suppliers."

Originally from Nepal, Pandey has a Masters in Business Administration from the University of Hawaii and an undergraduate degree in food processing from the Ukraine, where he learned to speak Russian fluently. His previous experience includes market development work in Nepal, helping exporters with sales to Japan, the US, Germany and India. Prior to working with OFEX, Pandey took part in a government internship program at OMAFRA, working with the investment development unit. "I understand the Asian buyers and am happy to be assisting Ontario suppliers with their exporting endeavours to the Asian market."

REGULATORY Update

The Government is negotiating bilateral free trade agreements that help level the trading field for Ontario suppliers

Under Canada's Global Commerce Strategy, the Government of Canada has been aggressively pursuing more bilateral free trade agreements to advance Canada's trade interests and provide greater opportunities for Canadian exporters in markets that offer significant potential, including the European Union, Central America and the Caribbean Community, to name just a few. "All countries have been revisiting their strategies given that the go-around of negotiations on a multilateral agreement with the World Trade Organization has faltered since 2001," says Bobby Seeber, Senior Policy Advisor, Trade, with OMAFRA. "In the last couple of years there has been absolutely no movement and while there are still efforts to try to revive and move that forward, many countries, including the EU, Australia, the US and Japan have been very aggressive on the bilateral front. Canada has picked up on that trend and the Canadian government is pursuing more bilateral agreements."

OMAFRA's trade policy team has been working closely with the Ministry of Economic Development and Trade and federal negotiators to ensure that Ontario's interests are well-represented in these bilateral free trade agreements. "From a practical trade perspective we've at times looked on with some envy as the US has concluded in excess of 30 bilateral trade agreements that have provided their exporters with some advantages in established new and emerging markets in regions around the world," says Alan Crawley, Manager, OFEX. "Ontario exporters should be pleased with the willingness of their federal and provincial governments to work towards similar opportunities for our food products."

In July 2010, Canada reached a trade agreement with the European Free Trade Agreement (EFTA), which represents European countries outside of the EU (Iceland, Switzerland, Norway and Lichtenstein). Canada also concluded a bilateral agreement with Peru in August 2009. "Canadian negotiators managed some significant market access improvements in both cases," says Seeber. "For the EFTA, Canadian wheat, French fries and pet food are accepted duty free and processed products at lower tariffs. The Canada-Peru agreement eliminated tariffs for 99% of Canadian exports to Peru including wheat, barley and lentils and some boneless beef cuts."

Canada is currently scoping out potential free trade agreements with India, the Ukraine, Jordan and Morocco. "The most important recent initiative is the Canada-EU negotiations where there is a significant amount of activity and momentum and the expectation is that we would conclude an agreement next year," says Seeber. "The potential is for it to be broader in scope and perhaps even surpass the NAFTA agreement in terms of impact, so a lot of attention is being placed on developments as these negotiations move forward." Visit www.agr.gc.ca for updates on free trade negotiations.

TREND *Watch*

GROWTH in the specialty food market

Sales in specialty foods are increasing in spite of the recession

Sales in the US specialty foods and beverage market grew 2.7% in 2009, reaching over $63 billion, according to the National Association For the Specialty Food Trade, Inc. (NASFT). The NASFT defines specialty foods as “foods of premium quality that are often made by small or local manufacturers or have exotic or ethnic flavours”. The specialty food industry was affected by the recession, with new product introductions dropping 37%. However, tighter spending meant that specialty foods that represent economical meal choices were in demand. For example, sales of beans, grain and rice, and shelf-stable pasta, rose 30% in 2007. These findings were presented in The State of the Specialty Food Industry 2010, a report from the NASFT and Mintel International, a market research firm. “The data reveals an industry that continued to grow despite the economic challenges that confronted the US and the world last year,” said Ron Tanner, Vice President, Communications and Education for the NASFT. “This year, manufacturers of specialty food are working hard to maintain that momentum with new go-to-market strategies.”

The report identified big growth areas in chocolate, confectionary products, desserts, ice cream and alcoholic beverages. The top five categories of specialty foods that were most purchased last year were cheeses; condiments; frozen and refrigerated entrees, pizzas and convenience foods; chips, pretzels and snacks; and frozen and refrigerated meats, poultry and seafood. “These types of comfort foods are doing well,” says Rick Tuma, Central US Trade Advisor with OFEX. “Grocery store managers have discontinued thousands of items but those foods are still in demand.”

According to the report, yogurt and kefir is the fastest growing specialty food category with sales up 38.9% in 2009 to $830 million. The fastest emerging cuisines were Mediterranean, Latin and Indian. In the beverage category of specialty foods, which are experiencing rapid growth, soy soared in popularity as a beverage ingredient, which has been attributed to its versatility and status as a functional food. The NASFT predicts that, assuming that the health concerns of consumers continue products such as highly functional beverages, exotic ingredients with nutraceuticals and vitamin-fortified baked snacks could be future trends.

Market share

Specialty food accounts for 13.1% of all food sales at retail. Supermarkets are the primary source of specialty foods, with 74% of sales, however, sales in natural food stores grew 17.4% in 2008 from 2007. Specialty products are purchased by 138 million American consumers, with consumers ages 18 to 34 the most likely buyers. The average specialty food consumer spends $111 weekly on food. Sales to foodservice represented 20% of specialty industry food sales in 2009 or $12.75 billion.

THE results of the OFEX Client Services Review

OFEX would like to extend our thanks to the Ontario suppliers who participated in the 2010 OFEX Client Services Review of OFEX programs and services. Through a third party, OFEX conducted personal and telephone interviews to survey food processing companies across all revenue sizes and food sectors and held a discussion group with senior managers, surveying 101 companies, up from 82 for the 2007 review.“Without suppliers’ input we couldn’t continue to improve the services we provide,” says Dean Post, Supervisor, Communications, OFEX. “We were pleased to see the support from our clients in the comments they provided but we noticed some data indicating areas of opportunity and we’re looking at making changes to our program to address them.”

The review found that OFEX continues its tradition of providing practical export advisory services and sales contact programs that the Ontario food processing industry wants and needs. One of the key findings was that 86% of companies surveyed feel that exporting is important to the overall financial success of their company. The companies surveyed placed significant value on the direct counseling that they receive from OFEX staff and their participation in OFEX programs, including trade missions such as the Street Smart events.

OFEX has improved its client satisfaction ratings and scored well on providing a high level of service to Ontario companies. The overall satisfaction rating with OFEX was 4 out of 5, with the highest ratings for accessible and fair service; ease of finding the right OFEX person; and knowledgeable staff that are courteous and go the extra mile.

OFEX also demonstrated significant economic multiplier impact on both sales and employment. The review showed that OFEX contributed back a multiplier effect of more than 20 times its annual budget in the form of new export sales.

US Retailer Profile – Topco

Company history

Topco (www.topco.com) was formed during war time in 1944, as a small cooperative, called Food Cooperatives, Inc., to supply members with paper goods and dairy products. Some members of Food Cooperatives were also members of another cooperative called Top Frost Foods and by the early 1950s the two cooperatives merged into Topco Associates, Inc. as it is known today. In 2001, Topco and Shurfine International merged to form the present organization.

A privately-held cooperative, Topco is owned by more than 50 member companies, including Associated Grocers, Inc., Meijer, Schnuck Markets, Fresh Brands, Big Y Foods, and Giant Eagle. The company distributes more than 10,000 products such as canned and frozen foods, produce, flowers, paper goods, pet food, and health and beauty care items. Topco has 400 employees and sales in 2009 totaled $10.7 billion. Co-op members are located around the United States as well as in Mexico, Dominican Republic and Puerto Rico.

Private label products

In addition to providing in-store brands exclusive to some members, Topco distributes private label grocery products to retail, wholesale and foodservice accounts under such names as Food Club, Full Circle, World Classic Trading Company, Dining In, Shurfresh and Shurfine. The combined volume of Topco's member-owners in retail and foodservice produces advantages in price, quality and service. "We're a private label specialist helping our members develop private label programs, with procurement and packaging," says Chuck Harris, Director of Business Management, Topco.

Quality and service

Topco has a three-tier program with brands and products that are premium, with first label or national brand equivalents and an economy line. "We really span the entire gamut of product types but we're also very particular on the suppliers we use," says Harris. Products for Topco have very specific quality specifications dependent on the quality tier, and quality control at your plant is essential. "Suppliers must have SQF (safe quality foods) qualifications because with food safety we want to make sure we're procuring from suppliers that have the same ideals of high-quality, safe foods," says Harris, who gives Ontario suppliers high marks: "We procure products from around the world and our experience is that Ontario suppliers are excellent and the one thing that really stands out is the quality of the products we're procuring from there; there are a lot of specialized, premium items."

If you're selling to Topco, which represents companies ranging from relatively small retailers to retailers with multi-billion dollar annual revenues, you must consider pricing and your product mix: if you have only one item, the company will have to purchase a truckload but if you have four or five products that is most efficient for them. "With private label products, the more items a supplier has the easier it is to combine and make shipments that can be brought directly into our members bypassing any external warehouse," says Harris.

Innovation is also important for Topco. "We're really interested in innovation with the product, packaging and even the processing," says Harris. "We want to make sure we're staying on the cutting edge of trends with our products."

OFEX enjoys a strong working relationship with Topco. If you are interested in contacting Topco, please speak with your export marketing officer.

HOW the OFEX research team can help your business

For Ontario suppliers in search of information on trends in a particular market or sector, OFEX's research team is an invaluable resource. "We're able to respond to individual inquiries and can provide tailored research for their export needs," says Dean Post, Supervisor of Communications for OFEX, whose team includes Karen Edwards and their research associates. For example, OFEX can provide an overview of the US processed frozen food market including trends, the competitive landscape and sales category data or produce a global sugar confectionary report highlighting performance, competitive landscape and global opportunities. "Our capable team has access to databases and can do the research for you to assist with your sales and help you be better prepared," says Post.

The OFEX research team also produces reports, such as the recently published report on the casual dining industry in the US which is available for all OFEX clients. "A report on the Cruise Ship Industry resulted in $30,000 in new sales for an OFEX client," says Post. If you need some research into a market or category, OFEX's research team is available to help; contact your sector officer for more information.

IN Good Company:
A unique product finds success in the UK market

A strategic business plan, plant certification and a product with wide appeal have landed this Ontario fruit snack manufacturer key customers in the US and Europe

The company: Niagara Natural Fruit Snacks in St. Davids, Ontario

The challenge: Making headway into Europe and North America

How OFEX helped: The OFEX team provided invaluable input during the company's initial plant set-up to ensure its capacity for BRC certification and facilitated the connections to UK retail buyers, through OFEX's UK Retail Project

Words to grow by: "In almost all food products that are of any significance, you have to look at both your supply and your market as international because everyone else is," says Niagara Natural Fruit Snacks president John Boot. "If you don't think in those terms, you're missing out."

At the plant for the first production run for Morrison's. Joanne Elsdon, NPD Manager, Morrison's (left) and Suzanne Laverack, Buyer, Morrison's (right)

In just two years, start-up company Niagara Natural Fruit Snacks has achieved a remarkable feat: the newly established Ontario manufacturer has landed customers in the US and the UK within six months of becoming operational.

After selling his former business, Kettle Valley Dried Fruits in British Columbia and temporarily retiring for a few years, John Boot started Niagara Natural Fruit Snacks in St. Davids, Ontario in 2008 with the help of a Rural Economic Development Program (RED) grant from OMAFRA and assistance from OFEX's sister unit, BID (Business and Investment Development Unit). The company has been operational for one year producing its all-natural fruit snacks, including fruit bars and twists made from 100% fruit, which are sold to medium- to large-size grocery stores in Canada. "In the US and the UK we deal with grocers with 300 to 400 stores," says Boot. "We're not going after General Mills or the Wal-Marts of the world or we'd wind up working for one company and we're not interested in that. We like spreading our risks in different markets."

> "Without BRC certification for UK private label you won't get in the door."

With a business plan to co-pack and produce private label products and to export to the US and the UK, Boot set up the company with the premise of qualifying for a third-party audit. "We did ISO 9000 at our other company but we specifically chose BRC [British Retail Consortium] certification as opposed to the more well known SQF," says Boot. "The BRC certification was harder to get but a lot of European markets recognize it." It was a smart strategy since BRC certification is essential for exporting to the private label market in the UK, according to OFEX UK Trade Advisor, Nick Orledge, who is also a BRC auditor: "If you're going to do any private label for the UK or Europe, if you don't have BRC certification you won't get in the door," he says. "Often suppliers say they'll get BRC-certified when they get the business but retailers don't call until you have the certification."

As part of OFEX's UK Retail Project, an initiative begun three years ago to secure business for Ontario suppliers with top UK grocery retailers through incoming missions and assistance with BRC certification, Orledge surveyed the Niagara Natural Fruit Snacks plant site before it was up and running, advising the company about the production line and plant orientation. "It was the most unbelievable opportunity," says Orledge. "This company was a blank canvas so we were starting from day one and therefore all the complicated EU and UK requirements could be factored in when the factory was being set up and the new staff was being trained." (Orledge's role as

—continued on page 7

IN Good Company: A unique product...

—Continued from page 6

an independent BRC auditor, in addition to OFEX's UK Trade Advisor, is a bonus that Ontario suppliers are able to tap into.)

Orledge's input was invaluable to Niagara Natural Fruit Snacks. "Having him come in was very helpful," says Boot. By planning for BRC at the ground level, Niagara was able to get certification as fast as possible for a start-up company. "We had to have six months of production and data so they could verify that we could trace our products. We started production in November 2009 and the successful audit was completed in spring 2010." Retailers were immediately interested in Niagara's product offerings. The company landed its first export customers, Hannaford in the US, after an introduction through OFEX at a Street Smart event, and with the help of Orledge's efforts, Morrison's in the UK. They are now lining up business at a number of different chains across North America and Europe. "John had the picture perfect company for getting into the UK," says Diana Campbell, OFEX UK geographic officer. "He had a strong vision of where he wanted to go, a strong sales team and a unique product and he was price competitive and BRC-certified."

In addition to meeting UK standards, Boot also credits having a unique product for opening doors with foreign retailers. "There are so many products in Europe and there's no way you can compete on price or quality so you really need to know that what you're selling is of value and it's unique and that you have your pricing correct," says Boot. "We're one of only two companies in the world–and the other is my former company– that can do this style of product. So when we did samples for the chains in Europe and North America, we were so unique that they looked at us and they were interested."

Having the BRC certification meant the company could get down to business immediately. "We were in a good position to say 'we're structured to service you: we are BRC certified; have a state-of-the-art factory and nut-free certification' so it was kind of a no-brainer on their part. It's easier for them to make a decision when they can come to your plant and see you're ready."

> "OFEX is doing a great job. More Ontario business owners should take advantage of their help."

Boot continues to work with OFEX UK geographic specialist Diana Campbell to participate in incoming missions and other opportunities. "OFEX is doing a great job," he says. "More Ontario business owners should take advantage of their help."

Assistance from OFEX in breaking into the UK is available for qualified Ontario suppliers. And this company's experience shows that the UK is achievable, says Orledge. "If you get the BRC certification and your product is the right fit, then it will happen. Some Ontario suppliers are now starting to realize the BRC standard is critical for private label and they're doing it. We now have five or six more Ontario companies at a point where they are also close to listing in the UK."

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MARKET *Watch*

OPPORTUNITIES in the Middle East

Retail opportunities in private label, organics and gourmet products make the United Arab Emirates an exporting hot spot

The United Arab Emirates (UAE) presents a growing opportunity for export-ready Ontario suppliers. The region enjoys one of the highest per capita incomes in the world and the retail sector continues to grow and modernize. The U.A.E. depends heavily on imports to fill the gap between limited domestic food production and the demand from a growing population. 85 to 90% of the UAE food requirements are imports.

In April 2010, Alan Crawley, Manager, OFEX visited the Dubai market. "Within the Middle-East North Africa Region, the Gulf states, including Saudi Arabia represent the strongest opportunity for Ontario suppliers," says Crawley. "As is the case with all export markets, it certainly isn't the market for all products but there are trade channels worthy of some Ontario companies' consideration."

Crawley was surprised by the diversity in the UAE marketplace, which included a broad spectrum of often European-sourced processed foods. "They were typically branded products though I understand that in Saudi Arabia especially there is more of an opportunity for private label," he says. "The UAE and Dubai specifically also play a tremendous role in interregional trade and the secondary markets that exist that are serviced by Dubai-based traders." Crawley met with some of these traders in the Al Ras market which serves customers within the Gulf and across the region from Africa, including the Horn, all the way to central and south Asia. "The strength of the Al Ras traders lies in their capacity to pull together mixed loads often of off-brand products or control labels that provide a lower quality of smaller package size that then translates into a more reasonable retail price point for the end consumer," says Crawley. "For example, smaller jars of lower fat mayonnaise which are sold at prices such that their retail point in a small shop in Somalia might be the equivalent of a dollar a jar."

The retail market

Most growth in the UAE retail sector is occurring in large-sized stores, where consumers tend to conduct their primary shopping. Established retailers include Carrefour and Spinneys which operate modern to ultramodern retail outlets throughout the UAE and into the Middle-East North African market. "Those retailers can be accessed directly or through Dubai-based importers and distributors, many of whom enjoy a close working relationship with our colleagues at the Canadian consulate and the OFEX team," says Crawley.

Local agricultural production is limited in the UAE and includes chicken, eggs, dairy products and some vegetables. Locally processed food products are also limited and most competitive in the categories of snack food, juices, poultry, bottled water, dairy products and some confectionary items.

Demand for private label is growing with several retailers and food importers developing their own brand names and sourcing products from a variety of locations. "There are different niches and in Saudi Arabia, private label is a substantial business," says Athar Shah, OFEX investment and trade consultant who has 15 years of experience working in Dubai in the private sector in food processing for a multinational and as a general manager of sales and marketing. "In the UAE there are good opportunities in organics and gourmet high-end products, such as chocolate, for the high-end market of ex-pats and Westerners in the region. There's a very good market for those products in that region."

The competition

Food suppliers from around the globe aggressively compete for market share in the UAE. European Union and Asian products pose the greatest competition and both hold a proximity advantage which results in lower freight costs. "India is selling about $16 billion USD annually in the region; they sell food and ingredients so they're a big partner and they're on the cheaper end," says Shah. Australia, Brazil and France are also active in that region. "Most of the chicken is imported from Brazil or France," says Shah. "Country-wise, Brazil is big competition for us because of the distance—the freight charges are going to be almost the same sending from Brazil, the US or Canada."

"...the Gulf states, including Saudi Arabia represent the strongest opportunity for Ontario suppliers."

The Gulfood show

Ontario suppliers who are seriously interested in exporting to the UAE market should consider attending Gulfood, the largest and most important food trade show in the Middle East which attracts trade visitors from around the region. "It's a good idea to go and exhibit or walk through the show to see the trends and players and what the market is like," says Shah. Gulfood will be held in Dubai from February 27 to March 2, 2011. Last year, approximately 50,000 visitors attended the event. "All of the business leaders of the region attend," says Shah.

While the Canadian Food Exporters Association section at the Gulfood show is currently sold out, there is a waiting list for experienced exporters. "We're also offering a walking program through Gulfood which is another way for companies to get a chance to see it," says Susan Powell, president of the Canadian Food Exporters Association. The walking program offers entry into the show, pre-show market briefing material, a seminar with an overview of the Middle East and an invitation to a networking reception of buyers.

Ontario companies interested in more information about exporting to the Middle East, the Gulfood show or trade missions with companies from the region, should contact their OFEX sector officer; OFEX Trade and Investment Consultant Athar Shah (519-826-3140; Athar.Shah@ontario.ca); or Susan Powell (416-445-3747).

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