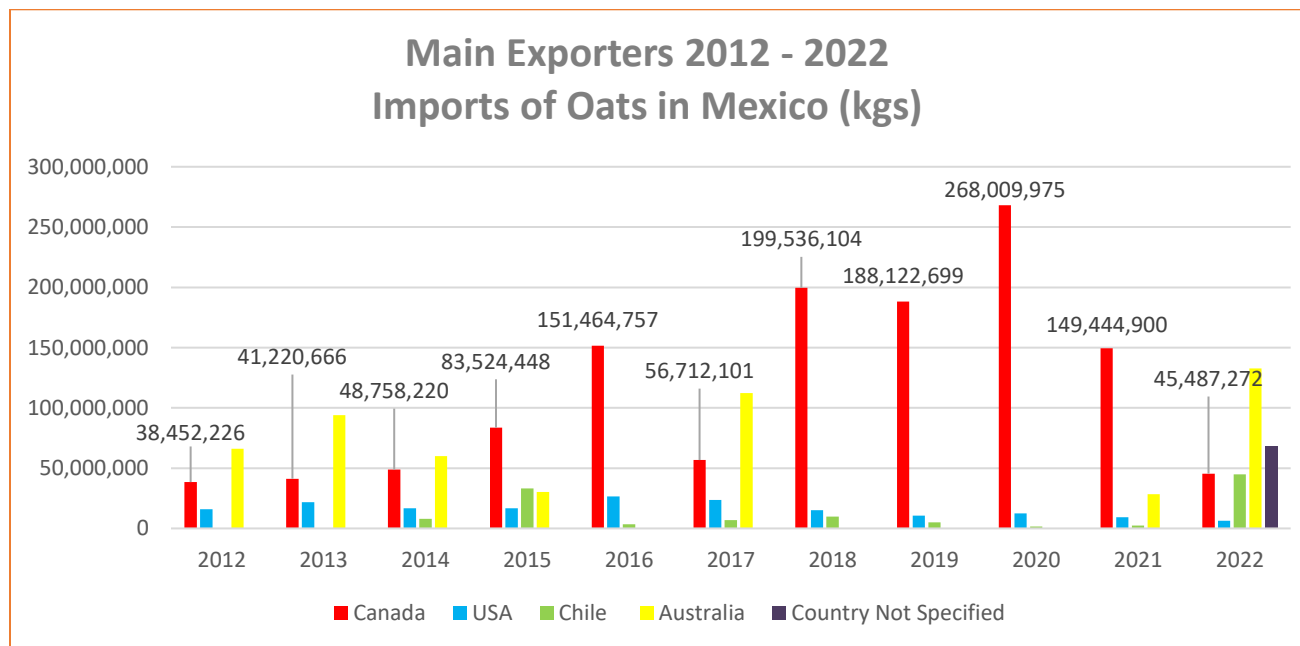


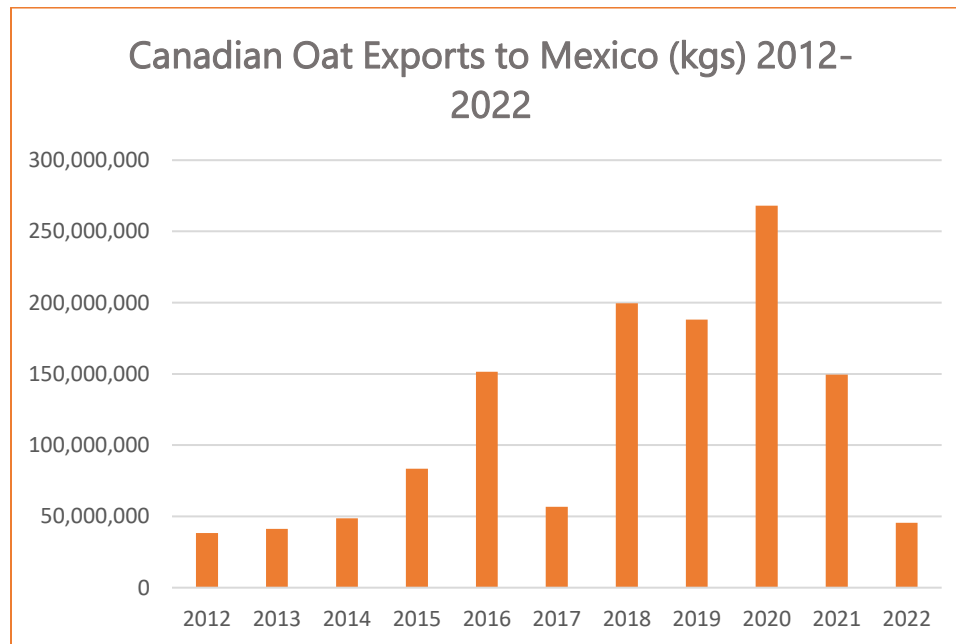
MEXICO

For 2022, the data was obtained from the Global Trade Tracker (GTT). We know the statistics from Mexico are no longer being reported in the same manner. The GTT numbers imply that only 1/3 of the total movement to Mexico is being reported by the Mexican government. Based on numbers from the GTT, Canada was able to move a further 28 million kgs beyond that which was reported on by the Mexican government. We do note that Australia has taken the lion's share of the market as Australia had a good crop and Canada had experienced a significant drought in 2021, which prevented Canada from having any product available to supply to this market. Australia now holds 45% of the market share, while Canada accounts for 15% of the market share. For the first time, we are seeing the category "Countries not Specified" from the Mexican government numbers. Unfortunately, there is no further insight into how this category and associated numbers were obtained. Canada was the lead exporter of 'Groats and meal of oats and pellets of other cereals (including oats)' to Mexico, accounting for 98% of the total exports in this category. Canada was also the lead exporter of 'worked grain of oats' to Mexico, accounting for 68% of the total exports in this category. The main export category 'oats other than seed' accounts for 73% of the total exports to Mexico, the majority of which is supplied by Australia. Chile has also returned to the market, with significantly higher exports to 2021. For the first time since September 2021, we see 'groats and meal of oats and pellets of other cereals (including oats)' being reported on. Overall, oat exports to Mexico have increased and are higher than in previous years.



CANADIAN EXPORTS TO MEXICO (KGS) AS PER THE [Global Trade Tracker](#)

COUNTRY/CODE	1004.90.99 OATS OTHER THAN SEED	1103.19.01 GROATS & MEAL OF OATS, PELLETS OF OATS	1104.12.01 OAT FLAKES OR ROLLED OATS	1104.22.01 WORKED GRAIN OF OATS	TOTAL
2017	2,746,853	1,390,730	2,045,177	50,529,341	56,712,101
2018	148,429,573	1,561,093	1,924,998	47,620,440	199,536,104
2019	142,919,891	1,343,194	1,072,903	39,336,867	184,672,855
2020	212,533,066	1,455,927	1,005,123	53,015,819	268,009,875
2021	96,526,282	-	701,475	52,181,143	149,444,900
2022	-	27,268,163	1,641,344	16,577,765	45,487,272



The 2022 **Mexico–Avena Canadiense** campaign exceeded all set KPIs in December 2022, prior to the close of the 2021-2023 grant cycle. As of the end of December 2022, on average, the campaign reached over 3.3 million Mexican consumers each month. As of December 31, 2022, the Key Performance Indicators (KPIs) for the 2021-2023 campaign were:

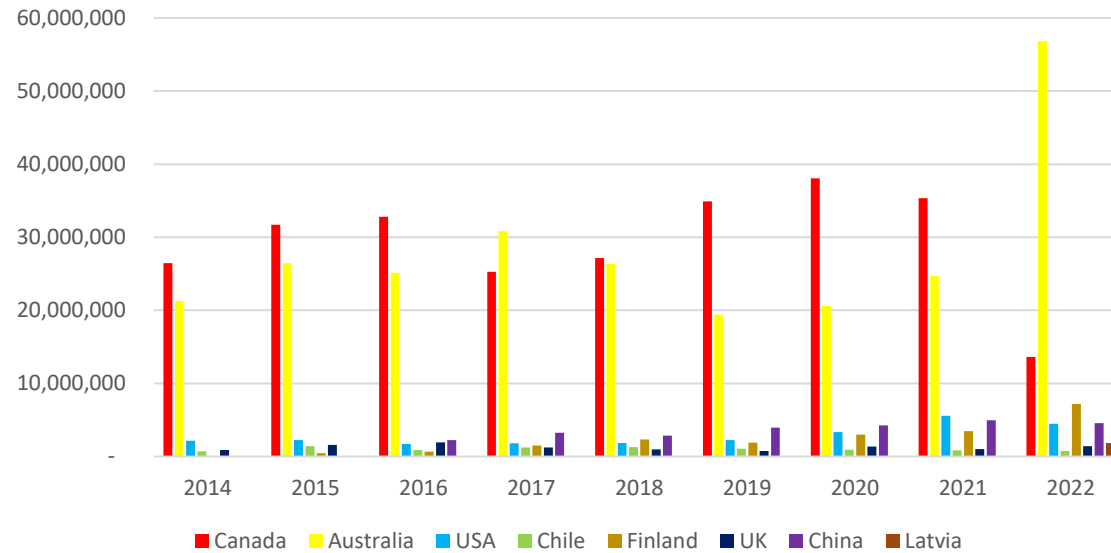
ACTIVITY	TARGET #	ACTUAL #	KPI (% OF TARGET)
Reach/Circulation/Readership	375,000	387,543	Achieved by 103%
Website & social media views	70,000,000	72,413,774	Achieved by 103%

This marketing project was funded by POGA and through the Agriculture and Agri-Food Canada (AAFC) AgriMarketing Program.

JAPAN

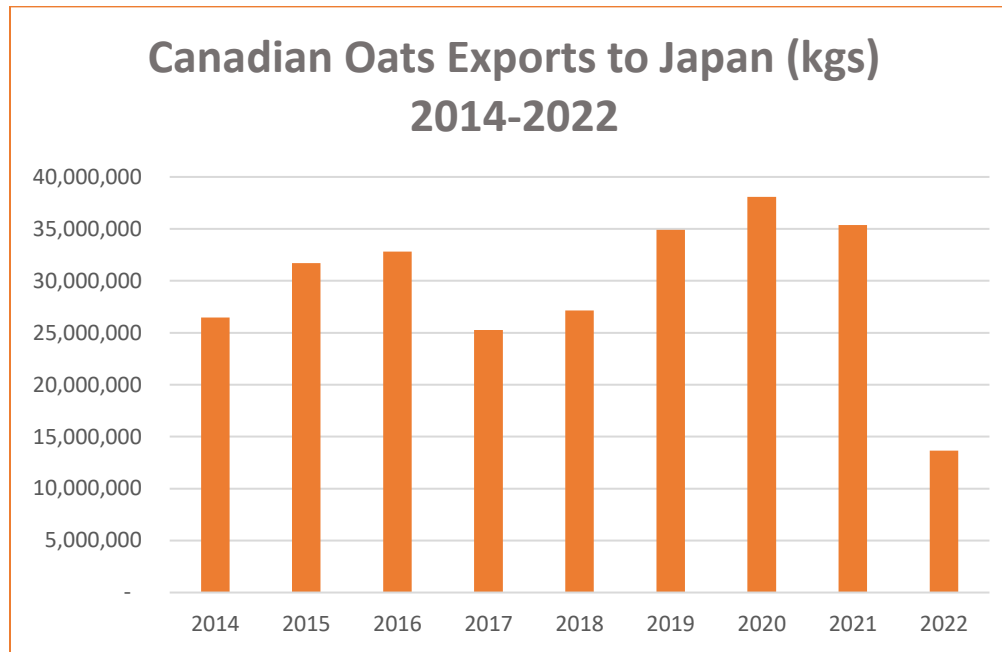
For 2022, data was obtained from the Trade Statistics of Japan website. It is evident that there are major problems with supply from Canada. Overall, Canada accounts for only 15% of the market share. The highest exports from Canada were raw oats which accounted for 27% of exports in this category. For the first time since 2017, Australia has become the main overall exporter to Japan with 61% of the market share. Australia is the leading exporter in all four categories. Overall oat exports to Japan have continued to increase and are the highest on record with an increase of 13 million kgs of imported oats from 2021. The USA, China, Finland, and UK remain relevant players in the market, with slightly higher exports to 2021, apart from the USA and China whose exports have declined slightly. Latvia’s exports of worked grains have increased from previous years and are comparable to that of Canada. Compared to 2021, Canada has seen a significant decline of around 39% of oat exports to Japan while Australia has more than doubled their total exports to Japan.

Main Exporters 2014 - 2022 Imports of Oats in Japan (kgs)



CANADIAN EXPORTS TO JAPAN (KGS) AS PER THE [Trade Statistic of Japan](#)

COUNTRY/CODE	1004.10.00 OAT SEED	1004.90.00 OATS OTHER THAN SEED	1104.12.01 OAT FLAKES OR ROLLED OATS	1104.22.01 WORKED GRAIN OF OATS	TOTAL
2018	–	26,515,000	448,129	172,340	27,135,469
2019	–	34,189,000	556,314	163,810	34,909,124
2020	12,000	36,806,000	1,132,079	123,260	38,073,339
2021	–	33,438,000	1,814,423	107,956	35,360,379
2022	-	11,518,000	2,005,177	124,114	13,647,291

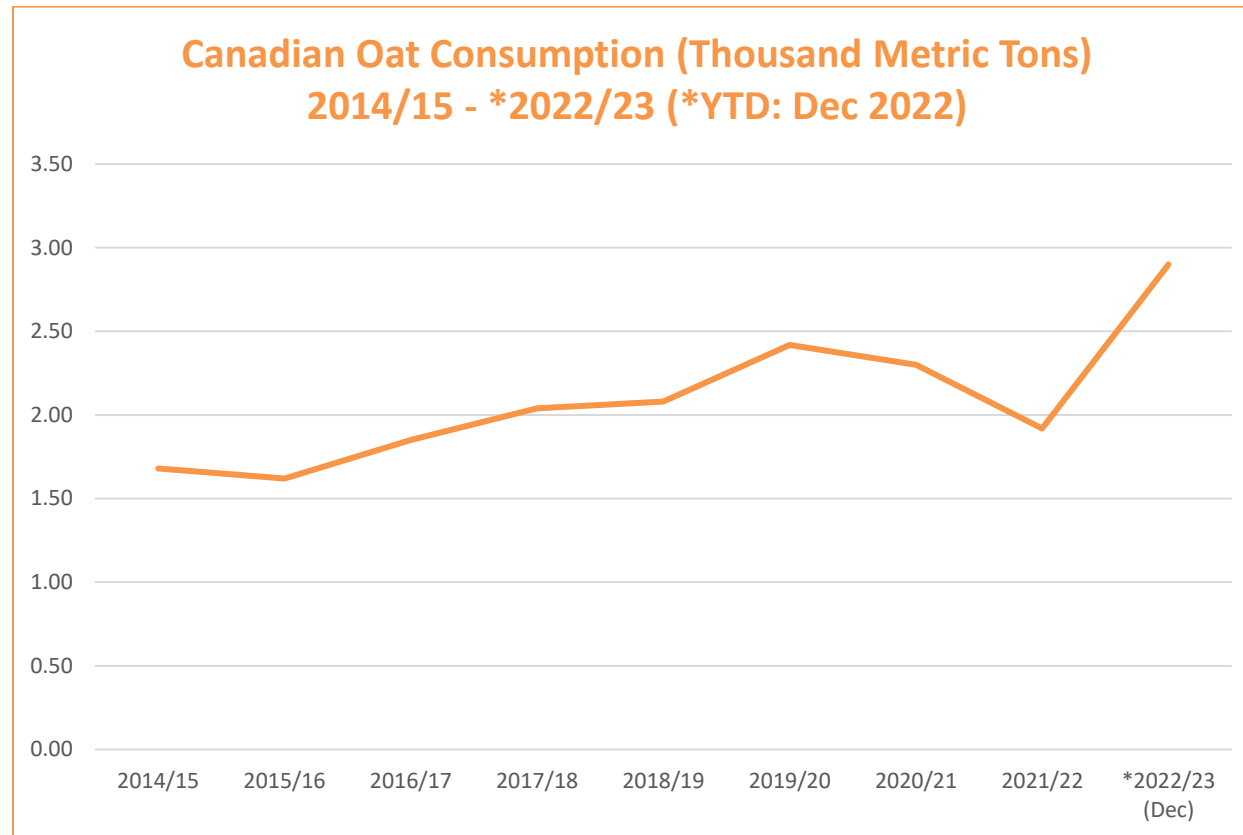


The 2022 **Japan–Kanadanootsumugi** campaign exceeded all set KPIs in August 2022, prior to the close of the 2021-2023 grant cycle. As of the end of December 2022, on average, the campaign reached over 1.3 million Japanese consumers each month. As of December 31, 2022, the Key Performance Indicators (KPIs) for the 2021-2023 campaign were:

ACTIVITY	TARGET #	ACTUAL #	KPI (% OF TARGET)
Reach/Circulation/Readership	3,000	3,505	Achieved by 116%
Website & social media views	10,000,000	28,406,856	Achieved by 284%

This marketing project was funded by POGA and through the Agriculture and Agri-Food Canada (AAFC) AgriMarketing Program.

The volume of oats consumed in Canada increased steadily from 1.7 MT in 2014/15 to a high of 2.4 MT in 2019/20. In 2020/21 there was a slight decline in the consumption of oats and in 2021/22 there is a further decline with only 1.9 MT of oats consumed. Fortunately, in 2022/23, reports until December 2022 indicate that oat consumption in Canada has increased to as high as 2.9 MT.



Source: USDA's [Grain: World Markets and Trade, January 2023](#)

The 2022 **Canada—Oats Everyday** campaign exceeded all set KPIs in August 2022, prior to the close of the 2021-2023 grant cycle. As of the end of December 2022, on average, the campaign reached over 2.7 million Canadians each month. As of December 31, 2022, the Key Performance Indicators (KPIs) for the 2021-2023 campaign were:

ACTIVITY	TARGET #	ACTUAL #	KPI (% OF TARGET)
Reach/Circulation/Readership	50,000	68,962	Achieved by 137%
Website & social media views	36,000,000	57,862,131	Achieved by 160%

These marketing projects were funded by POGA and through the Agriculture and Agri-Food Canada (AAFC) AgriMarketing Program. A portion of the Canada campaign is also supported by Ag Action Manitoba Program for Industry Organizations which is funded by the governments of Canada and Manitoba.