

# GLOBAL FOOD MARKETER™ NEWSLETTER

Export news from the Midwest and Northeast



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## THE EVOLUTION OF FOOD SHOW PLUS!™ SERVICES

Food Export's Food Show PLUS!™ concept was conceived over twenty years ago to help U.S. Supplier's attending international tradeshows get the best of their tradeshow experience. The service has truly evolved over the years because of expressed needs from our suppliers and because of the changing international audience of buyers and distributors encountered in different markets. The show enhancement package was always designed to help participants amplify their experience by becoming confident exhibitors with services to assist them before, during and after the show.

Food Show PLUS!™ makes you a better exhibitor as our services put you in the best position to make the most of your investment in an overseas trade show, whether that means increasing your booth traffic, translating materials into a different language, or helping you identify your strongest leads. All assistance is provided by Food Export's In-Market Representatives who are knowledgeable about the country's food industry.

### Food Show Plus!™ offers:

- **Market Briefings:** Pre-show intelligence covering regulations, trends, key players and more.
- **Retail Tour:** Get first-hand knowledge of the competitors, positioning, pricing and packaging of products that are on the store shelves now.
- **Invitations:** Stand out before the show even starts! Qualified buyers will receive invitations including your profile, contact information, product details and booth number.
- **Introductions:** Food Export's In-Market Representative will personally bring buyers to your booth whenever possible.
- **On-Site Assistance:** In-Market Representatives offer ongoing support during the show and answer any questions.
- **Post-Show Lead Analysis:** The In-Market Representative will check on participants to review and qualify leads, helping execute follow up more efficiently and effectively.

(continued on back page)

## IN THIS ISSUE



The Evolution of Food Show PLUS!™ Services



Market Focus: The Middle East



Food Export Helpline Q/A

## 2020 Activity Calendar Included Inside

### Register for an Online [foodexport.org](http://foodexport.org) Account!

Be sure to create an online account at [www.foodexport.org](http://www.foodexport.org) to make the most of your customized online experience—it's quick and easy! Just click on Create An Account at the top right corner of our homepage.



## MARKET FOCUS: THE MIDDLE EAST

The Middle East market covers the Gulf Cooperation Council (GCC-6) members [Bahrain, Kuwait, Oman, Qatar and the United Arab Emirates (UAE), and Saudi Arabia]. Middle East countries marked a turning point in 2018 as their economies overcome two difficult years of a low oil price environment and various austerity measures, according to economists and analysts. While the combined Gross Domestic Product (GDP) of the GCC-6 hit 2.3% in 2018, up from 1.7% in 2017, expanding at the fastest rate since 2015, and the forecast is for growth of 2.7% in 2019.

Private consumption has been weighed down by the 5% Value Added tax (VAT) and rising living costs as a result of higher electricity tariffs and gasoline prices introduced in January. Saudi inflation is expected to reach 4% in 2018, up from -0.3% in 2017. For businesses, levies on expat labor and rising input costs pose additional challenges. While on the monetary policy side, the expected three rate hikes in the U.S. this year will translate into higher interest rates in Saudi given the U.S. dollar peg – this would raise the cost of borrowing for businesses and consumers alike.

U.S. exports of consumer food products to the GCC-6 members decreased 3% to nearly US\$1.7 billion in 2018. This partner group is a solid importer of U.S. processed foods, totaling \$1.1 billion, a decline of 1% from the prior year.

### 2018 TOP U.S. PROCESSED FOOD EXPORTS TO THE REGION

- Food preparations
- Condiments and sauces
- Snack foods
- Chocolate and confectionery
- Fats and oils
- Processed/prepared dairy products
- Processed vegetables and pulses
- Non-alcoholic beverages

The UAE and Saudi Arabia are now the 16th and 20th largest markets respectively from the U.S. for consumer foods and are frequently in the top 10 of most major processed food export categories. Their import share is well over 75% of the region's total, although food products may be transiting through the Emirates into other GCC and/or Middle Eastern markets.

The U.S. has Free Trade Agreements (FTAs) with two of the six GCC-6 countries. The U.S.-Bahrain FTA entered into force on August 1, 2006. Bahrain is the first U.S. FTA partner on the Arabian Peninsula and the third FTA partner among Arab countries (Jordan and Morocco are the others). The U.S.-Oman FTA, which went into force on January 1, 2009, significantly opened U.S. trade with Oman in goods and services by eliminating most tariff and nontariff barriers. Under the market access provisions of the FTA, almost all consumer and industrial goods and 87% of all agricultural tariff lines were given duty-free access. Both countries agreed to phase out all tariffs on the remaining eligible goods by the end of 2019.

The GCC confers special trade and investment privileges to member countries. Processed food products manufactured in any of these countries can be exported to other GCC countries duty-free. The GCC formally instituted its Customs Union over a decade ago. A 5% across-the-board common external tariff now applies to most imported food and agricultural products that enter from non-GCC suppliers.

The Gulf Cooperation Council-5, (the aforementioned less Saudi Arabia), countries covered by USDA's Office of Agricultural Affairs, OAA, in Dubai, hereinafter referred to as "Post" are a relatively homogeneous group of small nations with a total population of just over 22 million. Energy is the main source of revenue and per capita income levels are high. All GCC 5 countries experienced economic growth in 2018.

Euromonitor reports that the UAE economy is picking up steam in 2019. The recovery in oil prices is the main driver; however growth is also aided by an increase in government spending – especially on large investments in infrastructure as part of the preparations for the 2020 World Expo.

Among the GCC-5 countries, the UAE with its larger population, larger influx of tourists and businessmen coupled with its vibrant re-export activities is the largest market for food products, followed by Kuwait. Within the UAE, Dubai is the country's commercial center and the region's trade hub. Efficient infrastructure (sea, land and



## EXPORTING U.S. CONSUMER-READY FOODS TO THE MIDDLE EAST ADVANTAGES

### ADVANTAGES

A high-quality image of U.S. products

High regional per capita incomes

Broad familiarity with U.S. culture

Increasing interest in U.S. products; increasing number of tourists to Bahrain, Oman and the U.A.E. in particular; and a U.S. military presence in Kuwait and Qatar

Consistently low tariffs and relatively transparent import procedures

### CHALLENGES

Significant competition from producers in EU, Asia, Australia, New Zealand and from local and regional processors

Large Indian subcontinent population with easy access to "home grown" products and modest income

U.S. goods viewed as higher price, partly because freight rates for U.S. foods are high compared to other regional suppliers

Importers want to start with small quantities and consolidate shipments, and often find there is a lack of interest from some U.S. exporters, unwilling to entertain small orders or meet local labeling requirements

air ports), large free trade zones and a strong business orientation make Dubai an important commercial center in the Middle East. Dubai derives sizable revenue from the re-export business and invests heavily in infrastructure, while luring foreign investment and buyers. Other countries in the region and other Emirates in the UAE, particularly Abu Dhabi, the capital, are following Dubai's lead and model to improve their infrastructure and attract business interests.

The standard of living in the UAE is one of the highest in the world. A liberal, business friendly and market-oriented growth strategy has reshaped the economy. The non-oil sector steadily expanded as diversification of the economy has proceeded. However, greater diversification meant that the UAE was hit more severely by the global financial crisis than its neighbors. The economy continued to struggle in later years as low oil prices persisted and the fiscal deficit widened (despite significant reforms).

Abu Dhabi and Dubai together contribute about 80% of the UAE's income. Abu Dhabi's diversification program has made impressive progress. Its non-oil industries now account for close to 50% of GDP. Dubai's diversification efforts have been side-tracked by problems in the financial industry and the real estate market. However, both sectors now appear to be on the way to recovery.

The UAE is the second largest foreign direct investment (FDI) recipient among Arab countries after Saudi Arabia. As the UAE's economy has developed into a major services hub in the Middle East, its dependency on oil exports has declined.

U.S. exports of consumer ready food products totaled \$778.6 million in 2018, down 6% from 2017. Through June of 2019, U.S. exports of consumer ready products are up 12% to \$433.2 million and on track for a new record high. The UAE imported \$400.7 million of U.S. processed foods in 2018, a decline of 5%. Through June of 2019 U.S. exports of processed food to the UAE totaled \$205.2 million, a decline of 6%.

### FOOD EXPORT ASSOCIATION OF THE MIDWEST USA® AND FOOD EXPORT USA®-NORTHEAST

We are non-profit organizations comprised of state agricultural promotion agencies that use federal, state, and industry resources to promote the export of Midwestern and Northeastern food and agricultural products.

Food Export-Midwest and Food Export-Northeast administer many services through Market Access Program (MAP) funding from the Foreign Agricultural Service (FAS) of the USDA.

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## FOOD EXPORT HELPLINE™

**Q:** Our Company produces a line of carbonated beverages. We have been researching export opportunities and have done some statistical research we heard about in webinars. We learned how to operate The Global Agricultural Trade System or "GATS." It classifies soft drinks as a processed food. What is the global market like for small beverage makers new to export?

**A:** Thanks for using the recorded webinars to help you get further oriented in the food export industry. In all the reporting done on food, beverages may be mentioned but nothing specific to the industry has been put out, much like most individual products or industry segments.

Indeed GATS does consider carbonated beverages a processed food. GATS refer to what you and others typically call soft drinks as "non-alcoholic beverages." Readers can locate GATS at <https://apps.fas.usda.gov/gats/default.aspx>

### SOFT DRINK MARKET INFORMATION FROM EUROMONITOR

You may have also heard of Euromonitor, a global research firm that produces marketing studies by category. Following is a summary of their "Soft Drinks" study by category.

Retail sales (both on and off trade) will reach \$892.1 billion in 2019, representing growth of 19% from 2015. With only 5% of the world's population, the U.S. will have sales of \$201.4 billion (about 22.5% of the world total). Other top markets for soft drink retail sales include: China (\$91.4 billion), Japan (\$66.9), Mexico (\$39.4), Germany (\$37.4), Brazil (\$32.7), France (\$21.4), U.K. (\$20.7), Spain (\$20), Italy (\$19.3) and Argentina (\$17.4).

Between 2019 and 2023 the forecast for growth of global sales in soft drinks is \$1.1 trillion, representing growth of 22.6% or 5.2% CAGR and \$202.8 billion.

**Carbonates** (including cola and non-cola, but excluding energy and bottled water carbonates) are the leading category of soft drinks globally. 2019 retail sales are forecast to reach \$326.1 billion, about 37% of the soft drink total. The leading global markets are Mexico, China, Brazil, Japan, Germany and Argentina.

**Bottled waters** (an aggregation of still bottled water – spring, mineral and purified, carbonated bottled water – spring, mineral and purified, flavored bottled water and functional bottled water) are the 2nd highest retail value of soft drinks with sales of \$238.9 billion in 2019, representing growth of 33.4% or \$60.1 billion since 2015.

**Juices** covers all still packaged juice obtained from fruits or vegetables by mechanical processes, reconstituted or fresh, often including pulp or fruit/vegetable puree. Retail sales are forecast to reach \$143.2 billion by the end of this year, representing growth of nearly 10% or \$12.9 billion.

**Ready to Drink (RTD) Tea** includes all packaged products based on brewed tea or tea extract. It may be sweetened or

unsweetened, carbonated or still, with a wide variety of different flavorings. Retail sales of RTD teas are forecast to reach \$69.6 billion in 2019, growth of 13.7% or \$18.4 billion.

**Energy Drinks** are functional drinks designed to boost energy levels. Often lightly carbonated, these contain high levels of caffeine and a number of added water-soluble vitamins, most often a selection of B vitamins including niacin, pantothenic acid, vitamin B6, and vitamin B12. Retail sales of these drinks may reach \$53.6 billion by year's end, growth of 28.7% and almost \$12 billion since 2015.

**RTD Coffee** includes packaged ready-to-drink coffee, consumed either hot or cold, made using a base of either brewed coffee or coffee extract. The 2019 forecast for retail sales from Euromonitor is \$22.5 billion, growth of 11% or \$2.2 billion from 2015.

**Sports Drinks** include isotonic, hypotonic and hypertonic sports drinks. Retail sales of sports drinks should reach \$19.6 billion by the end of 2019, growth of 4.3% and \$806.5 million. This is by far the lowest historical growth rate of all the soft drink categories.

**Concentrates** are the aggregation of liquid and powder concentrates. Liquid Concentrates and syrups are diluted with water before consumption. Dilution ratios vary from country to country, due to local preferences and available brands. Powder concentrates are also diluted with water before consumption. Retail sales of concentrates are expected to reach \$17.5 billion by the end of 2019, growth of 16.3% or \$2.4 billion since 2015.

**Asian Specialty Drinks** includes all traditional Asian drinks not included in RTD tea or juice drinks, including products such as Bandung (rose syrup with milk), bird's nest, tamarind juice, ginger, lemongrass, Roselle, zalaka, jelly drinks including grass jelly (cincau), sugar cane, and vinegar drinks and lactic acid drinks, such as Calpis. 2019 sales are forecast to reach \$3.4 billion, by far the lowest value of any soft drink. Growth was a modest 14.6% or \$433 million.

Many of the current top markets are mature, highly competitive, require constant promotion and attention and are a challenge for small businesses. In some cases, the markets depend on what type of soft drink you have, as there are many local cultural tastes and preferences to deal with. Growth in most categories is quite strong.

There are many smaller markets with strong growth and value in the forecast. About half are south of the U.S., including Argentina, Mexico, Brazil, Peru, Guatemala, Dominican Republic and Colombia. The U.S. has a Free Trade Agreement with all these markets except for Argentina and Brazil. If you want to stay focused on a segment for the next year or so Latin America could be a great place to start.



# FOOD EXPORT–MIDWEST AND FOOD EXPORT–NORTHEAST ACTIVITIES

**Branded Program:** Did you know that you might be eligible for up to 50% reimbursement on travel and exhibition fees for some of these activities? **Visit [www.foodexport.org](http://www.foodexport.org) for more information.** **ERD** Early Registration Deadline **RD** Registration Deadline

## BUYERS MISSIONS

Buyers Missions bring buyers from all over the globe to U.S. cities. U.S. food and beverage suppliers meet one-on-one with pre-qualified, international buyers to generate sales leads. Imagine meeting with numerous buyers from multiple countries all in one day.

### Private Label Buyers Mission at the 2019 Private Label Manufacturers Association Show

Nov. 10-11, 2019 Rosemont, IL  
**RD** Sept. 30, 2019

### Specialty Food Buyers Mission at the Winter Fancy Food Show

Jan. 18-20, 2020 SAn Francisco, CA  
**ERD** Nov. 15, 2019 **RD** Dec. 6, 2019

### Value-Added Feed Ingredients Buyers Mission at the 2020 IPPE

Jan. 29, 2020 Atlanta, GA  
**ERD** Nov. 20, 2019 **RD** Dec. 18, 2019

### Northeast Buyers Mission

Feb. 3, Boston, MA; Feb. 5, New York, NY; Feb. 6, Philadelphia, PA  
**ERD** Nov. 22, 2019 **RD** Dec. 20, 2019

### Pet Food Buyers Mission at the Global Pet Expo

February 25, 2020 Orlando, FL  
**ERD** Dec. 20, 2019 **RD** Jan. 17, 2020

### Frozen Food Buyers Mission at AFFI-CON 2020

Feb. 29 – March 2, 2020 Las Vegas, NV  
**ERD** Dec. 20, 2019 **RD** Jan. 20, 2020

### Natural Products Buyers Mission at Natural Products Expo West

March 4-5, 2020 Anaheim, CA  
**ERD** Jan. 10, 2020 **RD** Jan. 22, 2020

Buyers Missions

### Beer Ingredients Buyers Mission at Brew Expo America

April 20, 2020 San Antonio, TX  
**ERD** Feb. 17, 2020 **RD** March 9, 2020

## SEAFOOD ACTIVITIES

Food Export-Northeast is widely known for the foreign market development activities and cost-share assistance we provide to the region's seafood industry. We also provide a variety of support activities on behalf of the industry to continuously uncover new market opportunities and to create greater foreign market awareness and demand for the region's seafood products along with our Seafood Export Promotion Program that includes market briefs provided by our in-market representatives in Brazil, France, Germany and China.

### Seafood Buyers Mission at Seafood Expo North America

March 14, 2020 Boston, MA  
**ERD** Jan. 13, 2020 **RD** Feb. 3, 2020

### ▲Seafood Trade Show at Seafood Expo Global

April 21-23, 2020 Brussels, Belgium

### ▲Food Show PLUS!™ at China Fisheries and Seafood Expo

Oct. 28-30, 2020 Qingdao, China  
**ERD** May 22, 2020 **RD** June 19, 2020

## FOCUSED TRADE MISSIONS

Focused Trade Missions bring small groups of U.S. suppliers to a country with the goal of building participants' export businesses. You're able to see the market dynamics first-hand, meet and build relationships with interested importers, and discover your products' potential in that market.

### Focused Trade Mission to Dubai

Dec. 4-6, 2019  
**RD** Sept. 20, 2019

### Focused Trade Mission to Guatemala for Retail and Food Service Products

Jan. 29-30, 2020 Guatemala City, Guatemala  
**ERD** Oct. 2, 2019 **RD** Nov. 18, 2019

### Focused Trade Mission to South Korea for Pet Food Products

March 23-24, 2020 Seoul, South Korea  
**ERD** Nov. 25, 2019 **RD** Jan. 3, 2020

### Focused Trade Mission to Hong Kong for Pet Food Products

March 26-27, 2020 Hong Kong  
**ERD** Nov. 25, 2019 **RD** Jan. 3, 2020

### Focused Trade Mission to New Zealand

June 21-23, 2020 Auckland, New Zealand  
**ERD** Feb. 21, 2020 **RD** March 30, 2020

### Focused Trade Mission to Australia

June 24-25, 2020 Sydney, Australia  
**ERD** Feb. 21, 2020 **RD** March 30, 2020

## FOOD SHOW PLUS!™

Food Show PLUS!™ provides the logistical assistance you need to be a more effective exhibitor. Services may include registration assistance, pre-show product research, translations of booth and sales materials, technical interpreters at your booth, local industry tours, on-site show assistance from food marketing experts, and much more!

### ▲Booth Space Package Available

### ▲Food Show PLUS!™ at Supermarket Trade Show (SMTS)

Feb. 11-14, 2020 Tokyo, Japan  
**RD** Nov. 6, 2019

### ▲Food Show PLUS!™ at Gulfood

Feb. 15-20, 2020 Dubai, United Arab Emirates  
**RD** Nov. 20, 2019

### ▲Food Show PLUS!™ at CHFA West

Feb. 21-23, 2020 Vancouver, Canada  
**ERD** Oct. 2, 2019 **RD** Dec. 4, 2019

### ▲Food Show PLUS!™ at VIV MEA

March 8-11, 2020 Abu Dhabi, United Arab Emirates  
**ERD** Oct. 9, 2019 **RD** Dec. 11, 2019

### Food Show PLUS!™ at FOODEX

March 9-13, 2020 Tokyo, Japan  
**ERD** Nov. 20, 2019 **RD** Dec. 18, 2019

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Call: (312) 334-9200 or (215) 829-9111 E-mail: [info@foodexport.org](mailto:info@foodexport.org) | [www.foodexport.org](http://www.foodexport.org)



**Make your market.™**

Please note: Dates and locations are subject to change and upcoming activities are pending funding from the Foreign Agricultural Service (FAS) of the USDA. Visit our website for more event information.



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## THE EVOLUTION OF FOOD SHOW PLUS!™ SERVICES (CONTINUED)

\*Additional services can be added to Food Show PLUS!™ based on your needs, such as securing an interpreter/booth assistant, translating marketing materials, conducting market research, or assisting in follow up communication. Additional services are \$50 per selection and there is no limit on the number of selected additional services.

**NEW THIS YEAR! Food Export is offering turnkey booth space at a number of international trade shows. Exhibiting through Food Export reduces the hassle of coordinating space on your own and ensures that you receive Food Show PLUS!™ services.**

### 2020 FOOD SHOW PLUS!™ EVENTS WITH BOOTH SPACE AVAILABLE

▲ **Food Show PLUS!™ at Supermarket Trade Show (SMTS)**  
 Feb. 11-14, 2020 Tokyo, Japan

▲ **Food Show PLUS!™ at Gulfood**  
 Feb. 15-20, 2020 Dubai, United Arab Emirates

▲ **Food Show PLUS!™ at CHFA West**  
 Feb. 21-23, 2020 Vancouver, Canada

▲ **Food Show PLUS!™ at VIV MEA**  
 March 8-11, 2020 Abu Dhabi, United Arab Emirates

▲ **Food Show PLUS!™ at ANTAD & Alimentaria**  
 March 30 – April 2, 2020 Guadalajara, Mexico

▲ **Seafood Trade Show at Seafood Expo Global**  
 April 21-23, 2020 Brussels, Belgium

▲ **Food Show PLUS!™ at Alimentec**  
 June 8-12, 2020 Bogota, Colombia

▲ **Food Show PLUS!™ at Food Taipei**  
 June 16-20, 2020 Taipei, Taiwan

▲ **Food Show PLUS!™ at Fine Food Australia**  
 Sept. 6-10, 2020 Melbourne, Australia

▲ **Food Show PLUS!™ at FIGAP**  
 Oct. 20-23, 2020 Guadalajara, Mexico

▲ **Food Show PLUS!™ at China Fisheries and Seafood Expo**  
 Oct. 28-30, 2020 Qingdao, China