



2018 AGRICULTURE CHAIRS SUMMIT

Global Food Demand and Rural North America: Payback Time!

January 6, 2018
Kansas City, Missouri

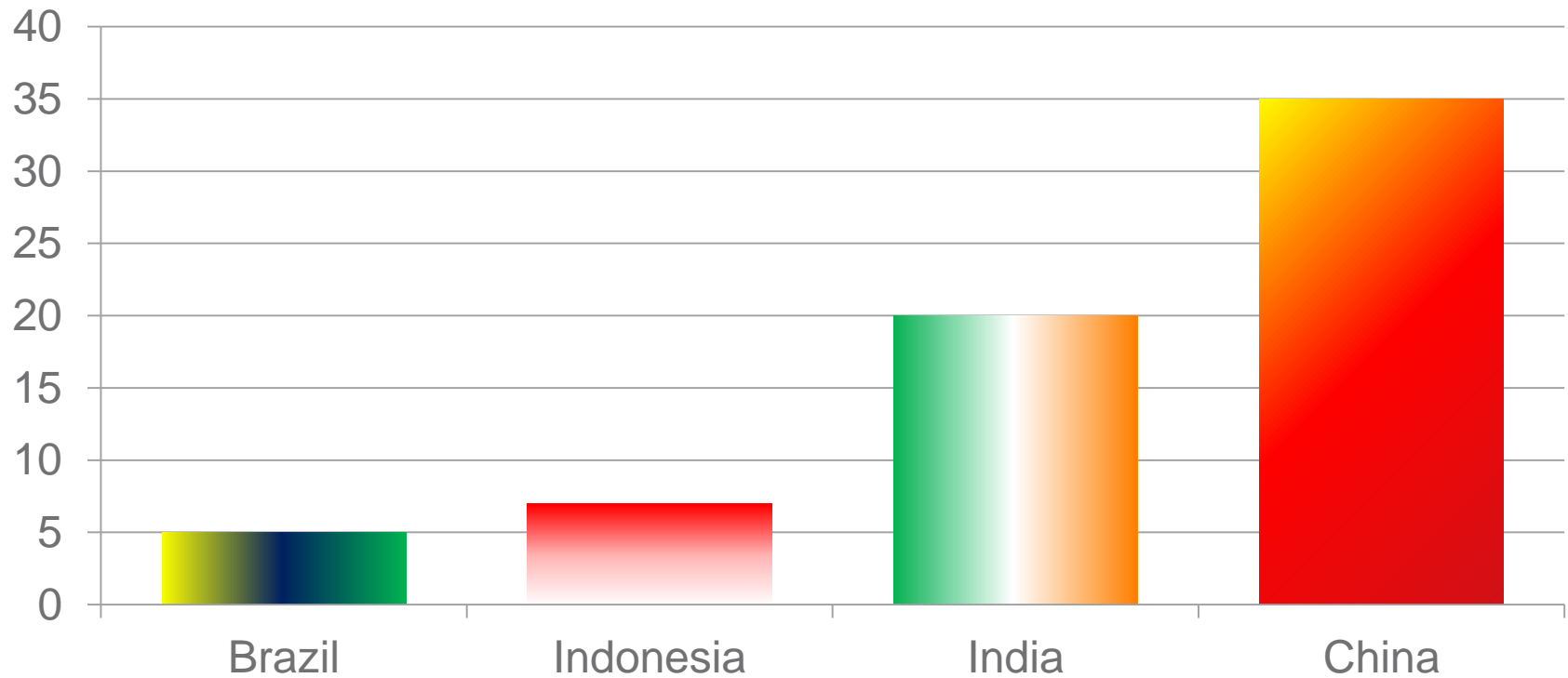
Peter Hall
Vice-President and Chief Economist



Realize a World of Opportunity

RISING WEALTH IN EMERGING MARKETS

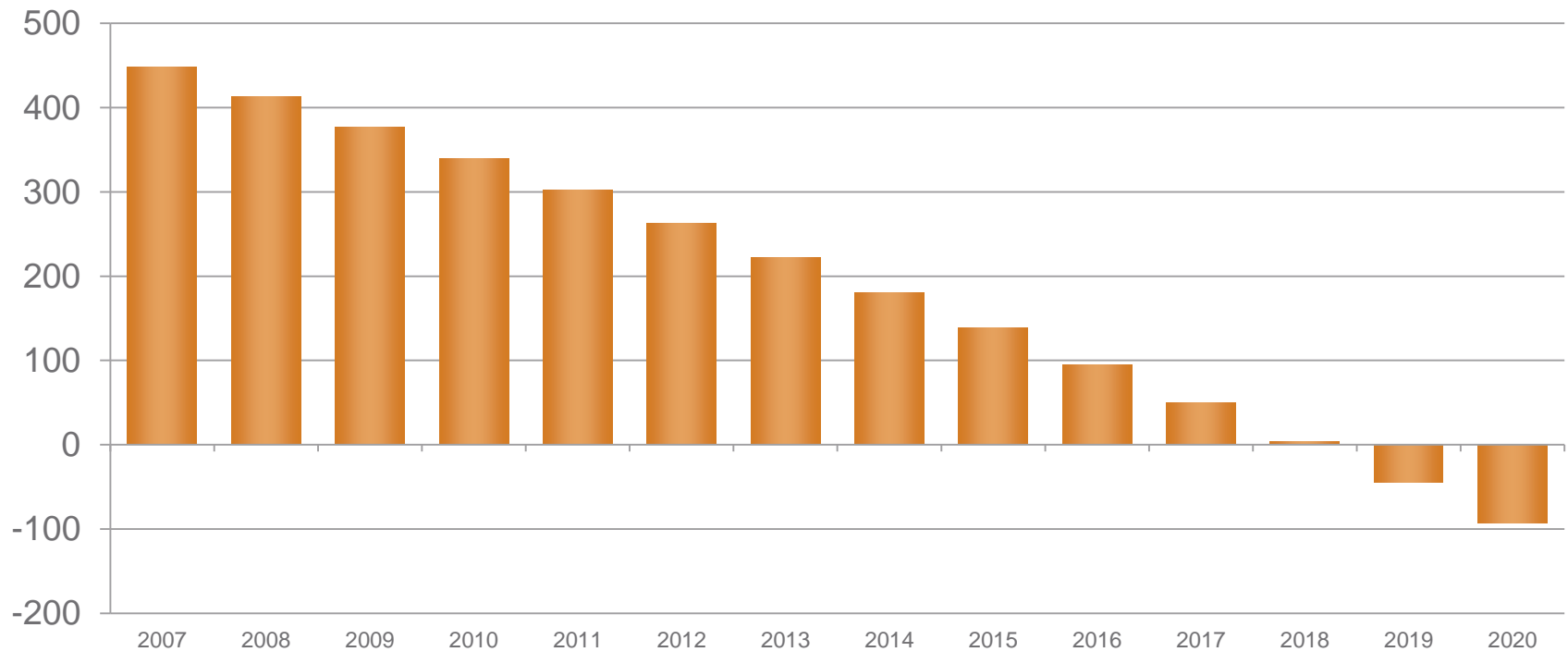
Annual increase of the middle class



Sources: Various – national population calculations

NET DEPENDENCE ON IMPORTS

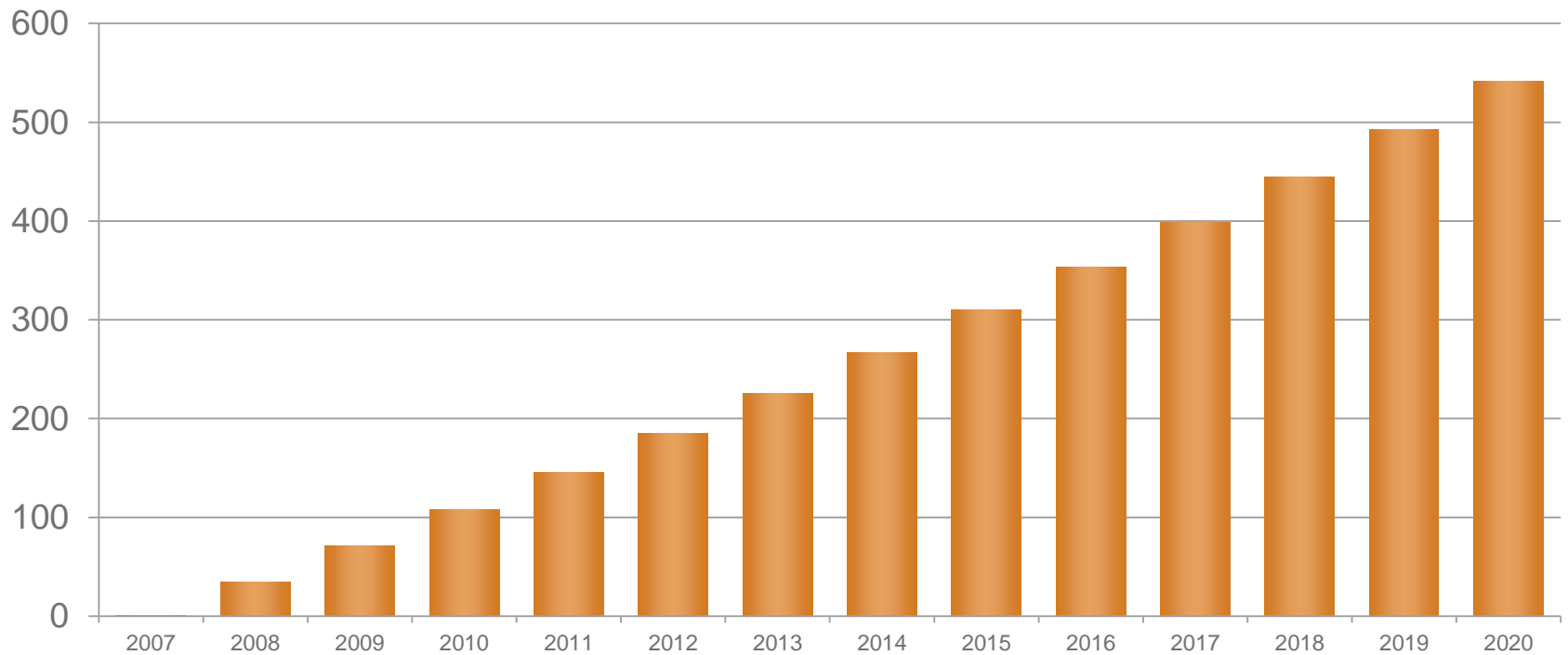
Net pork consumption, China, '000 tonnes



Source: UN FAO, EDC Economics

GROSS DEPENDENCE ON IMPORTS

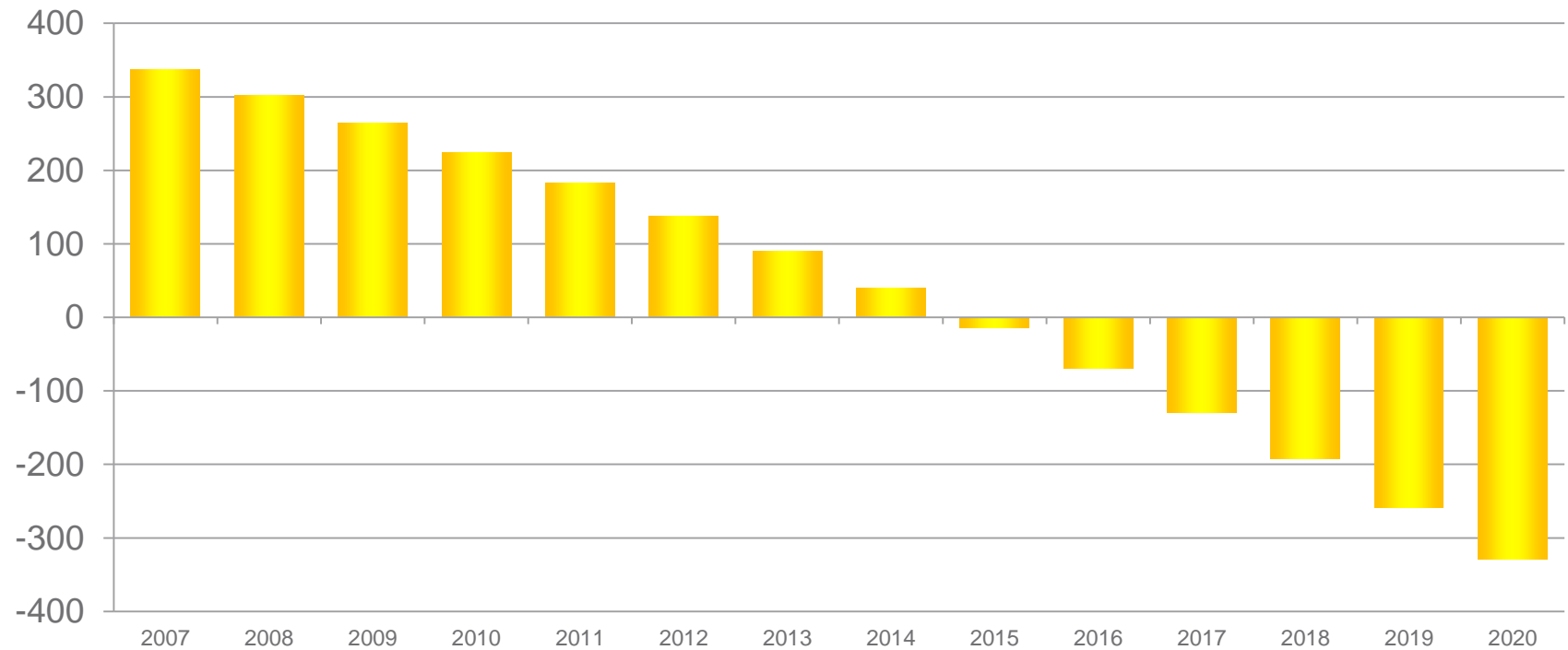
China, increase in need for extra production, imports, '000 tonnes



Source: UN FAO, EDC Economics

NET DEPENDENCE ON IMPORTS

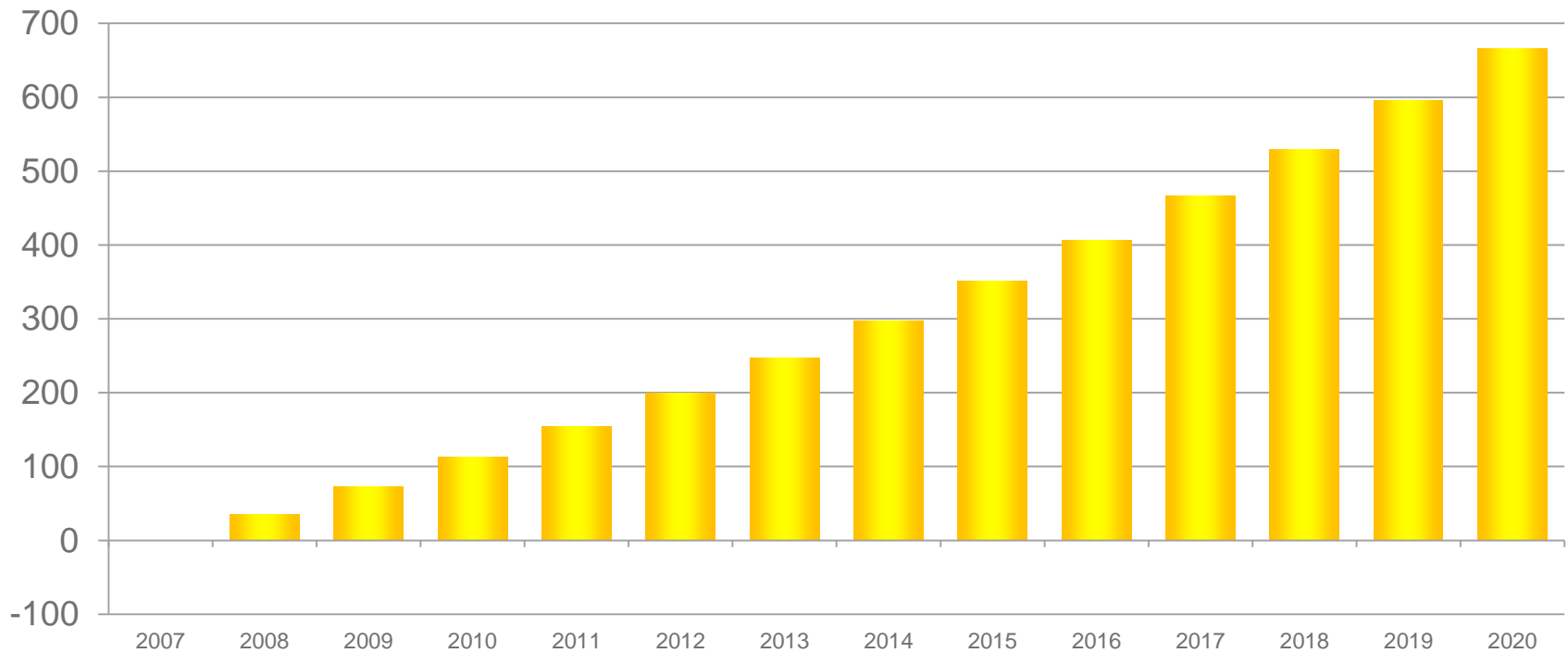
Net poultry consumption, emerging markets, '000 tonnes



Source: UN FAO, EDC Economics

GROSS DEPENDENCE ON IMPORTS

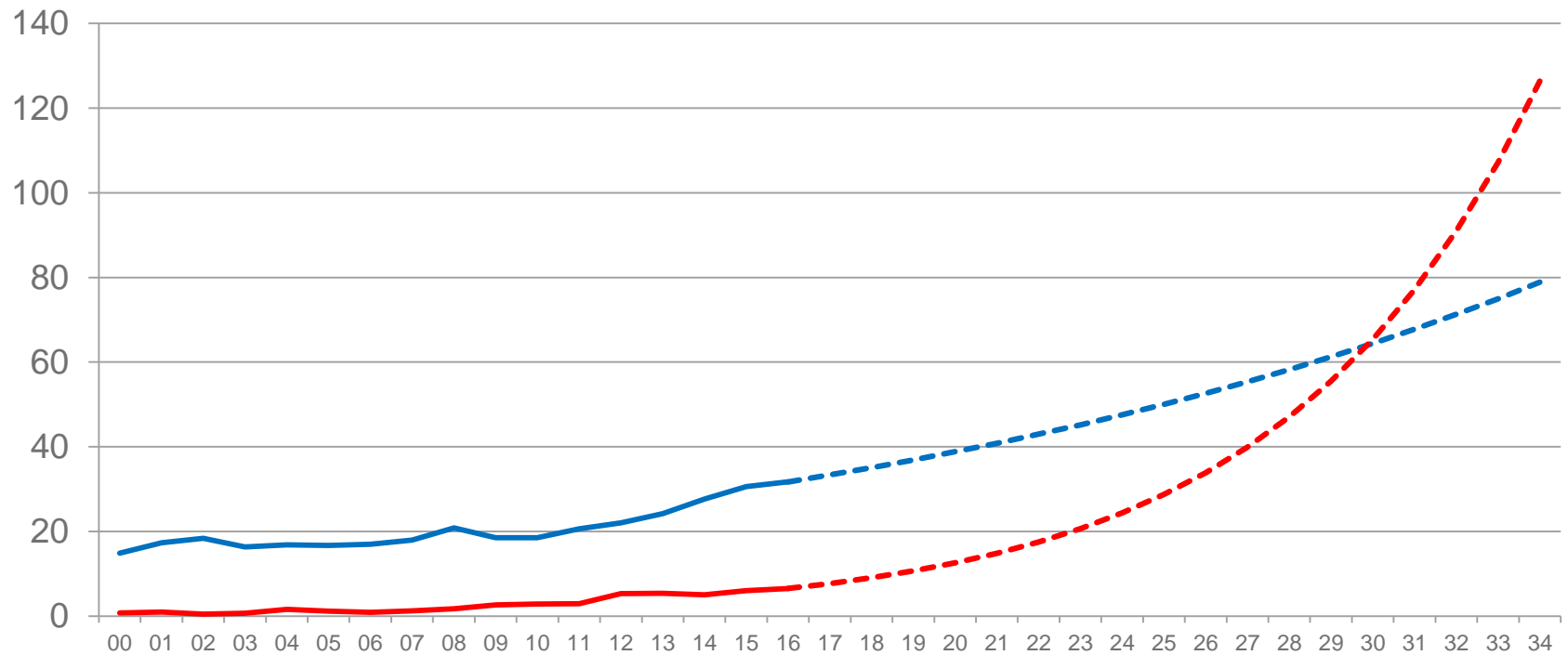
Emerging markets, increase in need for extra production, imports, '000 tonnes



Source: UN FAO, EDC Economics

CANADA: THE FUTURE OF FOOD EXPORTS?

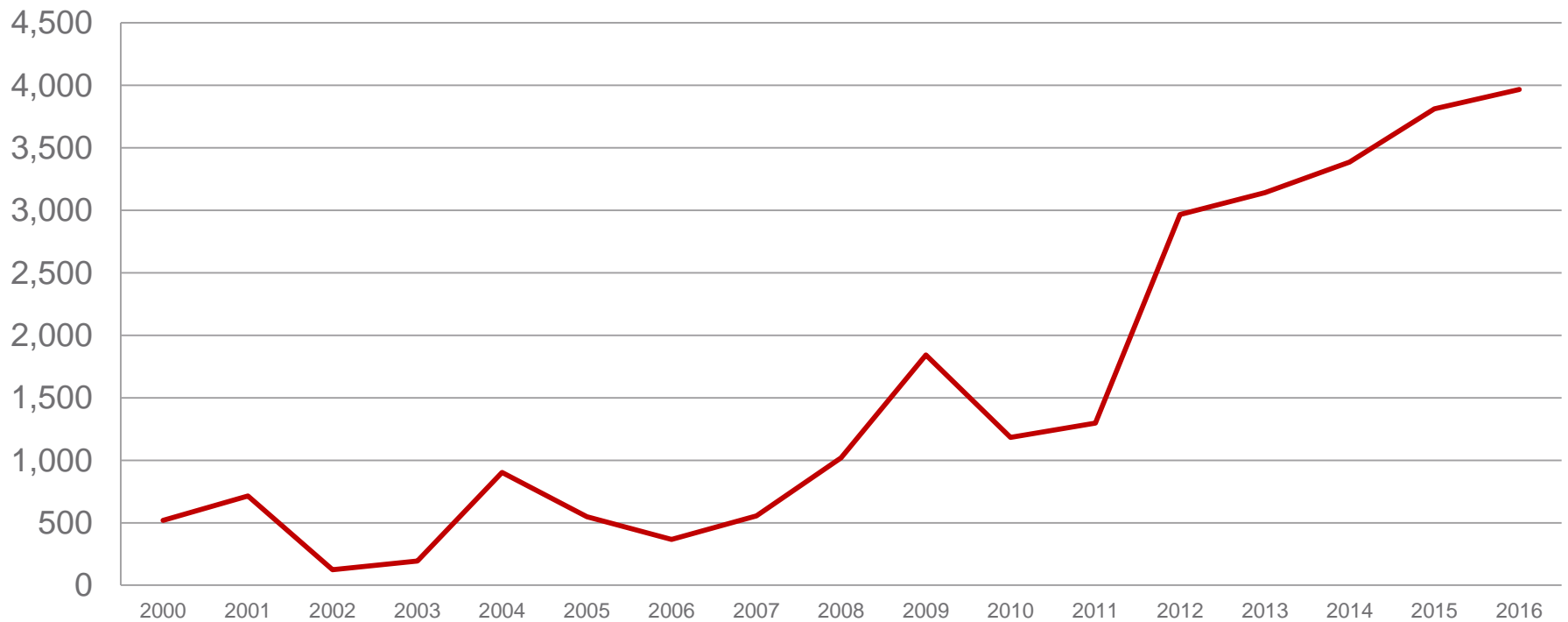
Canada's food shipments to US, China, CAD (billions)



Source: UN FAO, EDC Economics

DOMINATED BY GRAINS AND OILSEEDS

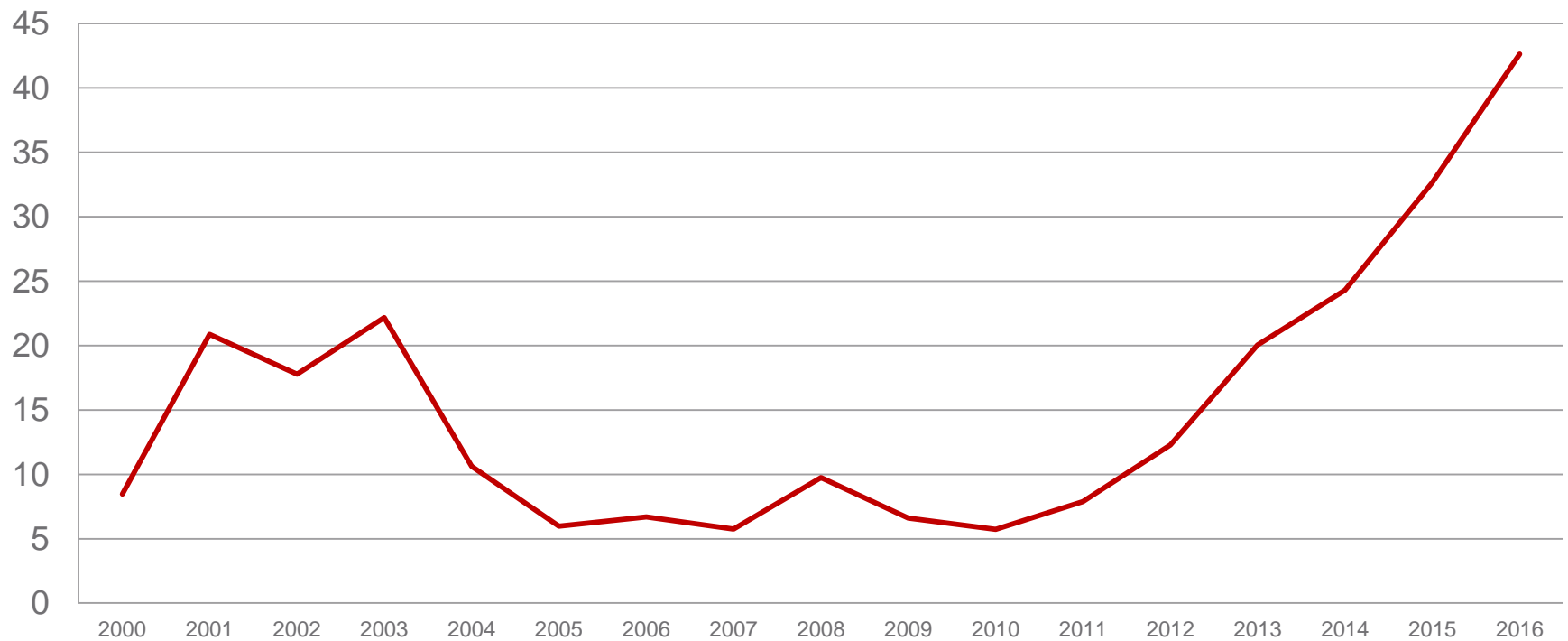
Grain and oilseed exports to China, \$millions



Source: UN FAO

...BUT OTHER CROPS: GOOD TRAJECTORY!

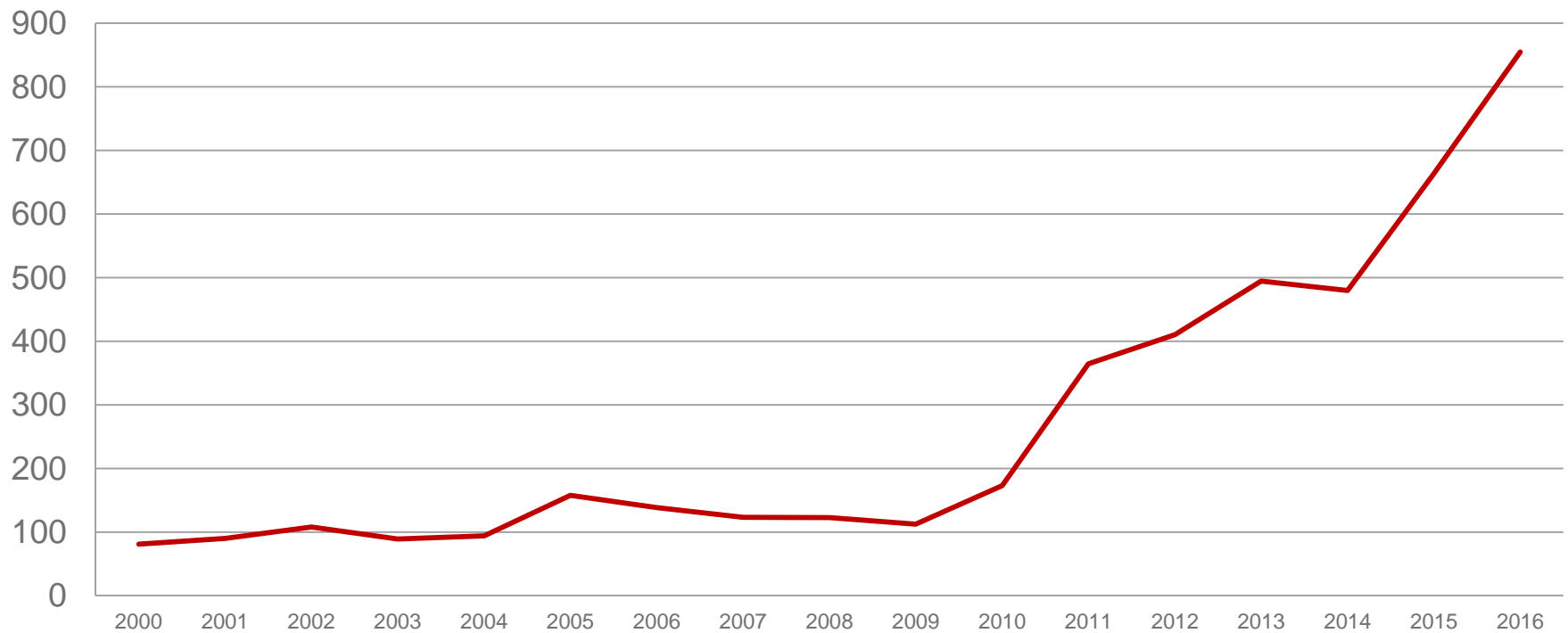
Exports of other crops to China, \$millions



Source: UN FAO

...AND LOOK AT MEAT PRODUCTS!

Meat product exports to China, \$millions



Source: UN FAO

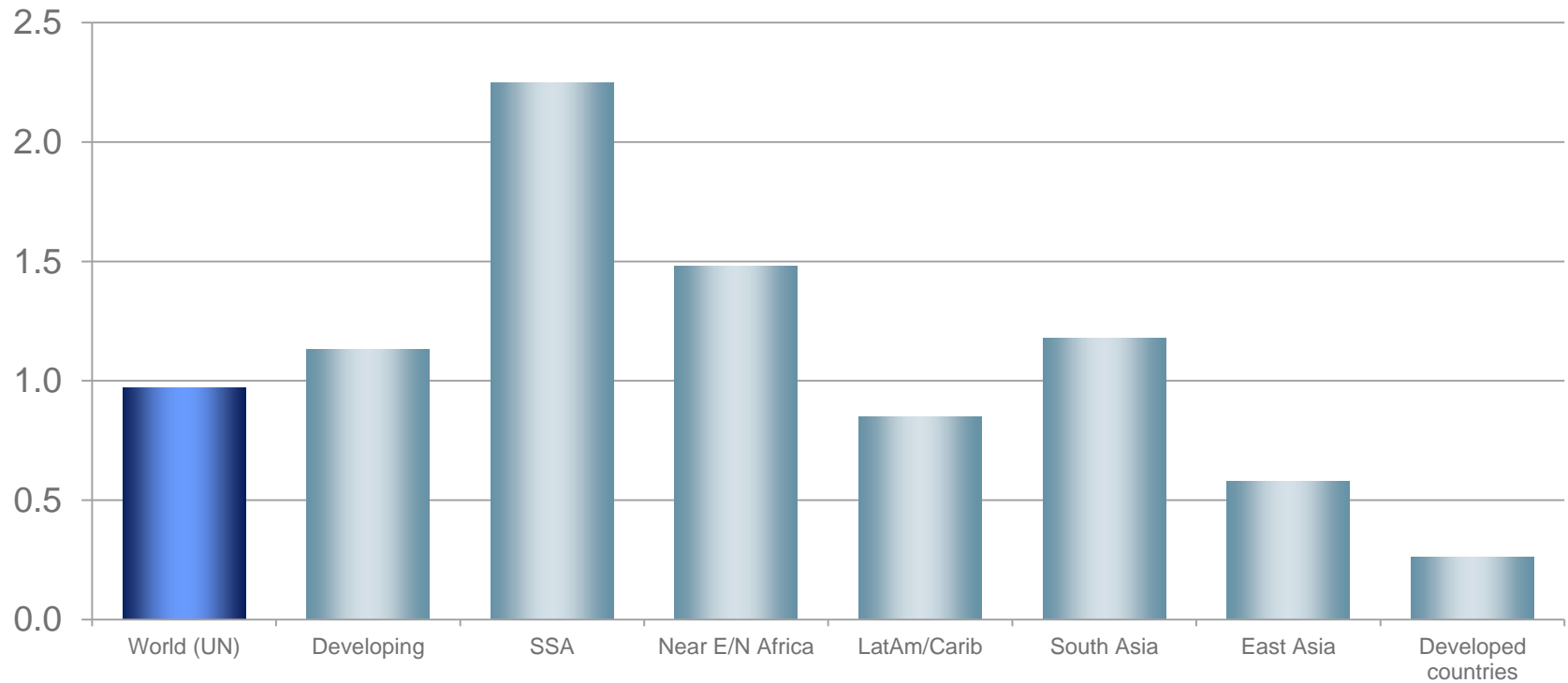
FREE RESOURCES ONLINE

- › www.edc.ca
 - › Country Risk Quarterly
 - › Global Export Forecast
 - › Weekly Commentary
 - › Trade Confidence Index
 - › The Commodity Tracker
 - › Research reports on international trade

The screenshot displays the EDC Knowledge Centre website. At the top, there is a navigation bar with links for 'About Exporting', 'Our Solutions', 'Country Info', 'Knowledge Centre', 'Events', and 'About Us'. A search bar is located on the right. The main content area is titled 'KNOWLEDGE CENTRE' and features a sidebar with a 'Knowledge Centre' menu containing links to 'Success Stories', 'Economic Analysis and Research', 'Multimedia Centre', 'TradeTalk', 'Publications', 'Subscriptions', and 'Topical Business Issues'. The main content area is titled 'Economic Analysis and Research' and includes a brief description of the research services. Below this, there are two sections: 'Economic Reports' and 'Research Reports & White Papers', each with a list of specific reports and publications. A 'Register now' button is visible on the right side of the page. The footer contains links for 'For Partners', 'Investor Relations', 'Communities', and 'Export Development Canada', along with social media icons and the EDC logo.

POPULATION GROWTH

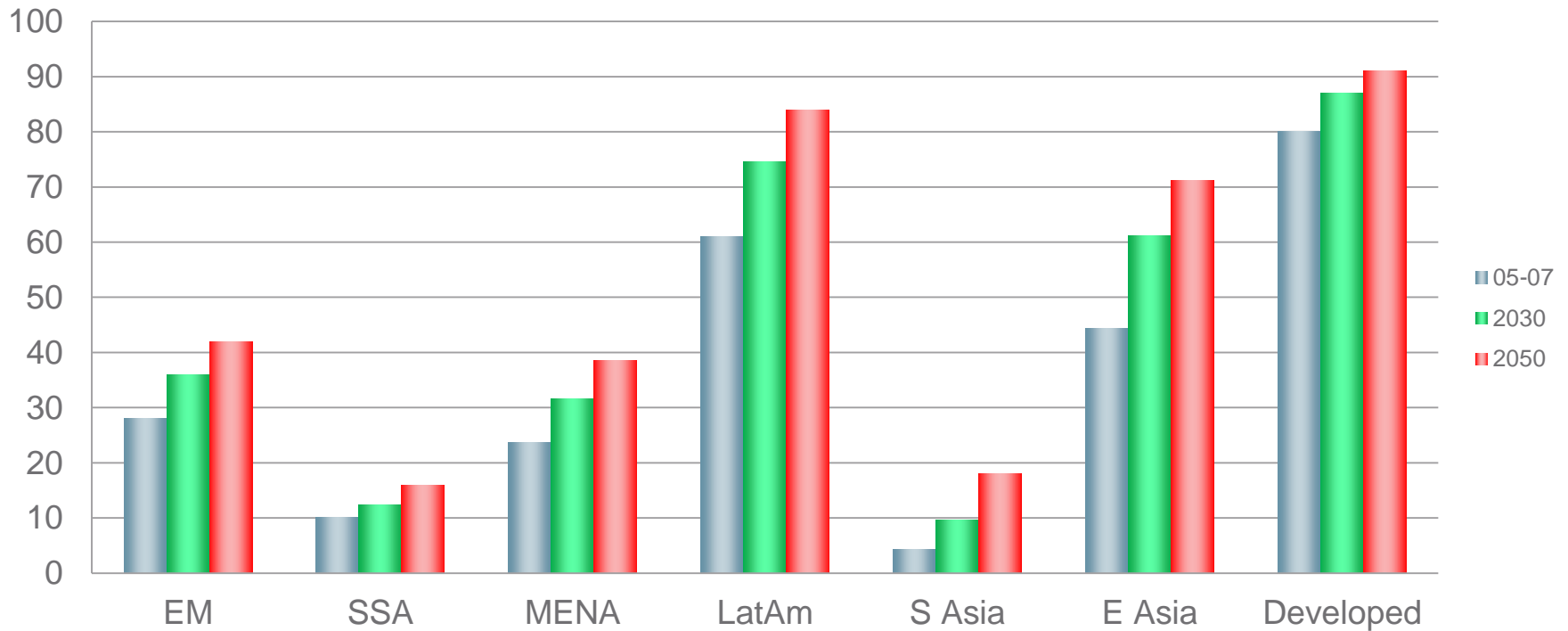
Projected increase, 2006-2030



Source: UN FAO

PER CAPITA MEAT CONSUMPTION

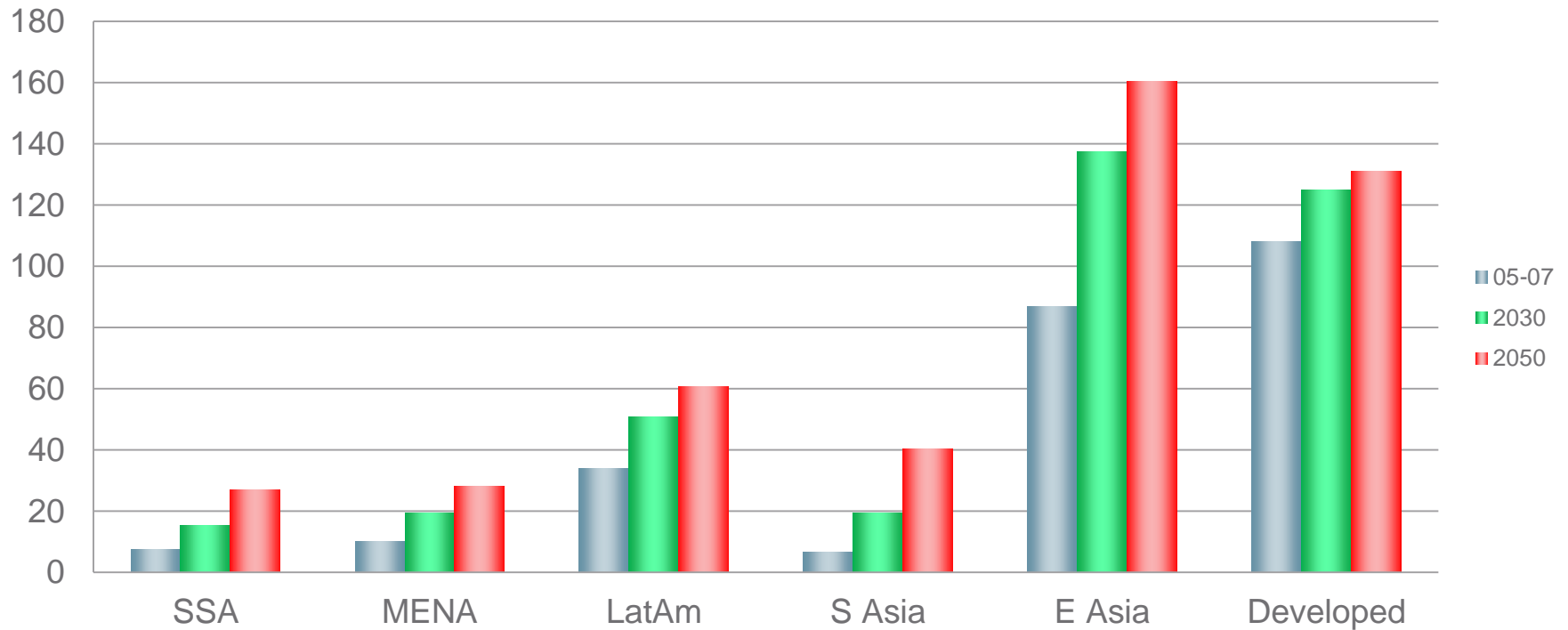
Kg per person per year



Source: UN FAO

TOTAL MEAT CONSUMPTION

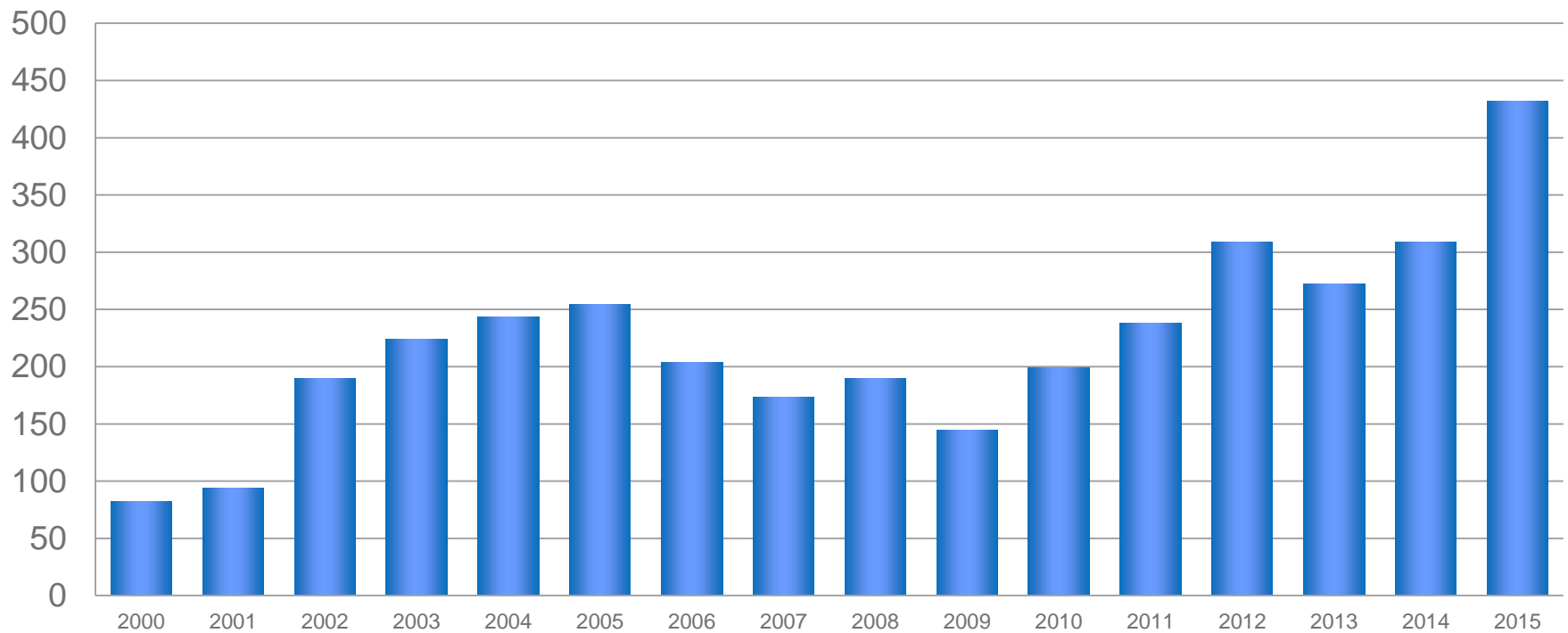
Kg per year



Source: UN FAO

THE POWER OF CHINESE CONSUMPTION

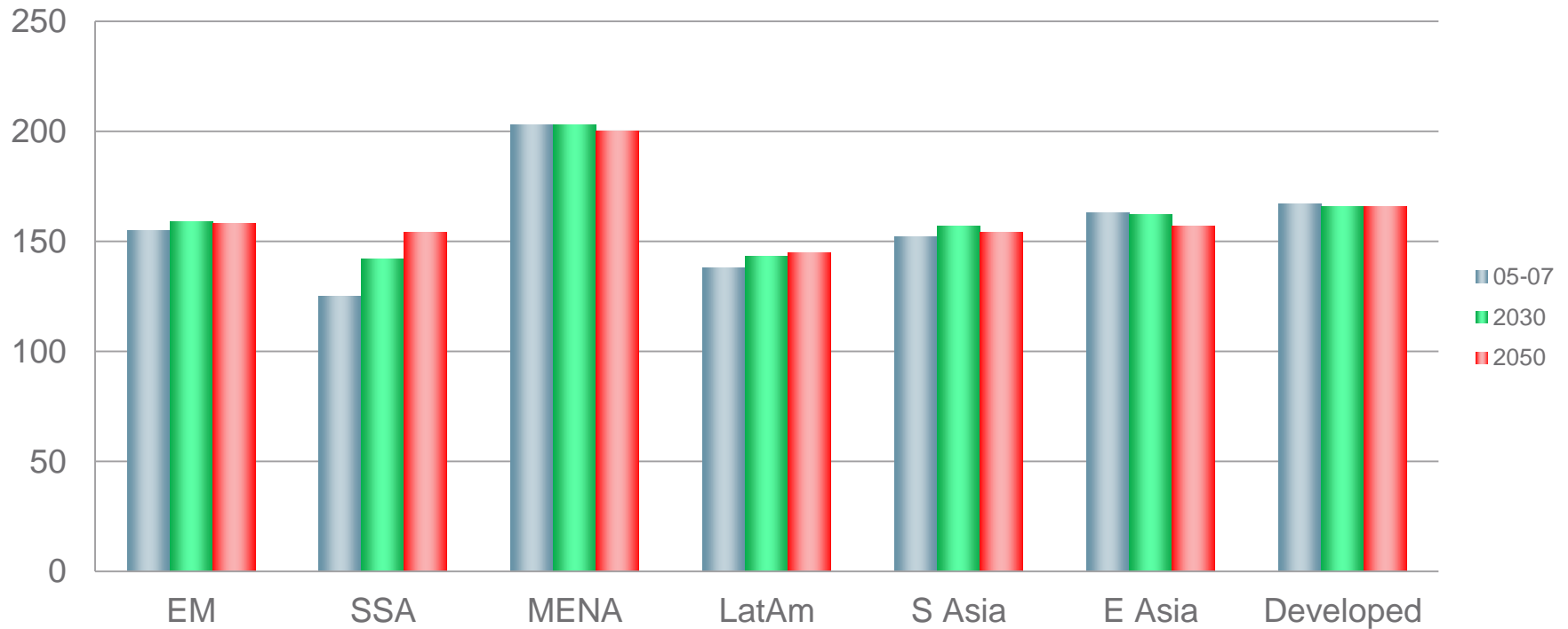
Fish and processed seafood exports, Atlantic Canada, \$millions



Source: UN FAO

PER CAPITA CEREALS CONSUMPTION

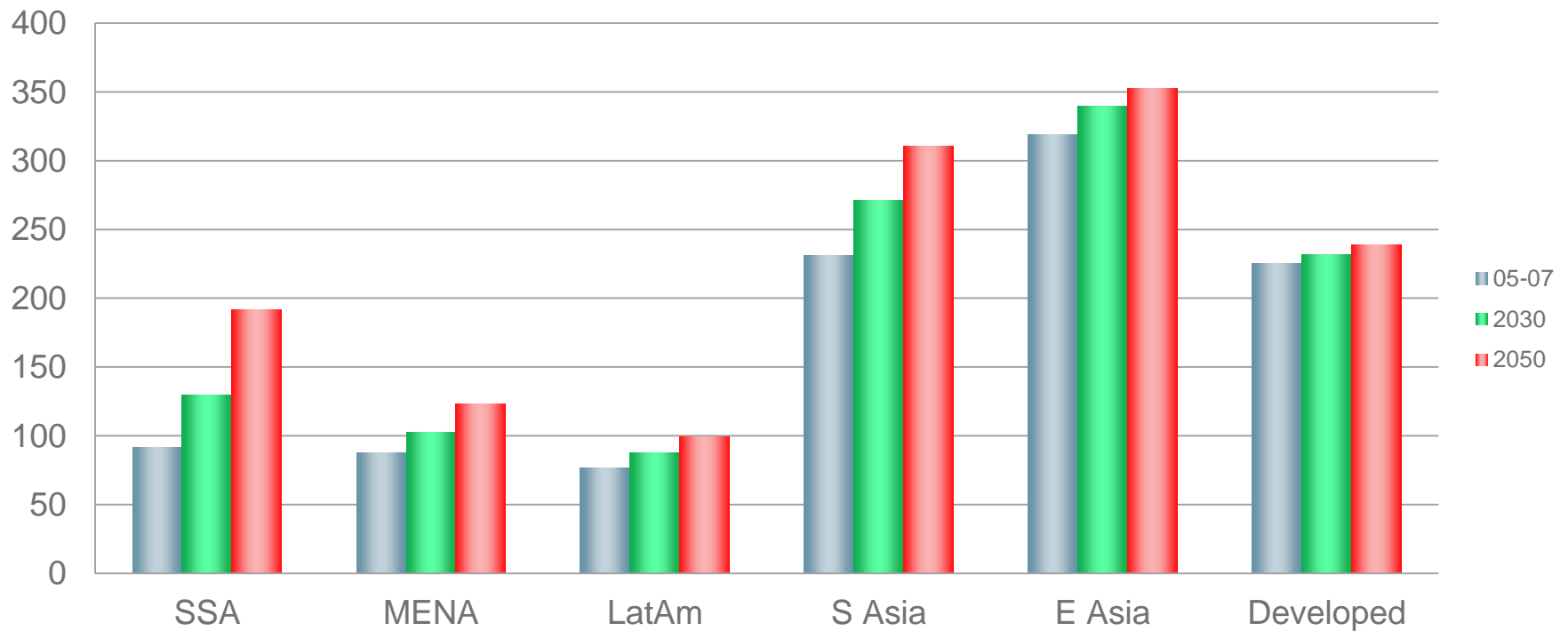
Kg per person per year



Source: UN FAO

TOTAL CEREALS CONSUMPTION

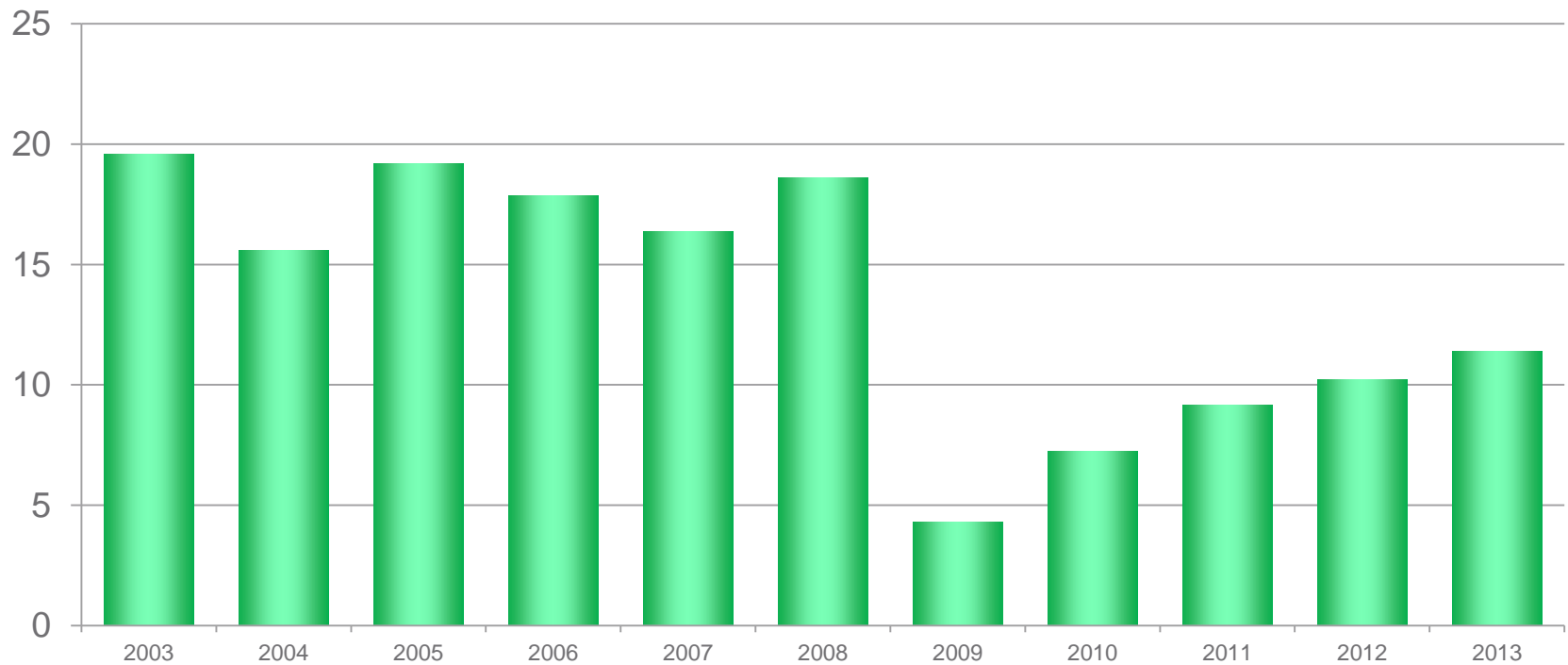
Kg per year



Source: UN FAO

U.S. ORGANIC FOOD SALES

Annual growth, per cent



Source: OTA, 2014 Organic Industry Survey