Diversifying Markets Update on China & Mexico

POGA AGM Report

December 6, 2018 - Saskatoon, SK





MEXICO

Online Campaign

New recipes ranged from oat honey bread to tamales with sweet potatoes, a green smoothie, paella, profiteroles, ravioli, waffles, crunchy shrimp tacos, spicy beef empanadas, and more.



Highlights:

- 4th Annual Oat Recipe contest with 9 winning recipes:
 - 82 unique recipe submissions
 - Total of CAD \$1500 USD distributed
- Partnerships with 2 bloggers produced 6 recipes, which will continue to be posted into 2019:
 - Karla Hernandez, Pizca de Sabor
 - Gloria Zabalgoitia, Te La Pongo Facil
- World Diabetes Day partnership with La Federacion Mexicana de Diabetes (FMD):
 - Recipe booklet launched in November
 - Social media guide to celebrate World Diabetes Day
- In total, 24 new oat recipes in 2018



2018 Facebook Campaign Results

Jan 1, 2018 - Nov 21, 2018

- 22,892 new fans in 2018
- Facebook followers increased to a total of 203,194
- Average of 5,455 daily actions by Facebook users
- More than 3,429 Facebook users taking actions each day regarding any of our content

Total Reach	28,997,760
Total Impressions	31,912,194
Total Clicks	1,396,011
Total Actions (shares, likes, comments, reactions)	1,800,289
People taking actions	1,114,584
Total Followers	203,194



2018 Website Results

- An average of 4,209 daily page views
- 2,427 sessions were started every day on the website, on average
- An average of 1,653 users
 visited the website every day

Total sessions	800,949
New users	523,593
Total page views	1,389,009
Average # of pages per session	1.73
Average session duration	1:10
% New sessions	79.6%
B ounce rate	73.47%

www.avenacanada.com



November Mission: Cooking Workshops

"Oats, a healthy choice for Mexican cuisine"







- November 8: Cooking workshop at Colegio Superior de Gastronomia (morning with patients, afternoon with nutritionists)
- 70 people trained using recipes from the booklet



November Mission: Media Event

Wijer es Mds Grands Root Prairie 100200 WEA 10000

«DOLCE ÁLTER EGO»: Avena, más allá del desayuno

TO NOVINEMBES, JOTA

GRIDA MET, GAR

F James

Diplomote on Prestricting

Promoting Line inverses the
basics oil gone subhease.

Promoting investment on
basics oil gone subhease

promoting investment on
basics oil gone subhease

promoting investment of
basics oil gone and basic

promoting investment oil

default you or getter oil

promoting the common oil

default you or getter oil

default you only oil

gone digit of oil

gone digit of oil size

gone digit of oil size



culmano organizado por la Asociación de Productores de Avena Canadiense (PO GA), la Embajada de Canadá y la Federación Mexicana de Diabetes. El objetivo fue moster los beneficios y la versatifidad de la avena como un alimento coadyuvante en la dieta recomendada a las personas que viven con esa enfermedad, aurque no exclusivamente para ellos,

Una porticia of Dia Nondidi Ciri is Diotrise e o riferezi attantaria de allinistración correcta con la propuesción de passa consistente in vive a seu ser es entre la resistante processor de la presentante y apertante y ape

incluso para mil, conocer de qué otras formas podemos usarlo dentro de la dieta familiar fue una grata sorpresa y un aprendicaje tan útil que —ni tanda ni perezosa – puse ya manos a la obra preparando mi para de perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi para del perezosa – puse ya manos a la obra preparando mi parando mi parando





es que, una gracia de este cereal es que **no contiene gluten**, por lo tanto, es de índice hipoglucérnico sijo, pero s**i "representa una fuente de carbohidratos, aminoácidos, vitaminas, minerales, fibras y**

De acustro con the equation on it is wrong por it in presentants de a VIII, il consum de a vivine, entre desta bereficiors, require a l'indication quales a rivorier la moisse y a devinance de si in clienter in require a devinance de l'indication production que a rivorier de l'indication que a rivorier de l'indication que a rivorier de rivorieres les consortius que a rivoriere de rivorieres la consortiu propriere la consortiu production que a rivoriere de rivorieres la consortiu proprieres la consortiu proprieres la consortiu production que a rivoriere de rivoriere s'entre de a rivoriere la rivoriere de antique a rivoriere de antique a

De la offerta due suprascar y distinctiva per o man passo sastato de concerno que suma sabor, textura y nutrición, un trío dificil de conseguir.

Vayan al incentario para experimentar en casa cualquiare de las 10 deliciosas expoinces. Ademais de ser "un siado formisada per para la gente com distante, proque ayuda e mejorar el centrel de arcicar de la sanger," la sevena también "centime vitamina Bi 1, que fortalece el sistema nervisos, es anticiosátens, tiem propiedades humententes para la piel punde ayudar a controlar el presió Una taxa de sevena contiene adela 100 calorias. Curre que nos referencios a las hojuedas naturales sin micros administrativos.

como a mis in me importa saber de ponde venen los alimentos que consumo, es bueno saber que Canad es el principel productor y proveedor de avena para México y el mundo, cuyos granos "cumplen con las más estrictas medidas sobrie la salud y el ambiente".

Creo que la avena es una forma deliciosa de empezar o terminar el día. Es cosa de experimentar y

https://bit.ly/2RYL58y



Presidente de POGA. "La avena no contiene gluten y es una fuente de carbohidratos, aminoácidos, vitaminas, minerales, fibras y proteínas". Es importante que la gente conozza las muchas maneras de incluir avena en su dieta para obtener sus beneficios. La avena puede ser cocida y homead



November 9: 14 journalists

- + Recipe contest winners
- + Canadian Embassy
- + Grupo Vida

Media	Media
Crónicas del Sabor	Aqua Alta Producciones
Periódico Reforma	Diabetes Hoy
Medicina Digital	Periódico El Universal
Mujer es Mas – blog	El blog de Yes
Revista Cocina Fácil	Animal Gourmet
Periódico La Crónica	The Markethink
Caprichos y Antojos	Cocina Vital



Articles

- https://www.debate.com.mx/salud/alimentos-diabeticos-avena-dia-de-diabetes-20181114-0059.html
- http://www.eluniversal.com.mx/menu/que-comer-si-tienes-diabetes-segun-tuedad
- http://mujeresmas.mx/2018/11/16/dolce-alter-ego-avena-mas-alla-deldesayuno/
- https://acquaaltaproduccionesdotcom.wordpress.com/2018/11/12/avena-un-ingrediente-saludable-por-definicion/
- http://www.restaurantesdemexico.com.mx/4906/Reportaje_Avena_Un_Ingrediente_Saludable_Por_Definicion_html



9

November Mission: FMD Fair and Booth







November II: FMD fair

Avena Canadiense booth at Plaza Tlaxcoaque, Mexico City

900 visitors to the booth











November Mission: World Diabetes Day



November 14: Campaign on Facebook Theme Diabetes and Family

Posts

"Diabetes concerns every family"

EL CUIDADO DE LA DIABETES

también es responsabilidad de la familia

¿PUEDES PREVENIRLA EN LA TUYA?









www.worlddiabetesday.org/prevent #WDD2018





Partnership with Bloggers









- February 2018:
 - Leticia Jimenez of the blog Criando Creando (10,00 followers on Twitter;
 33,340 Facebook followers) yogurt popsicles with oats and cranberries
 - Pilar Guzman of La Cocina Mexicana de Pily (13,500 Facebook followers), who created a recipe for a winter soup with oats and jitomate.
- September-November 2018: Karla Hernandez of Pizca de Sabor (1,218,212 Facebook followers; 58,300 Instagram followers)
 - September: Oat waffles with matcha green tea
 - October: Gluten-free oat & seed crackers
 - November: Mocha crepes with strawberries
- December 2018 to Februry 2019: Gloria Zabalgoitia of Te La Pongo Facil (weekly radio program Vamos a Cocinar). Cross-promotion via her radio program, Vamos a Cocinar (Let's Get Cooking).

All recipes are posted on www.avenacanada.com and on the @avena.canadiense facebook page.



Great News...

- In 2018 Canada exported more oats than ever to Mexico,
- 2018 exports so far almost tripled 2017 results
- Canadian oats have now 95% of market share
- Australian oats dropped down from 56% to less than 1%



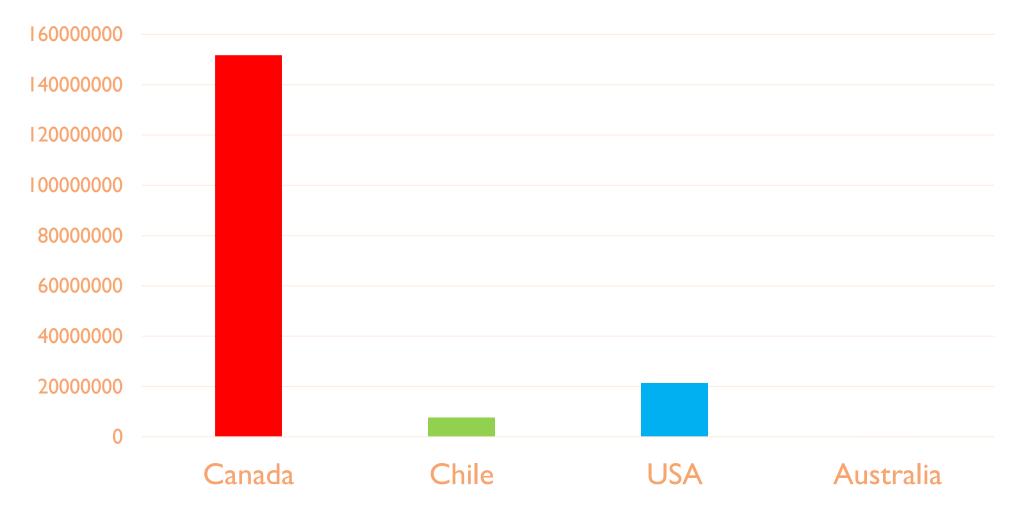
(13

Imports for HSC Codes

2017 - 2018					
Country/Code	1004.90.99 Oats other than Seed	I 103.19.01 Groats and Meals of Oats and pellets of Oats	1104.12.01 Oat Flakes and Rolled Oats	1104.22.01 Worked Grain of Oats	Total per year
Canada 2017	2,746,853	1,390,730	2,045,177	50,529,341	56,712,101
Canada 2018	114,699,053	1,218,175	1,443,848	34,366,817	151,727,893
TOTAL Imports	117,445,906	2,608,905	3,489,025	84,896,158	208,439,994



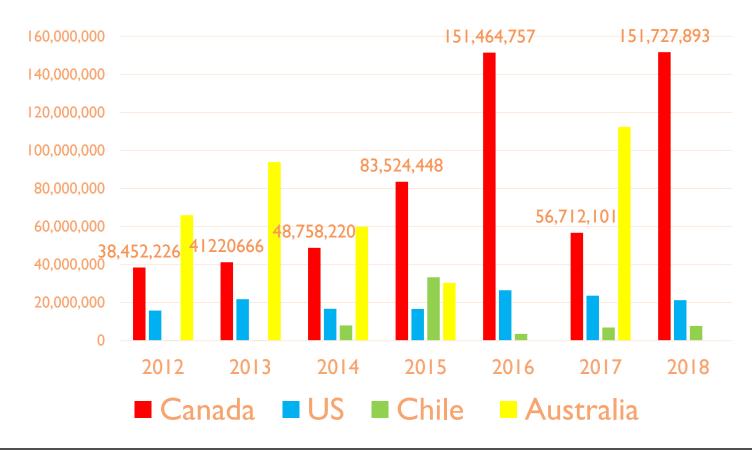
Imports Oats Mexico 2018 (September)







Imports Oats in Mexico (kgs) 2012-2018 (September)







Oats Market in China

- China is the second largest importer of oats globally.
- Australia largely dominates the market holding almost the 97% of the shares.
- Australian exports are enhanced by the geographical proximity and the existence of a free trade agreement.



(18

Agriculture and Agri-Food Canada Ministerial Trade Mission to China

"Fairs, tours, training seminars and matchmaking events"



- Nov 12-13 Shanghai: Food and Hotel China Expo
- November II Shenzen: Meeting with one of top 4 buyers
- Nov 14 Beijing: Chamber of Commerce of Foodstuffs and Native Produce (CFNA) and Chunbo Food Safety Laboratory
- Nov 15: Meetings with Oat suppliers
- Nov 16: Seminar at Canadian embassy and networking



Meetings with Importers

Jenneth
Johnson and
Ray Mazinke





With Grupo Vida

- President of Dongguan Rilong
- Wagamix Bio-Technology Co.
- Toatal/Grandview PRC Inc
- Presence of Grupo Vida



Leads Generated

Over the course of the week POGA interest for Canadian oat imports with 12 companies based in Beijing, Shenzhen, Shanghai and Dalian.

The delegates were also able to further develop their relationship with the Trade Commissioner Service and others at CFIA and AAFC.

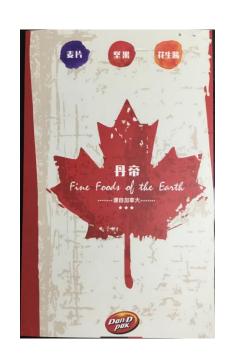




Canadians Present Selling Oats

- Cellstar International Group Limited
- China Certification and Inspection Corporation Canada Inc
- Dan-D Pak
- Grandview PRC Co.
- Greenfields Agriculture
- Litans International Corp Canada
- Ownace International Group Inc
- Prairie Bliss
- PurTree Natural Health Products
- Toatal



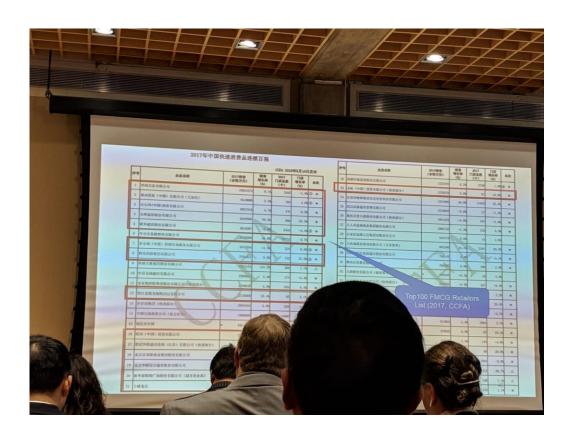






Canadian Oats in China

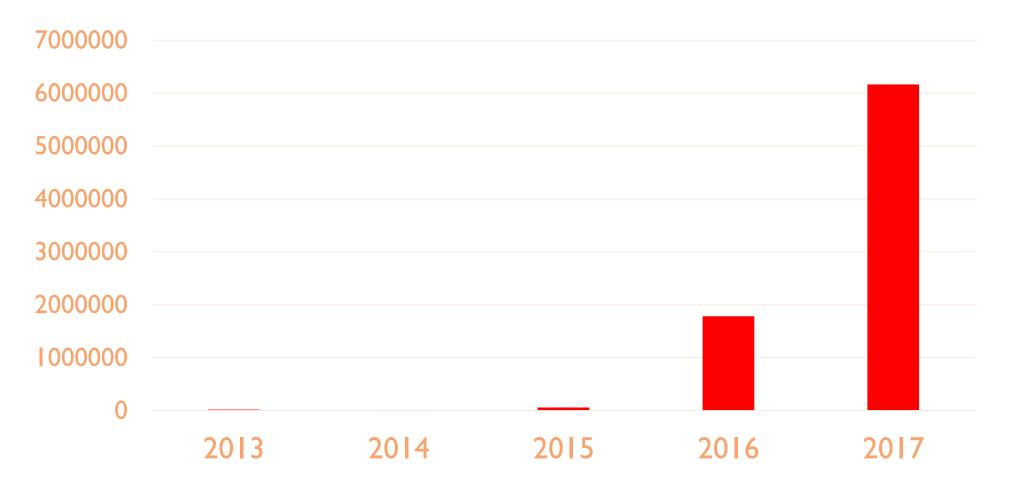
- Canadian oats have quickly gained market share in the last 5 years.
- In 2017 Canadian oat exports in China had a remarkable 345% increase compared to 2016
- Canada is already the second oat exporter to China after Australia





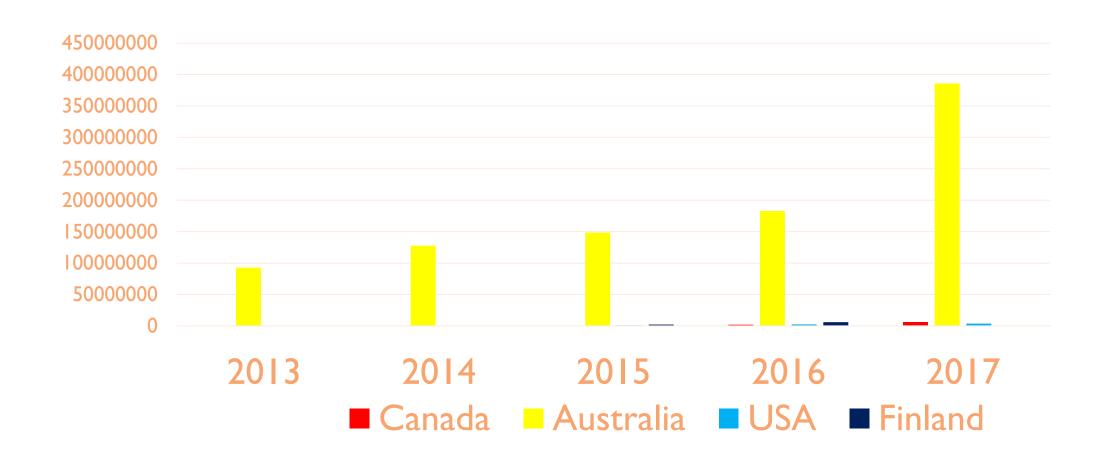
(23)

Canadian Exports of Oats (Kg) 2013-2017





Imports of Oats in China (Kg) 2013-2017





Platform T mall Double Eleven Day

56 seconds faster than

Double Eleven Day

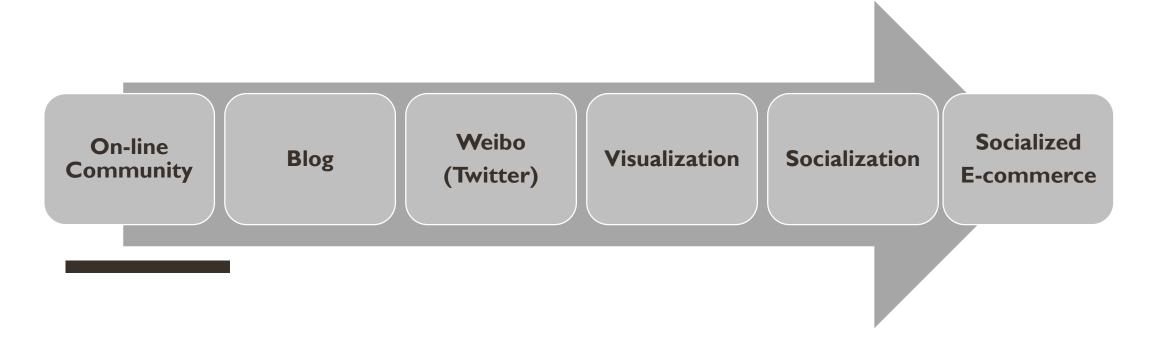
The Online Market Sales Volume

¥ 314.32 bil

Growth 23.8% Over 2017

00:02:05	10 bil	2017!
00:05:00	20 bil	I minute and 05 seconds faster than 2017!
00:08:45	30 bil	2 minutes and 41 seconds faster than 2017!
00:26:03	50 bil	<pre>14 minutes and 09 seconds faster than 2017 !</pre>
01:47:26	100 bil	7 hours 12 minutes and 48 seconds faster than 2017!
15:49:39	168 bil	8 hours 10 minutes and 21 seconds faster than 2017!

How Social Media Evolved Itself In China (2) Account Socialization



Source: Seabridge Marketing, China



China's New Retailors: 1.0 to 4.0







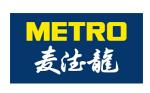




Carrefour, Metro 1995 Wal-Mart, Sam's Club 1996

Ole 2004

BHG 2007 Bravo 2013 Feiniu-RT-Mart 2014 Jingdong-Wal-Mart 2016 New Retailors 2017-2018







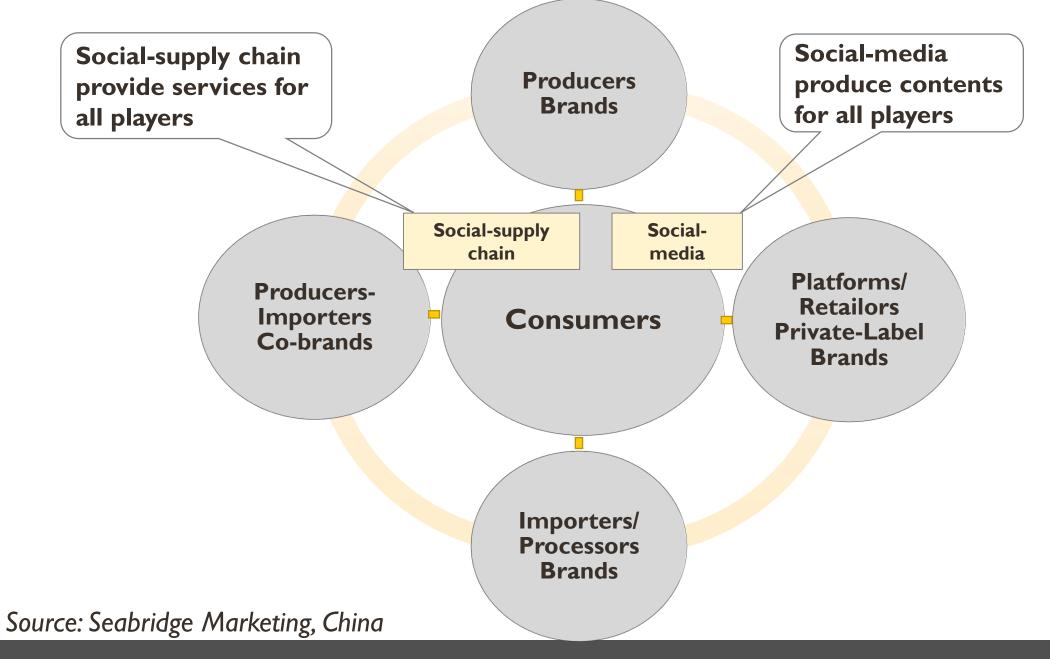


Source: Seabridge Marketing, China



How Content (contest, pictures, videos, story etc.) transport from producers to consumers, when products do so.

Professional agri-food social-media establish accounts on different platforms to attract target consumers Professional Agri-Agri-food Professional Agrifood importers, **Product Media Platforms** Consumers **Producers** food Social media **Platforms** processors, distributors **Agri-food** producers are also content Source: Seabridge Marketing, China producers





The world once simple, then complicated, now simple again.

Exhibitions Importers Wholesalers Processors Platforms Marketplaces Distributors Retailors **Restaurants Chain Hotel Chains**



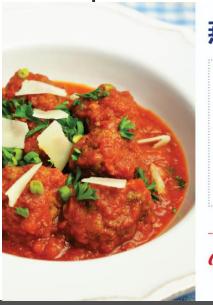


Online Campaign



Highlights:

- New logo
- Oats Canada website: oatscanada.cn, yanmaijianada.cn, 加拿大燕麦.cn
- Recipe cards



燕麦肉丸子



....

- 碎牛肉500克欧芹1枝,切碎
- 生鸡蛋1个
- 干辣椒2个
- ・ 帕玛森芝士2汤匙
- 新鲜西红柿500克,切碎0
- 按个人口味放盐和胡椒粉中等大小白洋葱1个,切碎
- 大蒜1瓣或大蒜粉1茶匙

烹饪方法:

在一个大碗里,将除了西红柿和辣椒以外的所有配料用手混合在一起。 混合少许盐在西红柿和辣椒里,放在一边。开始用手做肉丸,同时将烤箱加热至180°C。

将肉丸放入耐烤箱的锅中,放入烤箱。(不要忘记在锅底放几汤匙油,这样肉丸就不会粘了。)烤15分钟,直到它们开始变褐,然后倒入辣椒和西红柿的混合物。将温度降至160°C,继续烘烤30分钟,直至汤汁变稠并且肉丸完全烤熟。配上链米。





Canada





Update on Plant Health

- Quality time with the CFIA Asia team
- Briefing with the head of CFIA
- Opportunity to interact with Minister of Agriculture and remind him of oats prior to meeting with Minister Han
- No news from the Chinese Customs Department since September, other than some questions submitted to CFIA and answered.
- Next meeting being scheduled in December
- No request so far for an inbound mission. CFIA reminded that we are willing to help.



Analysis of Situation

- Market is being served by contracts for most part. By Q2 2019 are facing significant price hikes
- Processed products may be more competitive than ever before in the face of rumoured 50% price hikes on raw oats
- Small Canadian companies working on exports, need to build relations
- Phyto project moving slowly outreach to encourage demand and awareness of options internally is important
- The issue of duties needs to be addressed. 20% on processed products



Thank You

Robynne Anderson, President Emerging Ag Inc

robynne@emergingag.com



燕麦水果曲奇

- 碎牛肉500克
- 带皮大个有机苹果1个,擦碎
- 干蔓越莓1/2杯
- 燕麦片2杯
- 苋菜1/2杯
- 肉桂粉1茶匙
- 不加糖的苹果汁1/4杯
- 亚麻籽粉2茶匙
- 香草精1茶匙

烹饪方法:

制作方法:

烤箱预热至180°C (350°F)。 在大烤盘 上少许抹一遍油。

用叉子将香蕉压碎在一个中型碗中。

加入苹果, 然后是蓝莓, 燕麦片, 苋 菜,肉桂,亚麻籽,苹果汁和香草,和

您可以用心型切割器或用勺子做成面 团,将面团放在准备好的托盘上,用蘸 了面粉的叉子稍微压扁。

烤20至25分钟,直到变成褐色。

在盘中冷却5分钟,然后放在钢丝架上完 全冷却。









www.emergingag.com